Bob Hall, LLC Sales Territory

- Contiguous to Washington, DC and Virginia
- 1.2 Million People
- Diverse Consumer Base
  - Ethnically
  - Economically
  - Socially
- Major Venues
  - FedEx
  - Gaylord Convention Complex
Industry Snapshot

• Fiercely Competitive Independent Retailers
  ▪ 500 On, 350 Off
  ▪ 87% Volume Off Premise
  ▪ 50% of Total Volume in 88 Accts
  ▪ FedEx and Gaylord (10% of On)
  ▪ Serve 98% of Customers at least 1X Per Week

• Fragmented Market Shares
  ▪ ABI Single Highest Share
  ▪ Disproportionately High Industry Volume at High and Low End
Neighboring Wholesalers

- Two Geographic Marketing Groups
- Excellent Wholesalers
  - Active Day to Day Leadership
  - Competitive/Performance Driven
  - Execution – Scope and Scale
  - Collaborative and Supportive
- Essential to Local Marketing
  - Nat’l Programs to Target Consumer
  - Craft Relevant Local Plans
Typical Wholesaler Organization

EAM

Marketing Manager
- National Accounts Manager
- Team Leader
  - Sales Rep
  - Shelf Set

Sales Manager
- Team Leader
  - Sales Rep
  - Shelf Set
  - Sales Rep

Admin/Controller
- SEC
  - Team Leader
    - Sales Rep
    - Pro Sell Rep

Operations Manager
- Warehouse Mgr
  - Accting
  - WH Tech

- Delivery Mgr
  - Accting
  - WH Tech

- Fleet Supervisor
  - Driver
  - Mechanic

- Driver

- WH Tech

- Facility Main.
Wholesaler Structure

Operations
• Forecasting and Inventory
• Warehouse Design and Processes
• Delivery and Load Optimization
• Order Processing
• Customer Service Decisions
• Fleet Management
• Facility Maintenance
Wholesaler Structure

Administration
- IT and Route Accounting Systems
- Supplier Interfaces and Reporting Requirements
- Daily Cash and Inventory Reconciliations
- Financial Management/Cash Flow
- Standard Accounting Functions
- Human Resources
Wholesaler Structure

Sales
- Annual Market Planning and Execution – Living Document
  ABI KPI’s and Distributor Market Plan
  Monthly Review Process
  Weekly Performance Plans
  Daily Execution
- Territory Management – Time to Sell vs Operational Expectations
- Customer Relationships
Wholesaler Structure

- Marketing
  - Media and Merchandising Strategies
  - Region Planning Process (Trimester)
  - Sampling Initiatives – “Brand in the Hand” to Complement Marketing
    - On Premise, Off Premise
  - Sponsorships and Special Events
  - Political Connections
Independence/Interdependence

Wholesaler
- Organizational Structure
- Sales Execution
- Delivery
- Pricing
- Customer Relationships
- Local Legislative

Interdependent
- Inventory Mgt
- Geo Marketing
- Chain Execution
- Training
- AOE
- National Legislative Issues
- Technology/Systems

ABI
- Brewing
- Packaging
- Marketing
- Pricing
Mobility Hand Held

• A-B approved Wholesaler Selling System
• Co-Investment by A-B and Wholesalers
• Connects to wholesaler routing accounting system to capture . . .
  ▪ Daily inventory
  ▪ Sales orders
  ▪ Code dates
  ▪ Pricing information
  ▪ Shelf Space
  ▪ Other pertinent account data
• Connects sales rep to A-B and captures execution performance
• Enable objective setting by account, with supporting sales collateral
Sign Making Equipment

- Co-oped investment with A-B
- State of the art equipment
- Improved quality of POS at retail
- Enables customized POS for specific retailer needs
Wholesaler/Brewery Relations

- Wholesaler Advisory Panel
  - Established in 1964
  - Panel represents “the voice of the wholesalers” to advise brewery on key topics/initiatives
  - Establish “wins” for the system
    - Optimize decision making
    - Build trust and confidence
  - Advisory vs. Advocacy
Wholesaler/Brewery Relations

- Region Road Shows
  - Recently completed series of meetings
  - Re-open lines of communications
  - “Re-connect” wholesalers with ABI
    - Future vision and commitment to the three-tier system
    - Wholesaler engagement on future initiatives
  - Commitment to mutual profitability
    - Sustained sales and share growth
    - Mutual profit growth via top line and efficiencies
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