

# **St. Louis Investor Conference**

Eric Best

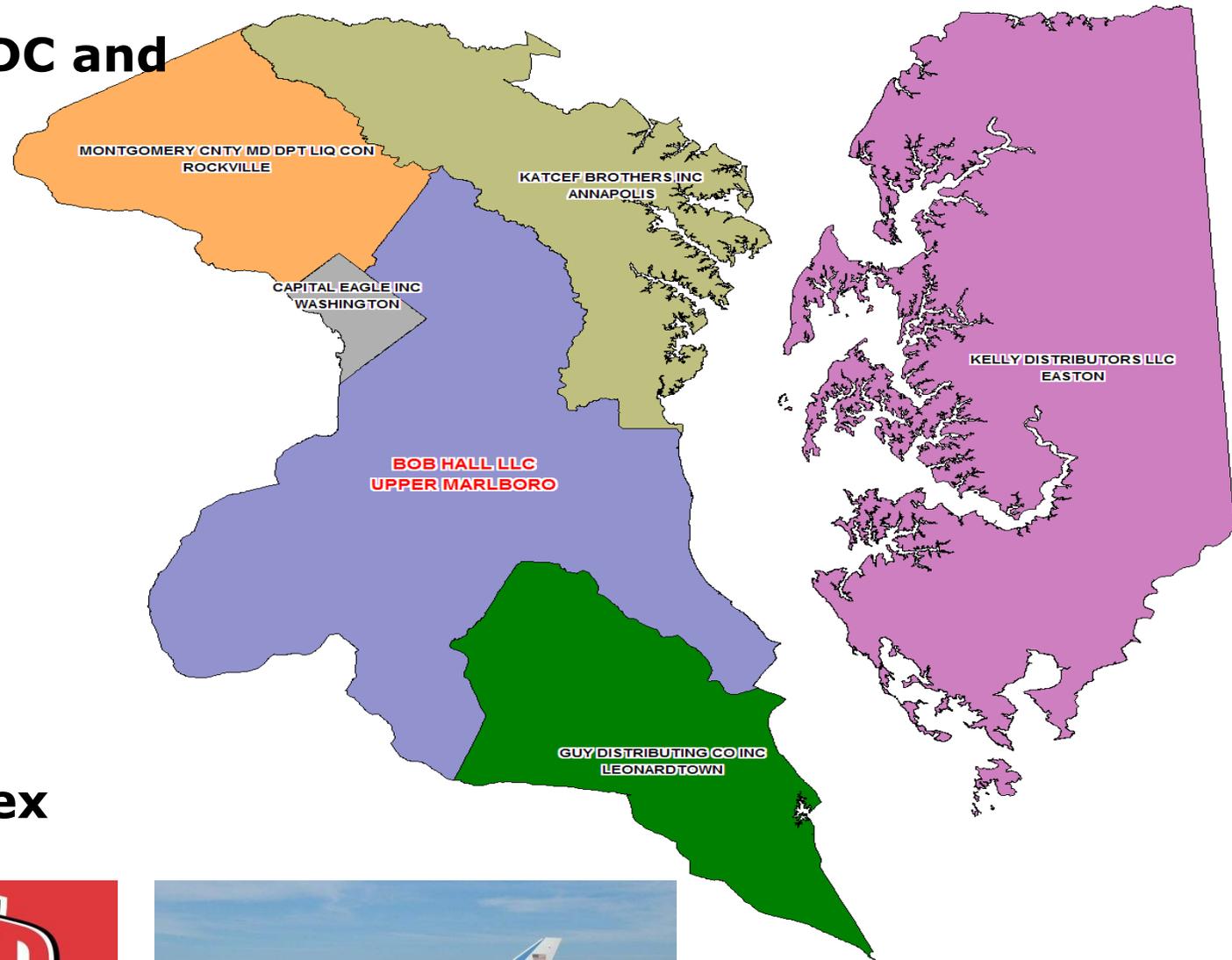
Bob Hall, LLC

Upper Marlboro, MD

June 2010

# 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**



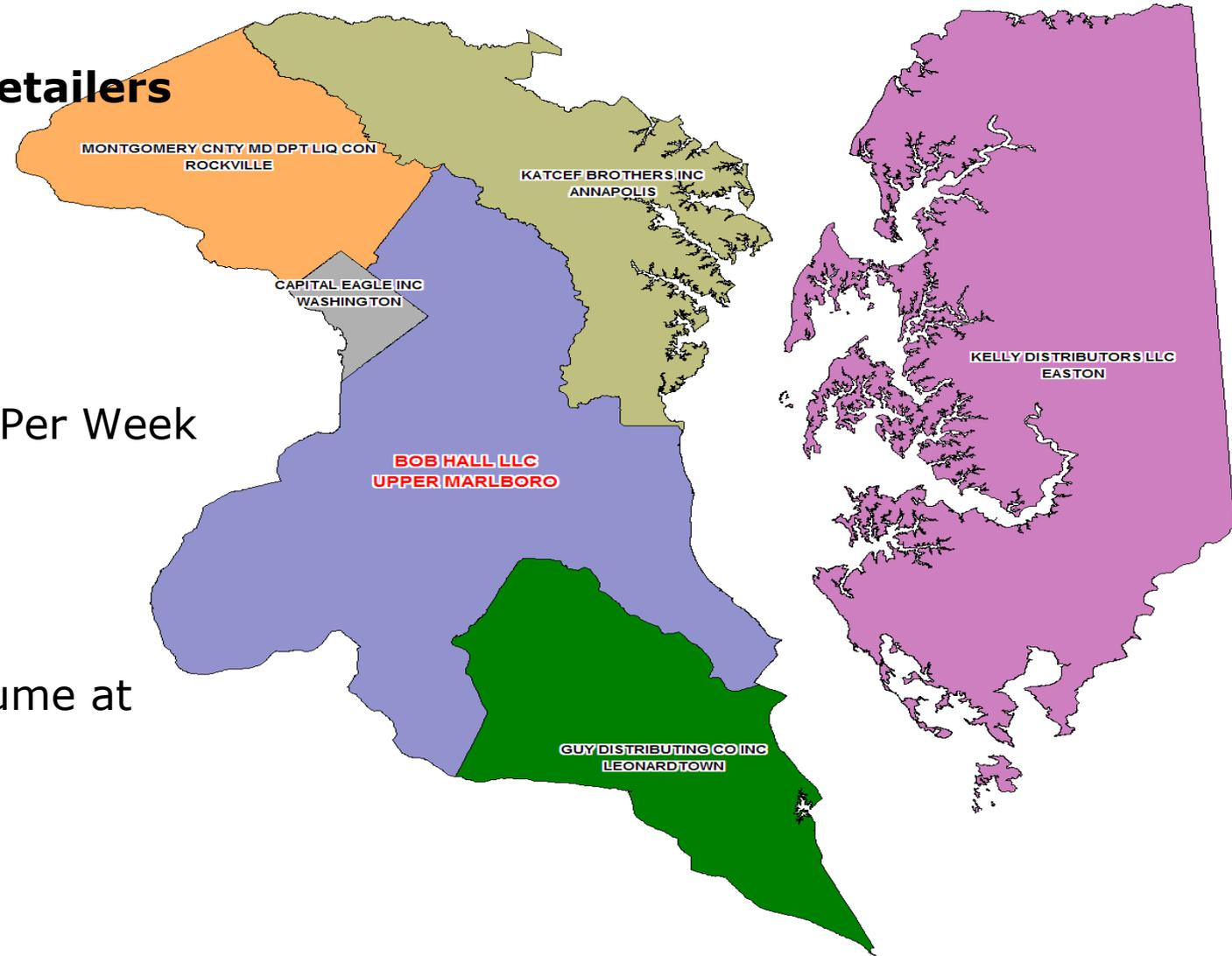
# Industry Snapshot

- **Fiercely Competitive Independent Retailers**

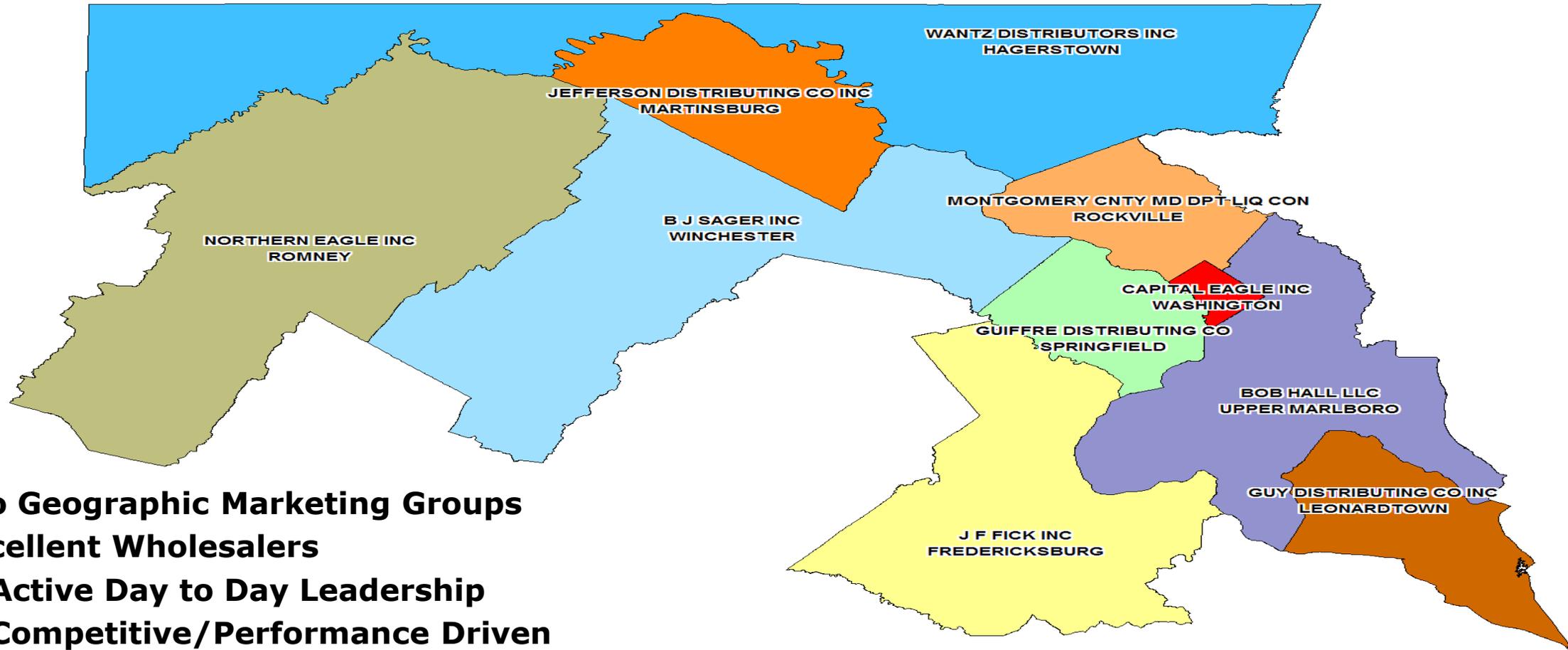
- 500 On, 350 Off
- 87% Volume Off Premise
- 50% of Total Volume in 88 Accts
- FedEx and Gaylord (10% of On)
- Serve 98% of Customers at least 1X Per Week

- **Fragmented Market Shares**

- ABI Single Highest Share
- Disproportionately High Industry Volume at High and Low End

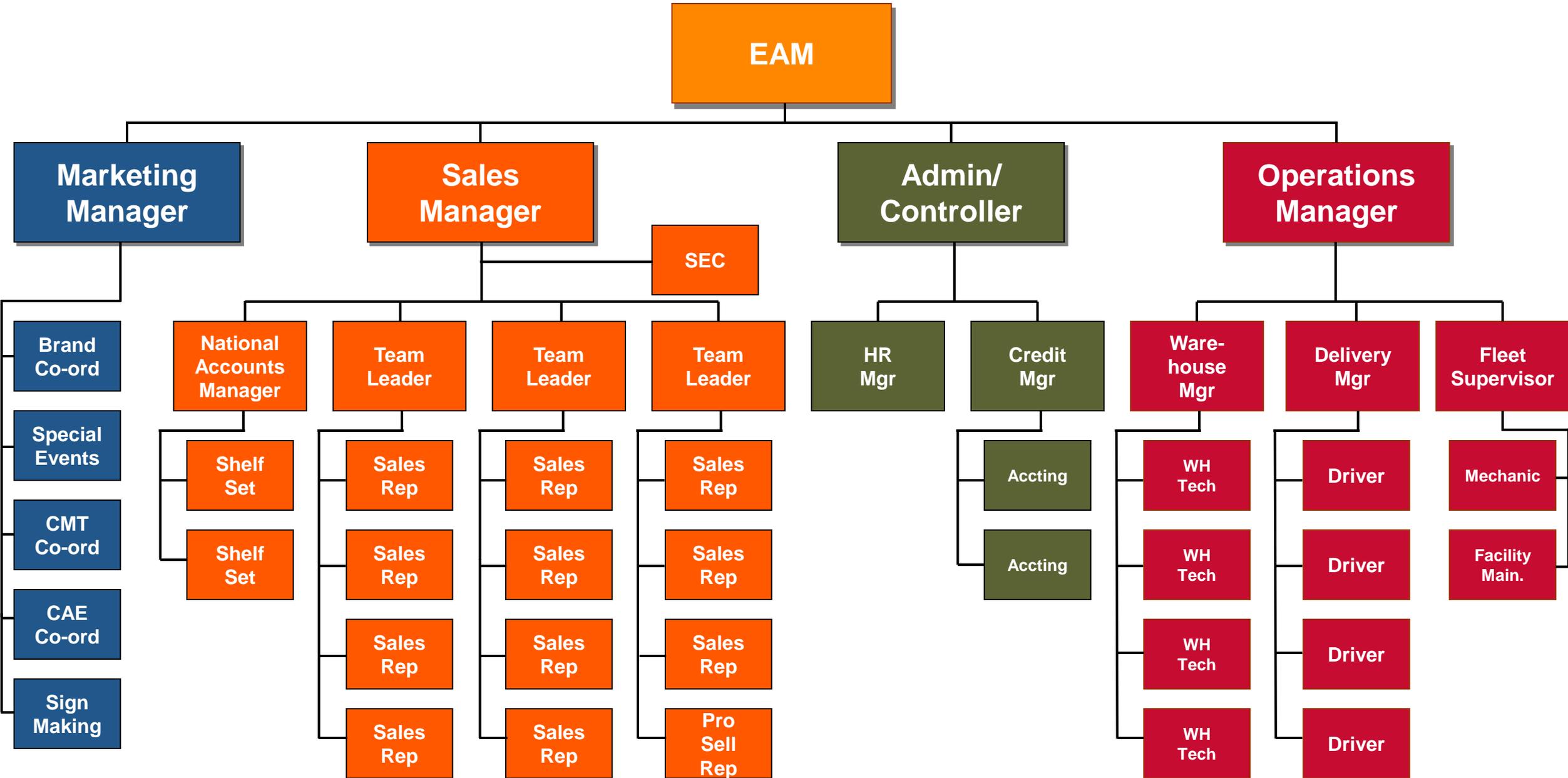


# Neighboring Wholesalers



- **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



# 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**

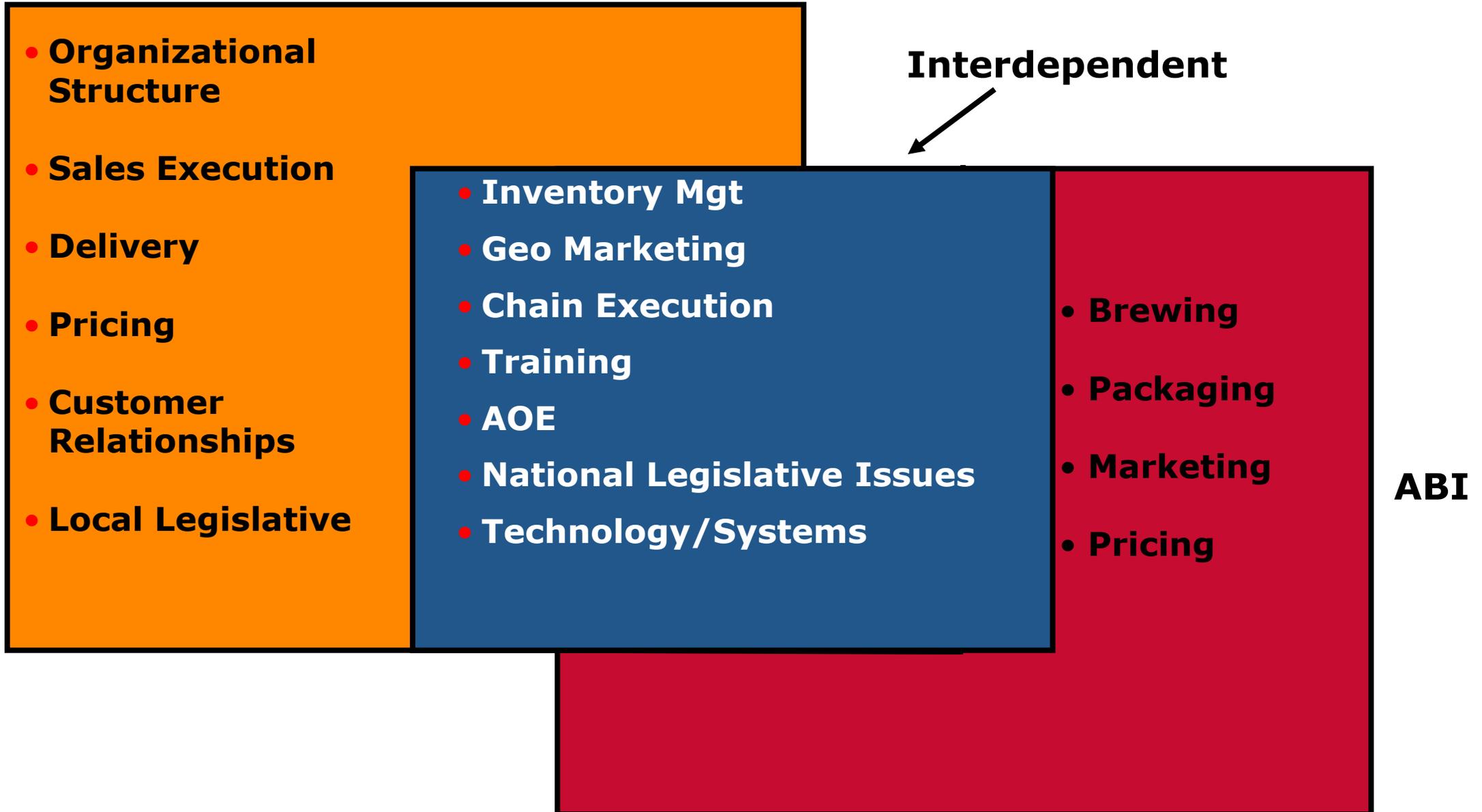
- **Territory Management – Time to Sell vs Operational Expectations**
- **Customer Relationships**

# 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



# 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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