

St. Louis Investor Conference

Eric Best

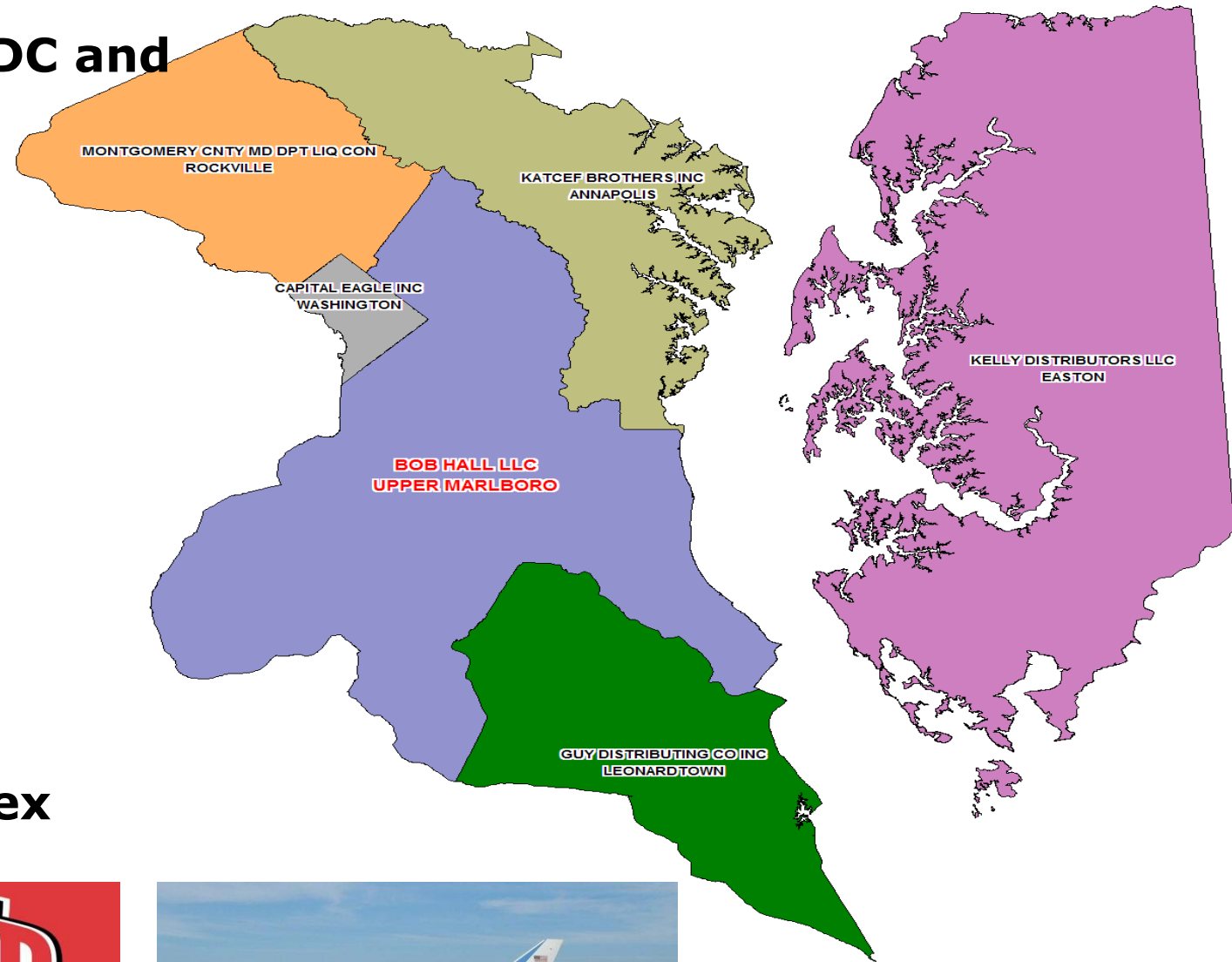
Bob Hall, LLC

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**



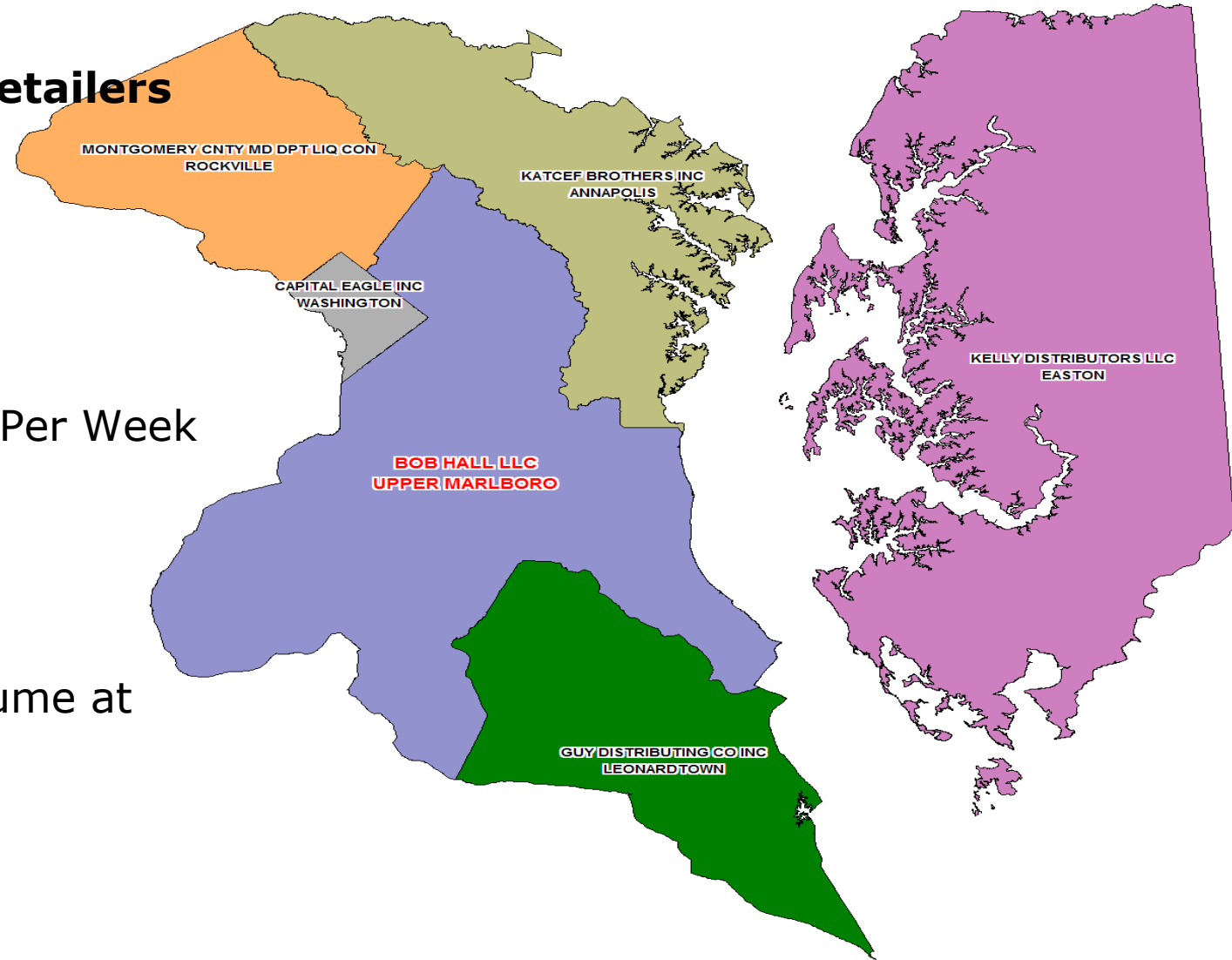
Industry Snapshot

- **Fiercely Competitive Independent Retailers**

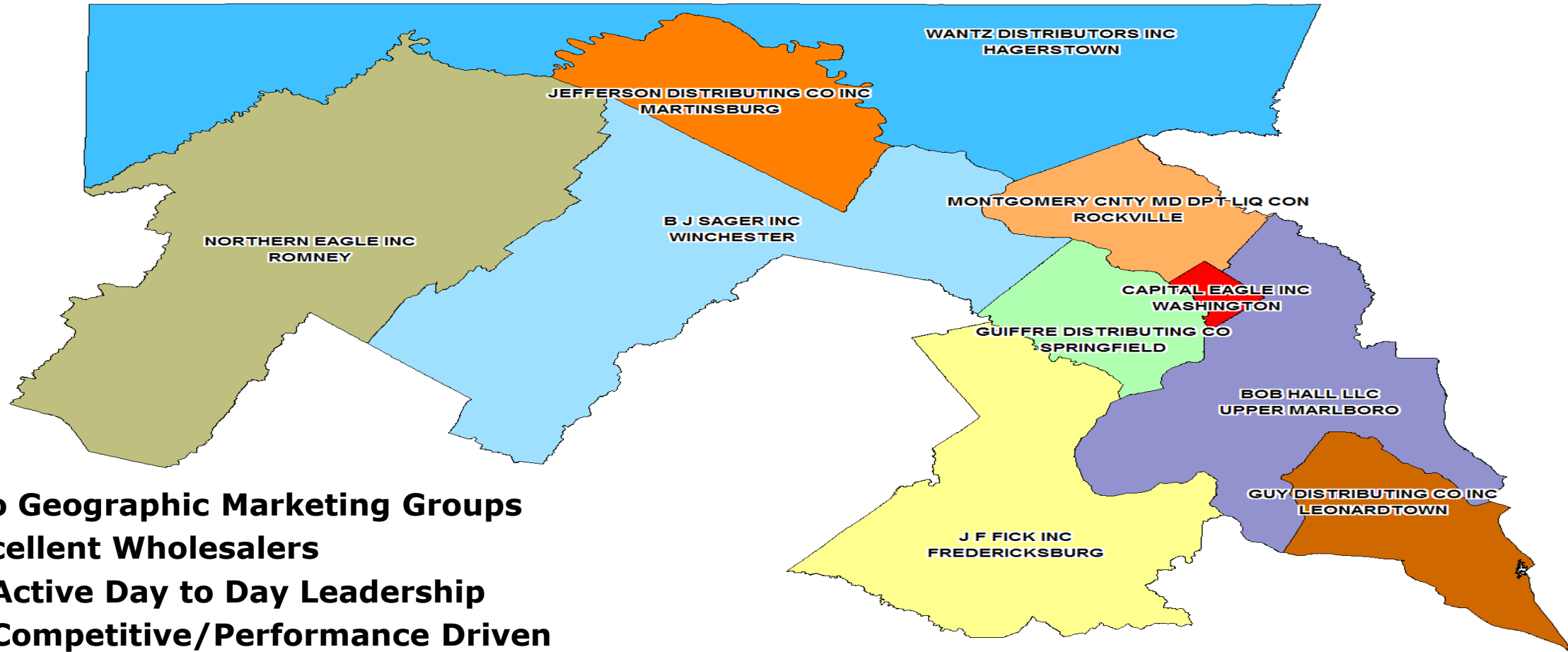
- 500 On, 350 Off
- 87% Volume Off Premise
- 50% of Total Volume in 88 Accts
- FedEx and Gaylord (10% of On)
- Serve 98% of Customers at least 1X Per Week

- **Fragmented Market Shares**

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

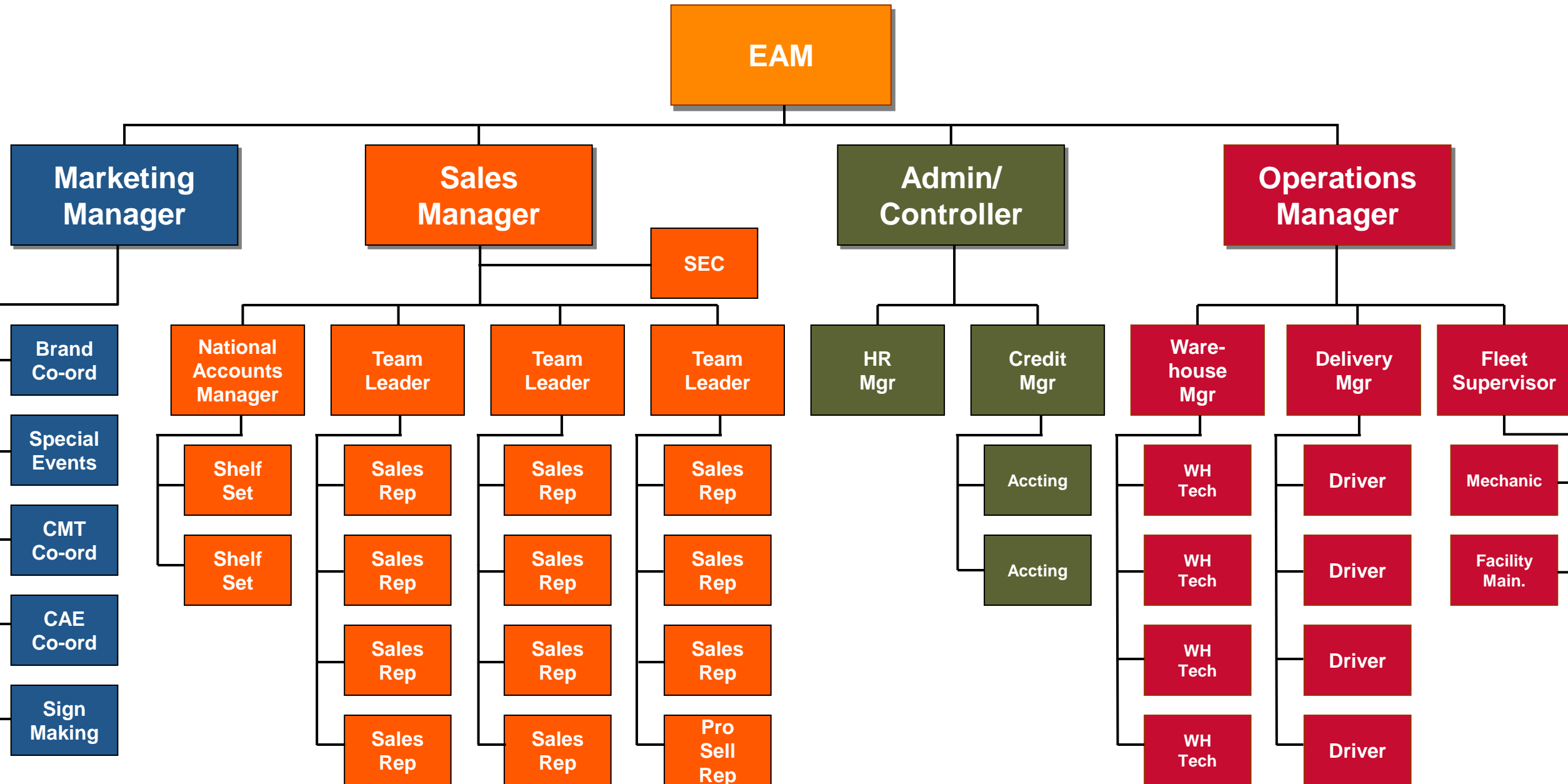


Neighboring Wholesalers



- **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

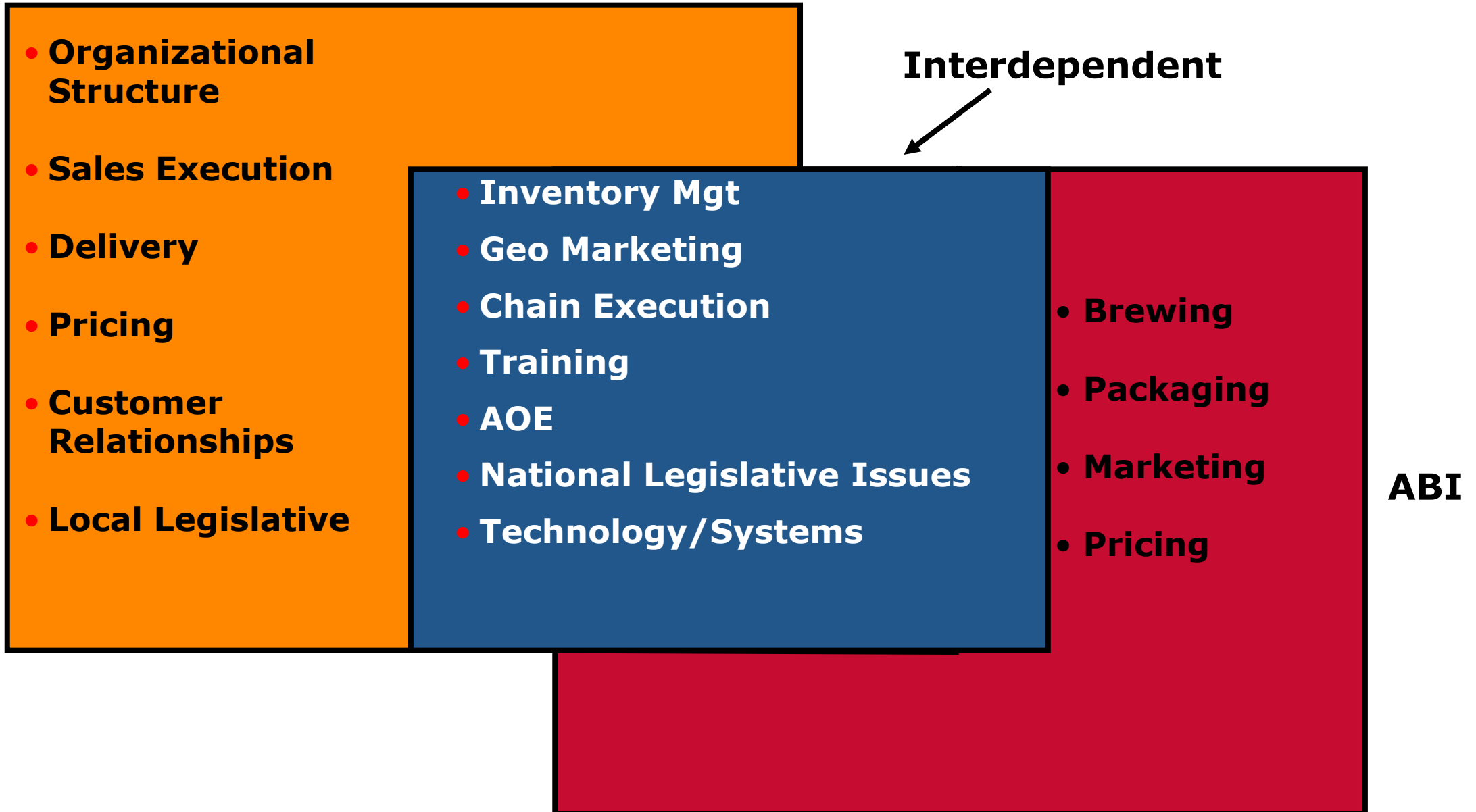
- **Territory Management – Time to Sell vs Operational Expectations**
- **Customer Relationships**

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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