



strategy + process = performance



Using Retailer Insight To Win

*A two-part program designed to give
Company Leadership and Sales teams
edge in your business with retailers*

About The Program

Using Retailer Insight To Win

This is a menu-based program designed to achieve greater success with your retail customers through deep understanding of:

- How a retailer operates – financials, management, buyers, vendor strategies, merchandising, Private Label and more
- The implications for your company – talent/organization/capabilities, opportunities, negotiating, bringing innovation to market and more.

Use this valuable information to:

- ✓ Create successful long term relationships with retail customers
- ✓ Identify and structure opportunities
- ✓ Communicate them effectively
- ✓ Negotiate
- ✓ Implement

Primary participants are:

- Sales Leaders
- Account Teams
- Marketing Managers
- Category Management/Insights
- Sales Strategy/Trade Marketing
- Senior Executives across all company functions

The program is structured to meet your company's specific needs.



Part One

“The Facts” – How A Retailer Operates

1. Retailers' View of the World Today

- Challenges
- Why they act the way they do
- Differences between retailers
- Outlook for next 2-3 years

2. Fundamentals of Retail

- How retailers are typically organized
- Business planning
- Retail calendar/advertising
- Competition
- Other essentials

3. How a Retailer Manages Their Business

- Retailer economics
- Margin \$ vs. %
- KPIs
- Category/product decision-making
- Merchandising vs. Marketing vs. Store Operations
- Priority management
- Managing profit levers

4. The Retailer CMO

5. Vendor Management

- Process, players and milestones involved in managing vendors

6. Retailer Perceptions of Vendors & What They Really Do

7. Current issues in Manufacturer-Retailer Relationships

- e.g. SKU proliferation, retailer competitors, price increases, spending, collaboration

8. The Buyer

- Typical profile
- The buyer calendar
- How they are compensated
- Challenges for the buyer

9. Manufacturer Spending with the Retailer

- How retailers think and measure spending
- Where manufacturer money goes
- What you get from different types of spending

10. Pricing

- How retailers think about and execute pricing

11. Private Label

- The role of PL to a retailer
- PL costs and accounting

12. Supply Chain

- Critical aspects of the supply chain from a retailer perspective

13. Retailer-Manufacturer Collaboration

- Joint Business Planning
- Category Management
- Other types

14. Suggestions for Manufacturer's Approach with Retailers



Part Two

“So What” – What It Means For Manufacturers

I. Principles of A Manufacturer's Approach with Retailers

- Relationships
- Mindset
- Approach
- Customer matrix

II. How and where to build influence

- Retailer resource allocation
- Category manager

III. Information

- Model for success
- What to capture – internal & external
- Best kinds of insights to look for
- How to visualize and use data and insights

IV. The Bad Stuff and How to Avoid It

- Top 10 Mistakes Manufacturers Make
- 'Watch-outs' for dealing with a retailer's competitors
- The 'Penalty Box' - what gets you there, what gets you out

V. Getting (and Losing) Distribution

- Factors retailers consider for a listing
- What gets a manufacturer delisted (and what they can do about it)

VI. Working the Store

- How a Manufacturer can make a real difference in store
- Helping retailers in-store

VII. Opportunity Development

- Key considerations for developing demand, cost or supply chain-based opportunities

VIII. Building a Compelling Value Proposition and Story for the Retailer (based on defined situations)

- New products
- Annual customer plan
- Promotional opportunities
- Price Increases

IX. Ongoing Management of the Retailer

- Organization structure e.g. Key Account teams
- The HQ call
- VP Sales and President visits – why, when

X. Negotiating

- Elements and exploiting leverage
- Elevating conflicts/concerns – when, how, who

XI. Keys to Successful Implementation

- Supply chain
- Field level
- Monitoring and compliance
- Follow-up



Using Retailer Insight To Win

Program Leaders

Duncan Reith

Duncan is a recognized leader in Canadian retail with extensive, senior experience in procurement, category management, national marketing and private label brand development. His executive roles include Chief Merchandising Officer at A&P Canada and Sobeys Ontario, SVP Merchandising at Canadian Tire, President Operations at Sobeys Ontario and CEO at XS Cargo. Duncan has also played an active role within the retail industry including four years as Chair of the Board of Directors of The Grocery Foundation.

Ian Townsend

Ian is a senior business leader with a background in top companies in both Canada and the USA. His 30+ years of experience comes primarily from Unilever, one of the world's largest consumer products businesses, in the core functions of Sales, Marketing and Operations. His focus is on driving results, both corporately and in the Sales function specifically. Ian is the founder of Avanzare Inc.

Other Avanzare

Bill Langlois, Jennifer Langlois, Alec Guerenstein



Who We Are

Avanzare Inc. is a consulting agency established in 2000. We are a team of senior, experienced Consumer Goods & Services and Retail industry professionals dedicated to working collaboratively with clients and identifying opportunities that help them grow.

Our clients are household names. To date, we have helped them add over \$1 Billion in shareholder value.

“ We recognized the significant challenges we were facing in our Sales function. We were looking for a partner we could trust and had the necessary expertise plus a proven record of success. Just as importantly, we wanted them to work beside us in the journey, as part of our team. Avanzare fit the bill and was a key contributor, along with our company’s leadership team, to our successful Sales transformation. Results speak louder than words – we are growing again, having reversed both our downward sales trajectory and contribution to company earnings.

VP Sales, Top Tier CPG Company

”



Our People



Ian Townsend, Principal Consultant

Ian is a senior business leader with a background in top companies in both Canada and the USA. His 30+ years of experience comes primarily from Unilever, one of the world's largest consumer products businesses, in the core functions of Sales, Marketing and Operations. His focus is on driving results, both corporately and in the Sales function. Ian is the founder of Avanzare Inc.



Duncan Reith, Senior Consultant

Duncan is a recognized leader in Canadian retail with senior experience in procurement, category management, national marketing and private label brand development. His executive roles include Chief Merchandising Officer at A&P Canada and Sobeys Ontario, SVP Merchandising at Canadian Tire, President Operations at Sobeys Ontario and CEO at XS Cargo. Duncan helps provide the critical retailer perspective in our work with clients.



Bill Langlois, Senior Consultant

Bill comes from the consumer packaged goods industry. As a senior executive with Unilever, he has had senior roles in Supply Chain, Sales and Marketing both within Canada and internationally. Bill brings clients a unique take on driving value by ensuring initiatives work in synergy within the entire organization to accelerate growth.



Jennifer Langlois, Senior Consultant

Jennifer has senior experience with multiple national retail businesses. With a primary focus on sales optimization, she builds high performance organizations by identifying the right data to capture and analyze to inform strategic direction, grow sales and drive customer loyalty.



Alec Guerenstein, Senior Consultant

Alec is an experienced professional specialized in building multi-tiered Visual Intelligence solutions for Sales. He draws his experience from different fields such as Systems Design, Lean Six Sigma and Visual Analysis Best Practices, implemented in some of the best known service and manufacturing companies.



Dave Draper, Senior Consultant

David experience includes leadership roles in Field Sales, Trade Marketing, Sales/Management Training, National Retail Sales Management and Brand Marketing. In addition to his subject matter expertise, Dave helps clients with large-scale integrations, organizational change, skills identification, recruiting and strategy implementation.



Dian Seguin-McIntyre, Senior Consultant

Dian is a senior finance professional and has worked extensively with sales and marketing teams on retail trade investment results. Additionally, she brings clients expertise in project management and in SAP systems implementations.



Our Difference

We do things differently for a reason. It works.

Truly collaborative approach

We work side-by-side with clients so that we can build solutions as unique as they are. We're highly responsive because we limit the number of engagements we undertake at any one point in time. In most cases, our relationships are ongoing and long term where we act as our clients' Sales 'agency'.

Senior people that actually do the work

We're passionate about our industry and want to see it prosper. We think the best way to know our clients and to fulfill their needs is by owning the work.

Sales-centric with a 360⁰ view

Our team has extensive experience in all aspects of Sales, enriched by subject-matter experts in Retail, Marketing, Supply Chain, Finance and C-Suite. We bring the complete picture to our clients in order to provide winning and doable solutions.

Proven Track Record

We have an impressive roster of clients who testify to what we do, how we do it and the success that we have contributed to.



Our Clients

A sample of clients we have served.





To talk about how we may help, please contact:

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