

Data and Profitability

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Data and Reporting

How much is to much!!!!

Depletion Reporting				Shipments				Retail			
Depl By Time Period TY	Depl By Time Period TY 9L	Depl By Time Period SEQ	Depl By Time Period SEQ 9L	Ship By Time Period TY	Ship By Time Period TY 9L	Ship By Time Period SEQ	Ship By Time Period SEQ 9L	Retail Cases TY	Retail Cases TY 9L	Retail Cases SEQ	Retail Cases SEQ 9L
Kegs Depl	Current Month, YTD, 6Mo Rolling, 12Mo Rolling			Current Month, YTD, 6Mo Rolling, 12Mo Rolling				Current Month, YTD, 6Mo Rolling, 12Mo Rolling			
Depl Distributor TY	Depl Distributor TY 9L	Depl Distributor SEQ	Depl Distributor SEQ 9L	Shipments TY	Shipments TY 9L	Shipments SEQ	Shipments SEQ 9L	Share of Business By Item	Retail By Month	Retail By Year	
One Pager	One Pager 9L			Current Month Ship, Current Month Bud, YTD Ship, YTD Budget, Full Year Budget				Share of Business By State			
Includes PODS by Premise Type ----- Current Month, YTD, 6Mo Rolling, Full Year, On Prem, Off Prem								Item Share by State/Family/Retailer			
Depl Sales TY	Depl Sales TY 9L	Depl Sales SEQ	Depl Sales SEQ 9L	Ship by Month	Ship by Month 9L	Ship by Month SEQ	Ship by Month SEQ 9L	Top Ult Parent	Top BannerName	Top Account	Top Account AcctGeo
Includes PODS by Premise Type - Current Month, YTD, 6Mo Rolling, Full Year, On Prem, Off Prem				Depl Cases by Month				Top List with CM, YTD, 12Mo Rolling, and Share - May take up to 45 seconds to build			
Depl Channel TY	Depl Channel TY 9L	Depl Channel SEQ	Depl Channel SEQ 9L					Accts Sold TY	Accts Sold By Prem TY	PODS TY	Accts Sold SEQ
Current Month, YTD, Full Year, On Prem, Off Prem								Current Month, YTD, 6Mo Rolling, 12Mo Rolling			
Depl Ship TY	Depl Ship TY 9L	Depl Ship SEQ	Depl Ship SEQ 9L					Natl Accts			
Depl YTD, Ending Inventory, Ship CM, Ship YTD								Natl Off Acct List	Natl Accts QTR Report		
End Inv	End Inv 9L	End Inv SEQ	End Inv SEQ 9L					Report Suites			
Ending Inventory by Month								Exec Market Visit	Marketing Review		
Depl by Month	Depl by Month 9L	Depl by Month SEQ	Depl by Month SEQ 9L	Ship/Depl Time Trend	Ship/Depl Time Trend 9L	Seasonality TY 9L	Seasonality TY 9L YTD				
Depl Cases by Month & Depl Bud by Month											

How many reports do you need to tell if you are succeeding or not!

Ad Hoc Reporting	
New TY Report	New Sequential Report

Keys to data – Keep it Simple

- Depletions, Shipments, On Hand inventory, Points of Distribution & Accounts Sold
 - Time, Geography, Product & Channel/Account
 - Single unit of measure (9.0l case)
 - Set a Standard for PODS or Accounts Sold
 - Meaningful distribution (9.0l case of more)
 - Stratify your distribution by channel to identify key supporters and opportunities to expand distribution and support
 - A accounts – top 10% of volume accts
 - B accounts – 75 – 89% of volume accts
 - C accounts – 50 – 75% of volume accts
- Where aren't you – Resources
 - Zagat, Wine Spectator, Michelin
 - Distributors

Data Sources

- Depletion Data – VIP (wine industry standard)
- Reporting – Dimensional Insights (Diver), Business Impact, VIP, Power BI
- Syndicated data – Nielsen & IRI (Retail)
- Industry data - Wine Business Monthly, wine analytics, Gomberg, Impact, & Adams
- Distributor Resources
 - Most major distributors have their own reporting systems (SGWS, RNDC etc...) excellent source of Data on a market by market basis. Hard to consolidate if you have multiple distributor groups.
 - “What if” data
 - Negotiate access on the way in

IRI example

RS

EST. 2009

RODNEY STRONG

Ending Date

10-30-22

Geography

Total US - Food/Drug

Supplier

All

Time Series Sort

3) Latest 26W

Color & Varietal

White (Wine Color...

Origin

Dom

Ave. Price

\$15 - \$19.99

Brand

All

\$122,848,929

632,334

Dollar Sales

Volume Sales

-0.4%

-2.6%

Dollar % chg YAG

Volume % chg YAG

Supplier

Product

Color & Varietal

Dollar Sales

Dollar Sales % chg YAG

Volume Sales

Volume Sales % chg YAG

Wks Any Merch

Wks Any Merch % chg YAG

Price per Unit Ave.

Price per Unit Ave. chg vs YAG

ACV Weighted Dist.

ACV Weighted Dist. Pt chg YAG

JAM CELLARS

BUTTER CHARD CA

White | CH

\$28,807,055

-3.3%

159,014

-5.4%

10.8

-5%

15.09

0.32

92.9

0.3

JACKSON FAMILY WINES

LA CREMA CHARD CA

White | CH

\$20,788,406

-1.2%

105,166

-2.1%

10.3

-1%

16.47

0.15

91.9

0.3

DUCKHORN VINEYARDS

DECOY CHARD CA

White | CH

\$8,514,205

14.8%

43,184

14.7%

6.9

11%

16.42

0.01

76.4

2.9

FOLEY FAMILY WINES

FERRARI CARANO CHARD CA

White | CH

\$8,070,857

4.1%

34,657

3.6%

4.6

-5%

19.40

0.09

70.0

0.4

CONSTELLATION BRANDS

SIMI CHARD CA

White | CH

\$7,011,875

6.0%

38,926

6.6%

4.6

-15%

15.00

-0.09

77.1

0.0

CONSTELLATION BRANDS

MEIOMI CHARD CA

White | CH

\$6,753,921

-11.3%

34,166

-16.0%

6.4

-14%

16.47

0.88

82.8

-0.5

PURPLE BRANDS

RAEBURN CHARD CA

White | CH

\$4,752,630

17.3%

23,976

17.9%

3.6

3%

16.51

-0.08

57.8

4.9

JACKSON FAMILY WINES

KENDALL JACKSON GRAND RSV CHARD CA

White | CH

\$4,153,819

-6.1%

21,535

-7.5%

3.1

-13%

16.07

0.23

68.2

-1.2

E & J GALLO

TALBOTT KALI HART CHARD CA

White | CH

\$3,701,491

7.4%

18,211

7.2%

2.1

-4%

16.93

0.03

57.4

1.6

FOLEY FAMILY WINES

CHALK HILL CHARD CA

White | CH

\$3,554,250

12.8%

18,597

14.1%

2.8

-19%

15.92

-0.18

61.0

-0.7

WAGNER FAMILY OF WINE

MER SOLEIL CHARD CA

White | CH

\$3,330,029

2.6%

14,350

1.2%

2.9

0%

19.33

0.26

58.3

5.5

WENTE FAMILY ESTATES

WENTE VINEYARDS SINGLE VINEYARD CHARD CA

White | CH

\$2,935,214

-10.9%

15,816

-16.6%

2.3

-7%

15.46

1.00

41.6

-0.6

E & J GALLO

FREI BROTHERS CHARD CA

White | CH

\$2,621,967

17.5%

14,095

16.4%

2.4

8%

15.50

0.14

61.0

-3.0

DAOU

DAOU CHARD CA

White | CH

\$2,020,831

45.3%

10,767

44.9%

2.2

27%

15.63

0.04

31.5

3.8

STE MICHELLE

CHATEAU STE MICHELLE CHARD WA

White | CH

\$1,757,254

-14.6%

9,683

-22.6%

1.8

-27%

15.12

1.42

49.7

-0.7

RODNEY STRONG

RODNEY STRONG CHALK HILL CHARD CA

White | CH

\$1,649,412

15.1%

8,794

10.9%

2.0

-2%

15.62

0.56

50.8

2.2

WAGNER FAMILY OF WINE

MER SOLEIL SILVER CHARD CA

White | CH

\$1,261,327

-14.3%

6,796

-14.4%

1.4

-16%

15.46

0.01

51.2

-1.0

TRINCHERO

NAPA CELLARS CHARD CA

White | CH

\$709,227

-5.6%

3,604

-4.6%

0.8

14%

16.39

-0.17

27.6

-3.7

MERRYVALE

STARMONT CHARD CA

White | CH

\$640,325

-4.8%

2,930

-7.6%

0.4

-31%

18.20

0.53

18.7

0.3

E & J GALLO

CLOS DU BOIS CHARD CA

White | CH

\$601,996

-23.7%

3,343

-30.5%

1.0

-31%

15.00

1.33

28.9

-1.3

TERLATO

MARKHAM VINEYARDS CHARD CA

White | CH

\$535,096

-31.5%

2,385

-38.2%

0.4

-43%

18.69

1.83

24.0

-4.0

HESS

HESS COLLECTION CHARD CA

White | CH

\$496,888

-5.0%

2,168

-9.4%

0.6

-11%

19.09

0.90

25.0

0.1

BOISSET FAMILY ESTATES

RAYMOND CHARD CA

White | CH

\$469,605

-26.5%

2,110

-42.0%

0.3

-29%

18.54

3.90

14.1

-0.4

COPPER CANE WINES & PRO...

BOEN CHARD CA

White | CH

\$378,025

50.3%

1,704

40.5%

0.5

18%

18.48

1.21

21.5

2.4

RIBOLI FAMILY WINES

SAN SIMEON CHARD CA

White | CH

\$353,069

-1.0%

1,834

-1.9%

0.3

0%

16.04

0.14

9.1

-0.2

VINTAGE WINE ESTATES

KUNDE CHARD CA

White | CH

\$265,930

1,425

0.2

15.55

15.55

10.0

10.0

TERLATO

THE FEDERALIST CHARD CA

White | CH

\$260,862

-39.9%

1,441

-42.1%

0.3

-51%

15.08

0.55

19.5

-8.0

TREASURY WINE ESTATES

ST HUBERTS THE STAG CHARD CA

White | CH

\$231,912

-29.8%

1,234

-36.3%

0.2

-42%

15.66

1.45

14.5

-5.4

STOLLER VINEYARDS

STOLLER CHARD OR

White | CH

\$228,197

8.4%

1,000

8.5%

0.2

-17%

19.02

-0.02

3.3

-0.9

September, 2022 - Choose Geo: Domestic - FamilyName: All

[illegible]

October, 2022 - Choose Geo: Domestic - FamilyName

[illegible]

Points of distribution over time Vs LY

Depletions & PODS over time Vs Budget & LY and channel

September, 2022 - FamilyName: All - Wines: (

[illegible]

P R I C I N G

xyz Wine company									
Suggested pricing									
Renwood									
Brand									
Varietal									
Size	750	Distributor State							
Pack	12	Effective Date 7/1/2015							
Vintage									
FOB Point	Napa	(Napa, NJ or ExCellars/DI)						Author	
Alc %	15							Approv	

Pricing & DA analysis											
Brand		Distributor									
Varietal		State									
Size 750											
Pack 12											
Vintage		FOB Point Napa									
Alc % 15											
Projected											
		Sales	case	% Of		Proj DA			DIST		DIST
		\$/cs	Sales	Sales \$	Business	DA \$	SPA \$	Spend/c	SPA	GP %	GP\$/cs
	Frontline	\$134.28	5	\$ 671	2%	\$ -	\$-	\$ -	\$-	0.42%	\$ 0.57
On Premise	BTG 1	\$120.00	28	\$ 3,360	9%	\$ 7.25	\$-	\$ 0.62	\$-	2.15%	\$ 2.58
	BTG 2	\$108.00	52	\$ 5,616	16%	\$15.00	\$-	\$ 2.40	\$-	3.80%	\$ 4.11
Off Premise	deal 1	\$117.48	60	\$ 7,049	18%	\$10.00	\$-	\$ 1.85	\$-	4.74%	\$ 5.57
	Deal 2	\$109.08	80	\$ 8,726	25%	\$14.00	\$-	\$ 3.45	\$-	5.81%	\$ 6.34
	deal 3	\$100.68	100	\$10,068	31%	\$19.00	\$-	\$ 5.85	\$-	6.83%	\$ 6.88
		\$ -		\$ -		\$ -	\$-	\$ -	\$-		\$ -
		\$ -		\$ -		\$ -	\$-	\$ -	\$-		\$ -
		\$ -		\$ -		\$ -	\$-	\$ -	\$-		\$ -
		\$ -		\$ -		\$ -	\$-	\$ -	\$-		\$ -
Totals/cs		\$109.20	325.00	100%			\$14.16	\$-	23.75%	\$26.03	
Total		\$35,491			\$4,603			\$-	\$8,461		
Actual											
		Sales	case	% Of		Act DA			DIST		DIST
		\$/cs	Sales	Sales \$	Business	DA \$	SPA \$	Spend/c	SPA	GP %	GP\$/cs
	Frontline	\$134.28	7	\$ 940	2%	\$ -	\$-	\$ -	\$-	0.56%	\$ 0.76
On Premise	BTG 1	\$120.00	25	\$ 3,000	7%	\$ 7.25	\$-	\$ 0.53	\$-	1.83%	\$ 2.19
	BTG 2	\$108.00	46	\$ 4,968	13%	\$15.00	\$-	\$ 2.02	\$-	3.21%	\$ 3.46
Off Premise	deal 1	\$117.48	54	\$ 6,344	16%	\$10.00	\$-	\$ 1.58	\$-	4.06%	\$ 4.77
	Deal 2	\$109.08	86	\$ 9,381	25%	\$14.00	\$-	\$ 3.53	\$-	5.95%	\$ 6.49
	deal 3	\$100.68	123	\$12,384	36%	\$19.00	\$-	\$ 6.85	\$-	8.01%	\$ 8.06
		\$ -		\$ -		\$ -	\$-	\$ -	\$-		\$ -
		\$ -		\$ -		\$ -	\$-	\$ -	\$-		\$ -
		\$ -		\$ -		\$ -	\$-	\$ -	\$-		\$ -
Totals/cs		\$108.55	341	100%			\$14.52	\$-	23.62%	\$25.75	
Total		\$37,016			\$4,952			\$-	\$8,779		

Pricing

Do's

- Documented pricing and DA/SPA agreements
- Know what is negotiable and what is not
 - State Tax - not negotiable. Distributor Margins, freight – negotiable
- The bigger the deal the lower the margin
- Understand market dynamics
 - Retail Margins
 - On premise
 - SPA/DA/floor stock
- Understand competitive pricing
- Focus on the brand or portfolio margin vs a specific deal or deal levels

Donts

- Have the same net price with different DA's
- Allow distributor Carte Blanche for pricing
- Approve billbacks without proper documentation

Turning Data into Sales and Profit

Sales

- Accounts sold/PODS
 - Channel, Label, Varietal trends
 - Identify brand champions or supporters
 - Target Key accounts (Zagat, Michelin etc...)
- Market trends (IRI/Nielsen)
 - Hot markets, Varietals, Price points
- Distributor Distribution Incentive Plans
 - BTG
 - Retail

Profit

- Sales by price point
 - What moves the needle/Drives volume
 - How much does it cost (DA, SPA)
 - Are you achieving the right market price points
 - Retail in between price points
 - Key BTG
- Freight
- Distributor Margins
- Days of Inventory (OOS/Overstock)