

## Roles & Responsibilities: Supplier

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### Portfolio Management

#### *Portfolio Strategy*

1. Establishes clear overall portfolio strategy & related objectives
2. Develops and communicates an alignment between the brand strategies of each brand within the portfolio including new items
3. Share of Focus - Seeks to understand how its portfolio fits within distributor's total portfolio and expects an appropriate level of focus and support
4. Recognizes and understands how [supplier's] brands, expectations, & local decisions/requests financially impact (directly and indirectly) the distributor (e.g., margins, margin mix, marketing and tactical spend, etc.)
5. Ensures that all levels of the field sales organization focus on the same objectives from top-to-bottom
6. Acts as a "macro market expert" and regularly shares information such as unique market characteristics, consumer and sales syndicated data, knowledge & insights

#### *Brand Strategy*

7. Establishes a distinctive, competitive, and sustainable positioning strategy for each brand in the portfolio
8. Communicates brand building objectives to distributors as part of the annual planning process (e.g., distribution, display activity, feature activity)
9. Effectively balances growing short term volume with longer-term brand building objectives
10. Aligns supplier field sales organization objectives and market spending allocation to achieve communicated brand building strategies

#### *Marketing Direction and Investment (National and Local)*

11. Serves as the out of market (State, Region etc.) expert and effectively shares that knowledge including Channel expertise.
12. Provides channel and/or consumer-targeted programming resources that are competitive with other brands/packages within the segment
13. Demonstrates a clear alignment between supplier committed and requested distributor investment with the support of a strong marketing plan
14. Delivers an annual business plan (with national media plans, sales programs, and sponsorships) for the following year on a timely basis (i.e., sufficient lead time to enable distributor to use as an input for its annual plan)
15. Incorporates distributor pre-plan input into local brand plans & programs and localizes programs to ensure commercial relevance



16. Invests locally to build the strength of supplier's brands at a rate commensurate with supplier's portfolio size and opportunity
17. Aligns the local field sales team with the agreed-to objectives as laid out in the annual plan
18. Actively collects and shares "best practices" from other distributors
19. Consistently participates in sales meetings (when allowed) prior to each key selling period and/or program

*Brand/Package Exit Strategy*

20. Acknowledges the full economic impact of keeping an under-performing brand or package in the market (e.g., out of code issues, shelf space, time, inventory, etc.)
21. Seeks to understand the root causes of an underperforming brand/package
22. Understands the distributor portfolio management process as it relates to brand or package discontinuation
23. Provides analysis on borderline brands and packages supporting their continuation in the marketplace
24. Collaborates with distributor on identifying opportunities to improve performance & programming (e.g, course correcting) during plan or program periods



## Retail Account Management

### *Distribution*

25. Provides direction to distributors on brands and packages targeted for distribution by channel and class of trade based on portfolio goals, competitive assessment, and consumer preferences.
26. Collaborates with distributor to clarify and localize brand/package distribution and merchandising standards/priorities by class of trade (e.g., distribution, display position and size, POS usage, visibility, SKU priorities, etc.)

### *Feature/Display Execution*

27. Ability to secure effective ad features at a competitive frequency with customers that supplier has established call responsibility - On/Off Premise
28. Effectively communicates to distributors all chain feature activity and supporting display expectations with proper lead time and details
29. Regularly communicates performance (features, displays, etc.) vs. expectations/planned activity (i.e., measurement and evaluation of results)

### *Category Management*

30. Establishes a clear category management strategy and effectively communicates it to distributor
31. Effectively communicates (sells in) its supplier category management strategy, including space & assortment plan to retail customers
32. Provides distributors with category management best practices and recommends other helpful resources

### *Retail Programming*

33. Provides channel and/or consumer-targeted programming resources that are competitive with other brands/packages within the segment
34. Establishes a program calendar as input into the annual business plan and, if adjustments are needed, communicates to distributors with sufficient lead time
35. Delivers program materials (e.g., program sell sheets, POS, etc.) on a timely basis
36. Proactively reviews retail program results with distributors

### *Merchandising*

37. Provides impactful and adequate supply of permanent and paper POS to support [supplier] plans & programs
38. Provides electronic access to current brand trademarks and thematic images
39. Provides guidelines for the proper use of protected brand trademarks

### *Service Policy*

40. Understands distributor's service policy and its rationale based on market and competitive dynamics
41. Works with distributors to identify any competitive gaps in service policy that may be impacting retail execution and volume performance

### *Product Quality*

42. Provides product to distributors with adequate lead time to sell prior to code date expiration



43. Informs distributors of any product quality concerns in a timely manner and shares best practices for improvement
44. Regularly conducts quality assurance reviews in both distributor warehouses and retail accounts
45. Provides clear, specific, and reasonable product quality standards to distributors
46. Ensures product quality remains a central consideration with determining the scope of marketing activity (e.g. display sizes, size of keg)



## **Training and Development**

### *General Training & Development*

47. Provides support materials to enable effective training & development of distributor staff on all supplier products, standards and procedures

### *Sales Training*

48. Provides selling information to educate and enable distributor sales personnel to effectively present, sell, and market the supplier's brands
49. Actively engages distributors with training sessions to educate sales personnel on supplier's products and programs
50. Provides or recommends sales management/selling skills training commensurate with similar sized suppliers
51. Converts sales information (syndicated data, best practices, etc.) into insights and selling stories to share with distributors and to enable a more effective distributor selling effort

