

**FORM MARKET** 

*Beam*  
**SUNTORY**

CASE STUDY

# Beam Suntory Distills Data to Drive Sales and Find Marketplace Visibility



# Company: Beam Suntory

Industry-leading spirits company, Beam Suntory, has a portfolio rich with some of the world's largest brands including Maker's Mark, Pinnacle, and Jim Beam. Over seven million cases of Beam Suntory's flagship brand, Jim Beam, are distributed annually.

Beam Suntory, a global supplier with brands on bar fixtures and liquor store shelves worldwide, leverages FORM MarketX to

emphasize innovation, monitor distribution, and showcase spirited marketing. Megan Monti, Manager of Commercial Strategy, and John Moore, Analyst of Commercial Strategy and Planning, explained how partnering with FORM MarketX enables Beam to manage rep activity and collect real-time constructive insights from the marketplace.



## Problem

Prior to using FORM MarketX, Beam manually documented store-level and account data. Field personnel “would do a blitz, record everything on pen and paper, and the results would then be rolled up into an Excel file,” explained Monti. Data collection methods differed by source, which muddled reports and made for an inefficient process.

To minimize confusion and maximize field efforts, Beam began looking for a flexible

solution to effectively gather information regarding in-store activity. According to Monti, Beam was **“trying to find visibility into the marketplace, improve display execution, and get clean, actionable data.”**



## Problem (cont.)

In addition, Beam was searching for a product that would function as an accountability tool, enable goal setting and provide a corresponding method for compensation. “We were looking for an accurate way to track what our distributors and field personnel were doing, with a process that wasn’t as burdensome as going around with pen and paper,” Monti said.

Historically, Beam had limited verification that

instructions were carried out appropriately and that strategy was executed according to plan. “Before FORM MarketX, we weren’t examining visibility or monitoring field reps,” Monti explained. Eventually, Beam became aware that current processes were not adequate to achieve new growth. So, management began taking initiatives to find a platform that would enable the Beam team.

“We use FORM MarketX to gain visibility into in-store activity. As our use of the platform grows, we have begun to use data to hold reps accountable.”

- Megan Monti, Manager of Commercial Strategy



# Solution

FORM MarketX gives Beam a way to track KPIs, implement a goaling system, and record marketplace activity. Specific features within the platform, including photo-capture capabilities and geo-tagging, enable Beam with a mobile-first solution. FORM MarketX's tailored reporting delivers actionable, accessible data. Metrics can easily be identified to ensure goals are reached and objectives are achieved. Specific data points – related to retail execution, surrounding varietals, case counts, menu placement, and specialty cocktail selections – aggregate online in the FORM MarketX reporting dashboard. Answers and results from Missions – which function as surveys in the FORM MarketX app – are displayed in customized charts, graphs, and tables. “It’s

extremely useful to be able to open the dashboard page and examine all the responses to Missions,” Monti explained.

This reporting furthers Beam’s goal to give niche markets flexibility while adding structure to Beam’s national strategy. “FORM MarketX is an efficient tool to implement nationally and standardize processes across the country,” Monti explained.

Beam and FORM MarketX collaborate to ensure the platform fits seamlessly into Beam’s organization. “The FORM MarketX team has been really awesome to work with,” Monti said. “As a whole, the company is quick to respond, give us updates, and work with us to find solutions.”



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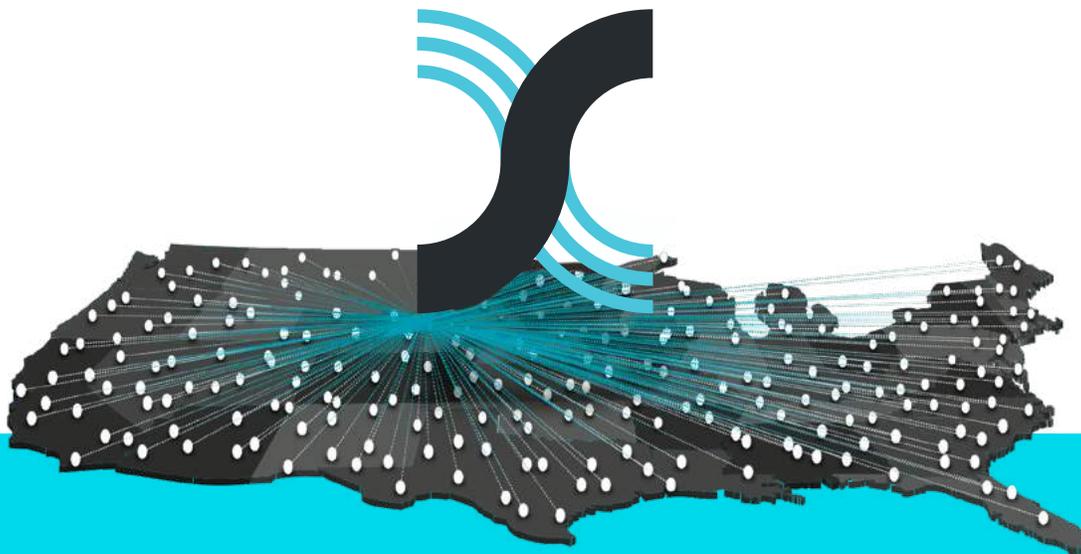
# Outcome

Beam's goal to increase visibility was the initial catalyst that led them to search for mobile data collection software. With this type of technology, Beam reps can quickly capture information that was previously unavailable. The team has also been able to eliminate activities that have a cumbersome human element. According to Monti, "FORM MarketX helps us by pre-calculating some of the things that we would have to do manually."

**Additionally, engaging FORM MarketX has given Beam a way to effectively measure display compliance and report important marketplace data.** "We use FORM MarketX

to gain visibility into in-store activity," Monti explained. "As our use of the platform grows, we have begun to use data to hold reps accountable."

Beam uses the FORM MarketX platform to examine a host of overarching metrics surrounding shelf placement, display execution, and menu presence. On a granular level, FORM MarketX empowers Beam to gather detailed information from both off-premise and on-premise accounts. "Now that we have FORM MarketX, we can track in-store activity which has consequently added more rigor around the reporting," Monti said.



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## Outcome (cont.)

Furthermore, Beam uses FORM MarketX to facilitate a goaling system, which gives reps a way to track their progress towards reaching objectives and goal attainment. “Our strong focus on goaling ensures that field reps put more cases on the floor,” Monti said. “These actions and subsequent changes drive more dollar sales.”

Beam has also identified a relationship between display compliance and residual sales lifts. “I did a lift execution analysis on menu execution and control states,” Moore explained. “Using FORM MarketX data that showed menu location, we were able to see a lift in depletions – which translates into more sales – in areas where we had menu placement. In order to measure a lift as a result of execution on the ground, FORM MarketX is invaluable.”

A reputation defined by high quality and careful craftsmanship has established Beam’s name internationally. By increasing visibility and accountability, FORM MarketX helps Beam share signature products that have made the brand famous for 200 years.

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# FORM MARKET

**FORM** is reimagining how tomorrow's workforce works. 225+ of the world's top brands use our software to distribute work and receive execution analytics in real-time, with a mobile app for the frontline, and an analytics dashboard for leadership.

We present the right action at the right time to the right person in the right place to improve execution and surface insights that help leader make better decisions, faster.

Enterprise brands use FORM in 70 countries to manage the execution of field sales, marketing and merchandising, QA, asset management, competitive analysis, and training. We enable execution at scale for customers like PepsiCo, Coca-Cola, Danone, Dole, Boar's Head, Perfect Bar, Empire Marketing Strategies, JOH, Impact Group, Alliance Sales & Marketing, Dirty Handz, Panera, Red Robin, Dairy Queen, and more.

