



Las Vegas
October 2016



Confidentiality and Antitrust

- We are not here to ask anyone to disclose sensitive competitive information
- We are not here to encourage anyone to recommend changes to their company policies or practices – those decisions are up to each of you independently
- If you feel something is proprietary or confidential, do not offer that up to the group
- Do not breach any confidentiality agreements you may have with your customers during these discussions
- Be especially careful to avoid discussions about anything to do with specific prices for specific customers
- Avoid discussions about whether to do business with certain partners and under what terms of sale



Why are we here?

- Managing trade allowances and pricing discounts is a challenging and dynamic responsibility
 - Across manufacturers, there are significant yet common challenges
 - In some areas, solutions defined collectively can have greater value than operating independently
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- A. Education
- B. Awareness
- C. Problem-solving
- D. Networking



Meeting History

I	2011	June	Chicago
II		September	Chicago
III	2012	January	San Francisco
IV		June	New York
V		October	Las Vegas
VI	2013	January	Atlanta
VII		May	Chicago
VIII		December	Boston
IX	2014	May	Chicago
X		November	Napa Valley
XI	2015	February	Austin
XII		October	Orlando
XIII	2016	May	Chicago
XIV		October	Las Vegas



Participating Companies

AdvancePierre

Hormel Foods

Perdue Farms

Bagcraft

Huhtamaki

Pilgrim's Pride

Butterball Turkey

Idahoan Foods

Pinnacle Foods

Campbell's Soup

International Paper

Procter & Gamble

ConAgra Foods

J.M. Smucker

Reckitt Benckiser

Continental Mills

J.R. Simplot

Rich Products

Custom Culinary

John Morrell

Sabert Corporation

D&W Fine Pack

Ken's Foods

Sargento

Diamond Crystal

Keurig Green Mountain

Schwan's

Farmland Foods

Kraft Heinz Company

Smithfield Foods

Flowers Foods

Lamb Weston

Solo Cup

Foster Farms

Land O' Lakes

Tyson Foods

General Mills

M&M Mars

Unilever

Genpak

Mission Foods

Ventura Foods

Hillshire Brands

Nestle

Hoffmaster

Ocean Spray

Topics

Broker Consolidation
Buying Group perspective
The Death of List Price Volume
Efficient Claims Processing
GPO Compliance
GPO Location Level data
Growth of Cash & Carry
Industry News
Operator-focused Organizations
Recapture
Sourcing RFP's
Sysco - US Foods merger
Trade Metrics
Trade Organization
Value for the Sales Function

Guests

AFS Technologies
CBS
CHD Expert
I-Trade Network
Local Operators
NPD
Technomic
The Hale Group
Tibersoft
Unipro





Agenda for today

- 9:00 Introductions and Overview
- 9:15 Dot Foods - Deduction Efficiency
- Break
- 10:45 Industry Integration Initiatives
- Lunch
- 1:00 Trade Research Headlines – Gary Karp
- Distributor Economics – Barry Friends
- 2:30 Group Breakouts
- 4:15 Wrap Up
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- 6:30 – 7:00 Lobby departure for Fiamma [here at MGM]

Thursday



- 7:30 Networking Breakfast
- 9:00 Regroup and follow-ups
- 9:15 Retail functionality upgrades
- 10:00 Analytics upgrades and new tools
- Break
- 11:00 ‘Snapshots’
- 11:45 Adjourn – Box lunches available



Deduction Efficiency

Kelly O'Donnell
Angie Wettstein



Industry Integration



Operator contract details

- Eliminate PDF
- Improve accuracy
- Improve timeliness

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- Sample file exchange
 - Targeting this year to begin pilot in production



Claim Processing Efficiency

PDF Conversions

- OCR technology
- Leverages Alias scheme
- Identical workflow to EDI 867

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- Piloting internally now
 - Will begin rolling out next spring

Initial Focus

- Gordon Food Service
- PFG
- Vistar
- Colabar
- Driscoll Foods



CRM Integration



Outbound File Specifications

- Trade Programs
- Operator Contracts
- Settlements [Checks/Credits]

Optional Master Data

- Customers
- Products
- Pricing
- Sales



Trade Survey

Gary Karp

Distributor Economics

Barry Friends



Taking Out the Trash



Today's process

- Small breakout groups for discussion
- Ideate, brainstorm and problem-solve
- Re-group as a general session

Your role

- Rely upon your experience and knowledge in the industry
- Try to free yourself of the constraints you may have "back at the ranch" [e.g., disposable vs. F&B, broker v. direct, etc.]
- While we are working as a group, feel free to throw in challenges you have right now for selfish reasons



Where is the most waste and/or inefficiency we can eliminate?

Costs

- A. Resources / Time
- B. Accuracy
- C. Timeliness
- D. Fees

Process Areas

- Distributor Trade
- Local Marketing
- Operator Contracts
- Other



What should 'we' do?

1. Easy – today, no capital, etc.
2. Medium
3. Big Idea



Group 1

Natalie Wolff

Russ Koshiol

Lana Braverman

Rick Wold

Group 2

Terry Feret

Keith Brennan

Gary Lehmann

Ellen Maier-Zinn

Group 3

Stacy Martin

Andres Hernandez

Jim Levi

John Haberman

Group 4

Jim Luster

Emily Conway

Tom Theis

Julie Michel

Group 5

Robbie Mamula

Steve Woodside

Matt Altimari

Gina Lalka

Group 6

Bernie Silveira

Scott Marquardt

Joe Lamb

Ann Perry

Group 7

Matt Stredney

Victor Ochoa

Tanya Smith

Teresa Holley

Group 8

Denise Tapia

Eric Anderson

Darren Oellien

Bernadette Kniedler