

 GoSpotCheck

TERLATO WINES

CASE STUDY

# Terlato Wines Cultivates Growth and Maximizes Distribution

# Company: Terlato Wines

With over 100 global brands of remarkable variety, Terlato Wines is a leading luxury wine and spirits supplier. To manage a quickly developing portfolio, Terlato needed a solution to execute complex go-to-market efforts as well as collect an array of field intelligence to maintain the integrity of their various brands.

Perry Brown, Vice President at Terlato, explained how the company uses GoSpotCheck to aggregate invaluable, real-time data into structured reports for company-wide use.



## Problem

Before GoSpotCheck, Terlato had a process that was time-intensive, inflexible, and lacked features including an easy way to display supporting photos. “What we were doing did not provide real-time data, and advanced reporting was out of the question,” Brown said. Data was collected in the marketplace primarily through handwritten notes and memory. Detailed, relevant information often arrived hours and sometimes days after real-time data would have provided instrumental insights, eliminated bottlenecks, or instigated a timely discussion.

Surveys were created using spreadsheets, and the results, according to Brown, were tedious and difficult to compile.

Management in various regions of the country designed different surveys—making rolling up data for an aggregate national view difficult and thus creating misalignment across teams. Furthermore, Terlato reports on individual accounts and regions as large as one-third of North America.

**“GoSpotCheck gives us real-time information that is dynamic, visual, and can be shared with an infinite number of people.”**

- Perry Brown, Vice President at Terlato Wines

## Problem (cont.)

Off-premise, Terlato needed data surrounding the number of total displays, number of Terlato displays, and competitors in a specific segment. “We wanted to understand and target a share of display activity at a certain price point,” Brown said.

Terlato’s distributor network makes sales calls, visits accounts, pitches products, and handles follow-ups. However, within some markets, Terlato district sales managers are accountable for placement, which includes putting products into a store’s circulation and documenting cases sold. Brown explained the complexity behind the supplier-distributor relationship.

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Considering a multitude of dynamics, Terlato needed to examine rep activity and visits, maintain a value proposition, and aggregate data from different sources into a clean, digestible format. Additionally, Terlato required constant visibility into the market and various accounts in order to confidently place and sell products.



## Solution

With the help of the GoSpotCheck team, Terlato created four primary Missions—the GoSpotCheck term for a survey—to easily record rep performance and collect marketplace data.

The Off-Premise Mission, designed for retail wine and spirits, encourages reps to document distribution and promotion activity—primarily around displays—at individual accounts. Terlato’s On-Premise Mission collects information at restaurants surrounding bottle placements, wine lists, and by-the-glass placements. A Mission examining market-specific execution relates to internal accountability by adding metrics to efficiency and effectiveness of sales visits. “We can clearly and easily answer the question: Did

we reach our share of 10%, 15%, or 20% of the luxury display, cold box, or other related locations,” Brown said. New placements can be compared to reselling a selection already in-store, and current efforts can be measured against past successes.

Understanding pricing and optimizing accordingly is critically important for Terlato, perhaps more so than in other consumer markets. A fourth Mission helps Terlato analyze promotional pricing, everyday pricing, and specific competitor pricing. A critical secondary location within retail is the cold box. Terlato reps use GoSpotCheck to count placements inside the cold box—both for Terlato and competitors at or above a specific price point.

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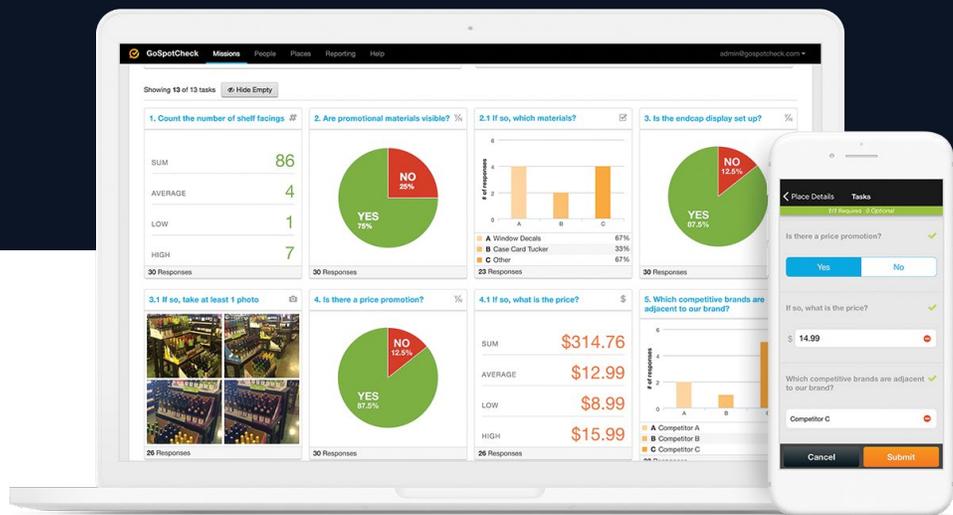
- Perry Brown, Vice President at Terlato Wines



## Solution (cont.)

Inside the GoSpotCheck dashboard, Terlato's advanced reporting aggregates data points through clean, simple charts and graphs. Real-time feedback from the field means that Brown has an update between when a sales rep finishes at an account and a dinner meeting the same evening. Preparation for managerial updates—minutes after data collection—enables Terlato to have a constant pulse on the market.

Valuable metrics in the dashboard provide details about particular items, regions, origin, varietals, types of wine, and more. "Our reports can be categorized by distributor, brand, and other components of the sales organization. As far as the advanced reporting goes, it's extremely filterable and customizable. I think it's an incredibly powerful tool," Brown said.



## Outcome

For Terlato, real-time data has proven to be an invaluable source of insights to execute market objectives. Brown and his team now better understand Terlato's share of premium price points, points of distribution, and shelf share. GoSpotCheck's reports demonstrate Terlato's share of displays, exact number of stacked cases, and totaled in-store placements. "The combination of output and real-time data helps our team prove that important goals were reached," Brown said

Terlato programs are designed around specific initiatives, like launching or boosting a brand.

Based on information collected in GoSpotCheck, Terlato recognizes reps for securing or increasing placements and visiting accounts. Filterable data points give Terlato the option to show distributors only relevant brands, instead of the entire Terlato portfolio. Distributors only see accounts important to them, thereby segregating confidential information and enabling discretion. For the wine and spirits supplier, this mitigates confusion and optimizes for rep efficiency. At the same time, a shared level of visibility between supplier and distributor enhances transparency and overall communication.

## Outcome (cont.)

Data accessibility and sharing has improved the metrics Terlato records on a daily basis. **Regional managers and regional vice presidents have the ability to provide real-time recaps at the end of the day.** “I would say the visibility and professional summary of field work is much better than before GoSpotCheck, when we sent around spreadsheets—which are cumbersome, disorganized, and hard to look at,” Brown said.

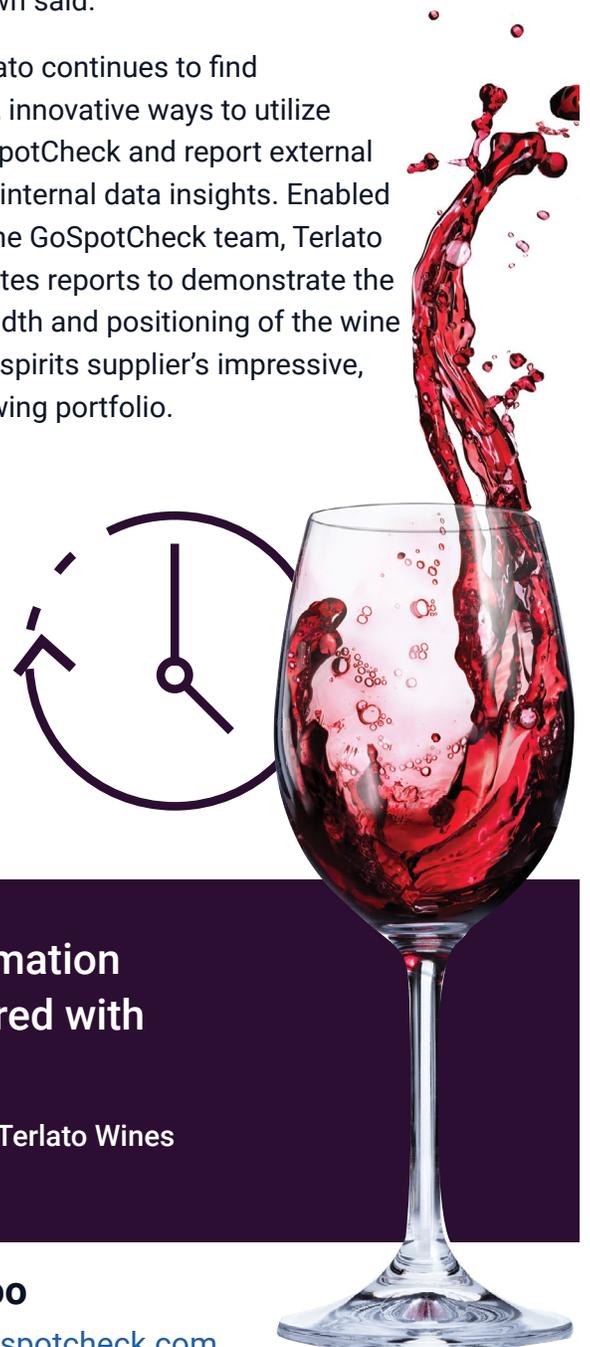
Terlato utilizes information collected through GoSpotCheck to enhance relationships with distributors. The wine and spirits supplier can correctly identify actions such as who deserves credit towards a placement within a certain market.

Furthermore, Terlato empowers distributor partners by clearly displaying evidence of poorly placed products before sales are negatively impacted. Aggregated data also clearly display which distributors in a given state are responsible for what brands of wine. In a small number of cases, two distributors sell a single brand. Terlato navigates this challenge efficiently by using filters, carefully tailored questions, and guidance from the GoSpotCheck partnership. “The GoSpotCheck team has been instrumental in the success of the GoSpotCheck platform within Terlato’s organization. Our account manager is always

timely, available, positive, and creative,” Brown said.

**For Terlato, the largest benefit of GoSpotCheck can be found in real-time data aggregation. Instant feedback creates a seamless closed-loop process** to ensure that Terlato stays aware of market trends, important pricing changes, and account visits. “GoSpotCheck gives us real-time information that is dynamic, visual, and can be shared with an infinite number of people,” Brown said.

Terlato continues to find new, innovative ways to utilize GoSpotCheck and report external and internal data insights. Enabled by the GoSpotCheck team, Terlato creates reports to demonstrate the breadth and positioning of the wine and spirits supplier’s impressive, growing portfolio.



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