

Benchmarking Brewer/Distributor Relationships for 25 Years!

Brewers have been relying on Tamarron's Brewer Partnership Compass for 25 years to steer the direction and measure their progress against distributor relationships and initiatives! In 2023, we're continuing to modify the survey to reflect the changing dynamics of the industry, brewer & distributor landscapes and the ever-evolving consumer needs. **Also, for the first time ever, we are offering three (3) \$500 awards for completing the survey. Your name will be entered into a drawing when you complete the survey. Winners will be announced after the survey closes in May!**

In 2023 we've once again made some modifications, but the brewers are mostly the same, the scoring is primarily the same, and the structure is largely the same. We've added/subtracted a number of questions based on distributor feedback in 2022 with the end results being a reduced number of questions on the survey:

- A few questions about the most important supplier practices for the future have been modified or added.
- Redundant questions have been removed.
- Questions that distributors stated they were not knowledgeable enough to score have been removed.
- We've consolidated the opportunities to provide qualitative feedback to limit the time required to complete the survey.

As always, in order to enable a truer read of their performance:

- **For ABI** – only select ABI as a supplier if you carry their core portfolio (e.g., Budweiser, Bud Light, Mich Ultra, etc.)
- **For Molson Coors** – only select Molson Coors as a brewer if you carry either or both of Miller Lite / Coors Light brands.

As in years past, we suggest that the individual sections be completed by their respective senior leaders (if possible), or a cross-sectional group of senior leaders, to grant a more specialized view of brewer performance.

Your candid input is vital to the value of this tool! As always, our participating brewers are awaiting your feedback to measure their progress and find more opportunities to improve their performance with their distributor partners. **Brewers do not receive individual responses, nor do they know which distributors responded on their behalf.** We strongly encourage you to be fair and honest in your assessment of suppliers.

We hope you will continue the tradition and take the time to fill out this year's survey. For those distributors that fill out the survey, we will e-mail a copy of your survey response as well as the summary results when the survey has concluded. *If you prefer to complete the survey electronically, you can go to [Tamarron 2023 Brewer Partnership Compass Survey](#) to fill out the survey online.*

For your input to be included in the results, we must receive your response via mail, email (tamarron@tamconsulting.com), or online **by May 5, 2023**. The most efficient method of responding is the online link.

As part of Tamarron's policy of confidentiality, your **company's name will never be identified with its related data**. **All responses will be kept strictly confidential.** To learn more about Tamarron Consulting and the Malt Beverage Supplier Performance Survey, visit our website at www.tamarronconsulting.com

Distributor Business Name:

D.B.A. Name (if applicable):

Distributor Mailing Address:

Street Number

City, State

Zip

Name:

Position:

E-mail Address:

The following information will be used to compile Respondent Profiles

What was your organization's 2022 annual sales revenue (including malt and all other beverages)?			Your 2022 annual malt beverage volume in C.E.'s:	# Malt Beverage		
<input type="checkbox"/> less than \$25 million	<input type="checkbox"/> between \$25-\$50 million	<input type="checkbox"/> between \$50-\$75 million		Brewers	Brands	SKUs
<input type="checkbox"/> between \$75-\$150 million	<input type="checkbox"/> between \$150-\$300 million	<input type="checkbox"/> over \$300 million				

Which of the following Beyond Beer categories have you added or wish to add to expand your portfolio?

1. RTD Spirits
2. Wine-based Seltzer or RTDs
3. Wine / Wine in Cans
4. CBD Beverages
5. THC Beverages
6. Spirits
7. Other (please specify)

What categories do you expect to de-emphasize and/or reduce SKUs in the coming year? (Check all that apply)

1. Domestic premium / premium lights
2. Sub-premium
3. Imports
4. National Craft Beer
5. Local Craft Beer
6. Seltzer / FMBs
7. Other (please specify)

Partnership & Relationship Grades

Based on your experience over the past year, please grade **your brewers' overall level of Partnership with your distributorship to grow the business?** *Note: think of the messaging from the top of the brewer that permeates through the culture of the brewer regarding partnering with distributors.* (check one only for the brewers you carry)

AB InBev (ABI)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Boston Beer Company (BBC)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Constellation Brands Beer Division (CBBD)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Diageo Beer Company (DBC)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Heineken USA (HKN)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Molson Coors (MC)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Mike's Hard Lemonade Company (MHL)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
New Belgium Brewing (NBB)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F

Based on your experience over the past year, please grade the **overall Relationship you have with each of your brewers at all levels of the organization, including local.** (check one only for the brewers you carry)

AB InBev (ABI)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Boston Beer Company (BBC)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Constellation Brands Beer Division (CBBD)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Diageo Beer Company (DBC)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Heineken USA (HKN)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Molson Coors (MC)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
Mike's Hard Lemonade Company (MHL)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F
New Belgium Brewing (NBB)	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> D	<input type="checkbox"/> F

If you gave a brewer/supplier a **C, D or F** grade for **Partnership and/or Relationship**, please provide rationale:

ABI	
BBC	
CBBB	
DBC	
HUSA	
MC	
MHL	
NBB	
SNB	

Best in Class Brewer Partner

Please select your best-in-class beer brewer partner (please circle just one):

ABI	Boston Beer	Constellation	Diageo Beer	Heineken
Molson Coors	Mike's Hard Lemonade	New Belgium	Other _____	

Why did you select [Brewer] as best-in-class?	Rationale:
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With the changing dynamics of the distributor business environment, what are some specific actions brewers can take to break through the clutter, anticipate distributor future business needs, and become preferred brewer partners?	Specific Recommendations:
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Biggest Brewer Opportunity

It is requested that the following sections of the survey be completed by a [General Manager or Principal](#).

Respond for **ABI ONLY** if you carry **ABI's core portfolio**

Respond for **Molson Coors ONLY** if you carry either or both **Miller Lite / Coors Light brands**

For each of your brewers, please list what you perceive is their biggest opportunity as well as a recommendation or industry best practice to help them address the opportunity.

Biggest Opportunity & Top Recommendation for Improvement	
1. Anheuser-Busch InBev (ABI)	
2. Boston Beer Company (BBC)	

3. Constellation Brands Beer Division (CBBB)	
4. Diageo Beer Company (DBC)	
5. Heineken USA (HUSA)	
6. Molson Coors Beverage Co (MC)	
7. Mike's Hard Lemonade (MHL)	
8. New Belgium Brewing (NBB)	



Please select the responses that are applicable to your distributorship relative to your B2B eCommerce efforts (select all that apply)

1. My distributorship is building an eCommerce proprietary platform on our RAS system (e.g., VIP, Encompass, eoStar, etc.)
2. My distributorship is building a custom platform via Salesforce
3. My distributorship is using a 3rd party platform (e.g., Provi, Seventifty, etc.)
4. My distributorship is using a supplier-supported platform (e.g., BEES)
5. My distributorship is using Fintech for payment processing
6. We have not yet implemented B2B eCommerce.
7. My distributorship has changed or plans to change sales representative routing and/or call frequency as part of the eCommerce strategy.

More specifically, what are your longer-term plans to evolve your organization goals and priorities based on B2B implementation, including **business building tactics**, **training** and **sales efficiency/structure**?

Constellation Custom Questions: (Please use the following scale to rate each of the statements below: 1=Never; 2=Rarely; 3=Sometimes; 4=Often; 5=Always)	
1. Constellation provides targeted distribution opportunities during key drives	
2. Constellation shares results from retail surveys helping identify executional opportunities and strengths	
3. Constellation tools and sales information platforms are competitive with the best of my other suppliers	
4. Constellation's Gold Network Award structure helps motivate my distributorship to drive for superior results	
5. Constellation Sales team distributor coverage meets the need of my market	

Diageo Custom Questions:	
1. If you could see more of something from DBC, what would that be?	
2. If you could see less from DBC, what would that be?	
3. On a scale of 1-10, how committed do you believe Diageo is to beer? (1= Not Committed at All, 10=Fully Committed)	
4. If you could change one thing about DBC, what would that be?	

Molson Coors Custom Questions:	
1. How best can Molson Coors support your beyond beer business (e.g. non-alc, wine, spirits) and capabilities?	
2. How could Molson Coors improve the annual planning process to better align to your strategies?	
3. How could Molson Coors improve the distributors' sales team utilization of our selling tools and technology (BeerMate, selling stories, calculators, etc)?	

Please answer the remaining questions based on your honest impressions of brewer performance during the past 12 months. Rate the brewers you represent on the following scale. Leave blank or cross out those brewer columns that are not applicable to your company. Use “DK – Don’t Know” for questions that are not pertinent to a given brewer or topics that you are not engaged with enough to score confidently.

1 Never	2 Rarely	3 Sometimes	4 Often	5 Always	DK Don't Know
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Please the one most important question from each group of questions

General Manager / Principal	√ most important question	ABI	BBC	CBBB	DBC	HKN	MC	MHL	NBB
Leadership & Strategy									
1. Strategic Vision – Communicates and adheres to a strategic vision and disciplined long-term business plan to strengthen the [brewer's] future industry position	<input type="checkbox"/>								
2. Clarity of Annual Goals – Clearly communicates [brewer's] annual national goals, objectives, and strategies	<input type="checkbox"/>								
3. Professionalism & Authenticity of Top Field Sales Management – Top Field Sales Management (e.g., Zone/Region/Business Unit Manager or Director) represents brewer in a professional manner, listens & cares about distributor challenges and communicates with authenticity to brewer and distributor teams	<input type="checkbox"/>								
4. Solicits Distributor Input on Key Initiatives – Engages distributor council (or otherwise solicits distributor input) to identify and solve problems and improve supplier business practices with distributors	<input type="checkbox"/>								

General Manager / Principal	√ most important question	ABI	BBC	CBBB	DBC	HKN	MC	MHL	NBB
Portfolio & Marketing									
5. Portfolio Strategy – Provides focused brand portfolio and establishes/communicates portfolio strategy & objectives (including innovation and discontinuation strategies)	<input type="checkbox"/>								
6. Innovation Strategy & Launch Process – Speed-to-market with innovation to address emerging consumer needs and beverage categories; effectiveness and timeliness of innovation launch process (e.g., launch plan, forecast, product availability, sell sheets, kickoff, chain window alignment, programs, samples, POS, new item codes, etc.)	<input type="checkbox"/>								
7. Brand/Package Discontinuation Process & Support – Announces discontinuations with plans to support sell through of distributor inventory and/or provides financial support for remaining out-of-code distributor inventory	<input type="checkbox"/>								
8. Distributor Margins – Offers distributors margins on [brewer's] products that are commensurate with competitive set	<input type="checkbox"/>								
9. Level of Investment & Media Allocation – Invests adequate resources to build brands commensurate with brewer's communicated brand strategies and allocates investment to optimize media platforms to reach consumers (e.g., social, digital, TV, print, radio, etc.)	<input type="checkbox"/>								
10. Marketing Message to Align with Brand Strategy – Modifies marketing message to be relevant to align with brand strategy	<input type="checkbox"/>								
11. Programs and Brand Support With Flexibility to Address Local Opportunities – Provides channel and/or consumer-targeted programs and brand support that can be customized to address local opportunities that your team can effectively leverage in the marketplace	<input type="checkbox"/>								

It is requested that the following section of the survey be completed by a [Vice President of Sales](#) or equivalent.

Respond for ABI **ONLY** if you carry ABI's **core portfolio**

Respond for Molso, Coors **ONLY** if you carry either or both Miller Lite / Coors Light brands

1 Never	2 Rarely	3 Sometimes	4 Often	5 Always				DK Don't Know		
VP Sales and/or Brand Manager		√ most important question	ABI	BBC	CBBB	DBC	HKN	MC	MHL	NBB
Relationships & Communication										
12. Visibility & Authentic Sales & Operations Relationships – Is regularly visible within the distributor organization and establishes authentic relationships with all levels of your Sales organization and key Operations personnel; asks questions to understand the complexities in your business and cares about solutions & successes		<input type="checkbox"/>								
13. Share of Focus – Seeks to understand how [brewer's] portfolio fits within distributor's total portfolio and expects an appropriate level of focus and support to drive distributor and brewer priorities		<input type="checkbox"/>								
14. Reasonableness of Brewer Asks – Recognizes and understands how [brewer's], expectations & local decisions/requests financially impact (directly and indirectly) the distributor (i.e., margins, margin mix, marketing and tactical spend, etc.)		<input type="checkbox"/>								
15. Understands & Works Within Distributor Culture – Strives to understand how individual distributors make decisions/operate their businesses and adapts to distributors' culture and ways of working to add value		<input type="checkbox"/>								
16. Relevance, Timeliness and Cadence of Communication – Provides timely, relevant communication to the right people within your distributor organization with a cadence that is not disruptive to the business		<input type="checkbox"/>								
17. Effective Sales Communication Platform/Vehicle – [Brewer] has established an effective communication platform/vehicle to consistently deliver essential communication to the right people within the distributor organization		<input type="checkbox"/>								

<i>Develops effective relationships and aligns with distributor's culture to drive business</i>			
	Rate your level of satisfaction with your brewers' local Field Sales Personnel with the statement above on a scale of 0 (very unsatisfied) to 10 (very satisfied)	FOR THE BREWERS YOU SCORED 9 OR 10, explain their best practices:	FOR ALL OTHER BREWERS, provide recommendations for improvement:
AB InBev (ABI):			
Boston Beer Co (BBC):			
Constellation Brands Beer Division (CBBB):			
Diageo Beer Company (DBC):			
Heineken USA (HKN):			
Molson Coors (MC):			
Mike's Hard Lemonade Co (MHL):			
New Belgium Brewing Co (NBB):			

VP Sales and/or Brand Manager	√ most important question	ABI	BBC	CBBB	DBC	HKN	MC	MHL	NBB
Planning & Plan Management									
18. Proficiency in Pricing Mechanics and Pricing Discussions – Exhibits proficiency in general pricing mechanics / calculations and capability of having effective pricing discussions with distributors	<input type="checkbox"/>								
19. Promotion Calendar Distribution & Alignment – Establishes and adheres to a price promotion calendar with adequate lead time (minimum of 60 days) and alignment to brewer and distributor goals (i.e., not sacrificing margin to achieve volume goals)	<input type="checkbox"/>								
20. Collaborative Annual Plan Process – Employs a timely, effective annual planning process, achieving a simplified, collaborative plan that includes reasonable goals, local flexibility on programs & spending and buy-in from both brewer and distributor	<input type="checkbox"/>								
21. Plan Rationale and Brand Building Objectives – Provides rationale justifying how volume expectations can be achieved (e.g., brewer programs/investments, brand building objectives, including distribution, display/feature activity)	<input type="checkbox"/>								
22. Alignment of Objectives, Resources & Team to Support Plan – Aligns brewer objectives, team (i.e., Field Sales, Key Accounts, On Premise, etc.) and market spending allocation to achieve communicated brand building strategies and annual plan	<input type="checkbox"/>								
23. Monthly/Quarterly/Trimester Objective Setting – Develops attainable monthly/quarterly/trimester objectives that align with planned programming	<input type="checkbox"/>								
24. Distributor Performance Measurement / Scorecarding – Establishes clear expectations for distributor performance, provides regular performance measurements and holds distributor accountable for performance	<input type="checkbox"/>								
25. Innovative Course Correcting – Collaborates with distributor on identifying opportunities to improve performance & programming (e.g., course correcting) and challenges status quo with fresh ideas and methods	<input type="checkbox"/>								
26. POS Collaboration – Collaborates on POS needs and local market applicability of proposed POS to ensure quality and effectiveness of materials	<input type="checkbox"/>								

VP Sales and/or Brand Manager	√ most important question	ABI	BBC	CBBB	DBC	HKN	MC	MHL	NBB
In-Market Support									
27. Easily Accessible Localized Data Mining & Insights that Help Your Team Sell More Beer – Consistently provides access to locally relevant, fact-based and actionable data and insights based on distributor data and syndicated sources (e.g., Nielsen, IRI, etc.) to help you grow the business	<input type="checkbox"/>								
28. Execution Guidelines/Standards – [Brewer] provides appropriate retail guidelines and standards to maximize category/brand growth (e.g., shelf space, assortment, merchandising) and collaborates with distributor to localize as needed	<input type="checkbox"/>								
29. Consistent Collaborative In-Market Execution and Activation Support – Consistently works collaboratively with distributors to plan and execute account-level programs to successfully meet execution goals (i.e., account targeting, assigning responsibilities, etc.)	<input type="checkbox"/>								
30. Product Knowledge Training – Actively engages distributors with training sessions (live, remote or eLearning) to educate sales personnel on <u>brewer's</u> brands and initiatives	<input type="checkbox"/>								
31. Account Staff Training – [Brewer] knowledge of and ability to educate on-premise personnel on general beer knowledge (e.g., categories, styles, consumer experience, brand-specific target consumers, profit, etc.) as well as brand specifics (live, remote or eLearning)	<input type="checkbox"/>								
32. On Premise Business Building Efforts – is aware of all local/state on premise guidelines and alcohol regulations (e.g., beer/wine/spirits to-go); offers ideas, programs, personnel and strategies for building on premise business	<input type="checkbox"/>								
33. Supports Distributor B2B eCommerce Needs – [Brewer] has ramped up efforts to position brands to grow footprint on e-Commerce online platforms and provides tools and resources to support distributor B2B eCommerce needs									
Selling Tools									
34. Basic Selling Tools – Provides easily accessible selling information and data/facts on brands (e.g., brand/program features & benefits, sell sheets, beer/food pairing suggestions, etc.) to educate and enable distributor and brewer sales personnel to effectively present brands/programs to customers	<input type="checkbox"/>								
35. Advanced Fact & Insights-Based Selling Tools – Provides distributor advanced selling tools/Apps based on consumer/shopper insights to help grow the beer category and drive profitable growth for trade customers	<input type="checkbox"/>								
36. Consistent Communication Regarding Selling Tools & Distributor Training – Informs you of the availability of and updates to supplier-provided selling tools and distributor training programs									

Ability to navigate all levels of your organization, willingness to bring value and partner with you to achieve mutual business growth			
	Rate your level of satisfaction with your brewers' local Field Sales Personnel with the statement above on a scale of 0 (very unsatisfied) to 10 (very satisfied)	FOR THE BREWERS YOU SCORED 9 OR 10, explain their best practices:	FOR ALL OTHER BREWERS, provide recommendations for improvement:
AB InBev (ABI):			
Boston Beer Co (BBC):			

Constellation Brands Beer Division (CBBB):			
Diageo Beer Company (DBC):			
Heineken USA (HKN):			
Molson Coors (MC):			
Mike's Hard Lemonade Co (MHL):			
New Belgium Brewing Co (NBB):			

It is requested that the following section of the survey be completed by a Vice President of Sales or equivalent.

Respond for ABI **ONLY** if you carry ABI's core portfolio

Respond for Molson Coors **ONLY** if you carry either or both Miller Lite / Coors Light brands

1 Never	2 Rarely	3 Sometimes	4 Often	5 Always	D Don't Know
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VP Chain Accounts	√ most important question	ABI	BBC	CBBB	DBC	HKN	MC	MHL	NBB
Off Premise Chain Accounts									
37. Category Management – Executes a category management strategy that drives growth in the beer category and builds value for <u>Off Premise</u> retail customers	<input type="checkbox"/>								
38. Ad Feature Communication – Communicates all chain feature activity and supporting display expectations in a timely, effective manner – <u>Off Premise</u>	<input type="checkbox"/>								
39. Call Responsibility (Chain – Off) – Clarifies brewer and distributor chain customer call point responsibilities; ensuring all levels of chain account personnel are adequately called on (e.g., Divisional, Regional managers) – <u>Off Premise</u>	<input type="checkbox"/>								
40. Measurement & Evaluation of Chain Performance – Communicates chain performance (features, displays, etc.) vs. expectations/planned activity (i.e., measurement and evaluation of results) – <u>Off Premise</u>	<input type="checkbox"/>								
41. C-Stores – Effectively secures brand/SKU placements, programming, pricing, etc. in national/regional c-store chains	<input type="checkbox"/>								
42. Large Format Chains (Grocery, Club, Mass) – Effectively secures brand/SKU placements, programming, pricing, etc. in large format national/regional chains	<input type="checkbox"/>								
43. Capitalizing on E-Commerce Trends With Chain Retailers – [Brewer] has effective strategy and tools to grow their brands' presence on chain retailer web and digital platforms									
On Premise National Accounts									
44. Category Management – Executes a category management strategy that drives growth in the beer category and builds value for <u>On Premise</u> National Account customer	<input type="checkbox"/>								
45. Programming Communication – Communicates all national/regional accounts programming in a timely, effective manner to ensure proper lead time for success - <u>On Premise</u>	<input type="checkbox"/>								
46. Call Responsibility (National Accounts - On) – Clarifies brewer and distributor national/regional account customer call point responsibilities, ensuring all levels of personnel are adequately called on (e.g., Divisional, Regional Managers) - <u>On Premise</u>	<input type="checkbox"/>								
47. Measurement & Evaluation of National Accounts Performance – Communicates national/regional account performance (placements, features, promotions, etc.) vs. expectations (i.e., measurement and evaluation of results) - <u>On Premise</u>	<input type="checkbox"/>								

Overall effectiveness of Brewer chain/national account teams in building the beer category in Off and On Premise national and regional chains

	Rate your level of satisfaction with your brewers' Off and On Premise National Account teams with the statement above on a scale of 0 (very unsatisfied) to 10 (very satisfied)	FOR THE BREWERS YOU SCORED 9 OR 10, explain their best practices:	FOR ALL OTHER BREWERS, provide recommendations for improvement:
AB InBev (ABI):			

Boston Beer Co (BBC):			
Constellation Brands Beer Division (CBBB):			
Diageo Beer Company (DBC):			
Heineken USA (HKN):			
Molson Coors (MC):			
Mike's Hard Lemonade Co (MHL):			
New Belgium Brewing Co (NBB):			

Thank you for participating in our survey. As soon as the results are ready, we will email you a link to view the summary results.