

SUPPLIER CHECKLIST



Roles & Responsibilities Evaluation Checklist - Supplier

Introduction

The following Roles & Responsibilities Checklists were developed by Tamarron's Alliance For Beer. The Alliance is comprised of whose charter is ***"to clearly outline the interrelated roles and responsibilities of the 3 tiers and positively impact the industry those roles and responsibilities."*** The following materials do not intend to give a competitive advantage to any one tier or org; the value that suppliers and distributors add to all 3 tiers in selling more beer profitably".

This unbiased and mutually developed checklist of primary roles and responsibilities can serve as a springboard for open and c Suppliers and Distributors. Suppliers and/or Distributors can use the model individually as a self-assessment or jointly as a tool holding each other accountable. The materials do not intend to impose a standard course of action nor should they be used as **& Responsibilities documents serve as a foundation for discussion on opportunities to improve the efficiency of the entire 3**

Potential Uses

Following are potential opportunities to use the Roles & Responsibilities Checklists

Both Supplier and Distributor

Collaborative mutual Roles & Responsibilities assessment

Supplier Checklist

Internal Supplier assessment - self-evaluate performance against key Supplier roles & responsibilities

Distributor assessment - partner Distributors to provide Suppliers with collaborative feedback on key Supplier roles & res
Identification of opportunities and action planning

Distributor Checklist

Internal Distributor assessment - self-evaluate performance against key Distributor roles & responsibilities

Supplier assessment - partner Suppliers to provide Distributors with collaborative feedback on key Distributor roles & res
Identification of opportunities and action planning

SUPPLIER CHECKLIST



Roles & Responsibilities Evaluation Checklist - Supplier

Name of Organization:

Directions: Please rate (under Rating column) each Supplier responsibility listed in the Responsibilities column using the following scale:

(1) No Action Necessary;

(2) Not Urgent, possible future consideration;

(3) Action Necessary.

Document your rationale and/or actions required to improve performance in the Comments/Actions column.

Name/Role/Time Period: document the responsible party (Name), what role the responsible party has in the organization (Role), and Target Completion Date

Portfolio Leadership

Responsibilities	Rating	Comments/Actions
1. Develops and communicates an overall portfolio strategy & related sales objectives that are aligned with strategies for each brand within the supplier portfolio (including new items) for all levels of the field sales organization		
2. Recognizes and understands how [supplier's] brands fit within the distributor's total portfolio and emphasizes expectations of focus and support (how decisions/requests financially impact (directly and indirectly) the distributor)		
3. Actively collects "best practices" from other distributors and regularly shares the information (i.e., unique market characteristics, consumer and sales syndicated data, knowledge & insights)		
4. Effectively balances growing short term volume with longer-term brand building objectives		
5. Provides channel and/or consumer-targeted programming resources that are competitive with other brands/packages within the segment		
6. Invests locally to build the strength of supplier's brands at a rate commensurate with supplier's portfolio size and opportunity		

Portfolio Leadership (cont.)

Responsibilities	Rating	Comments/Actions
7. Acknowledges the full economic impact of keeping an under-		

performing brand or package in the market and seeks to understand the root cause (e.g., out of code issues, shelf space, time, inventory, etc.)		
8. Collaborates with distributor on identifying opportunities to improve performance & programming (e.g., course correcting) during plan or program periods		

Planning & Operational Excellence

Responsibilities	Rating	Comments/Actions
9. Communicates brand building objectives to distributors as part of the annual planning process (e.g., distribution, display activity, feature activity)		
10. Delivers a strong annual marketing 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 align with their annual plan)		
11. Incorporates distributor pre-plan input into local brand plans & programs and localizes programs to ensure commercial relevance		
12. Establishes a clear category management strategy and effectively communicates it to the distributor, including best practices and helpful resources		
13. Establishes a program calendar as input into the annual business plan and, if adjustments are needed, communicates to distributors with sufficient lead time		

Planning & Operational Excellence (cont.)

Responsibilities	Rating	Comments/Actions
14. Delivers program materials (e.g., program sell sheets, POS, etc.) on a timely basis		

15. Provides distributors with sufficient lead time to sell prior to the code date expiration and communicates any product quality concerns in a timely manner (e.g., shares best practices for improvement and corrective action plan)		
16. Regularly conducts quality assurance reviews in both distributor warehouses and retail accounts using clear, specific and reasonable product quality standards		
17. Provides or recommends support materials and/or skills training to enable distributor sales personnel to effectively present, sell, and market the supplier's products and programs		
18. Provides an effective ordering tool for forecasting, placing orders and tracking shipments and accepts responsibility for shipment accuracy, arrival dates and quantities		
19. Responds quickly and provides ongoing communication with a knowledgeable customer service department in all areas including product supply, claims and accounts receivable		
20. Provides a simple, workable and cost effective program for reverse logistics		

Planning & Operational Excellence (cont.)

Responsibilities	Rating	Comments/Actions
21. Provides the highest level of package & cooperation integrity for handling and retail sale		
22. Provides adequate, timely and cost effective repack material		

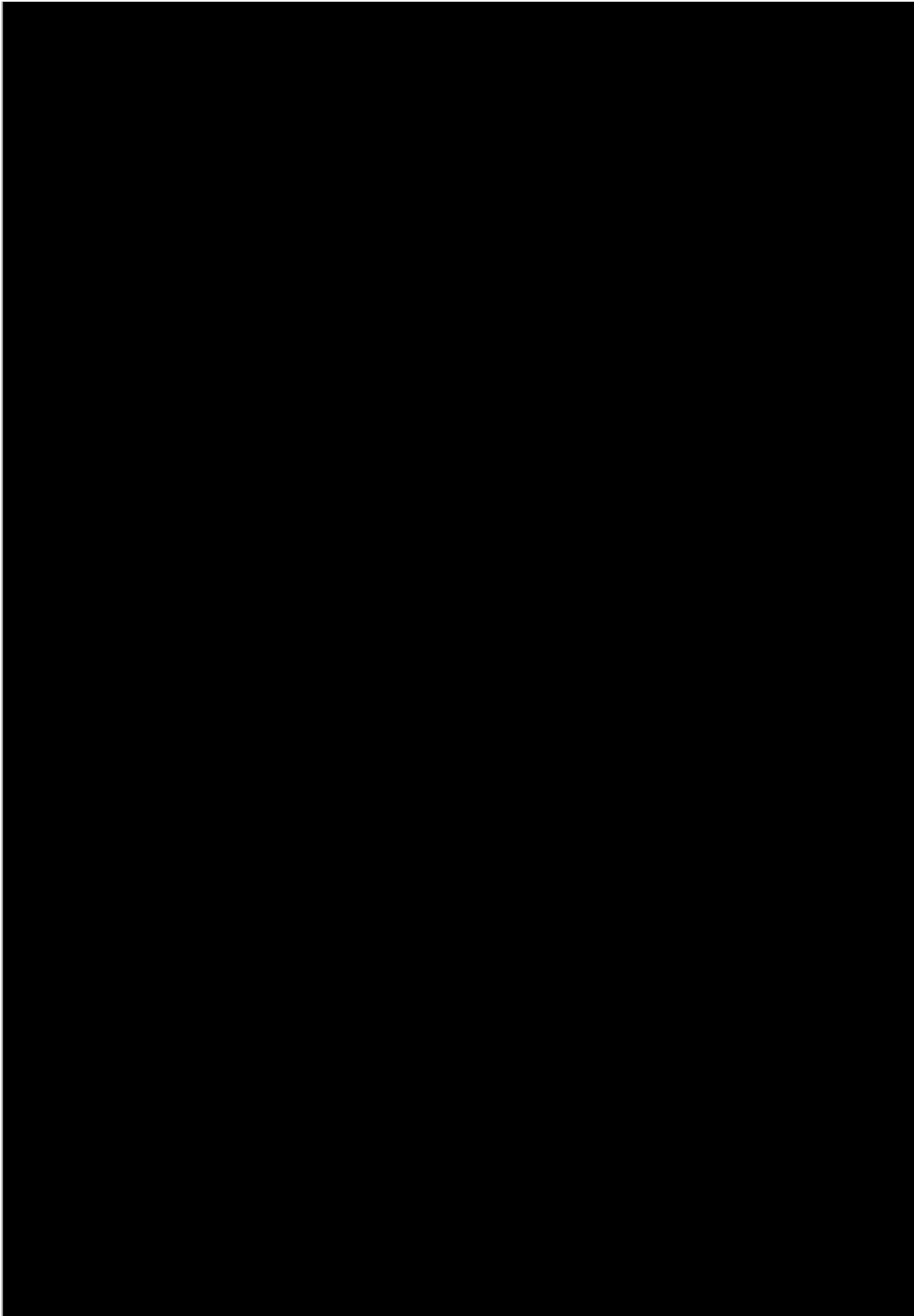
23. Understands distributors' operations costs and investments		
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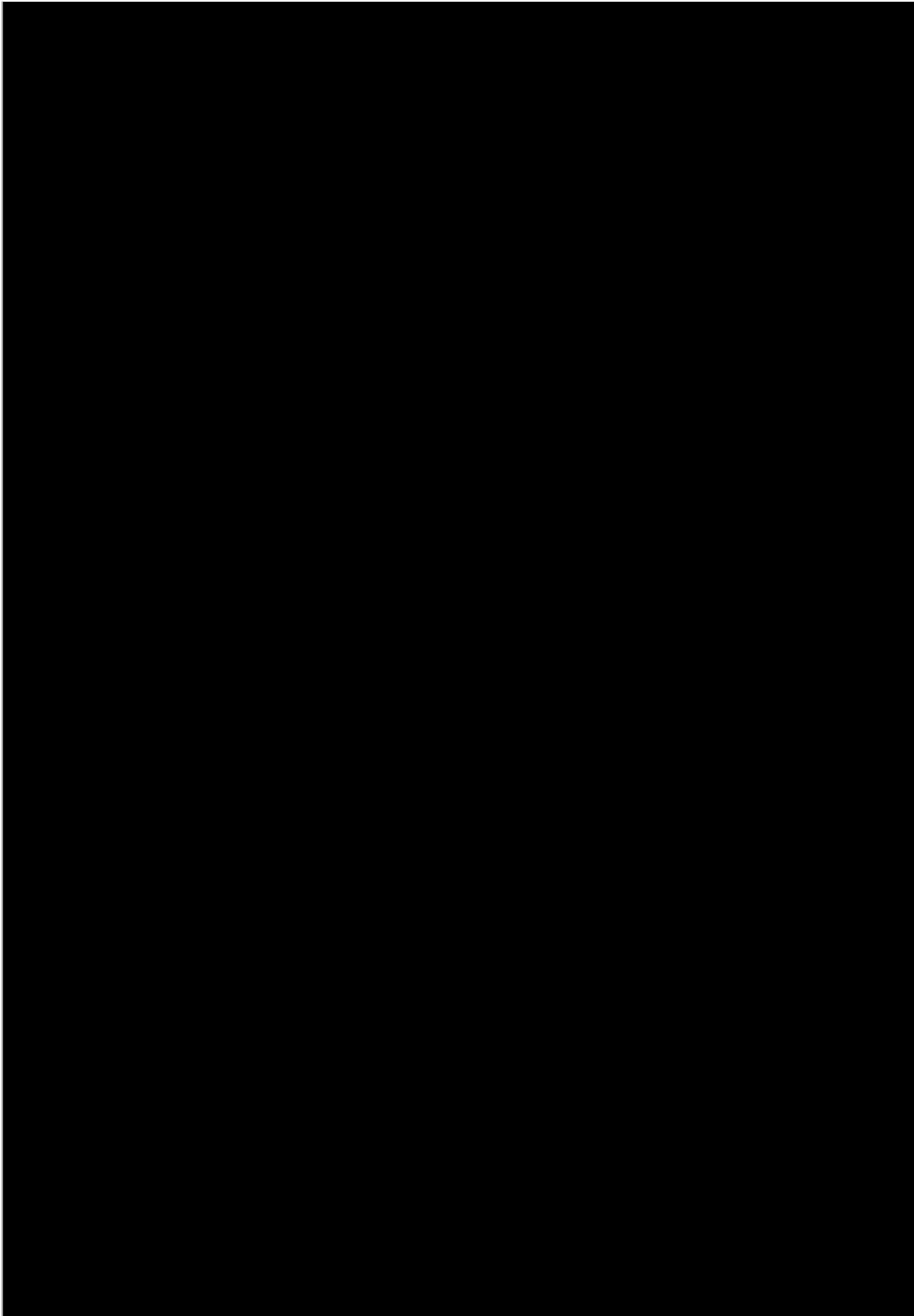
Customer

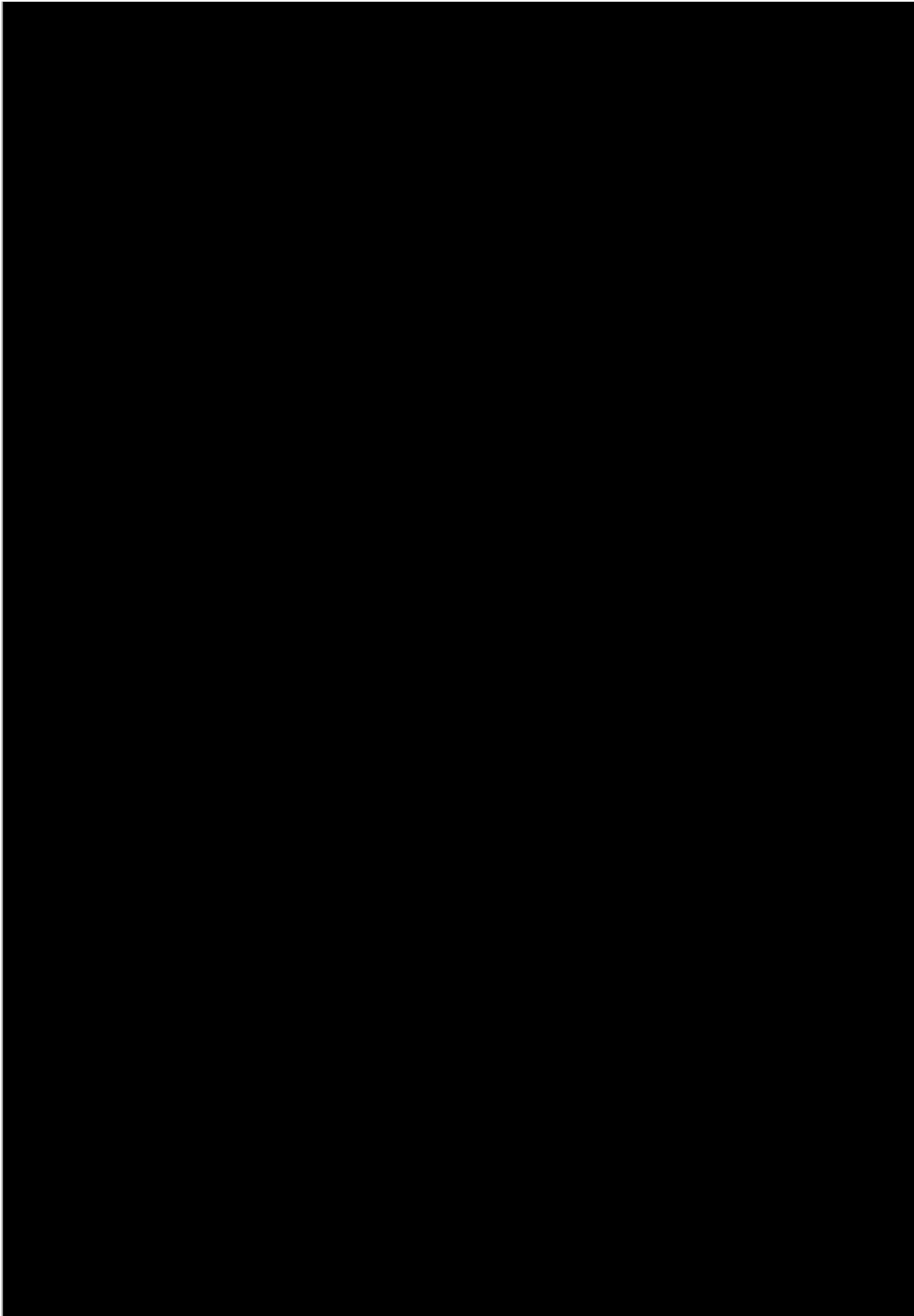
Responsibilities	Rating	Comments/Actions
24. Collaborates with distributors on brands and packages targeted for distribution by channel and class of trade based on portfolio goals, competitive assessment, and consumer preferences (e.g., display position and size, POS usage, visibility, SKU priorities, etc.)		
25. Ability to secure effective ad features at a competitive frequency with customers that supplier has established call responsibility - On/Off Premise		
26. Regularly and effectively communicates performance (features, displays, etc.) vs. expectations/planned activity (i.e., measurement and evaluation of results) to distributors with proper lead time and details		
27. Provides impactful and adequate supply of permanent and paper POS to support [supplier] plans & programs through electronic access to current brand trademarks and thematic images		

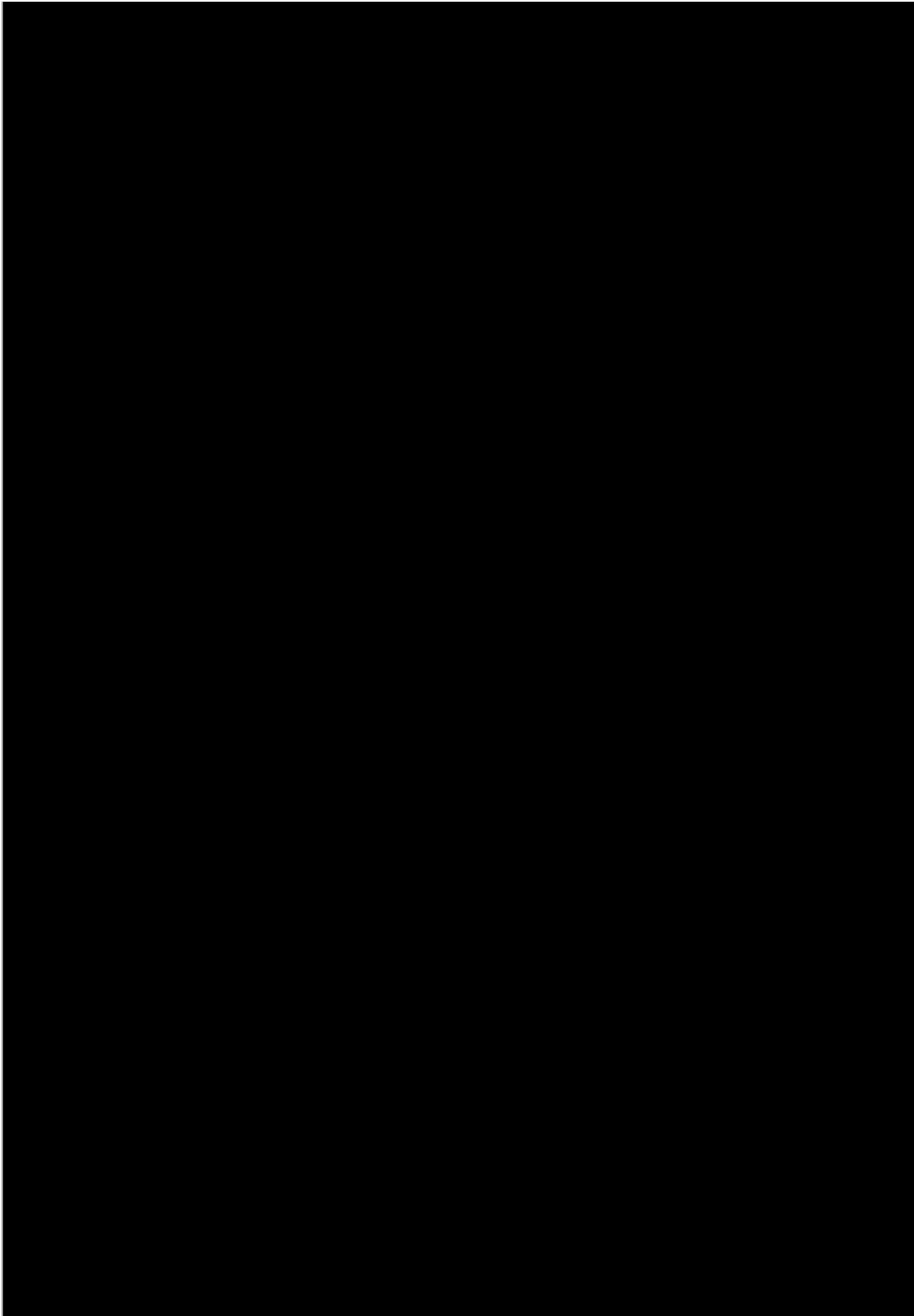
Customer (cont.)

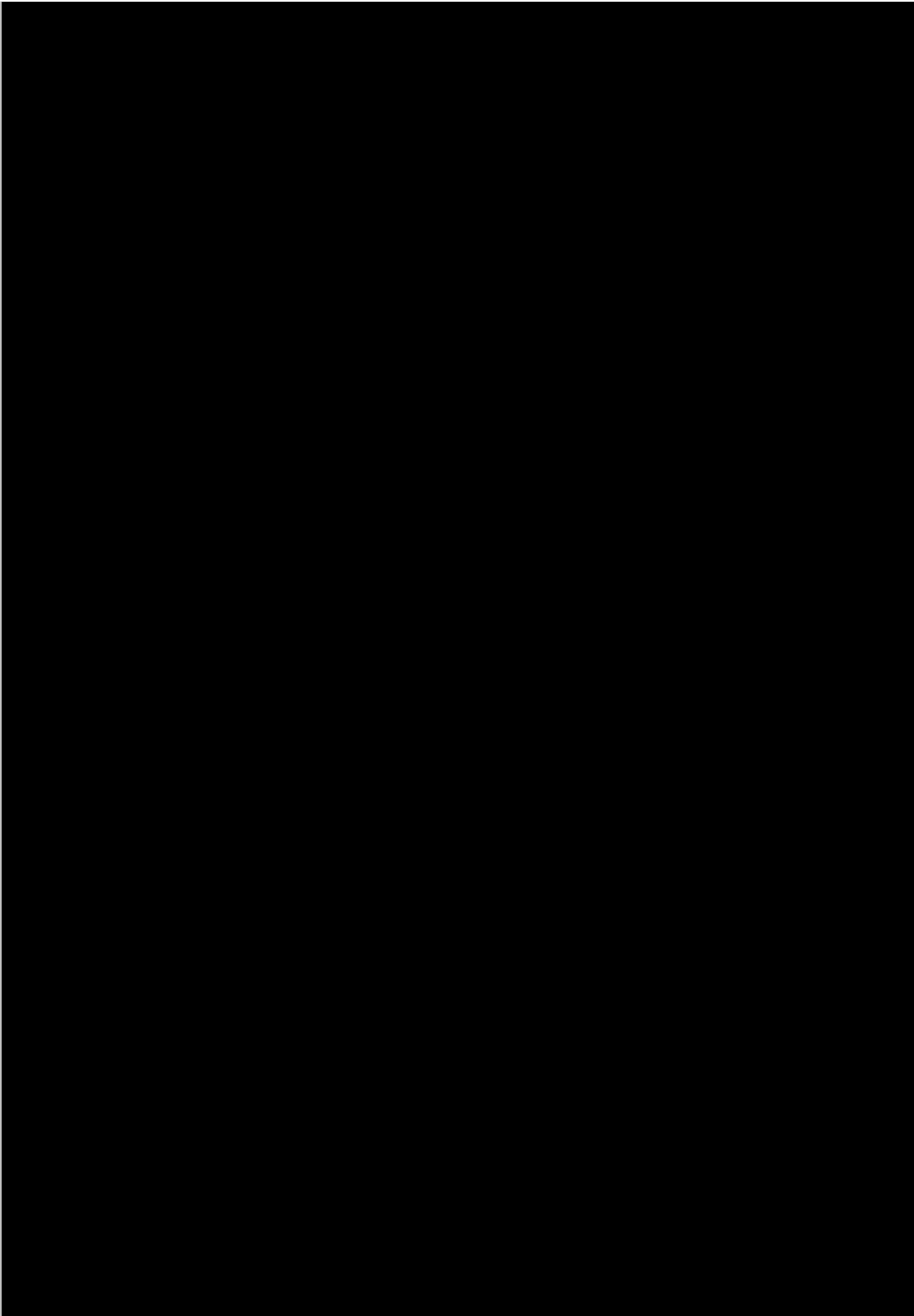
Responsibilities	Rating	Comments/Actions
28. Understands distributor's service policy and its rationale based on market and competitive dynamics and identifies gaps that may impact retail execution and volume performance		
29. Converts sales information (syndicated data, best practices, etc.) into insights and selling stories to share with distributors and to enable a more effective distributor selling effort		

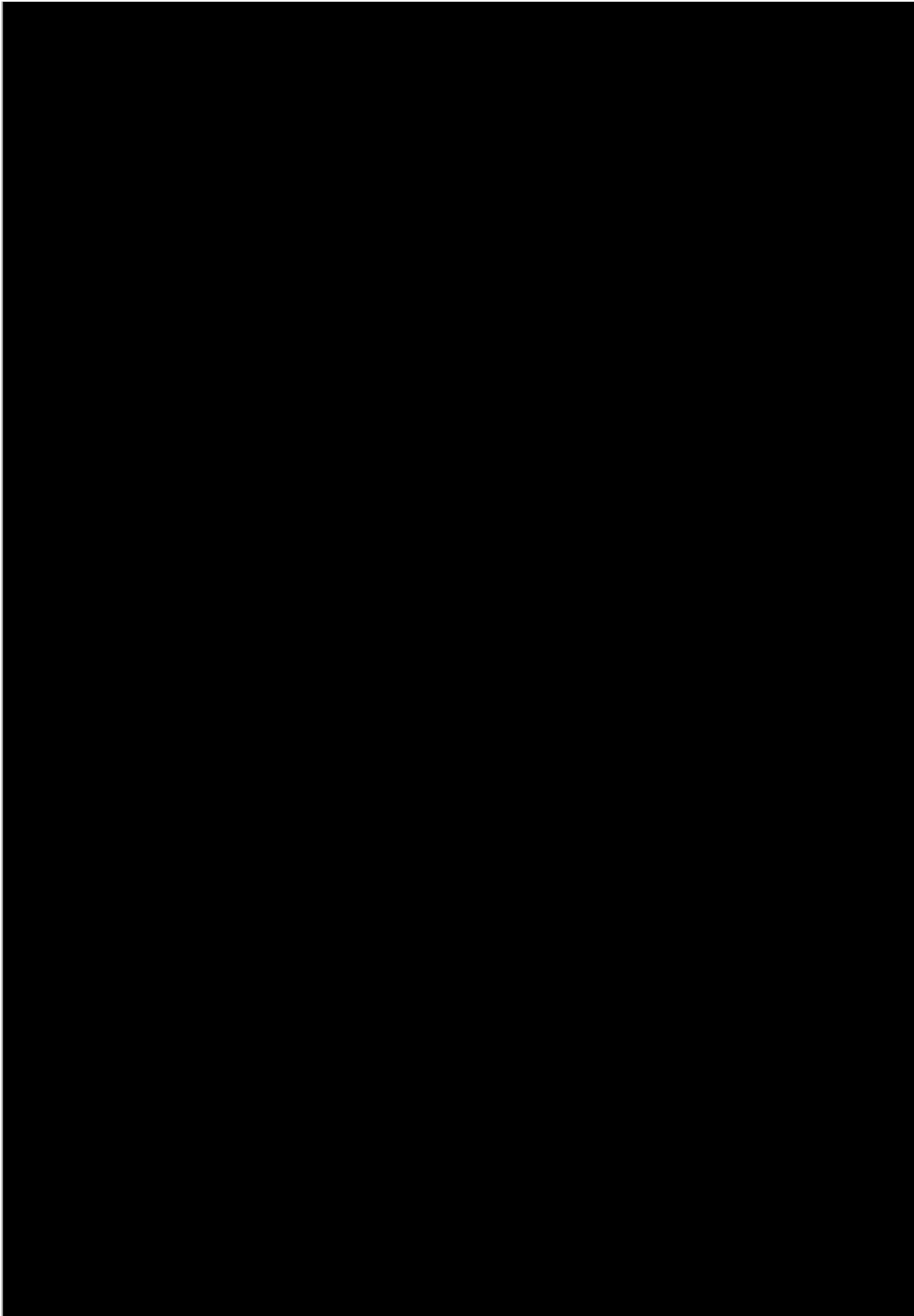


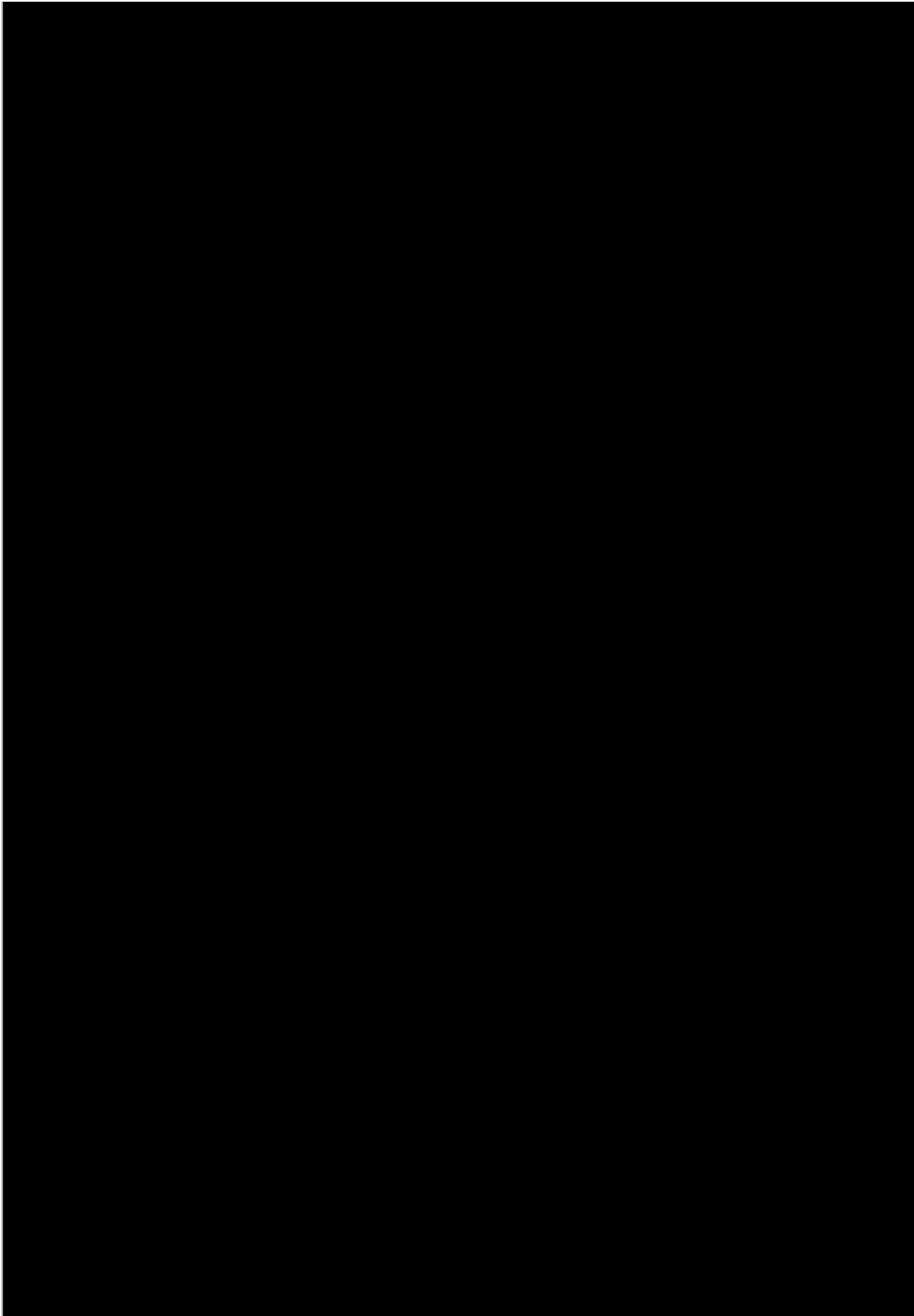


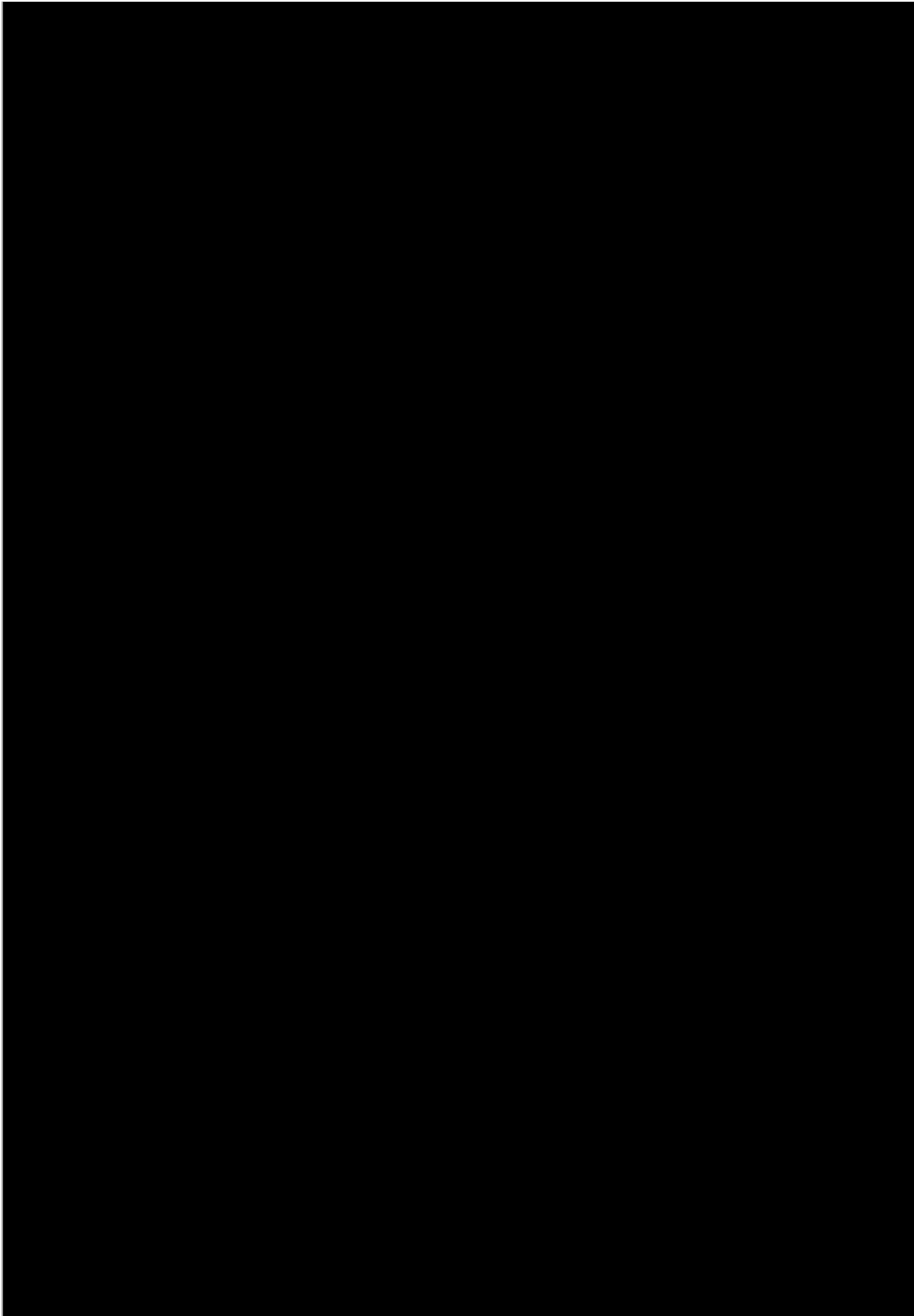


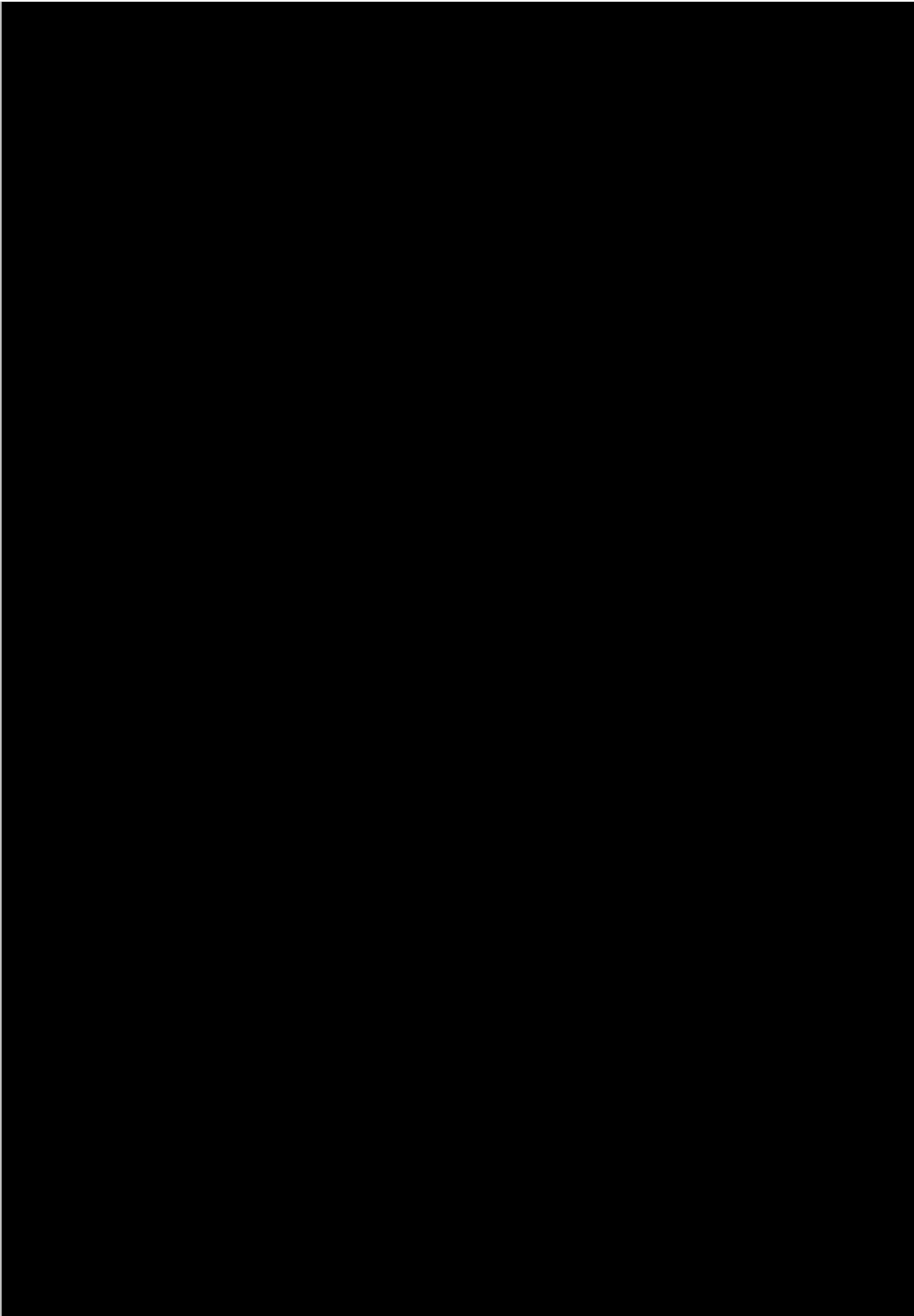


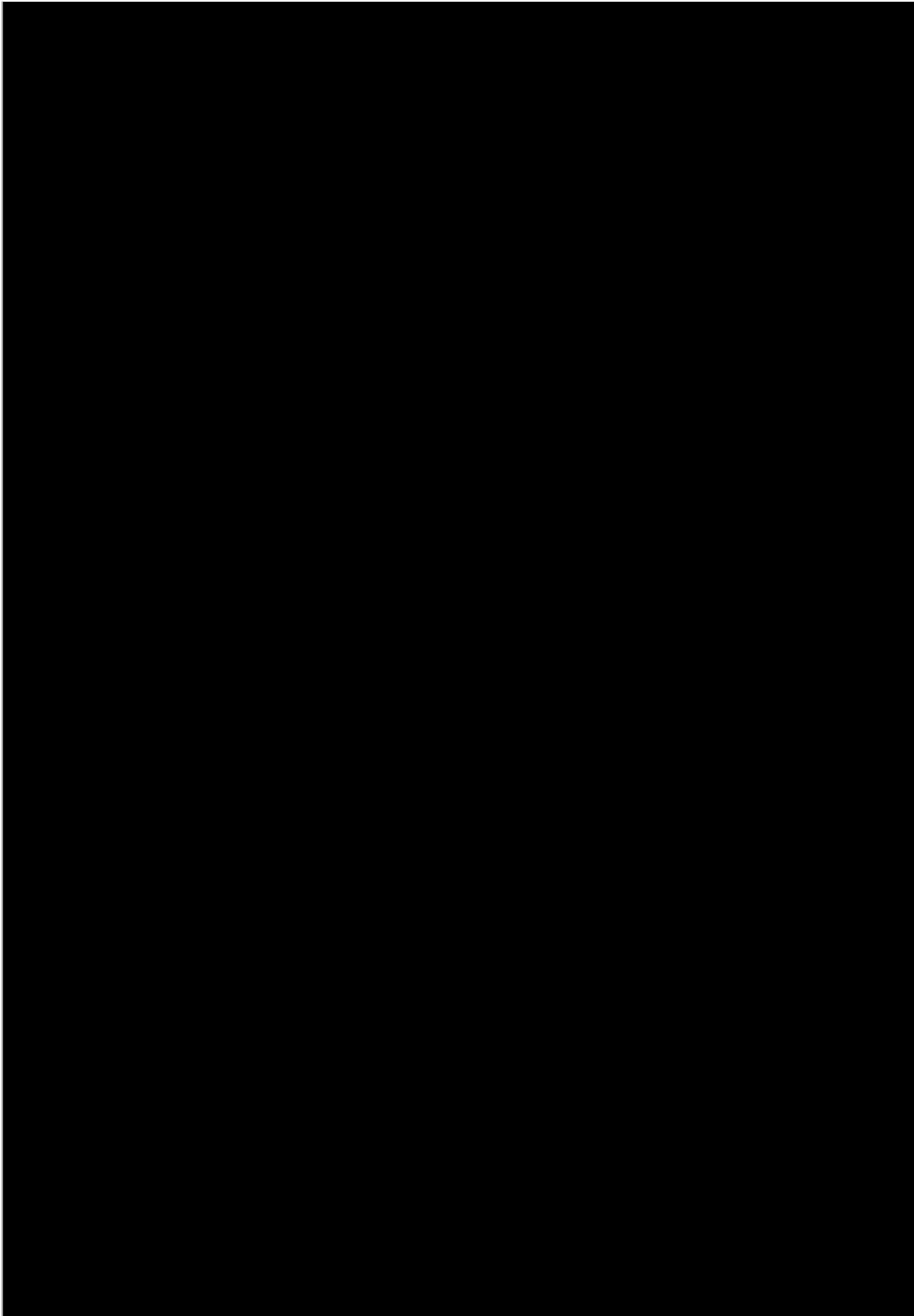


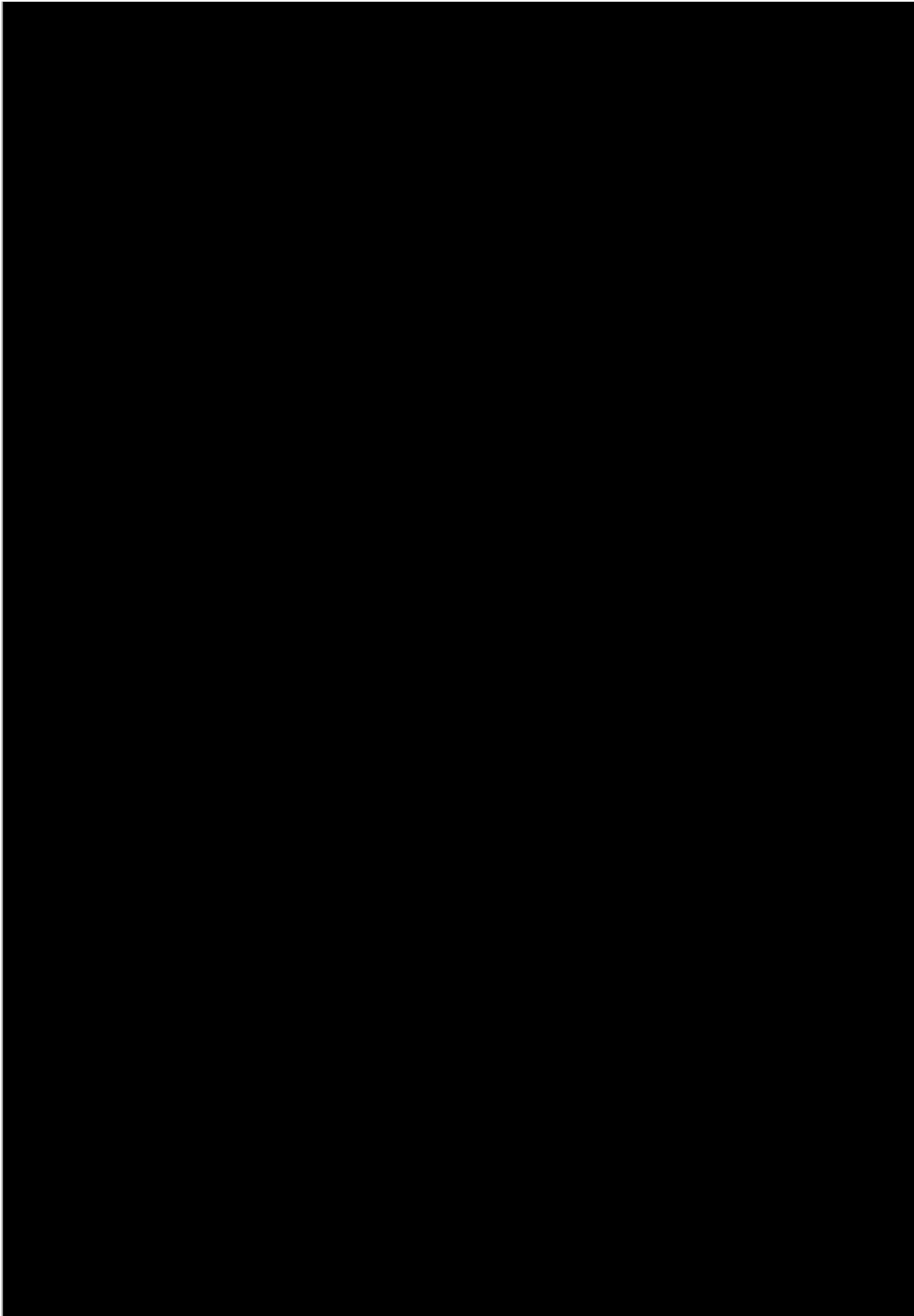


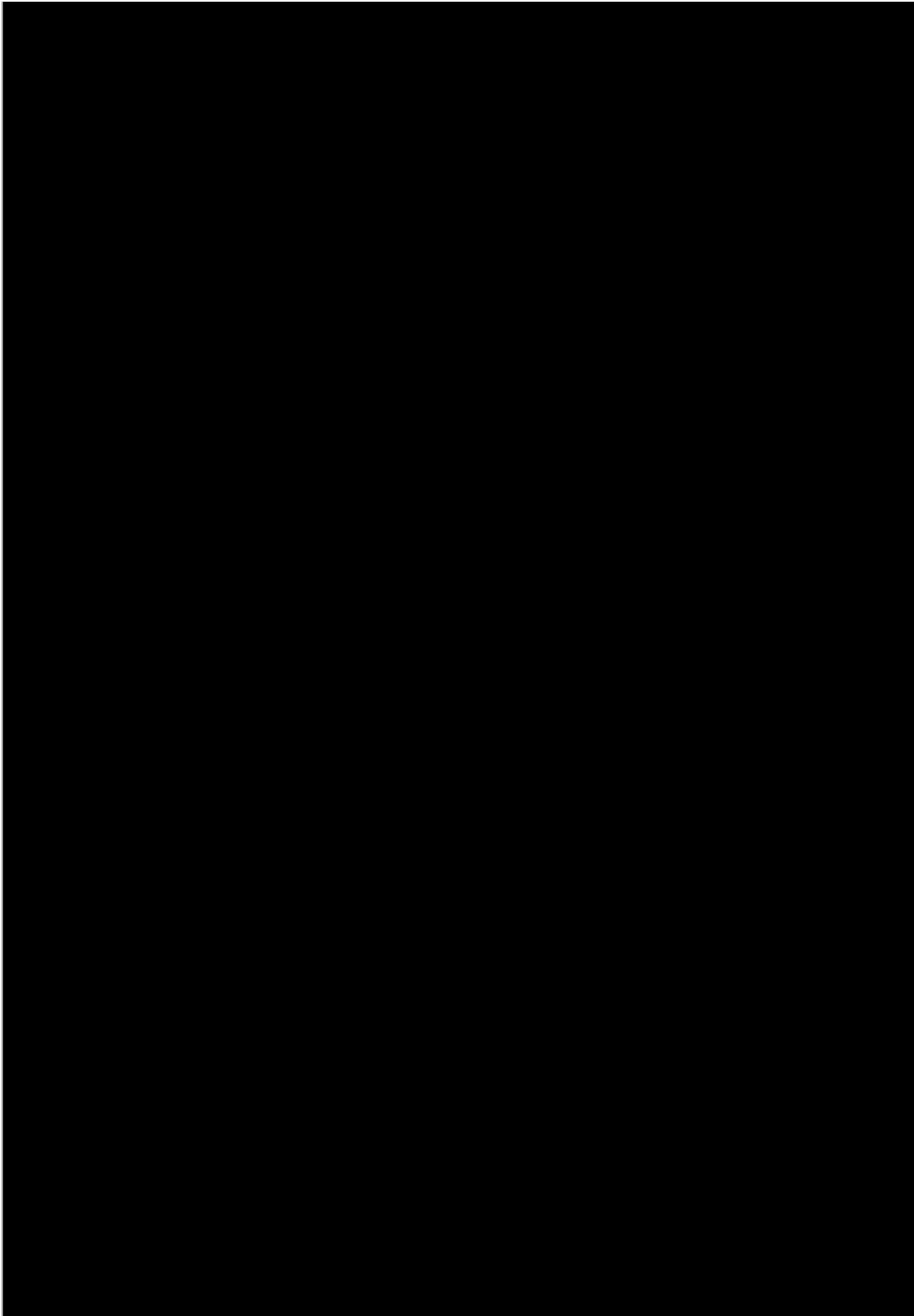


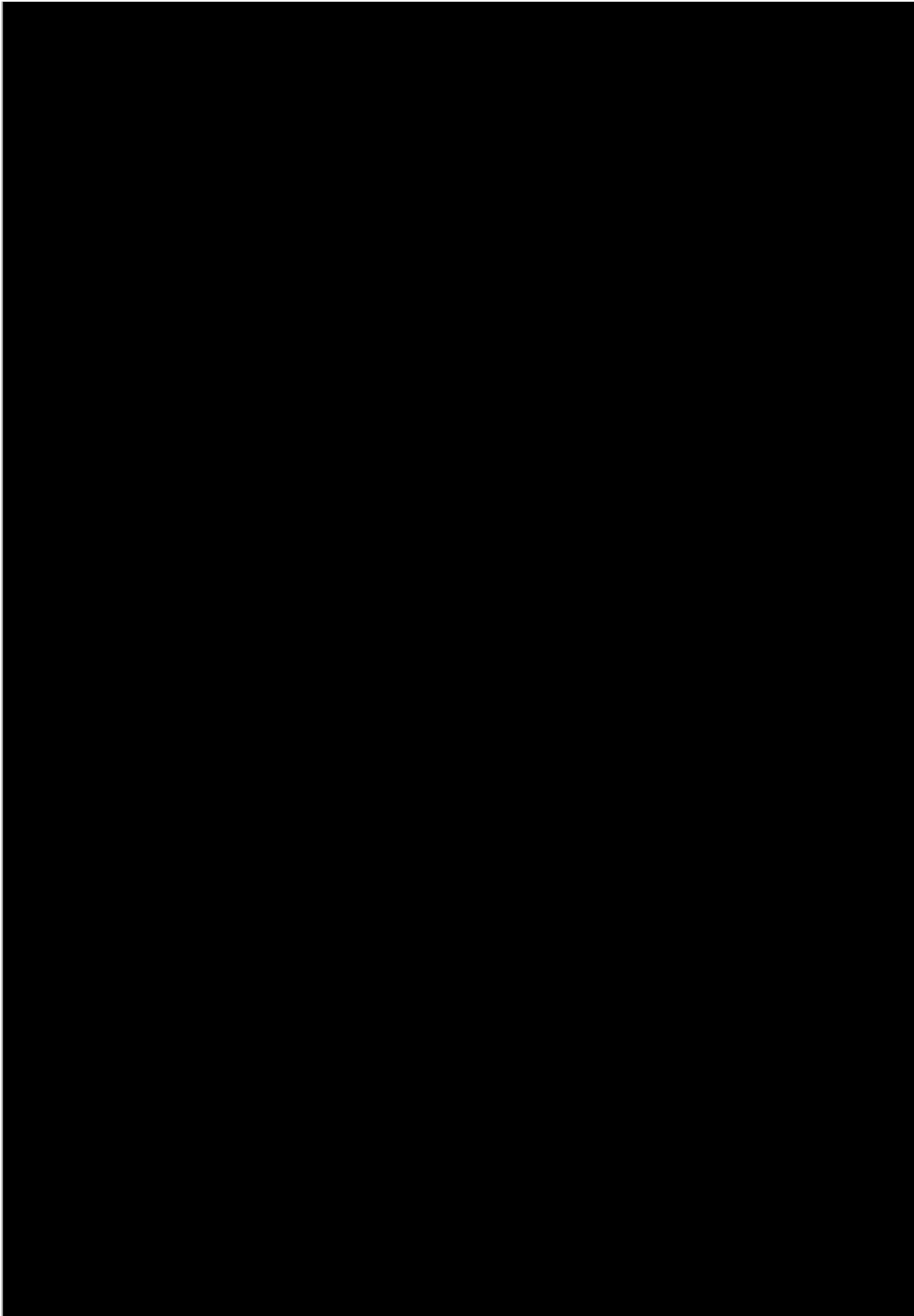


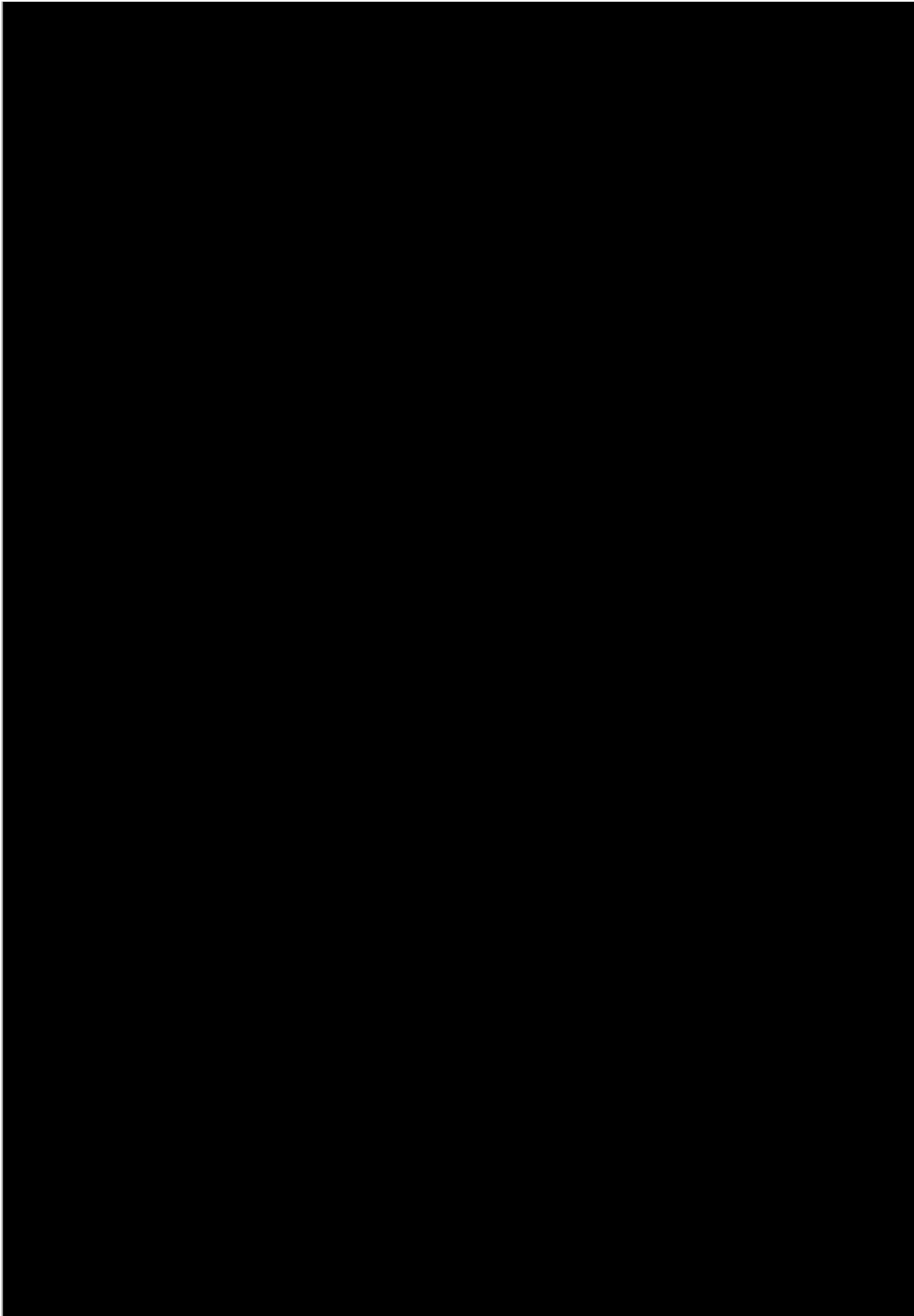


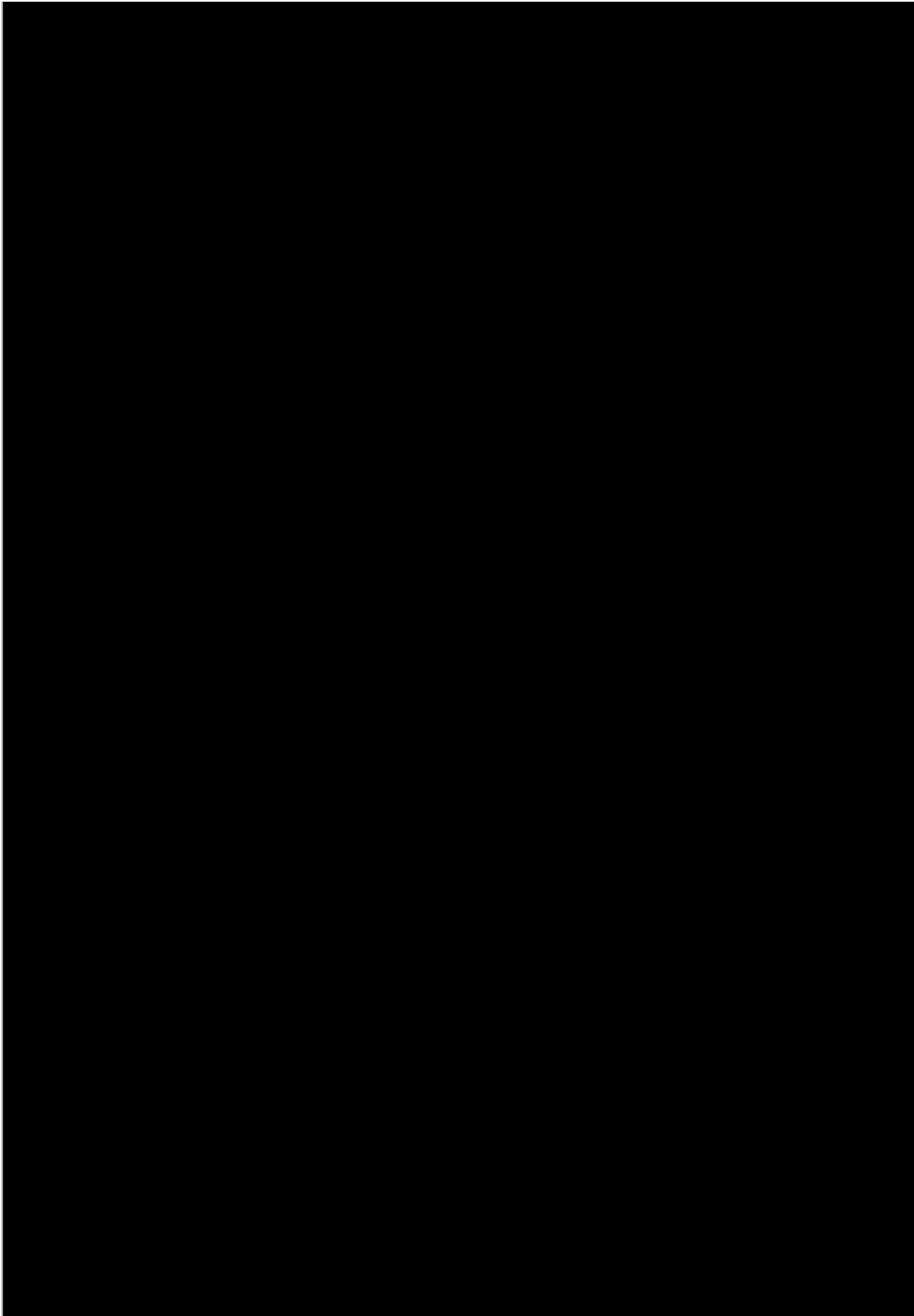


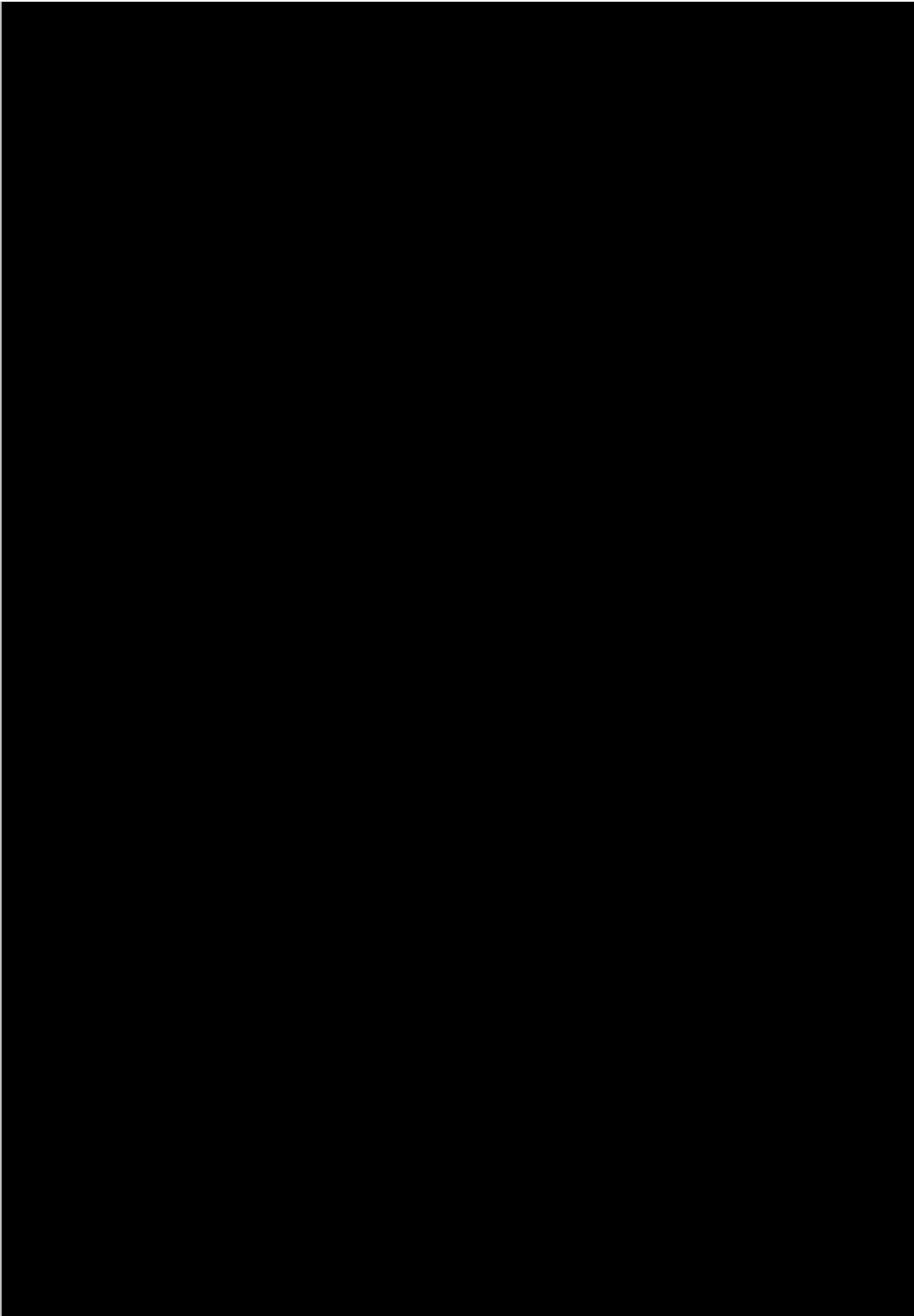


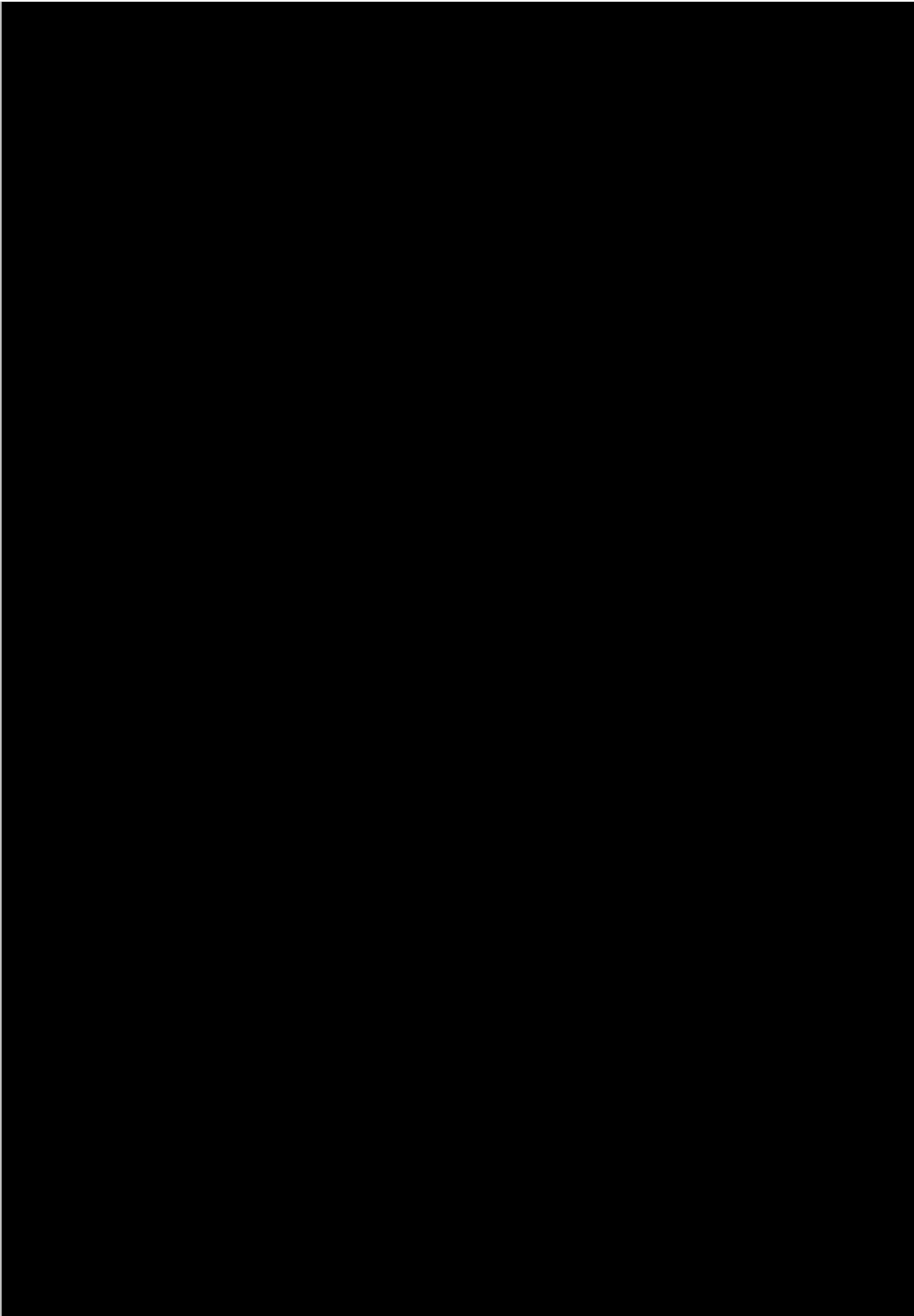


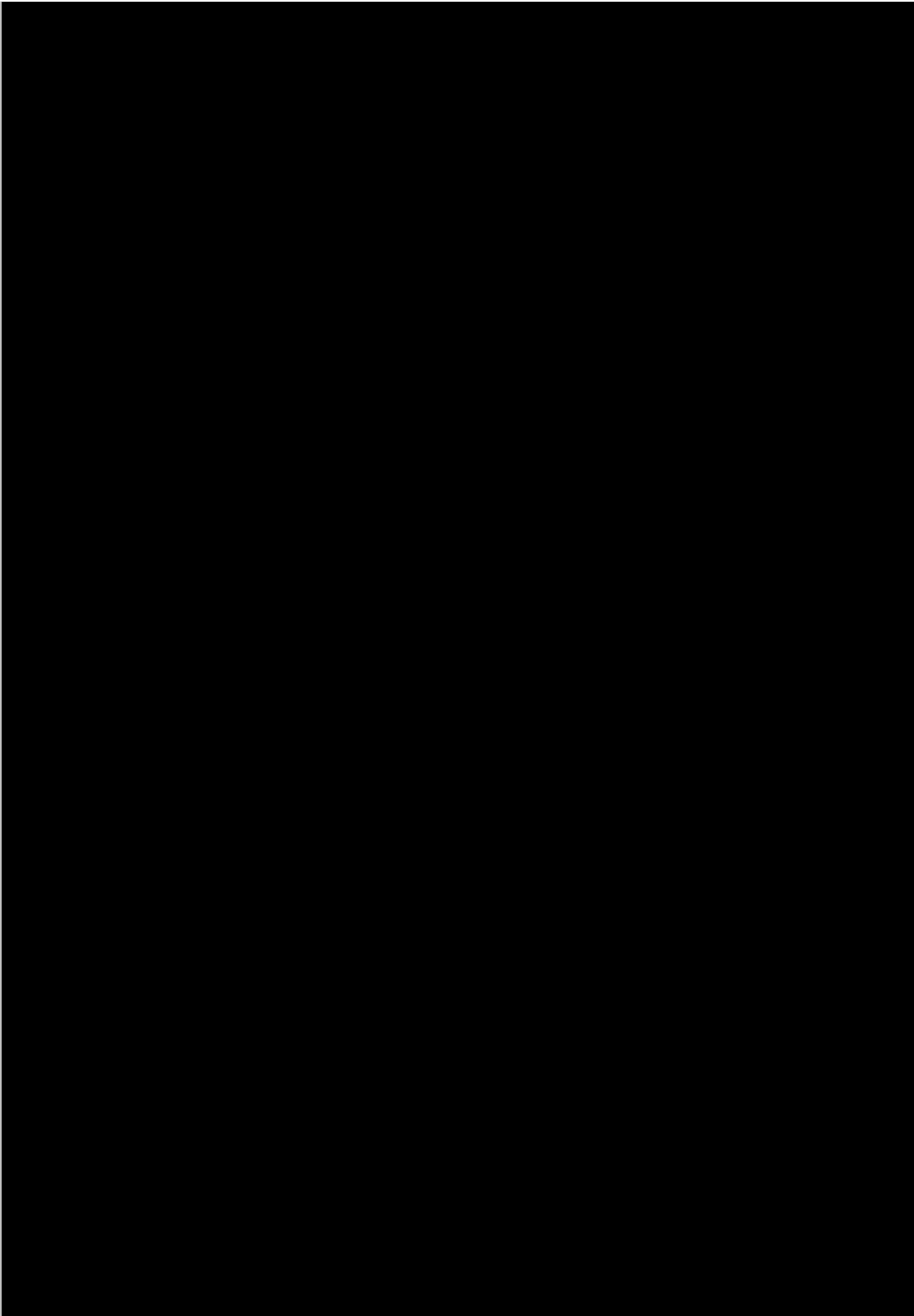


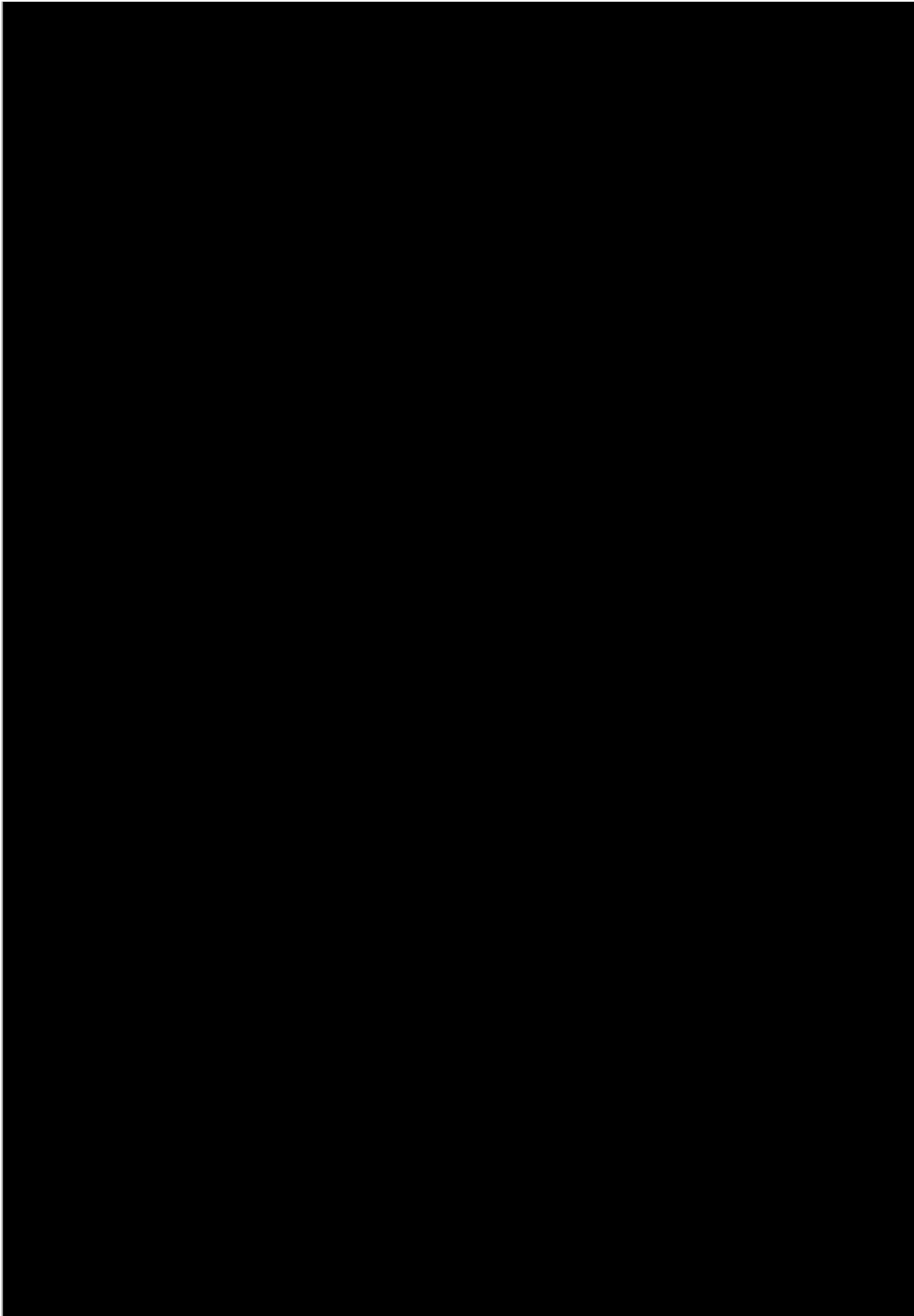


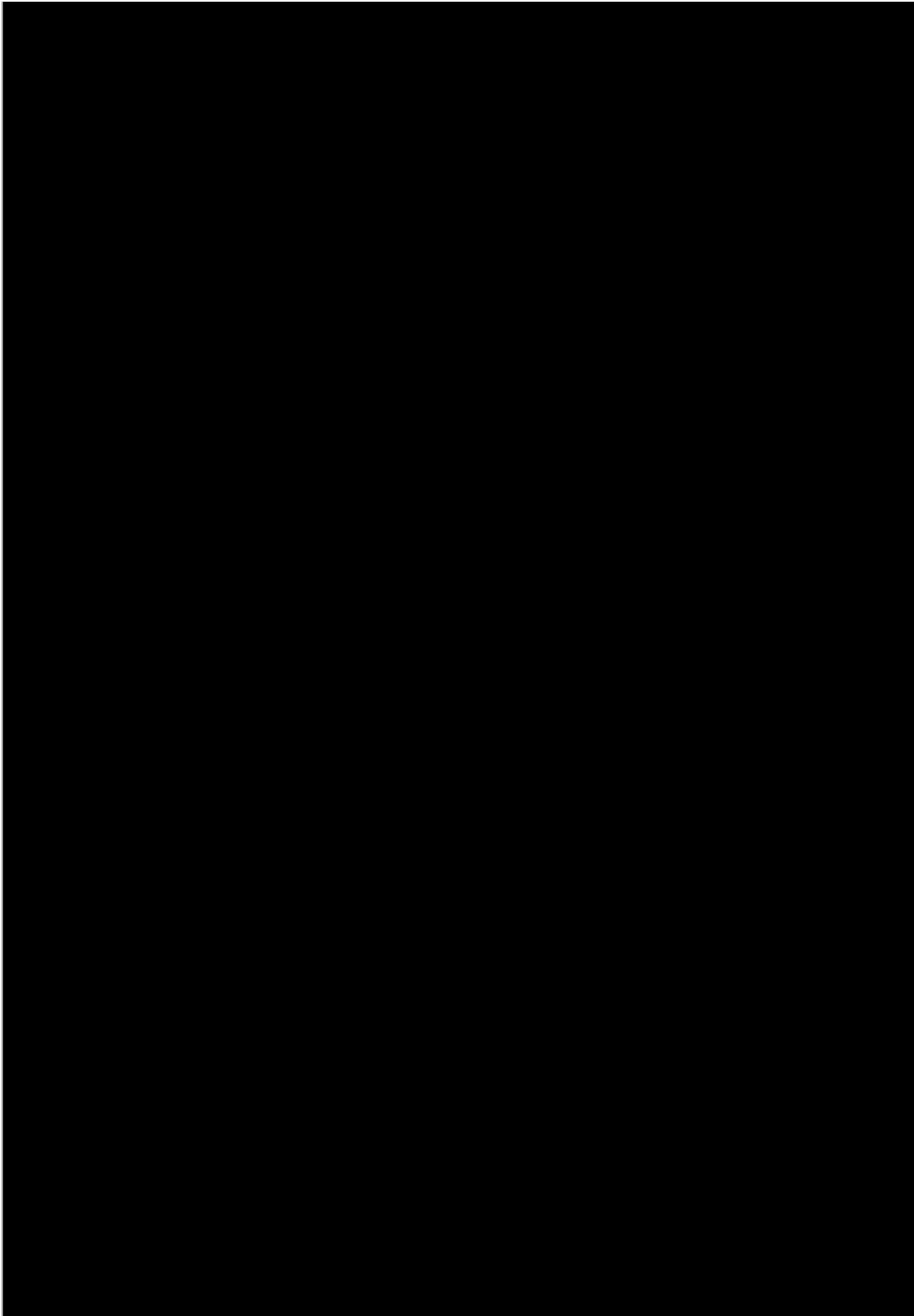


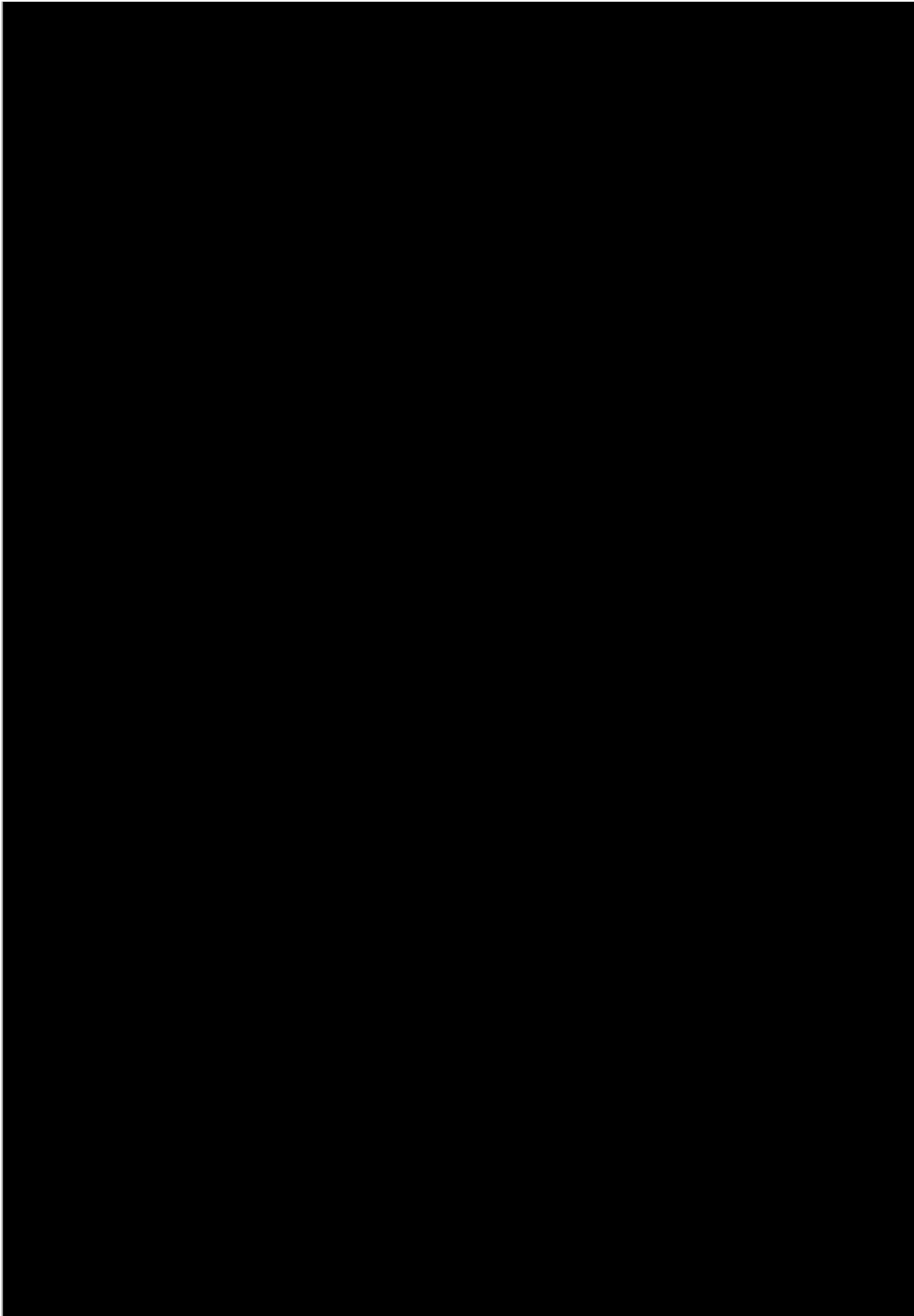


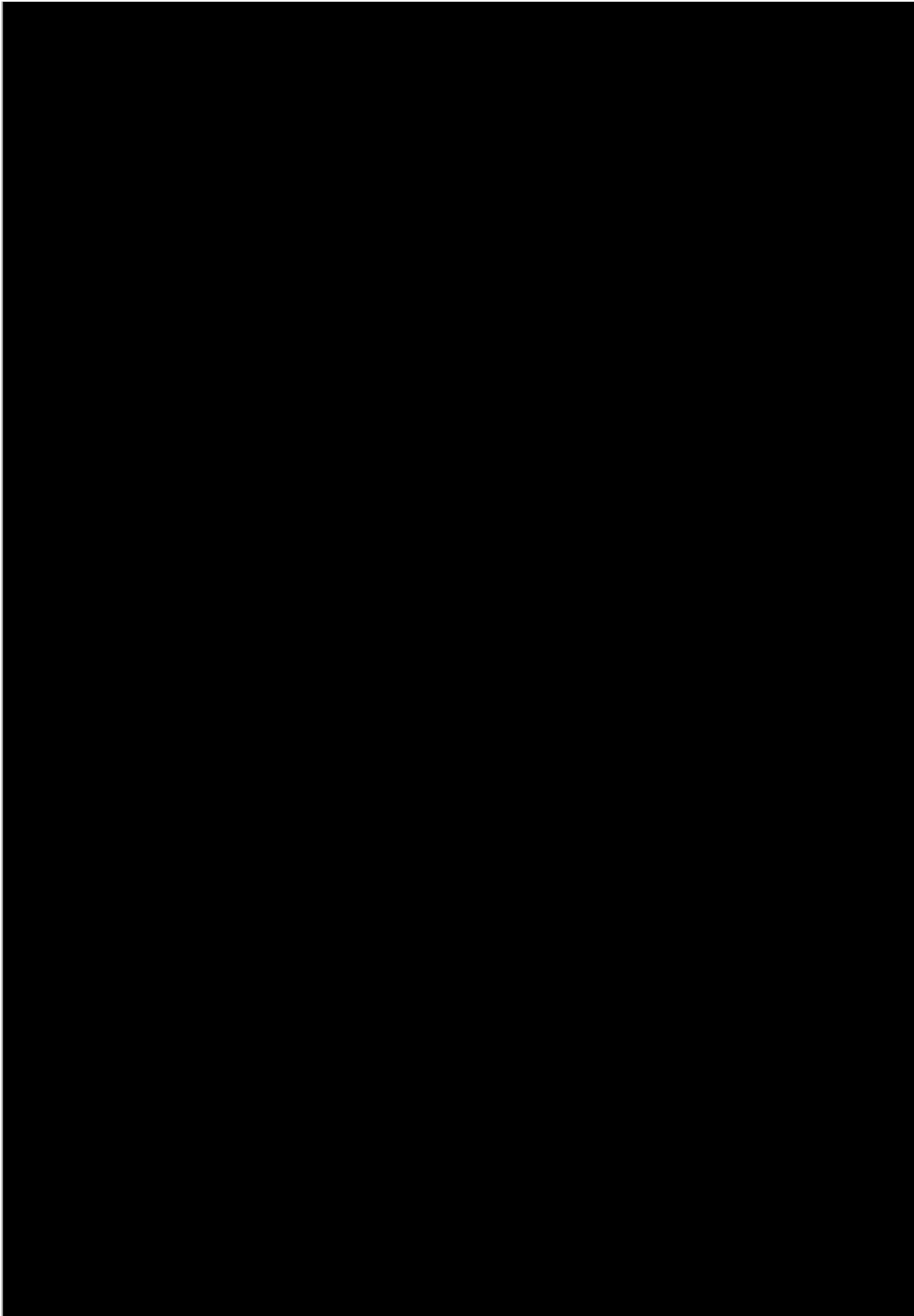


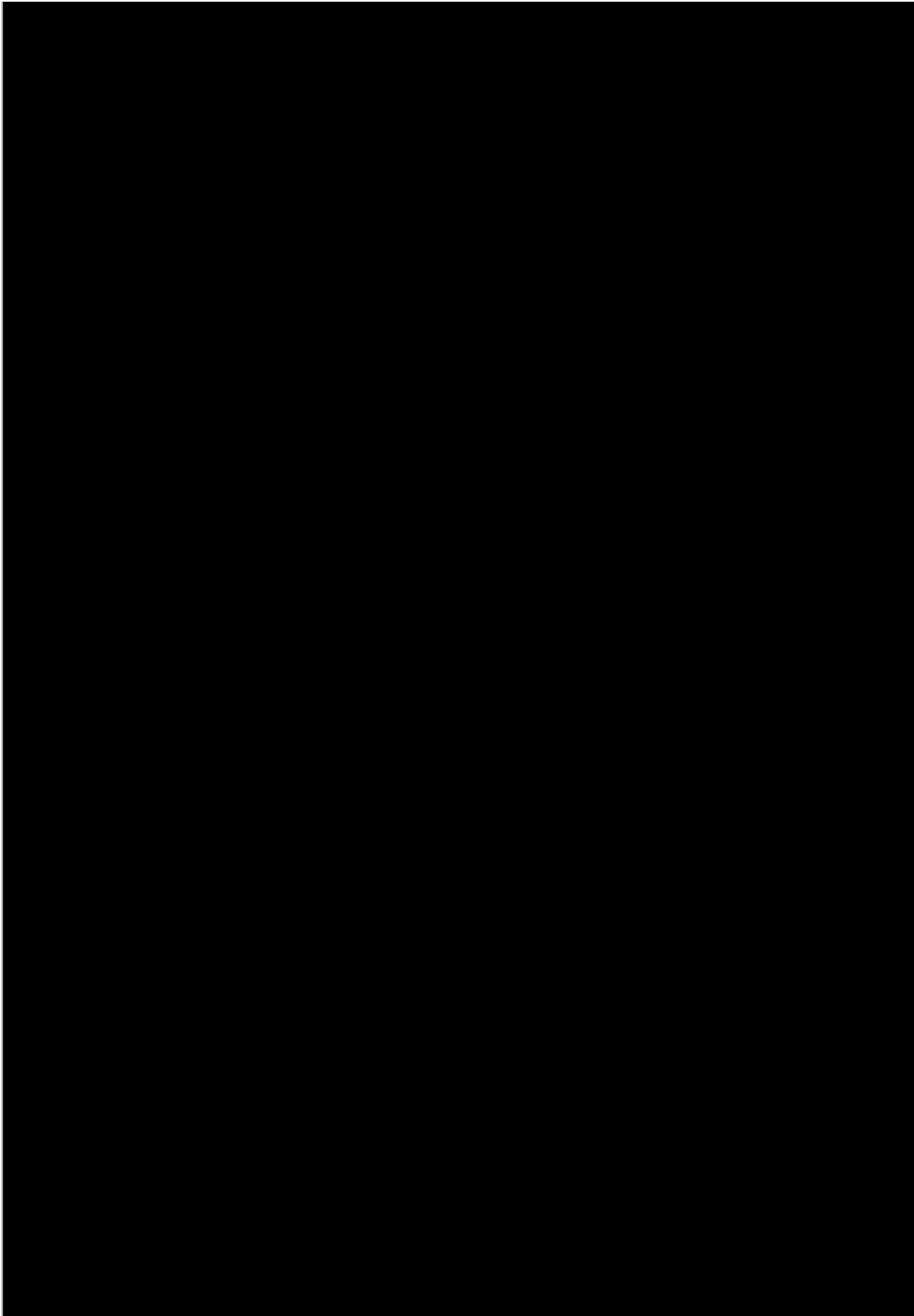


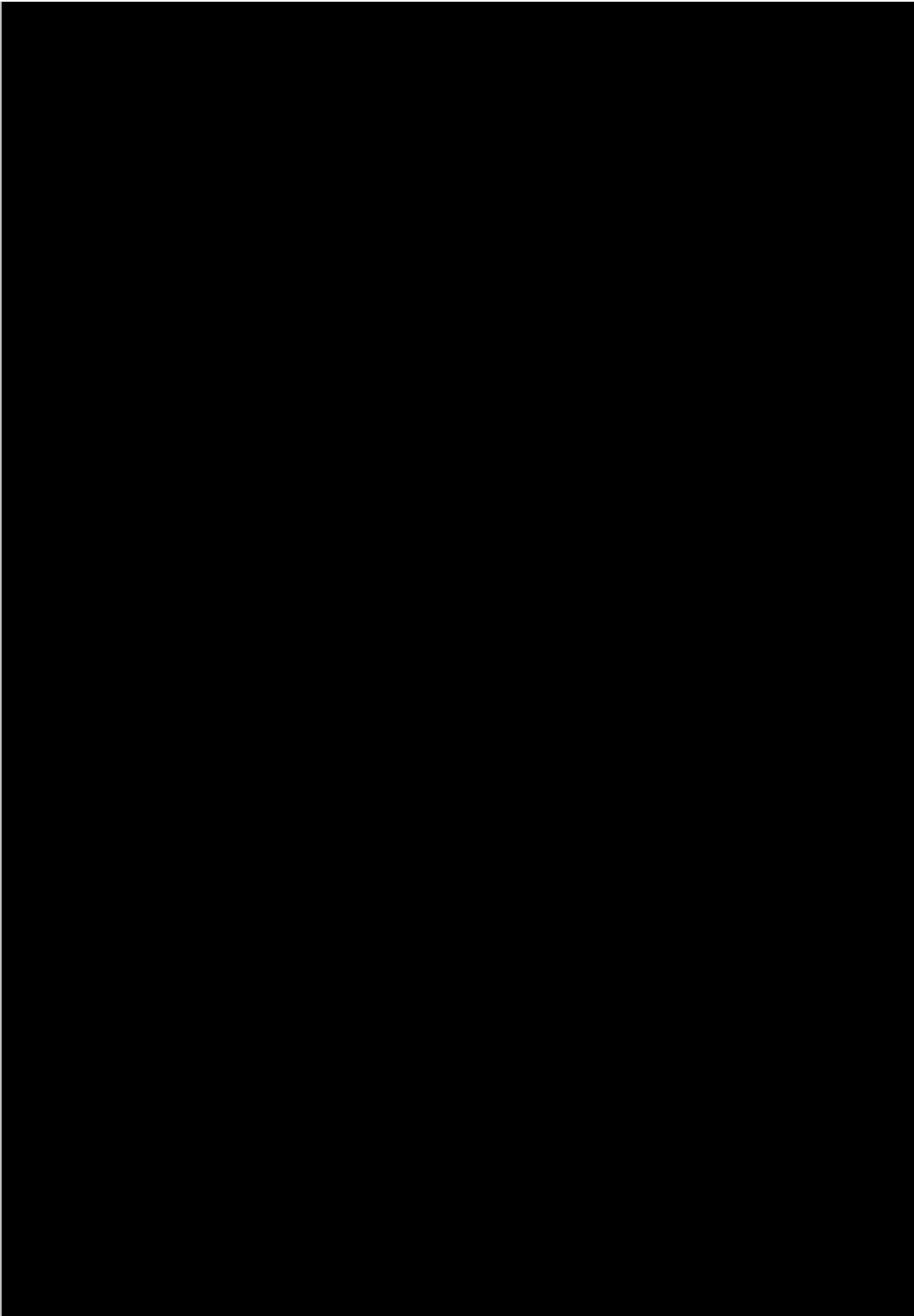


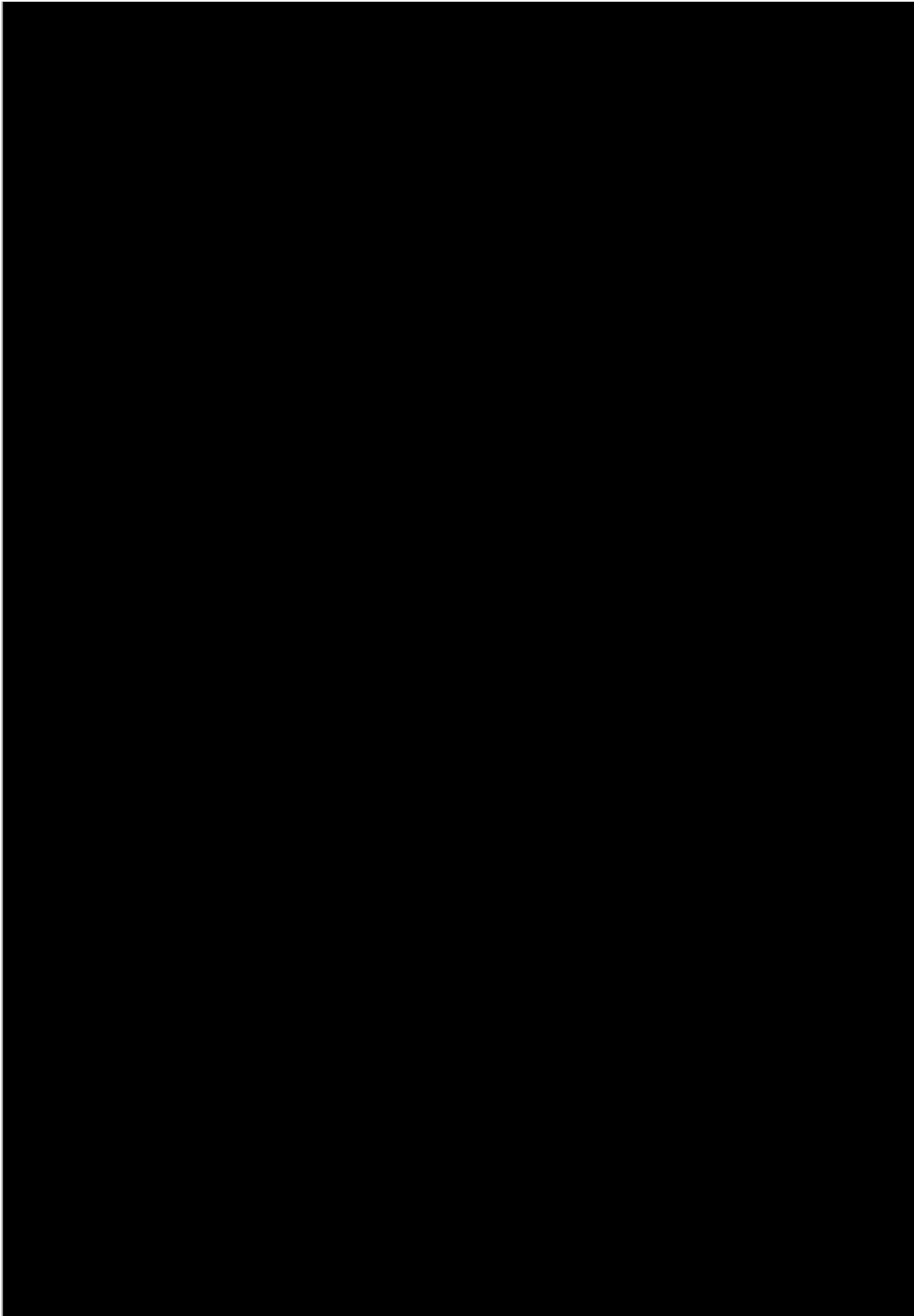


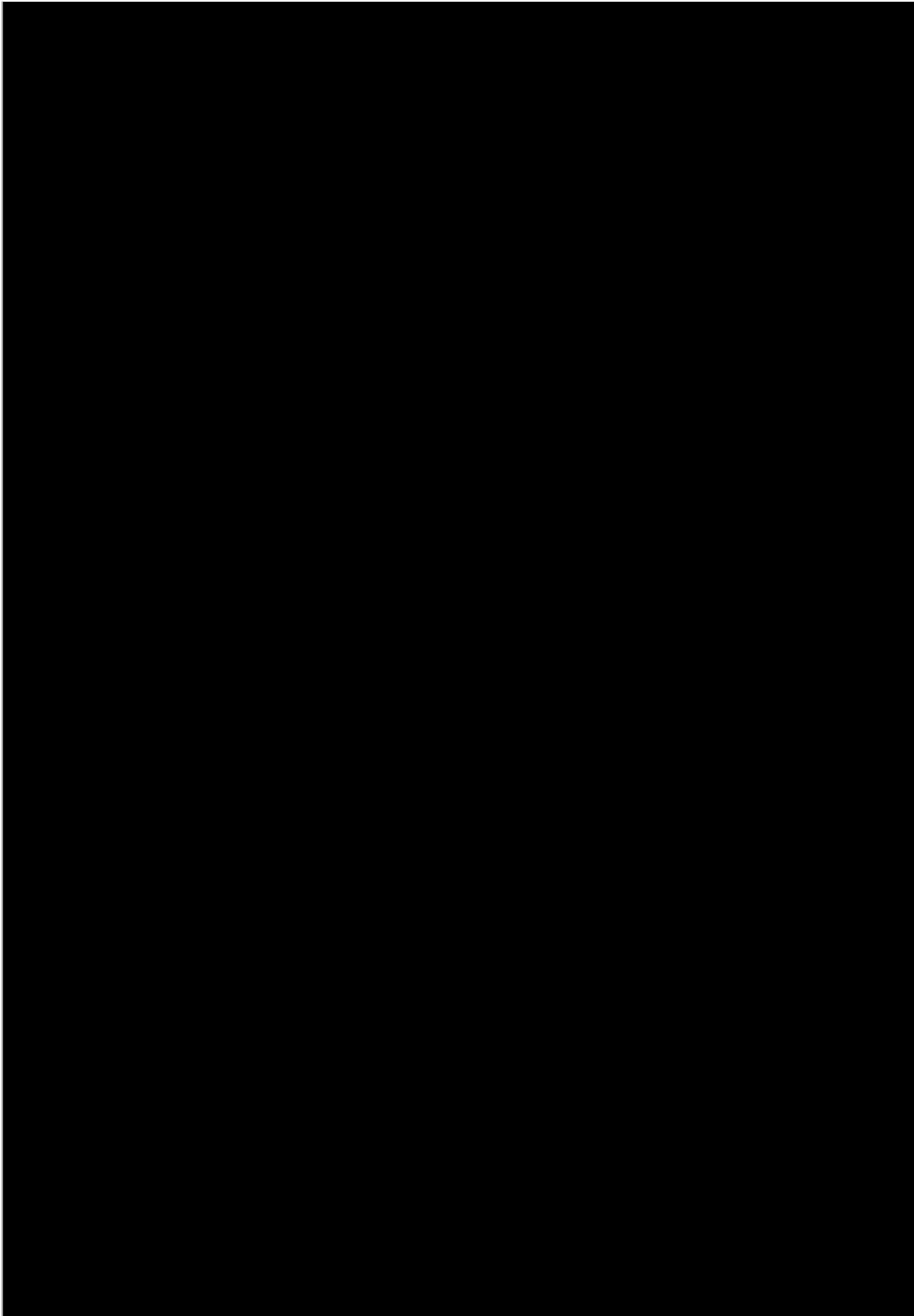


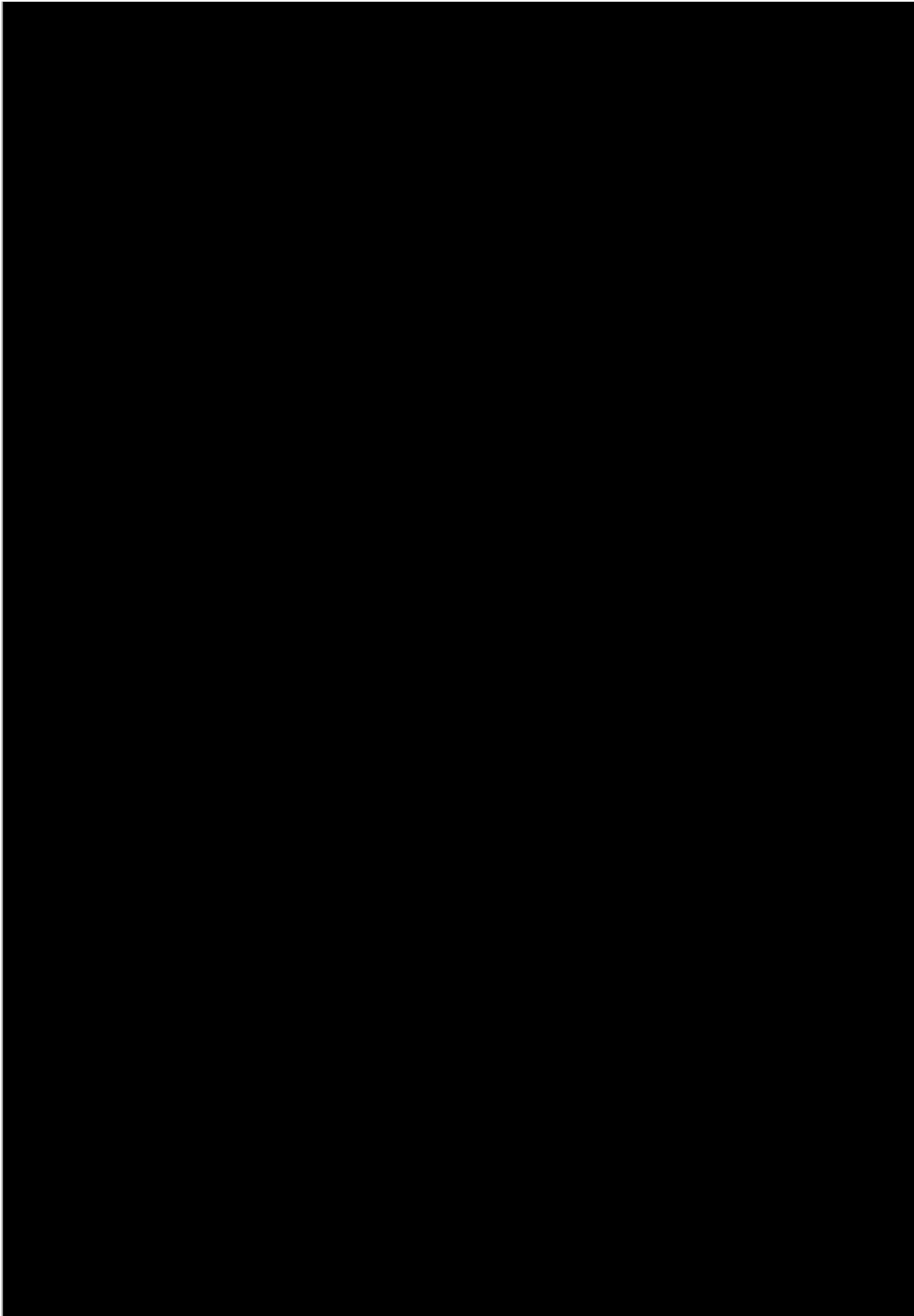


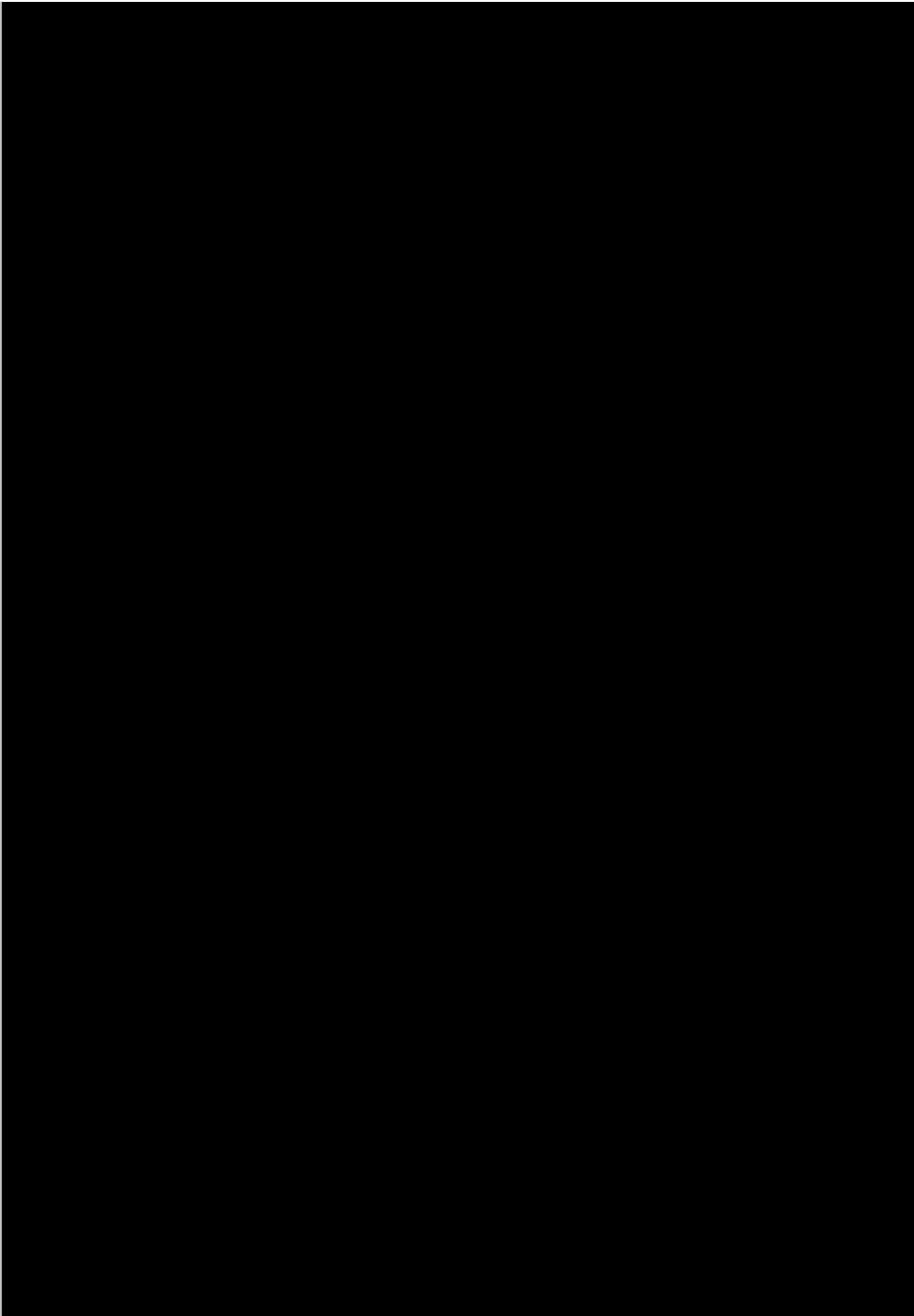


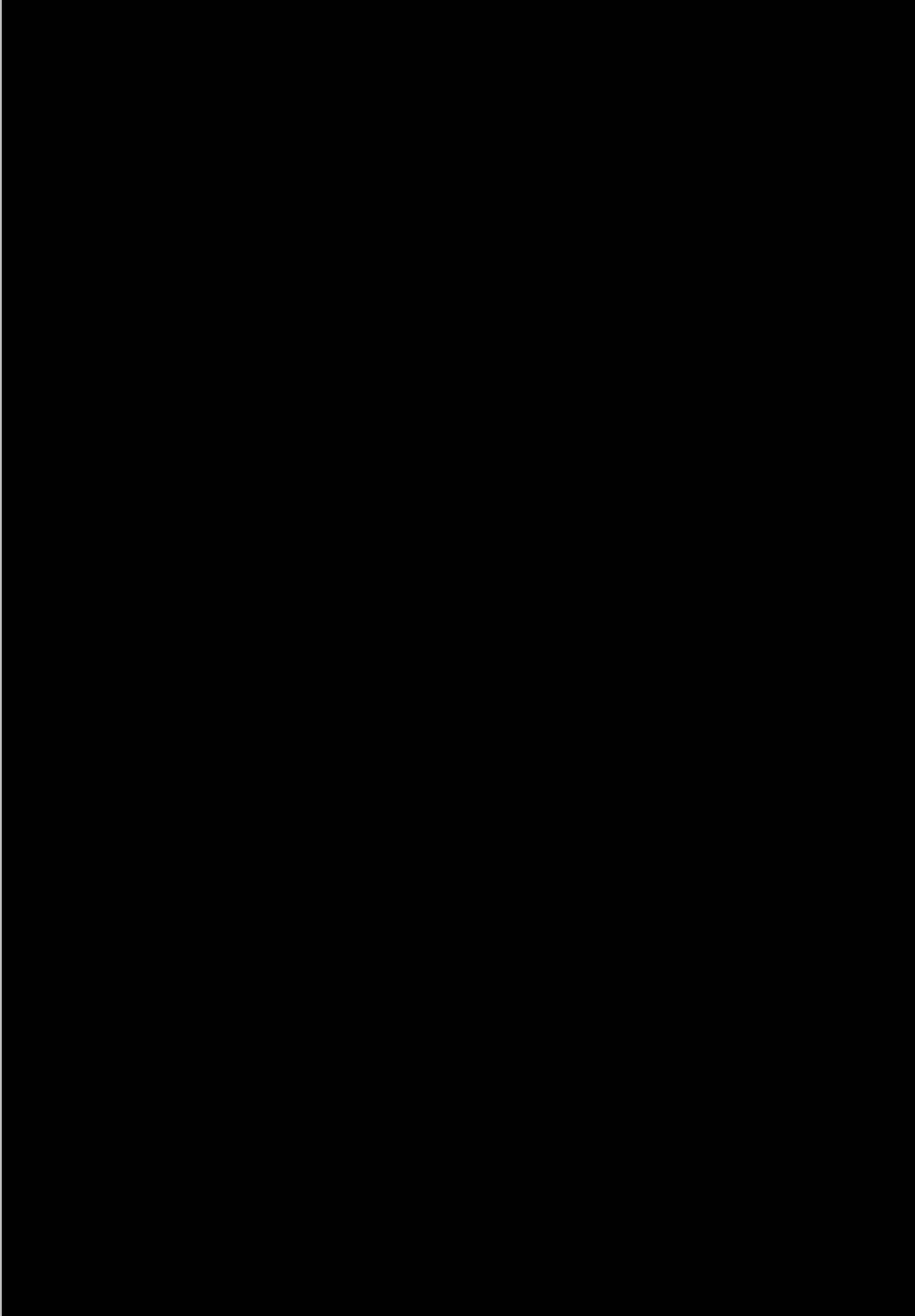


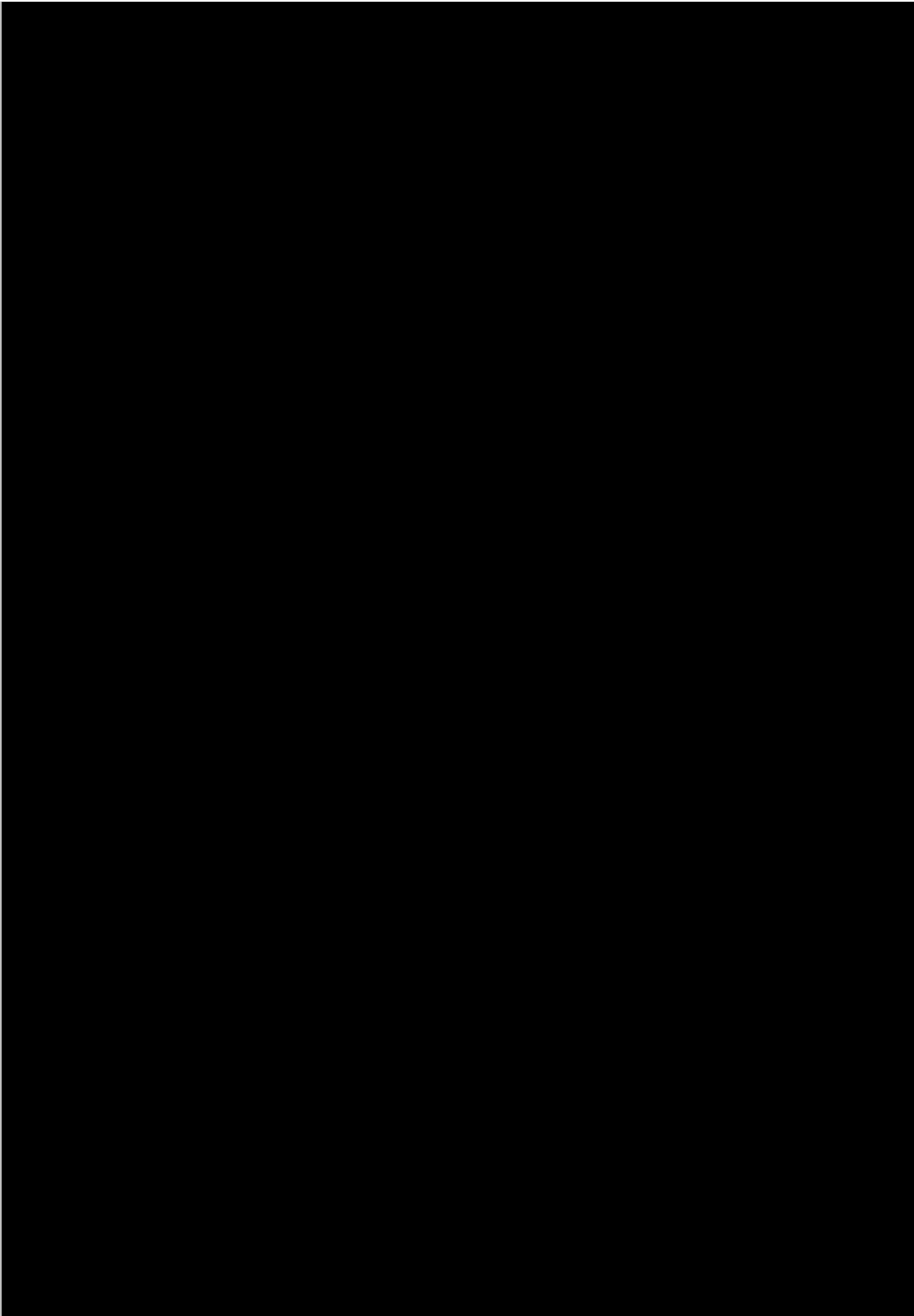


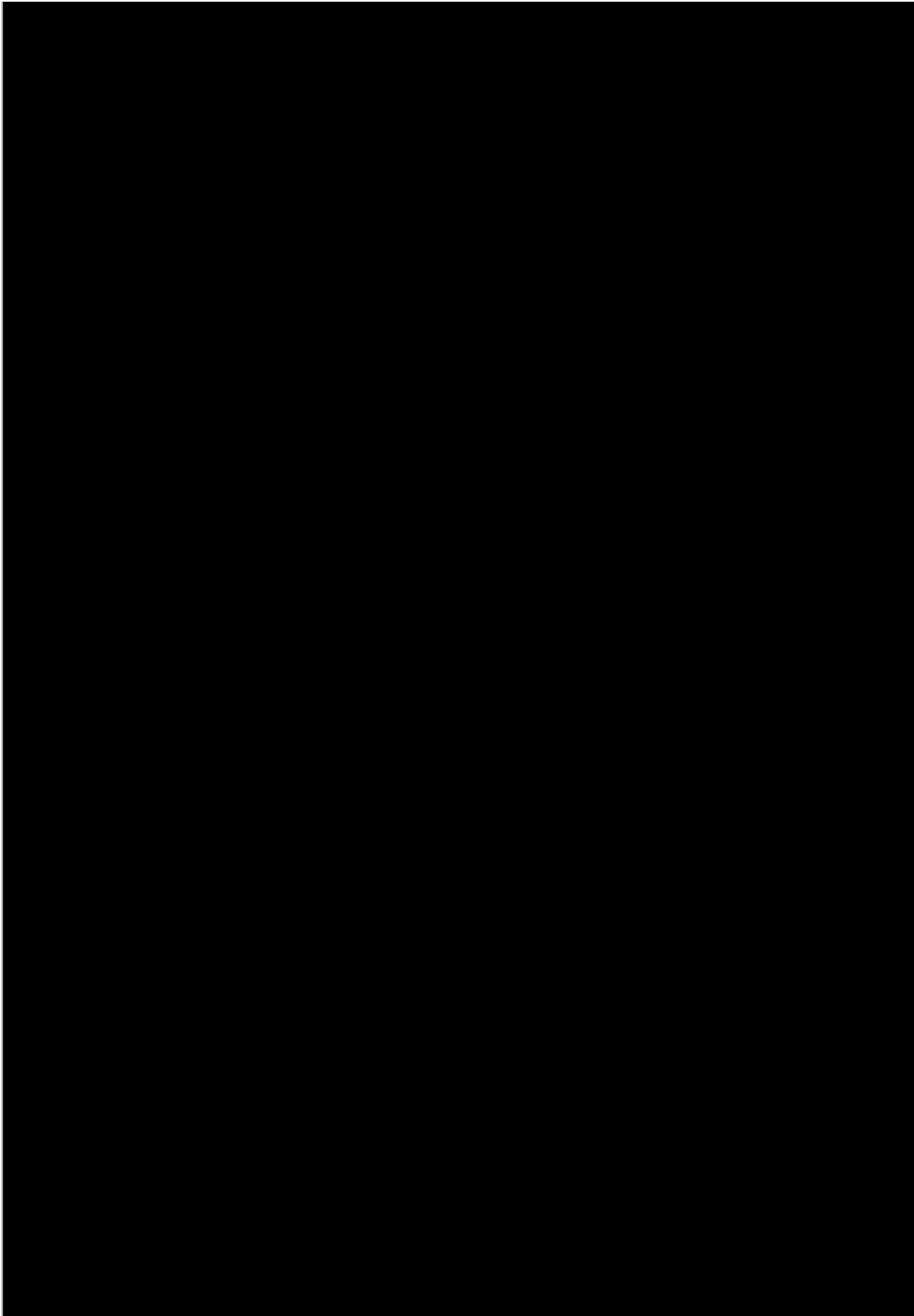


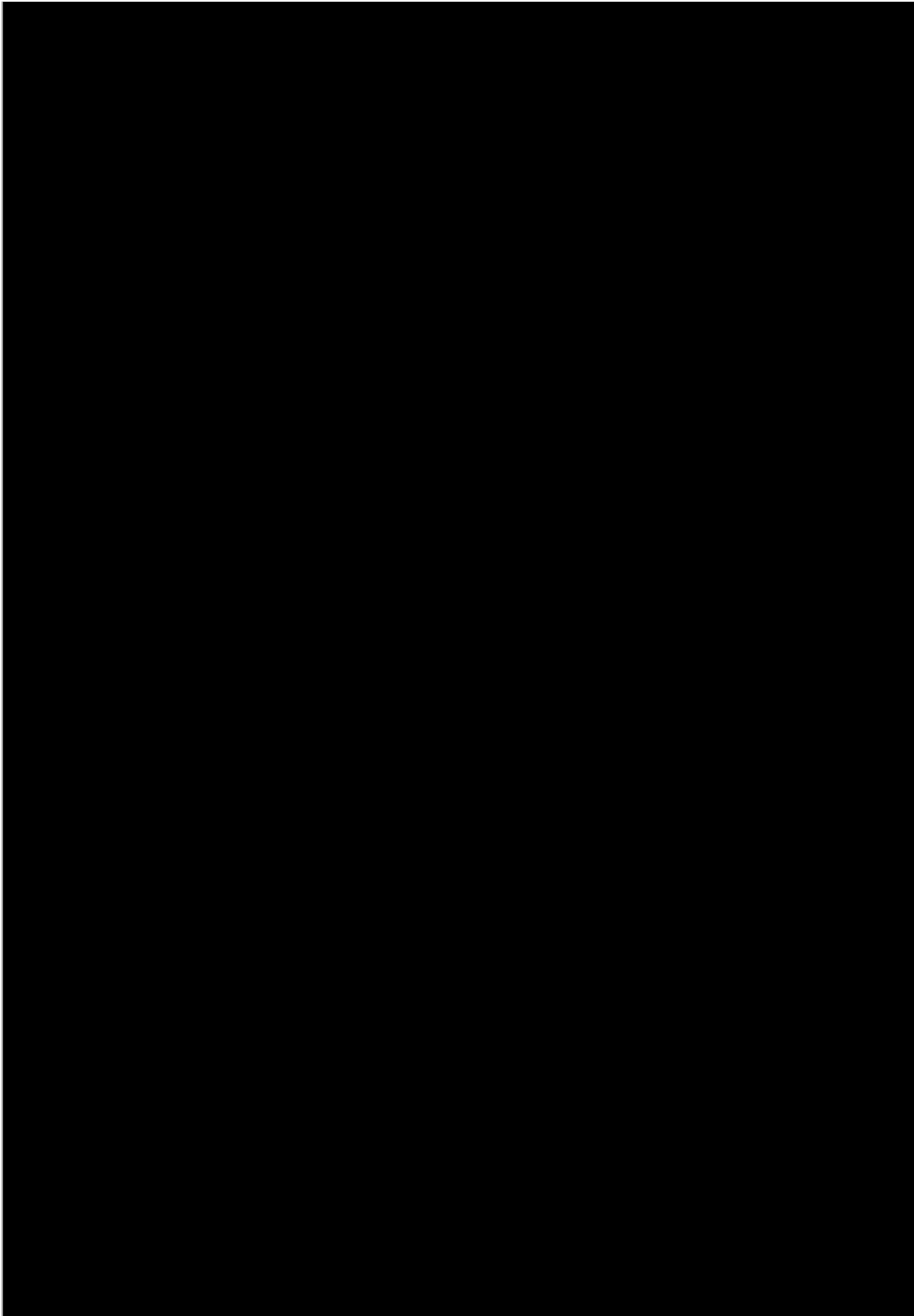


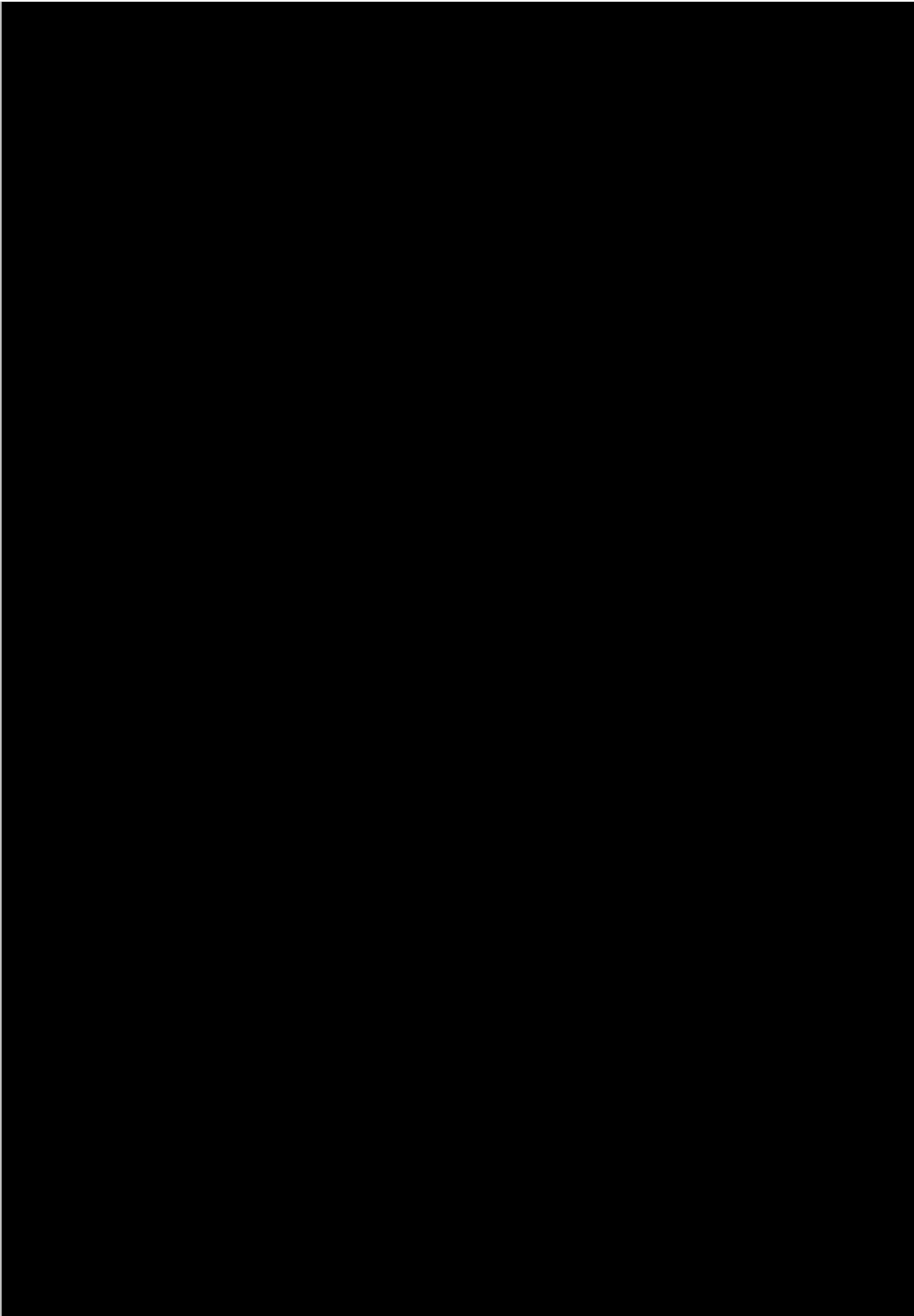


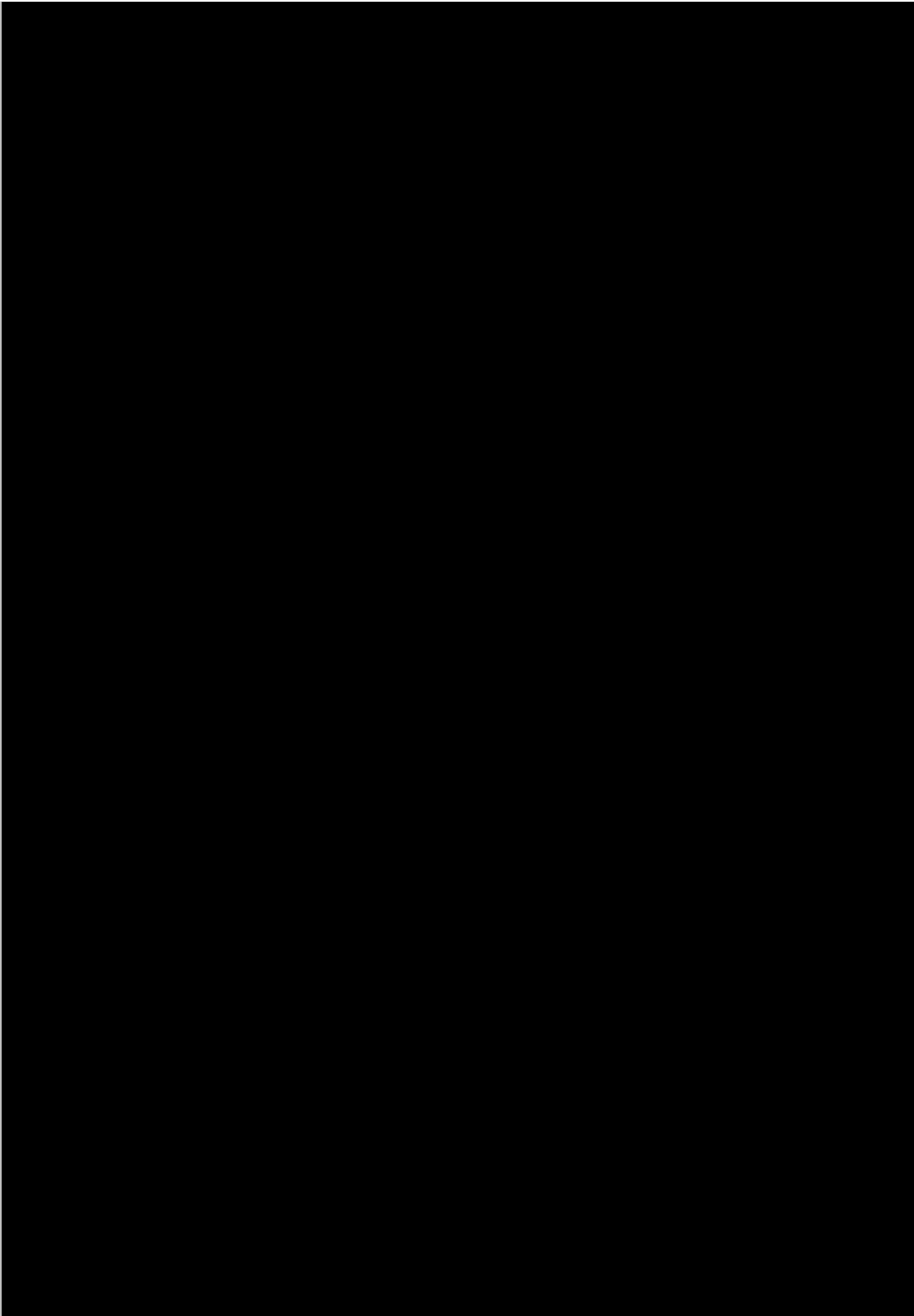


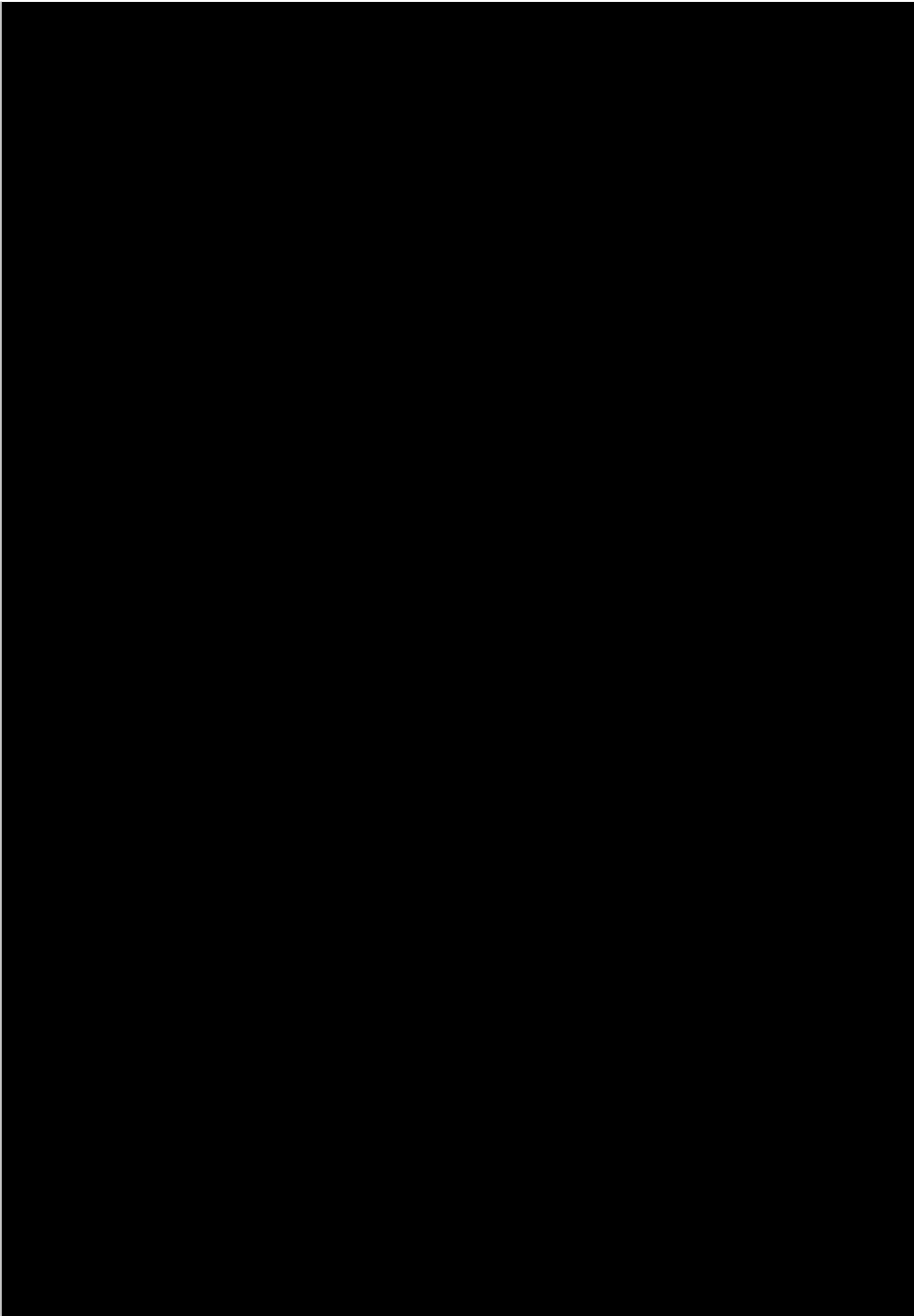


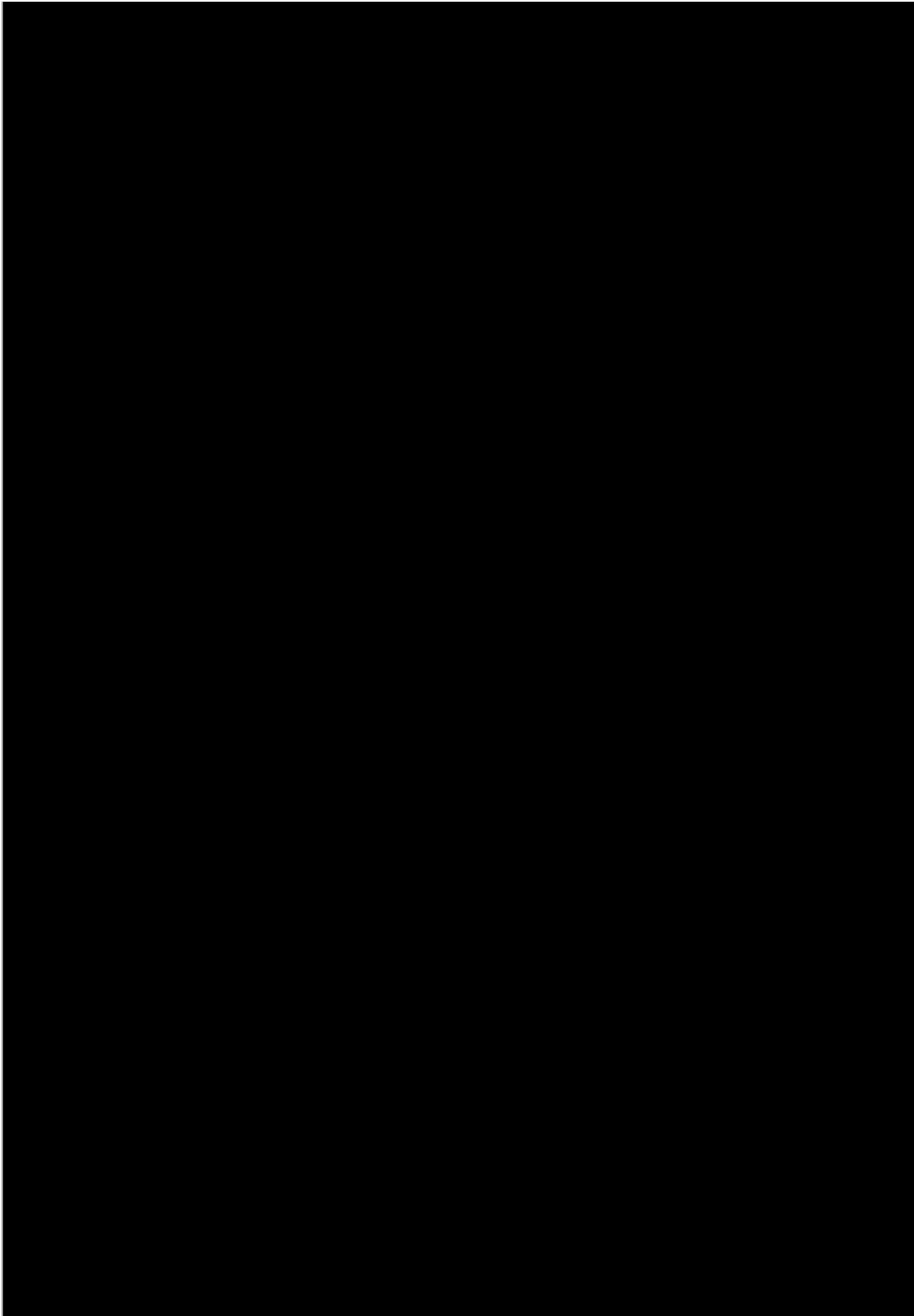


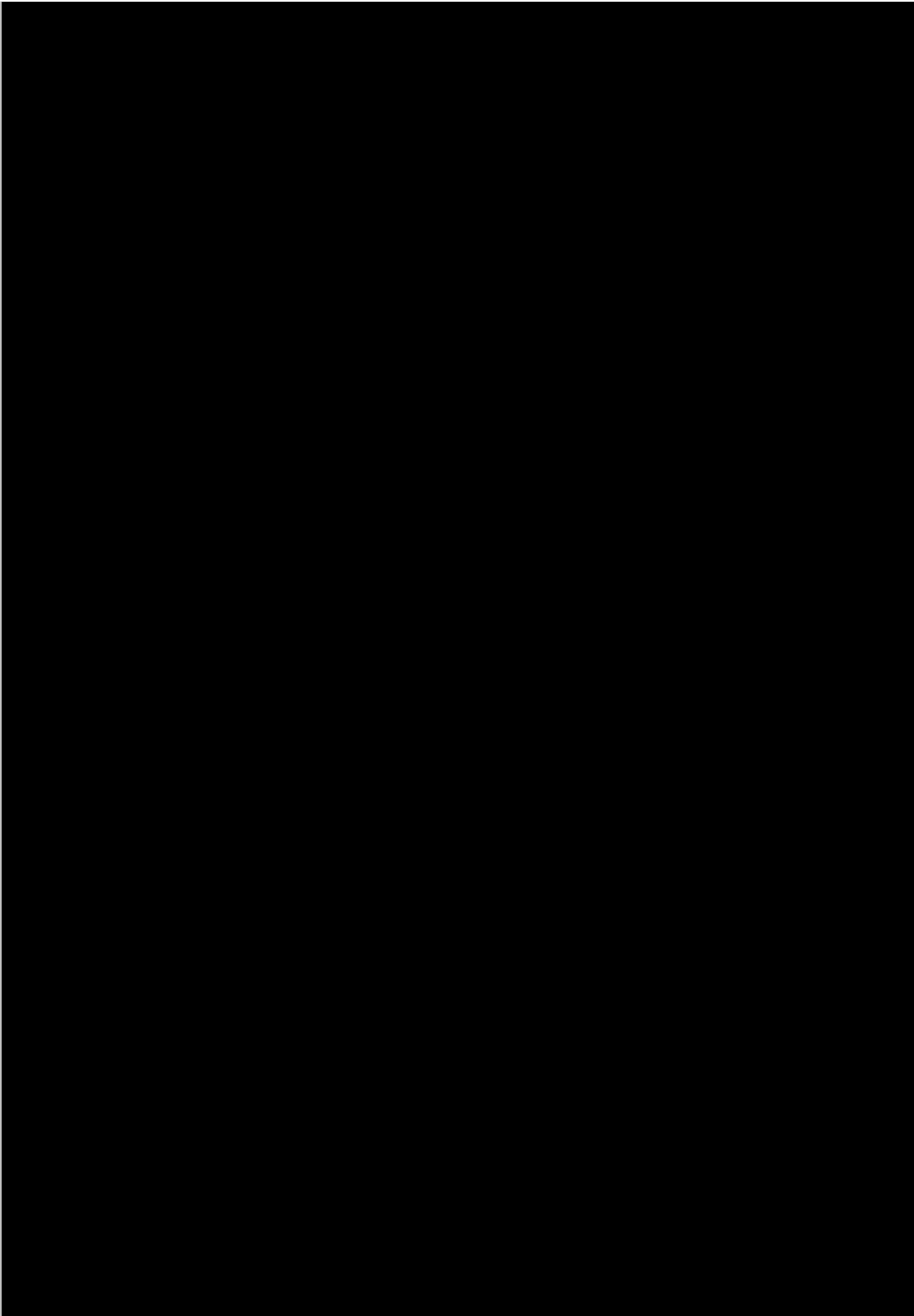


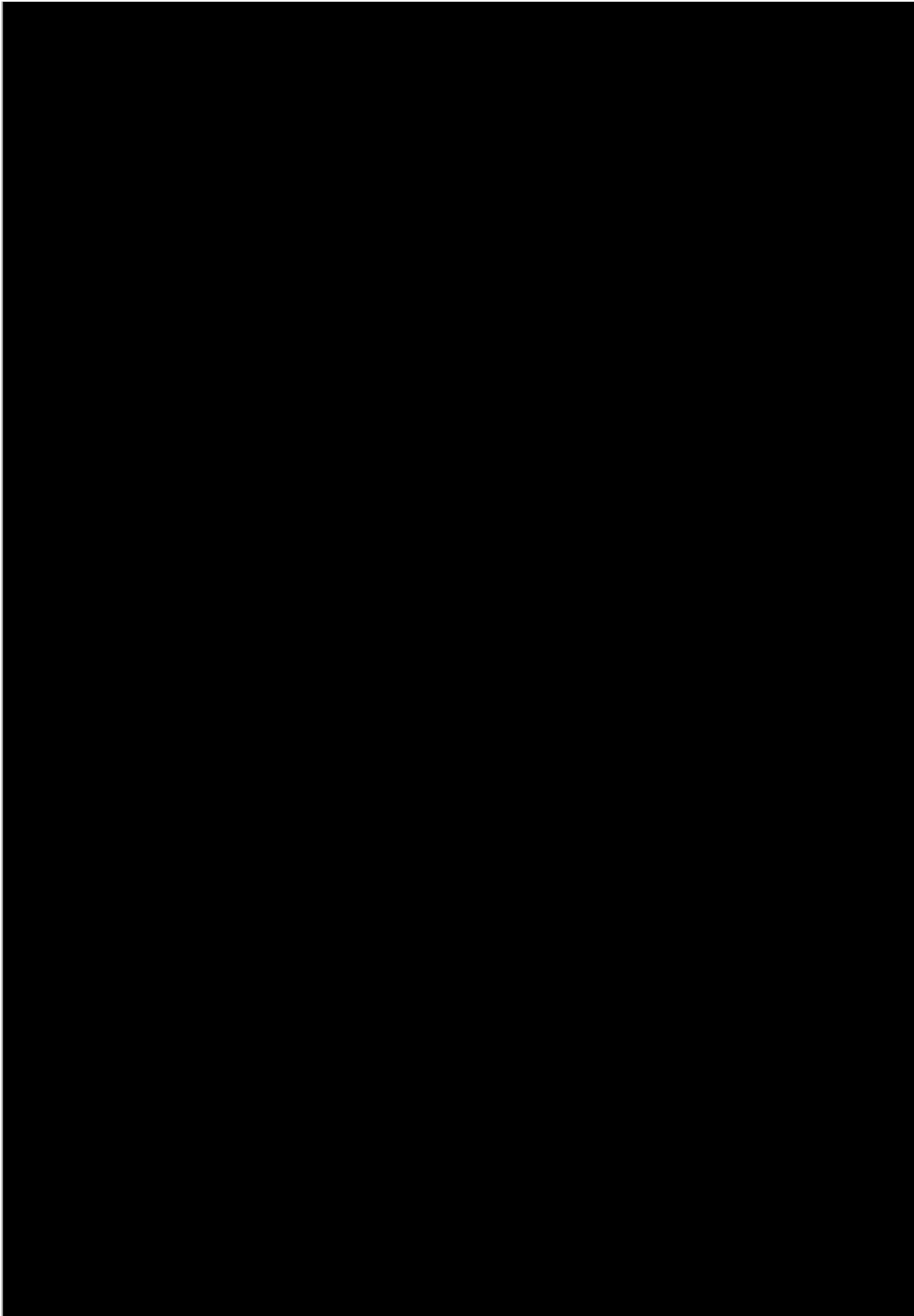


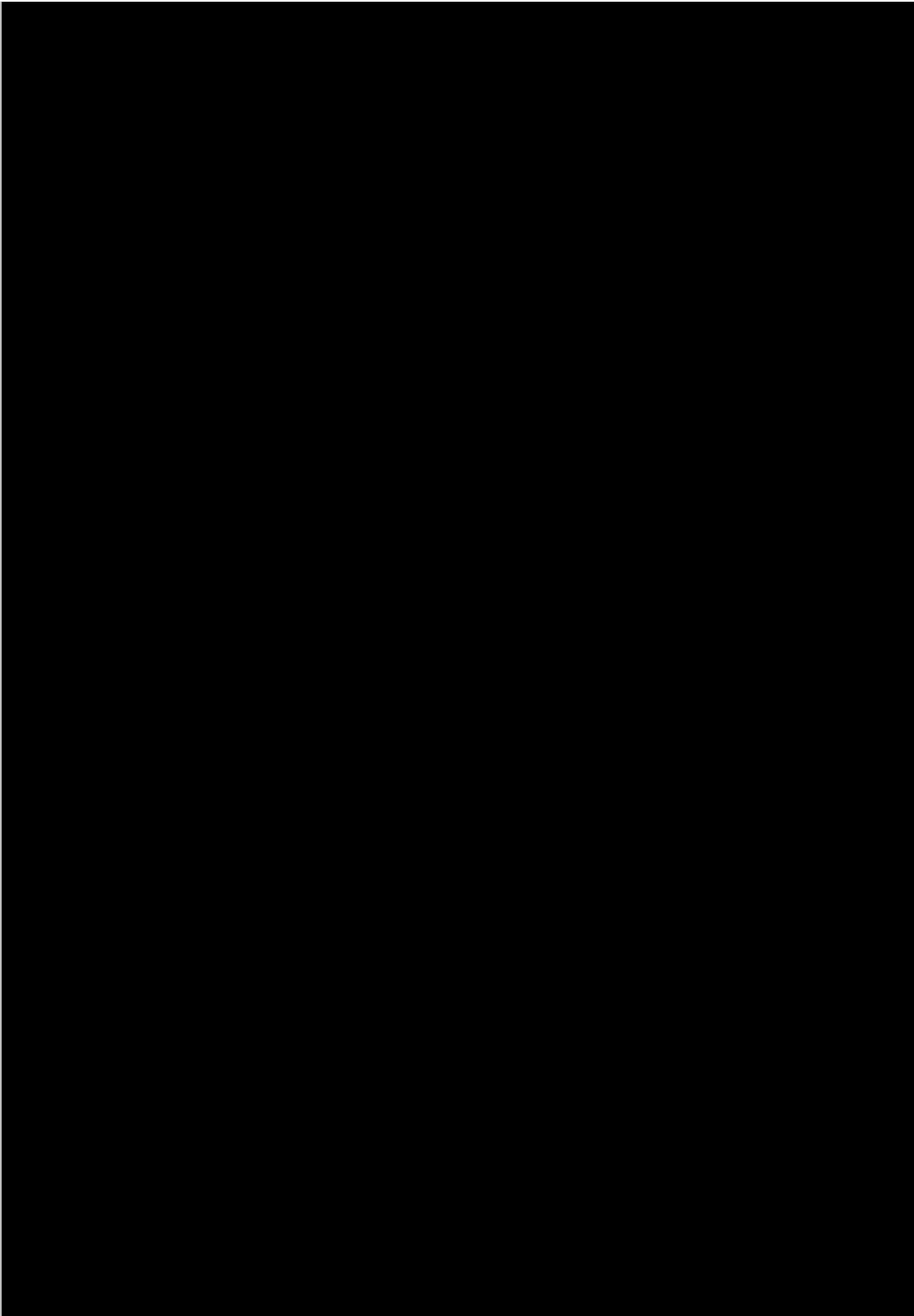


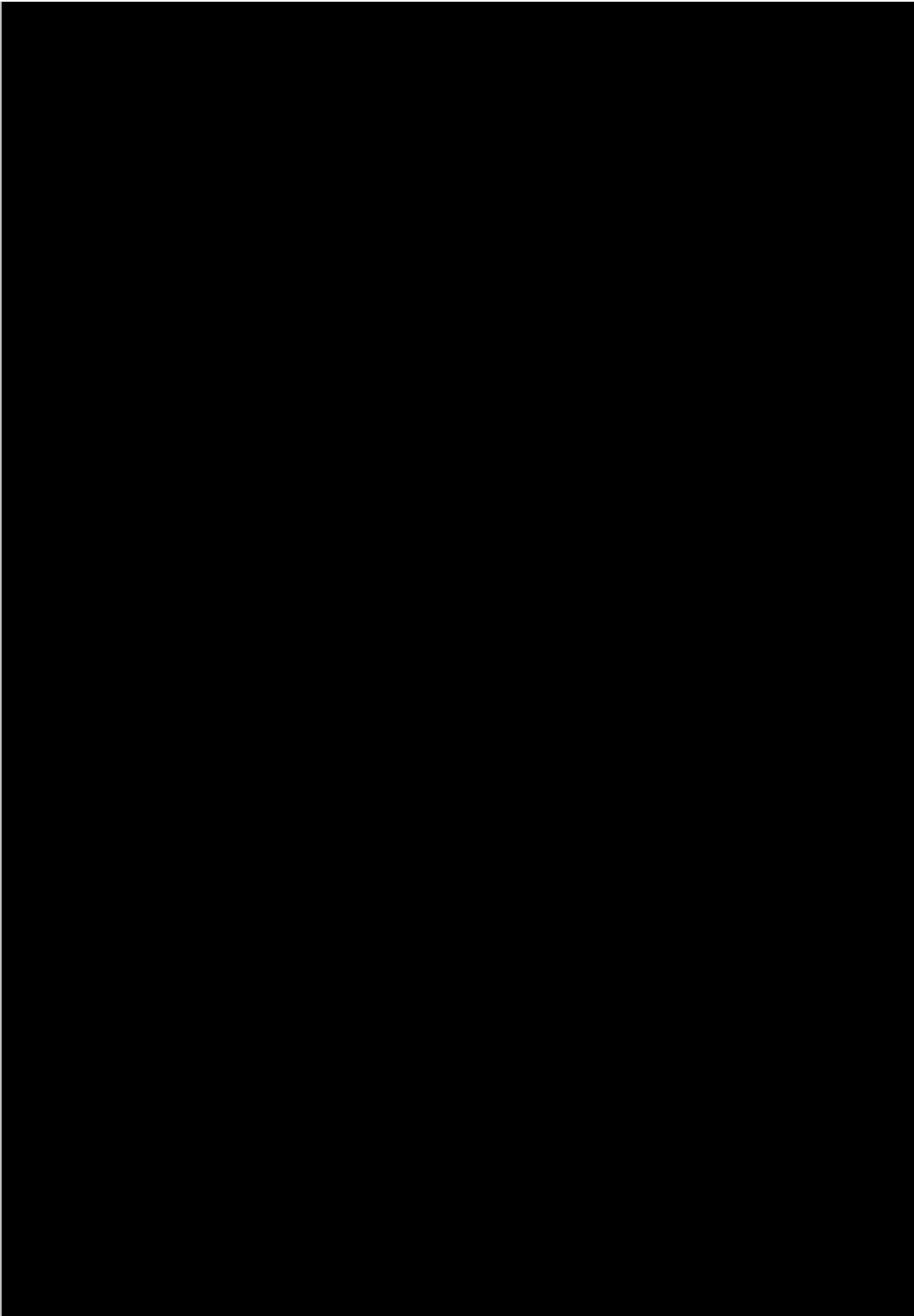


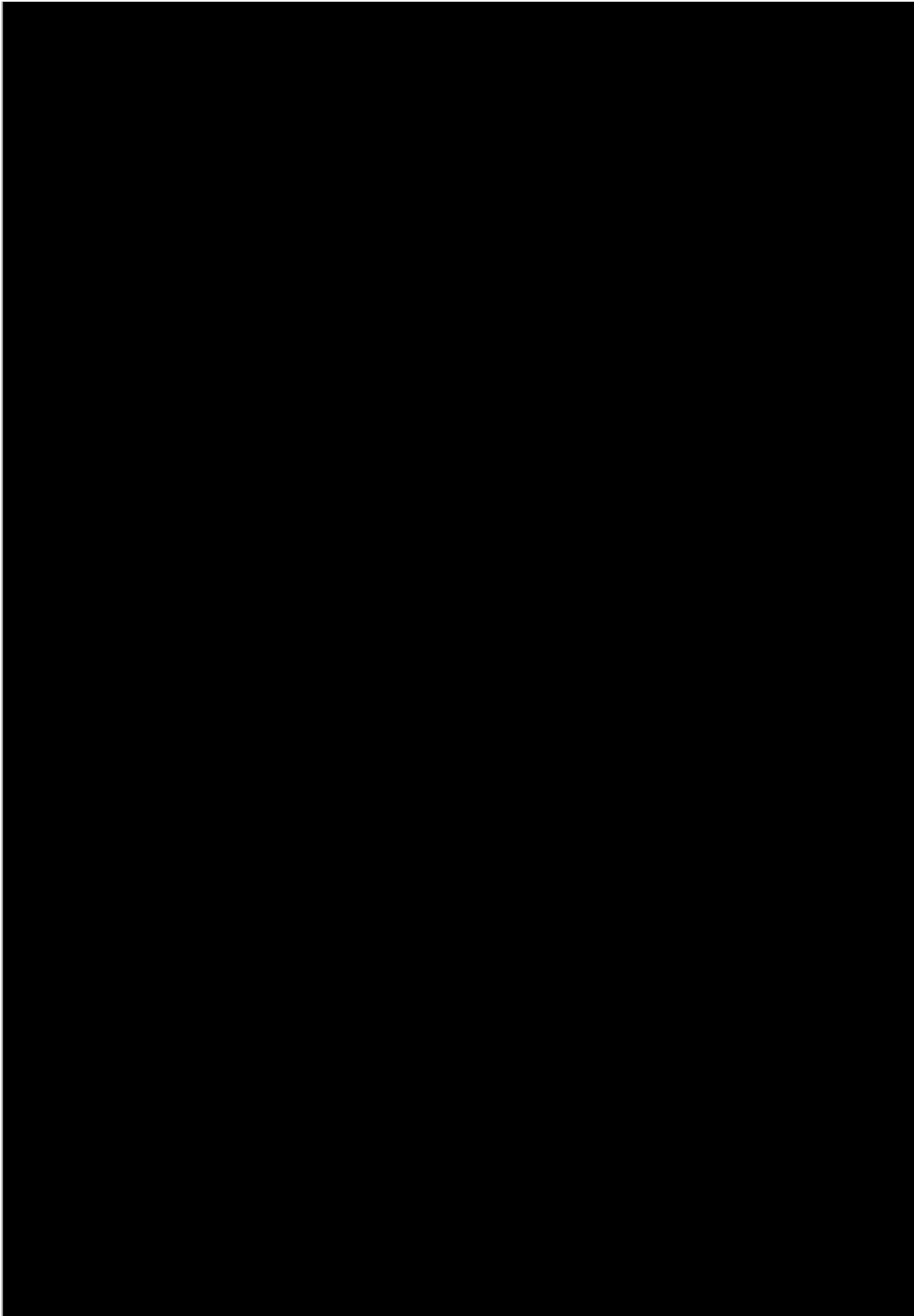


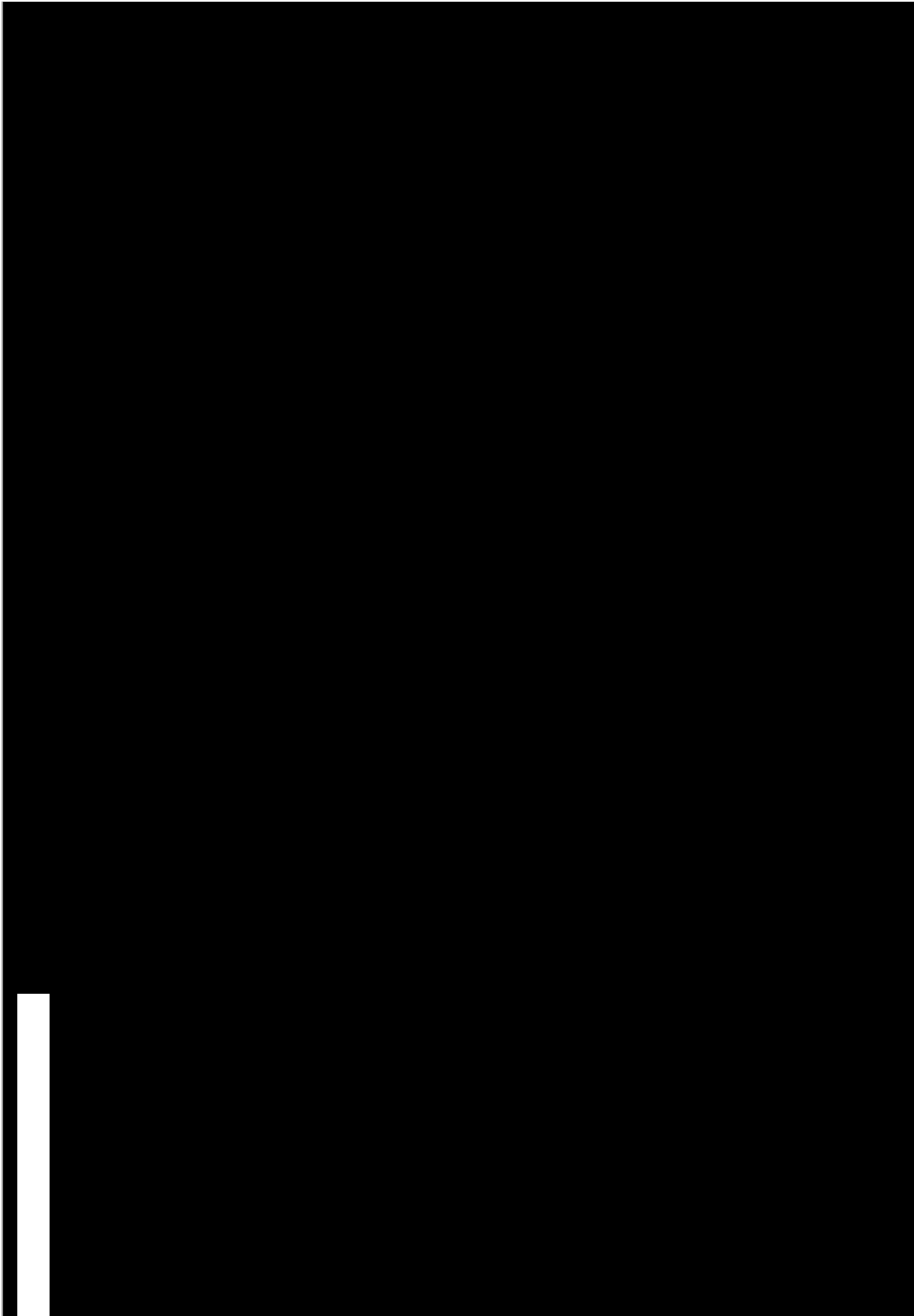


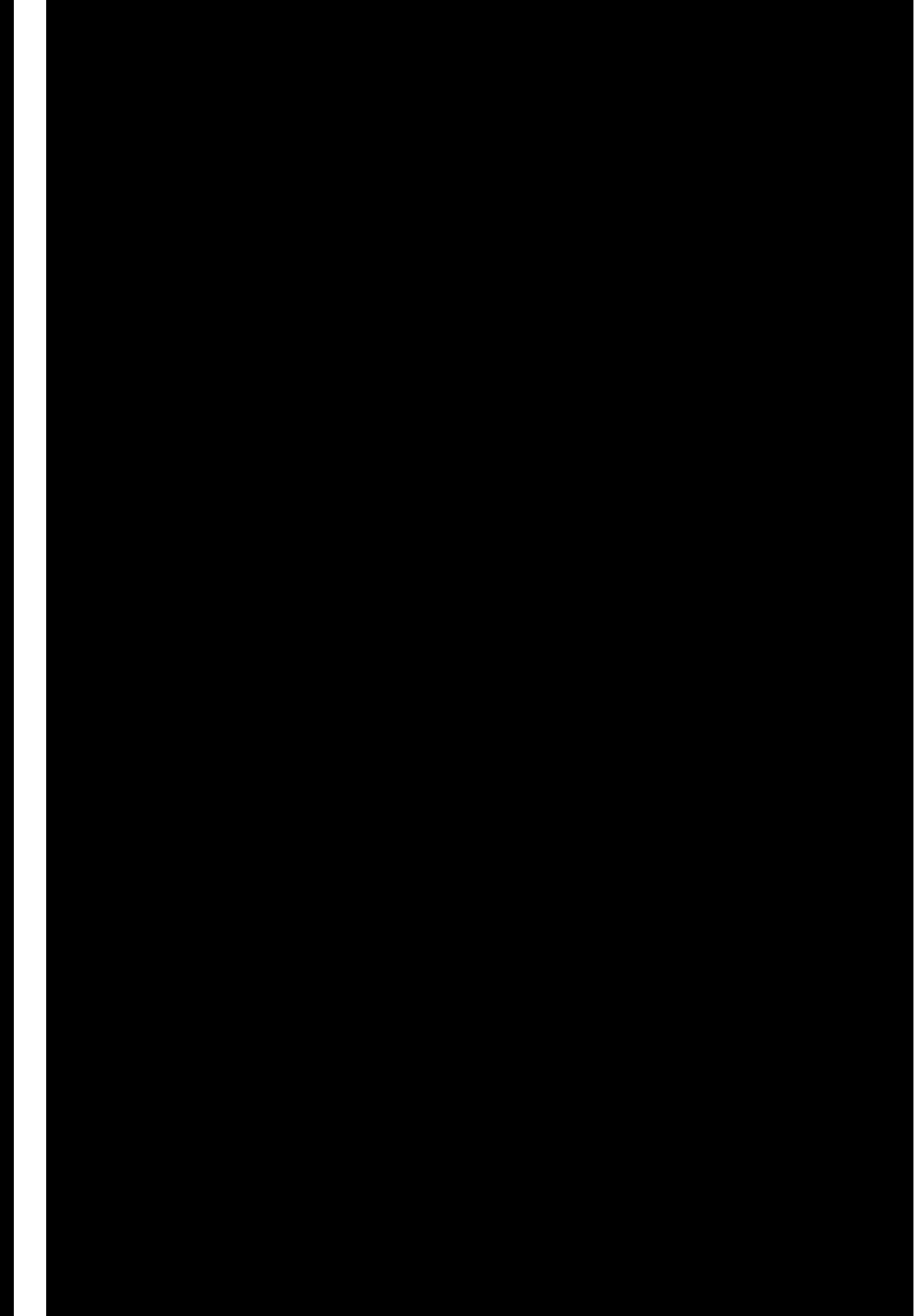


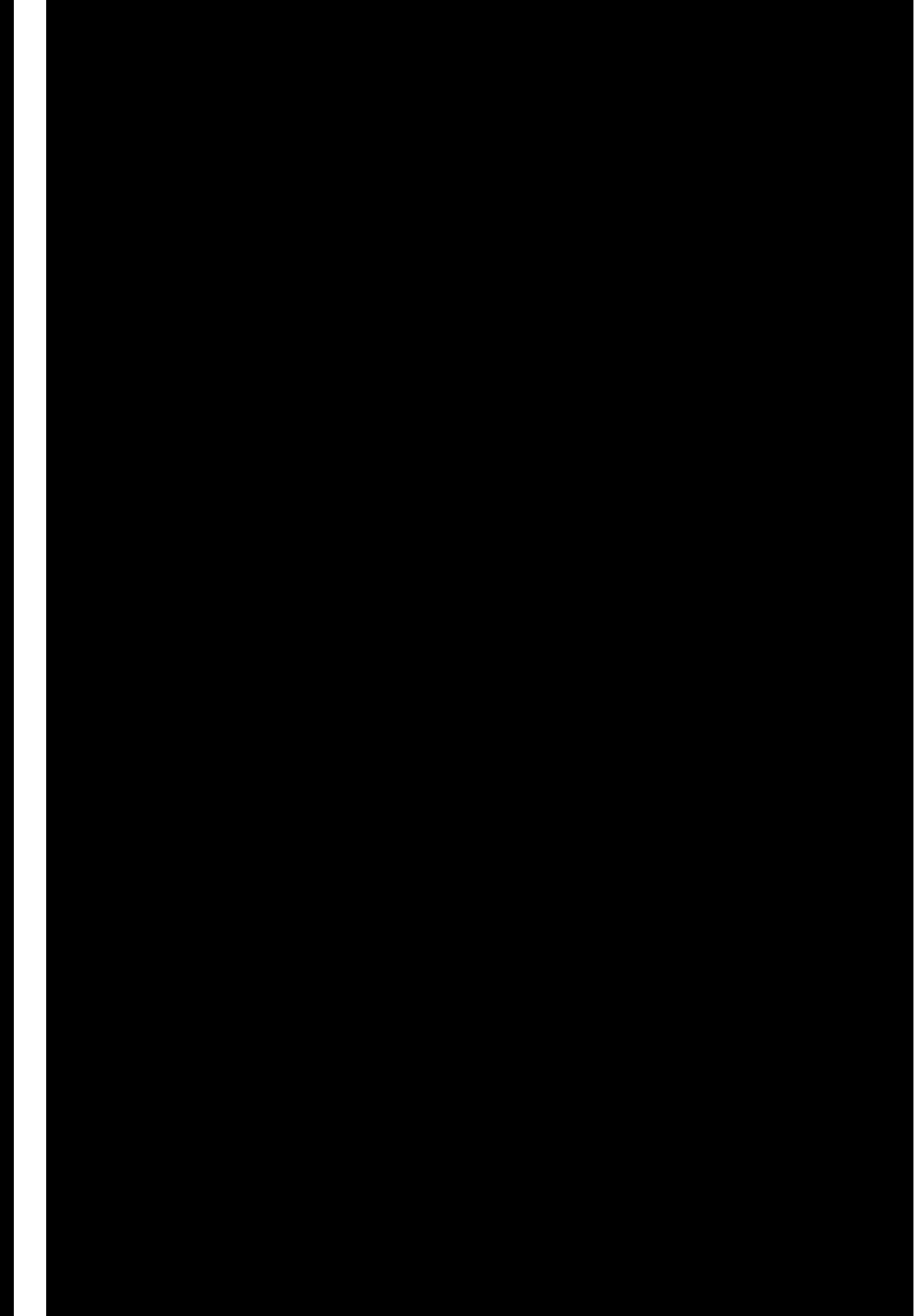


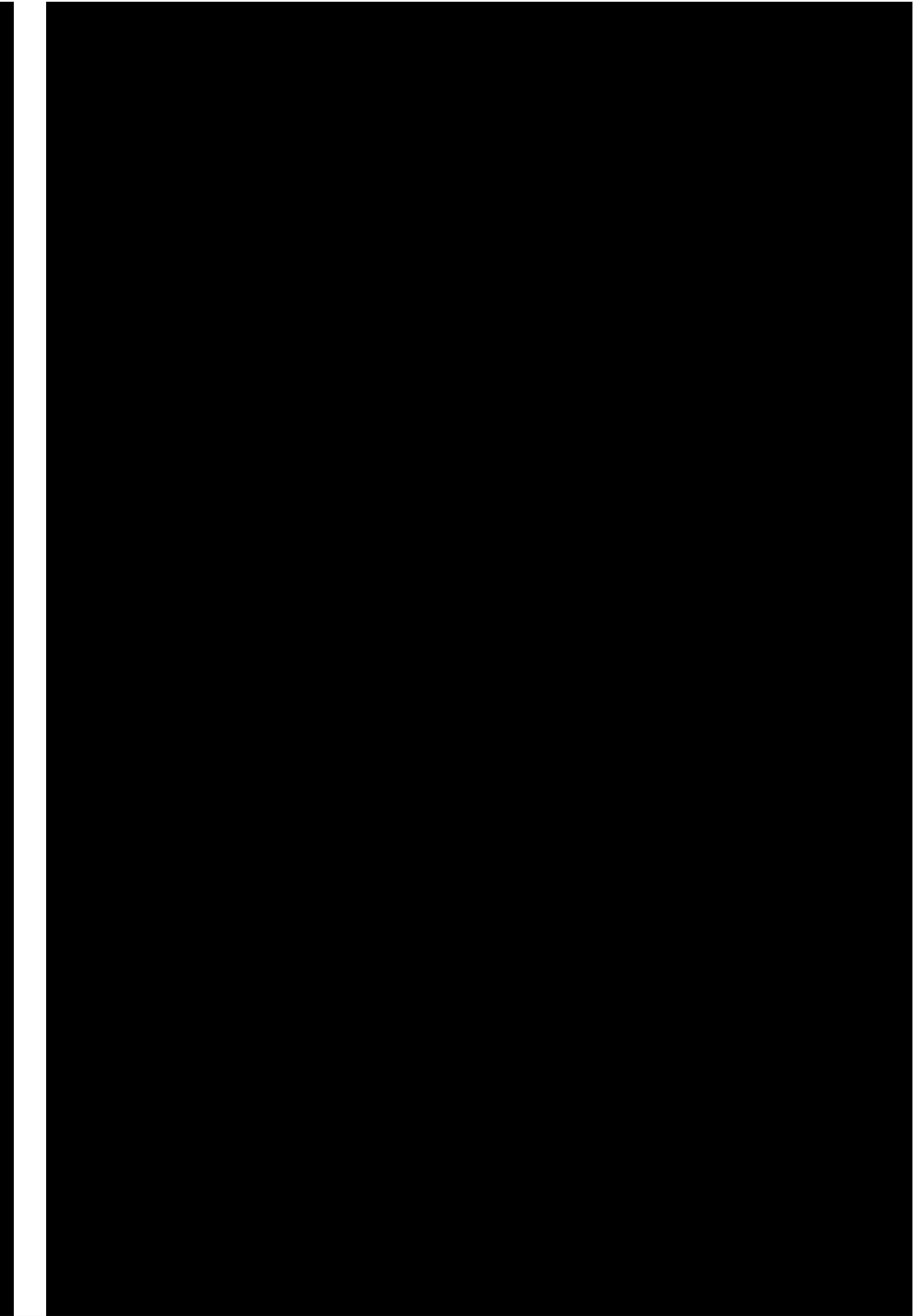














Supplier and Distributor leaders
not **its adoption and performance of**
organization but rather to "enhance

honest conversation between
to evaluate performance while
is a scorecard; instead, **the Roles**
1-tier distribution network.



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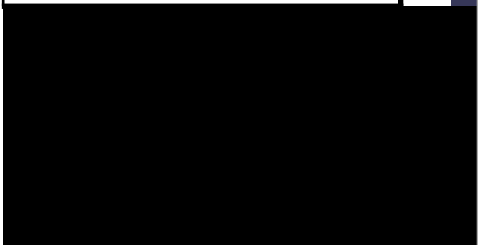
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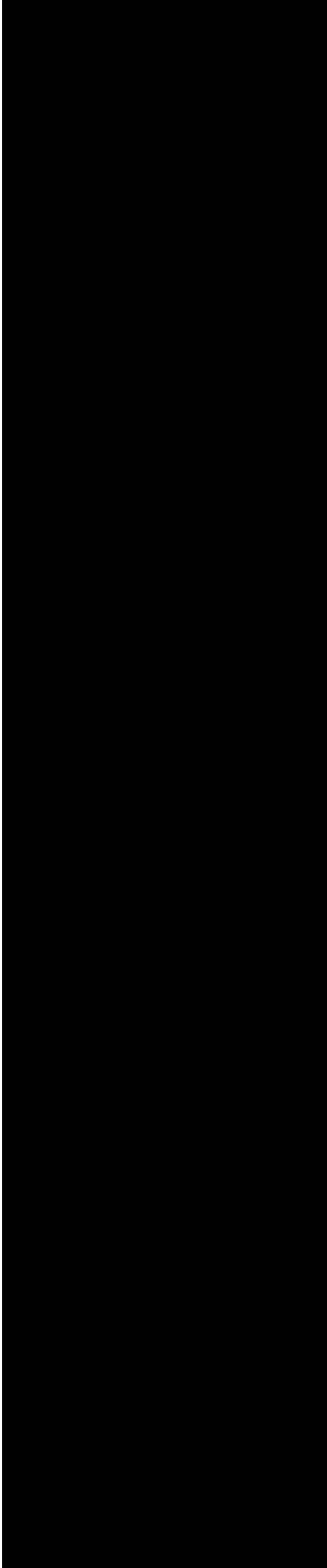
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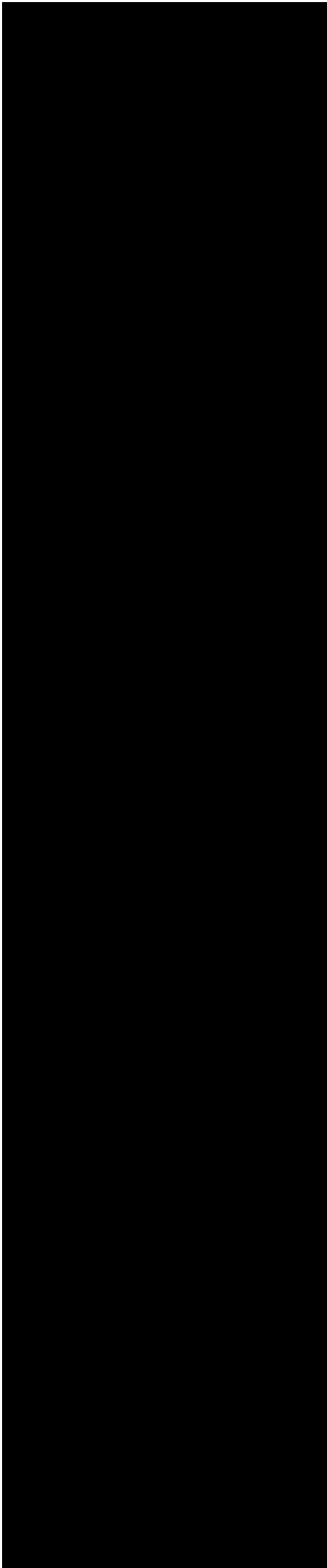
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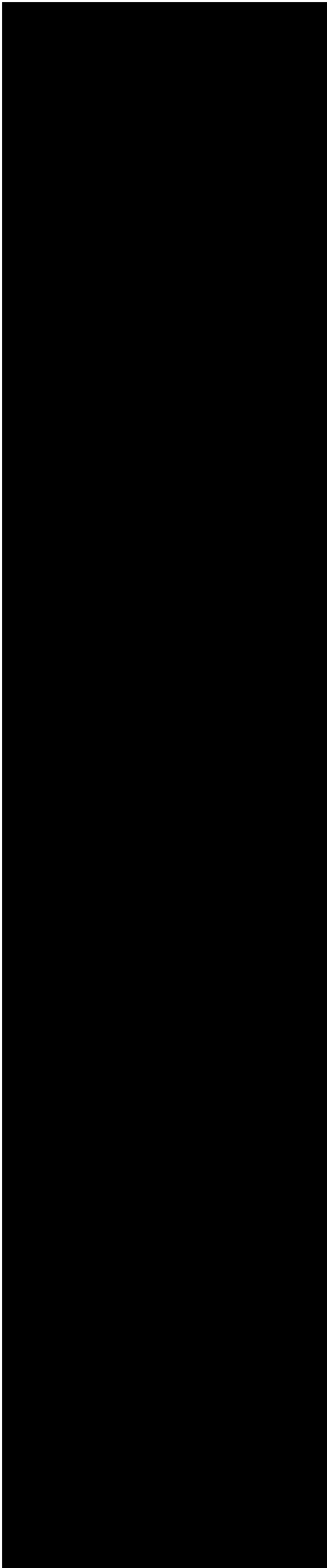


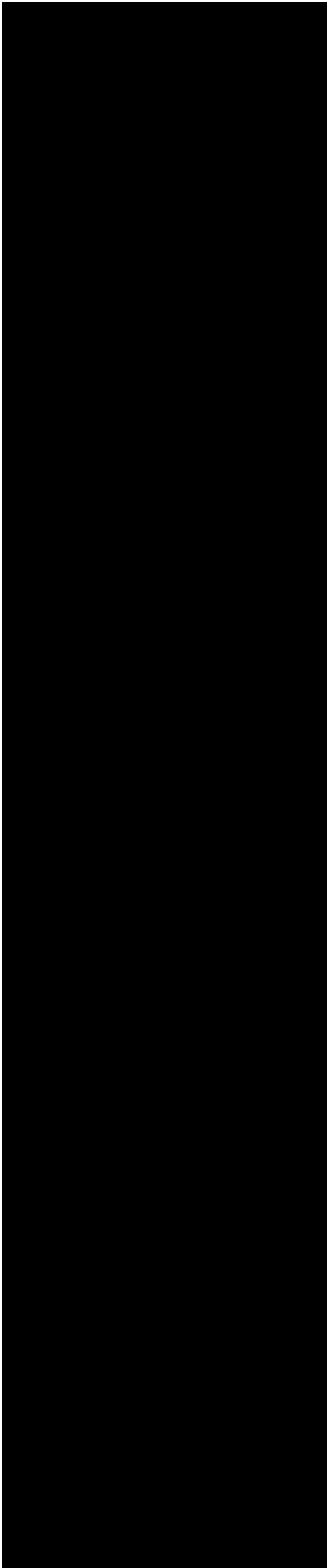


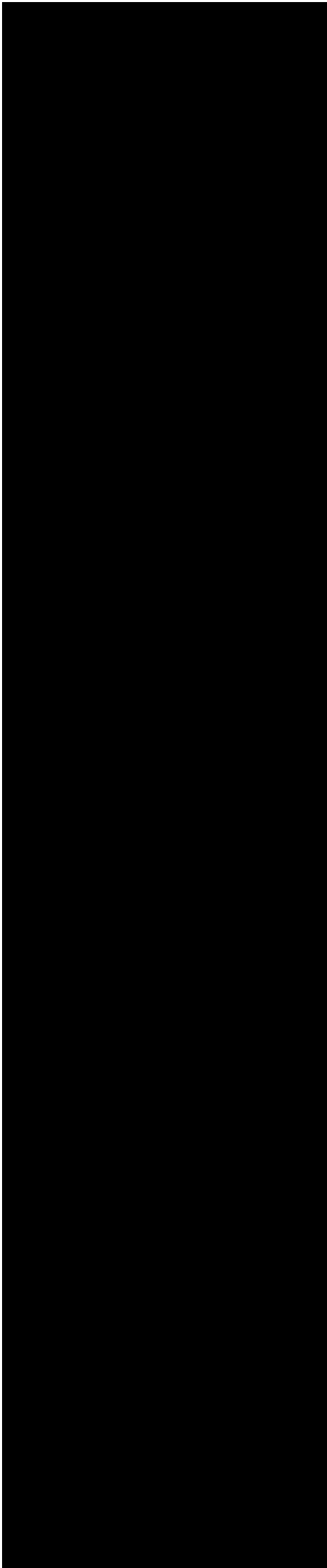


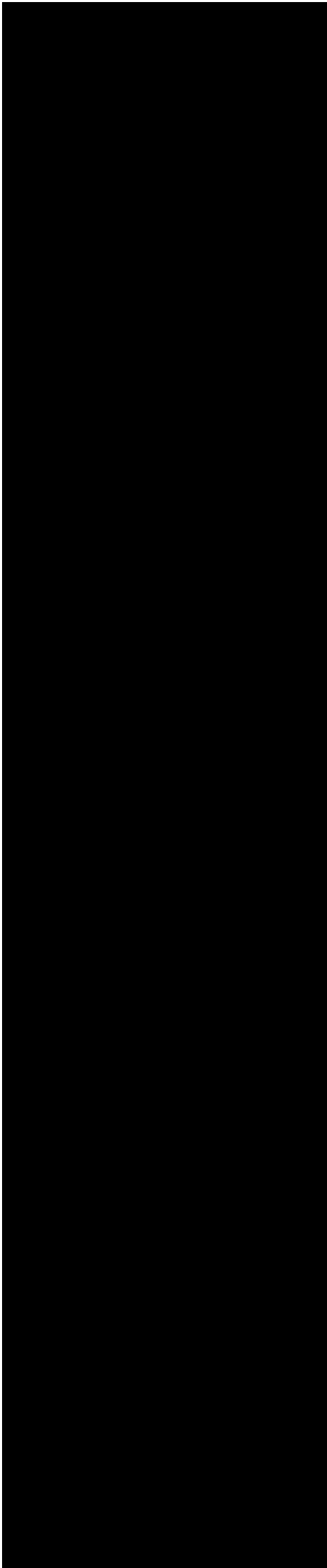


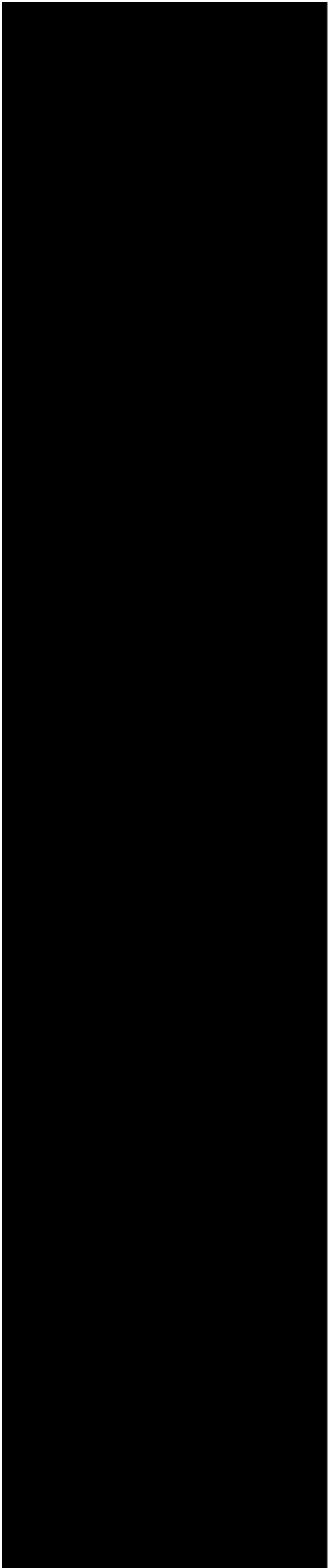


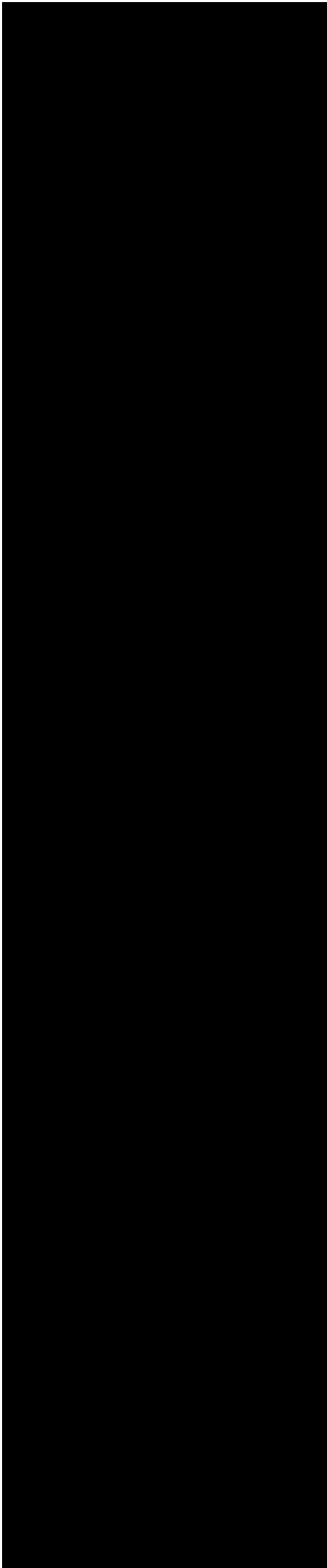






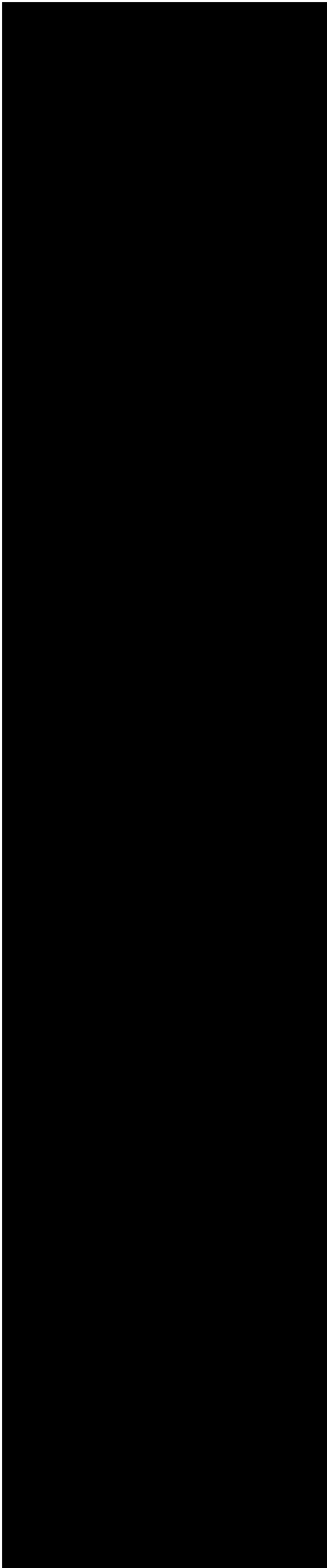


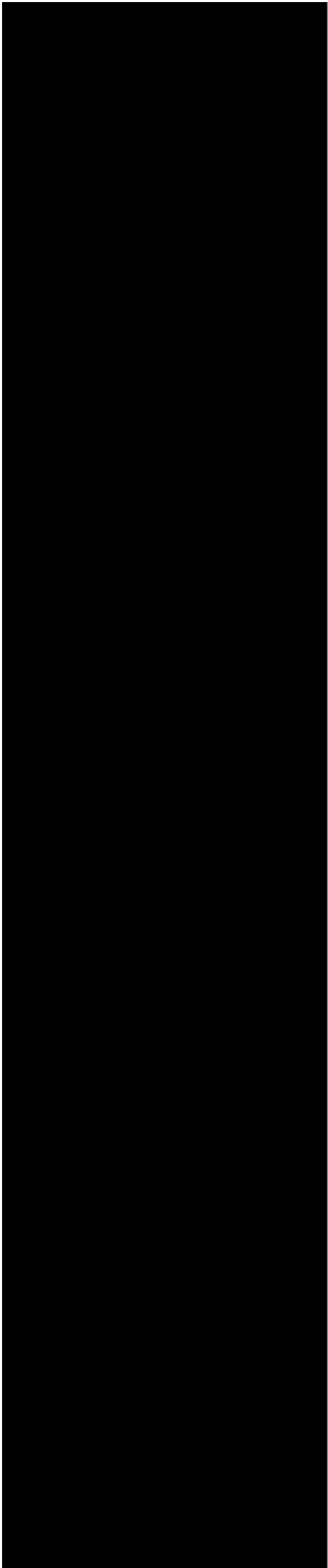


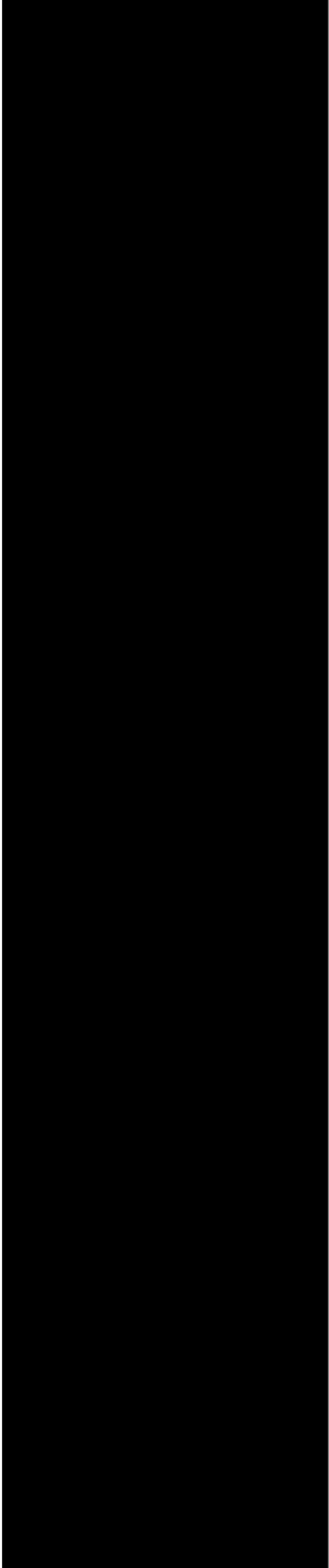


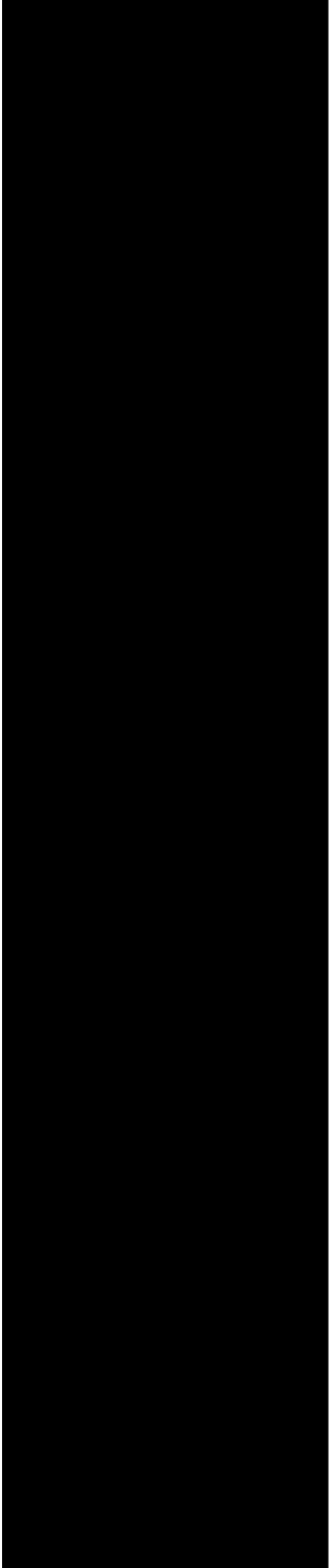


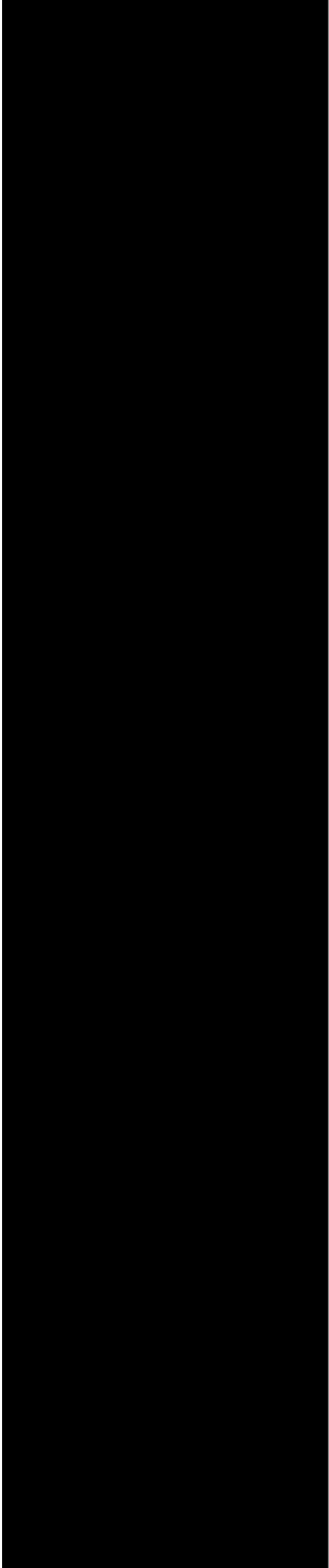


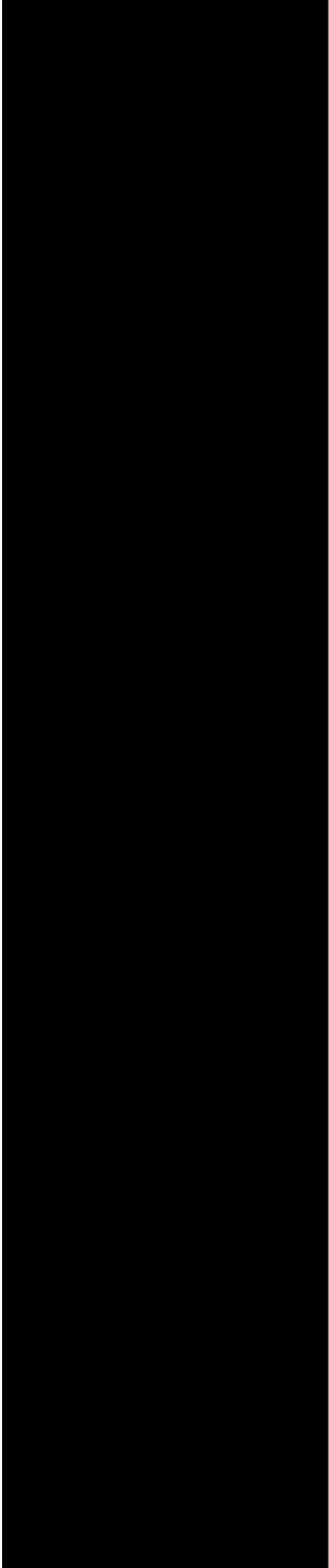






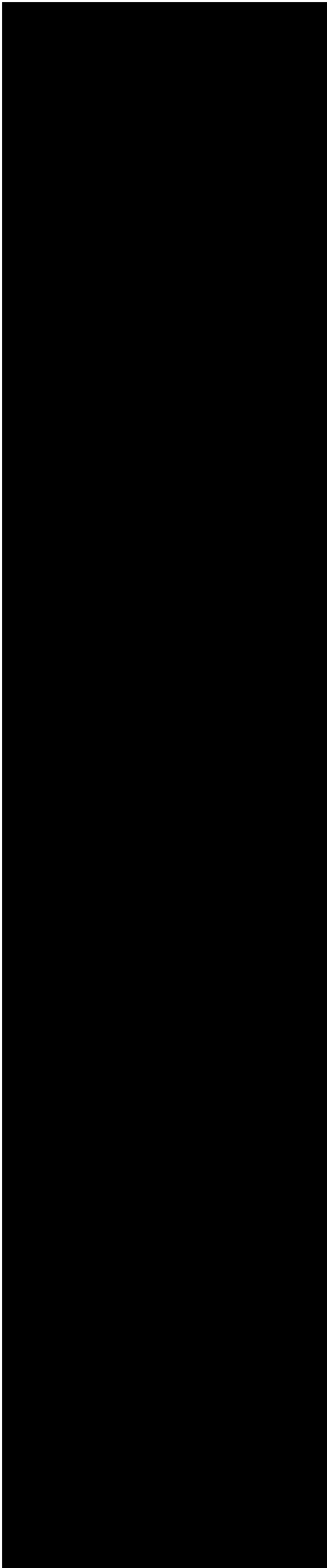


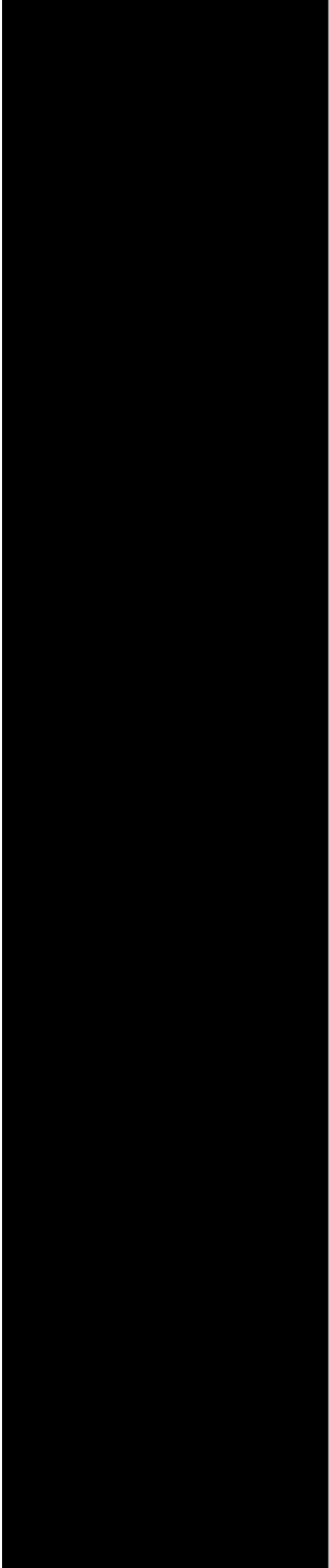


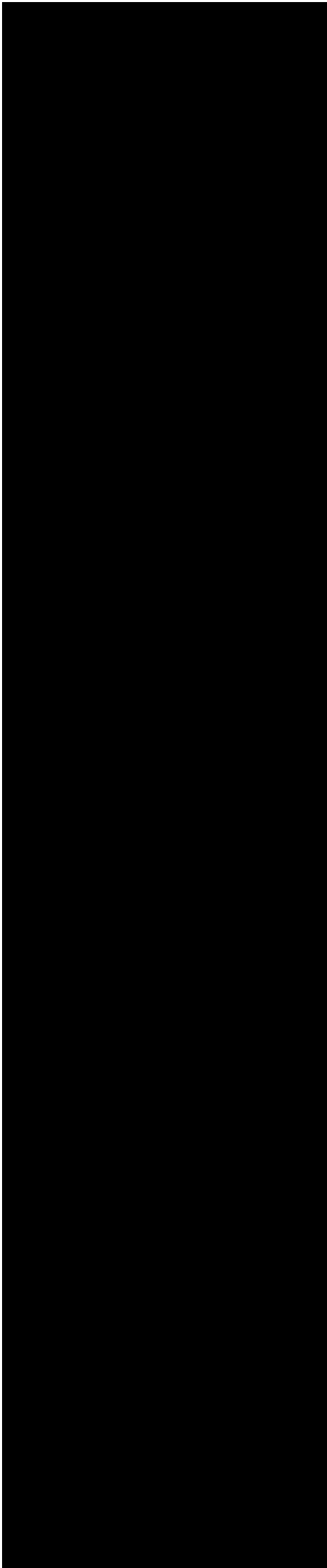


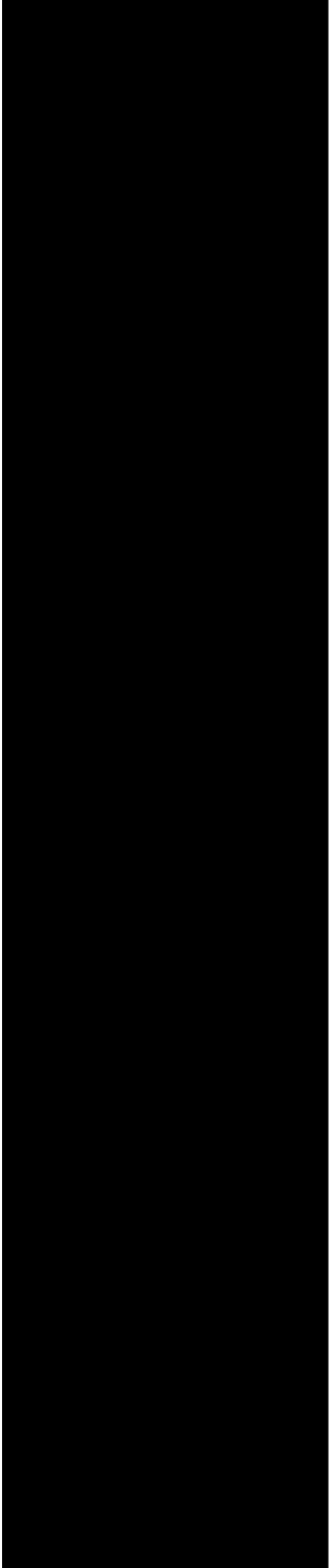


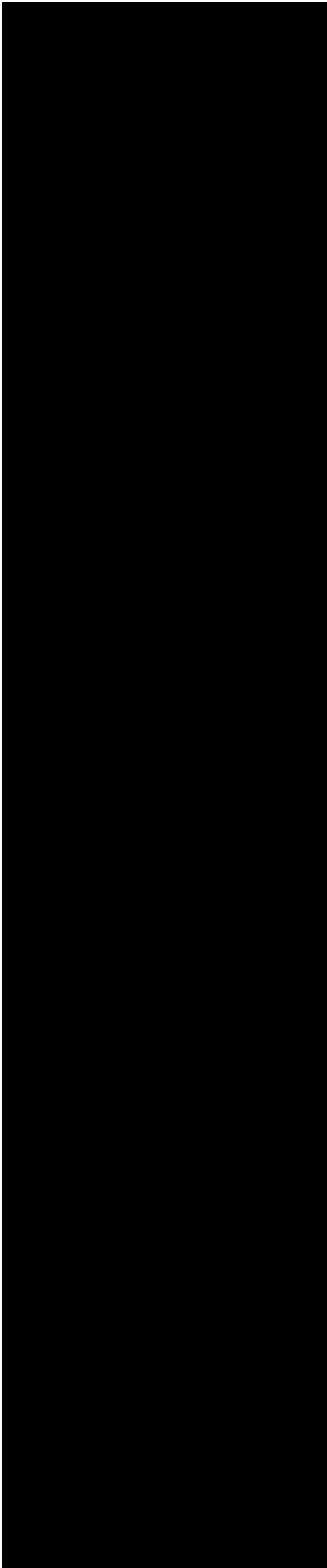


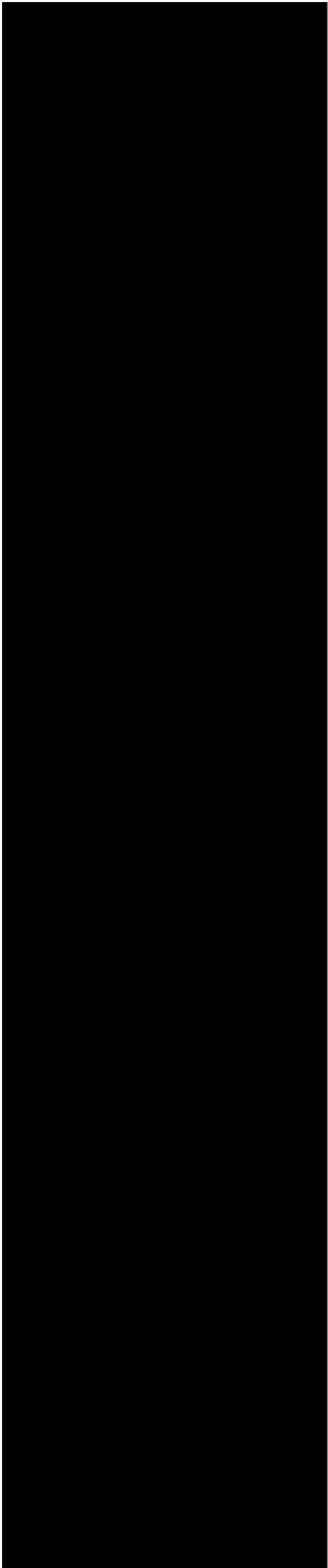


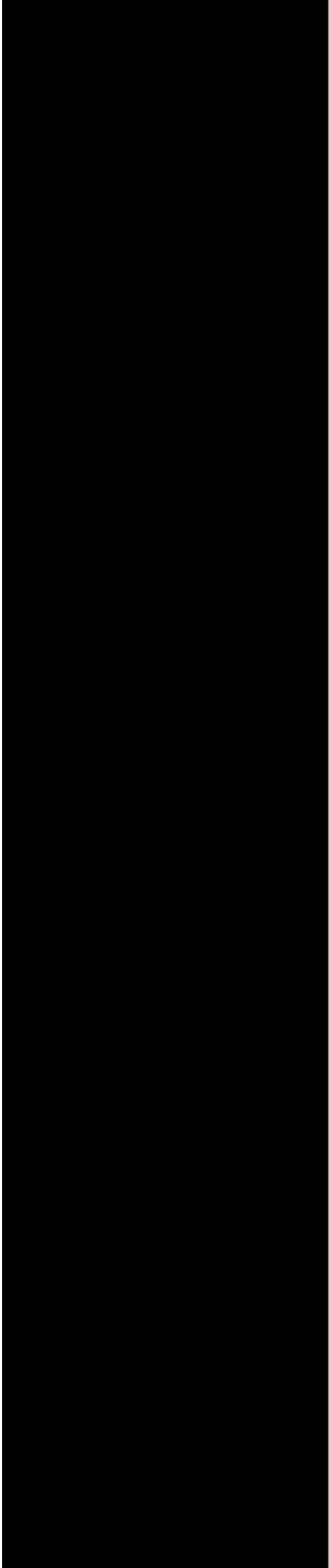




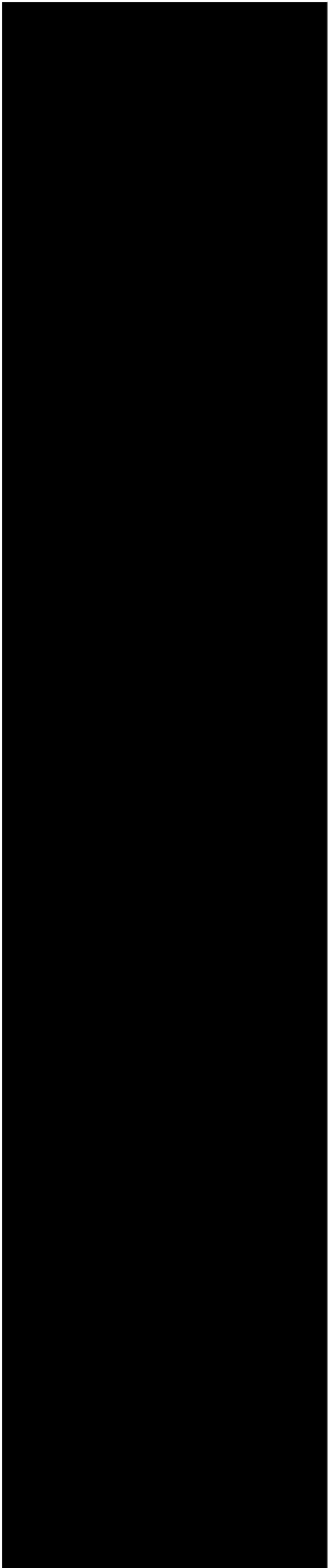


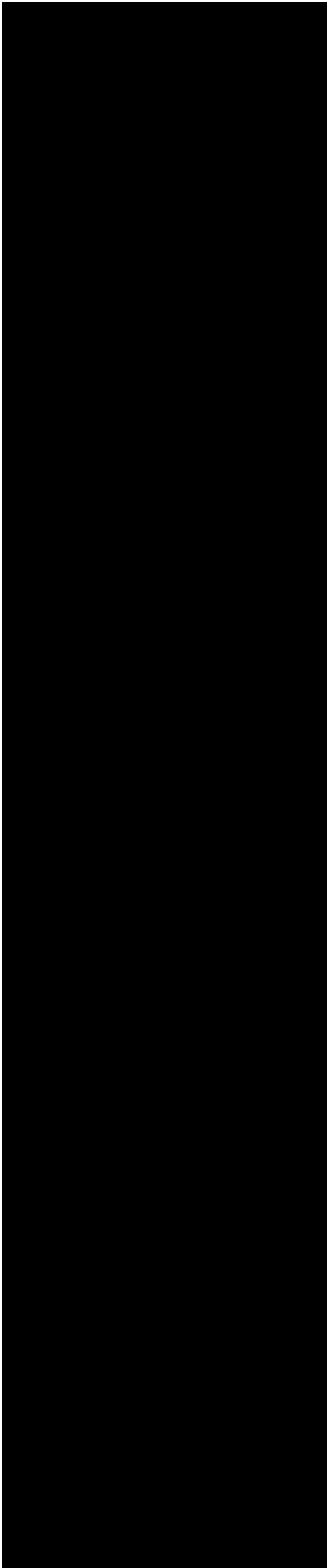


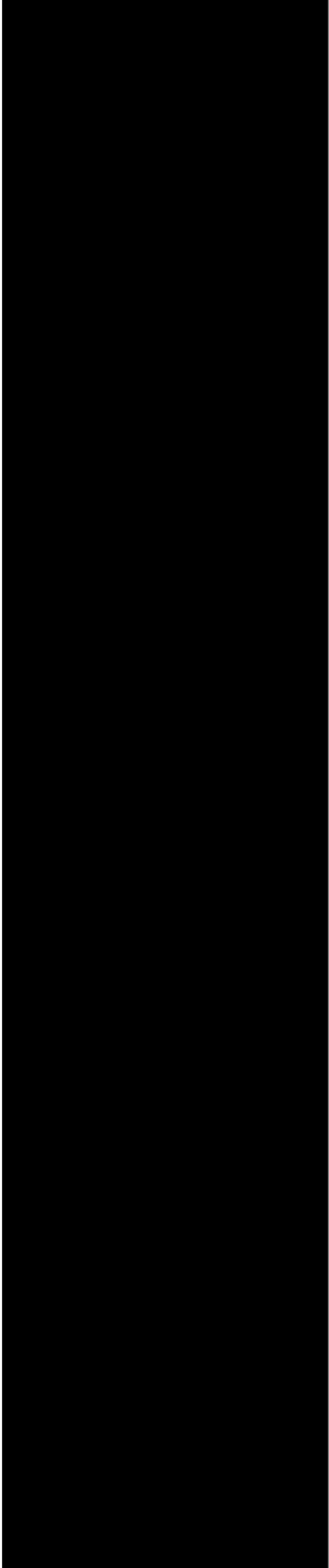


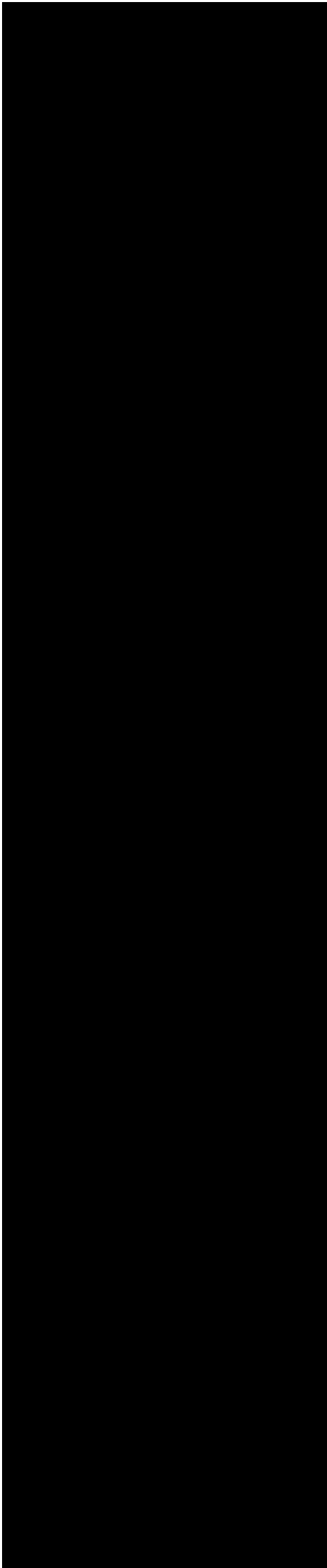


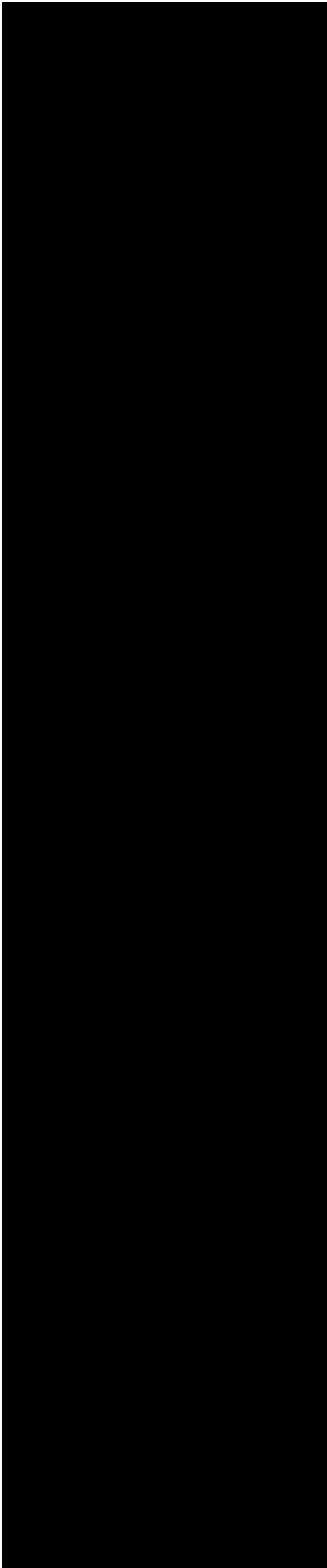








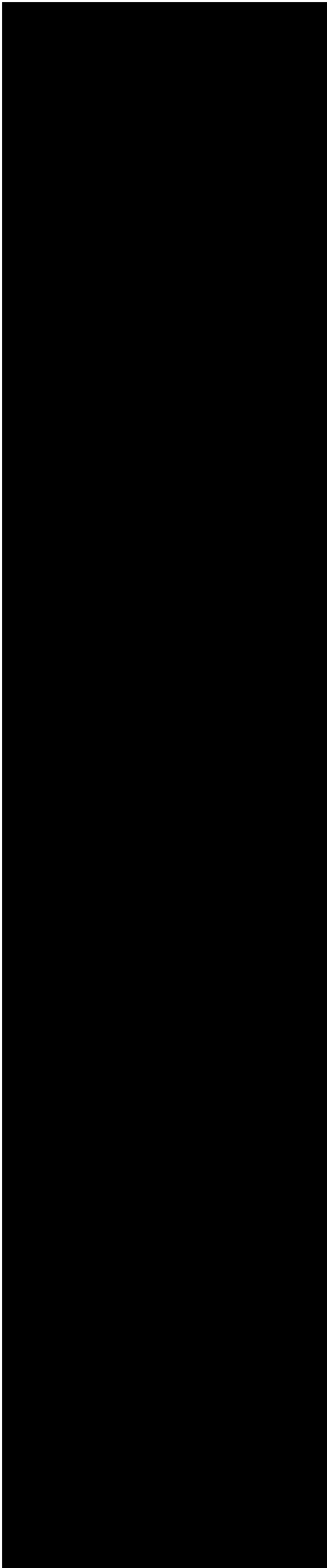


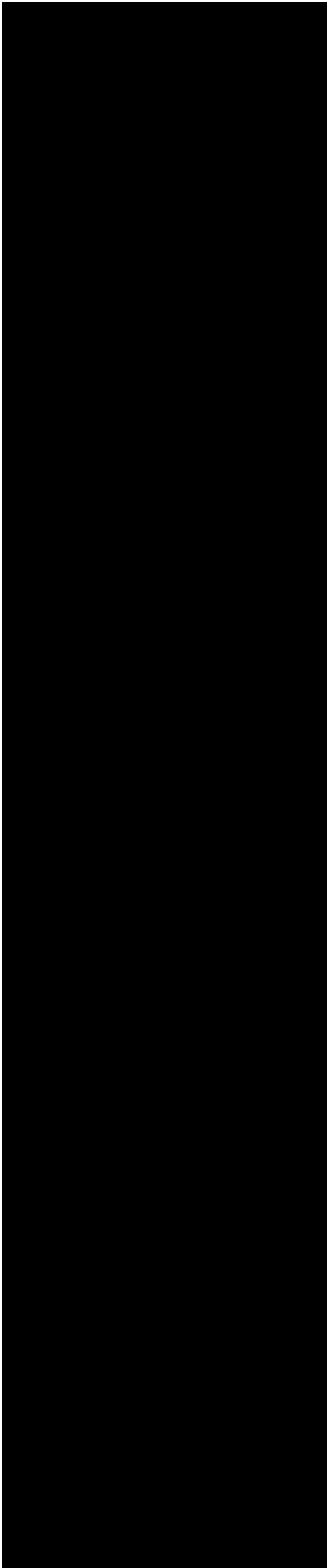


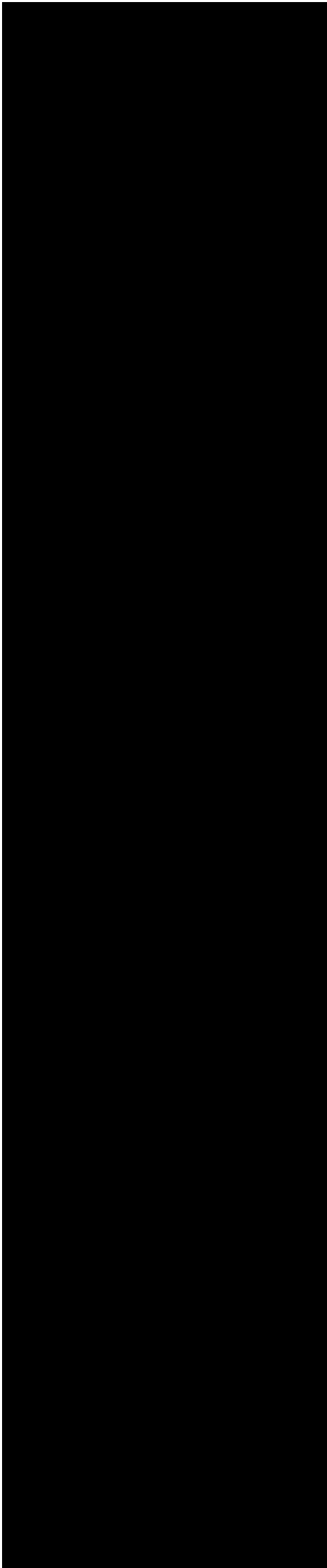


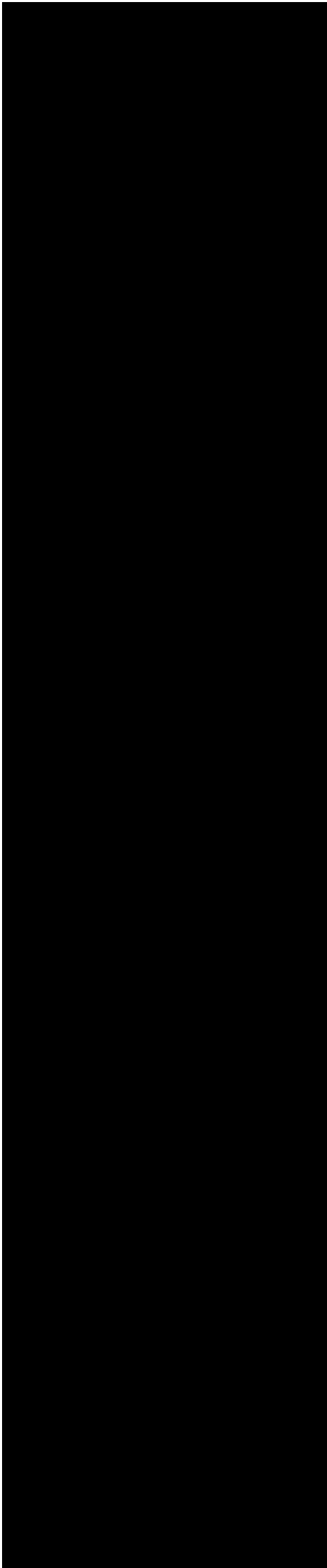


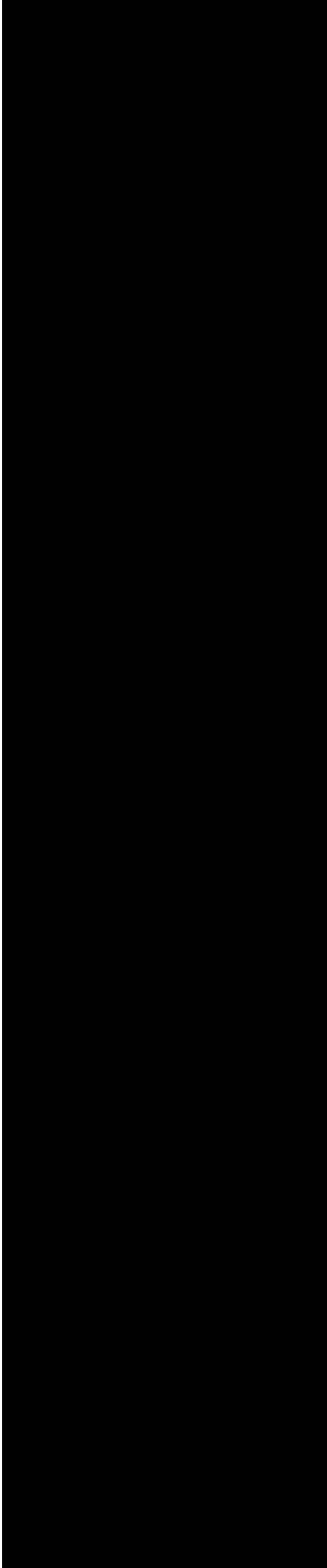


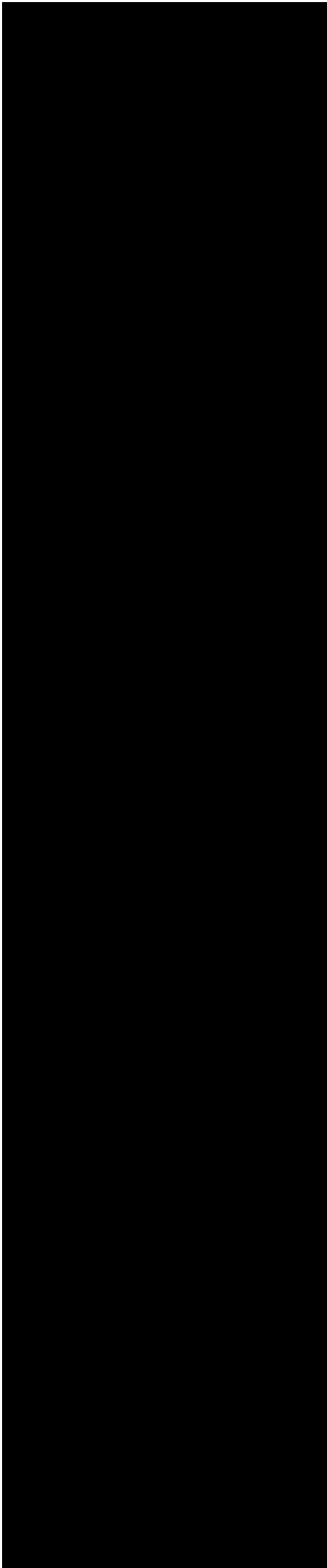






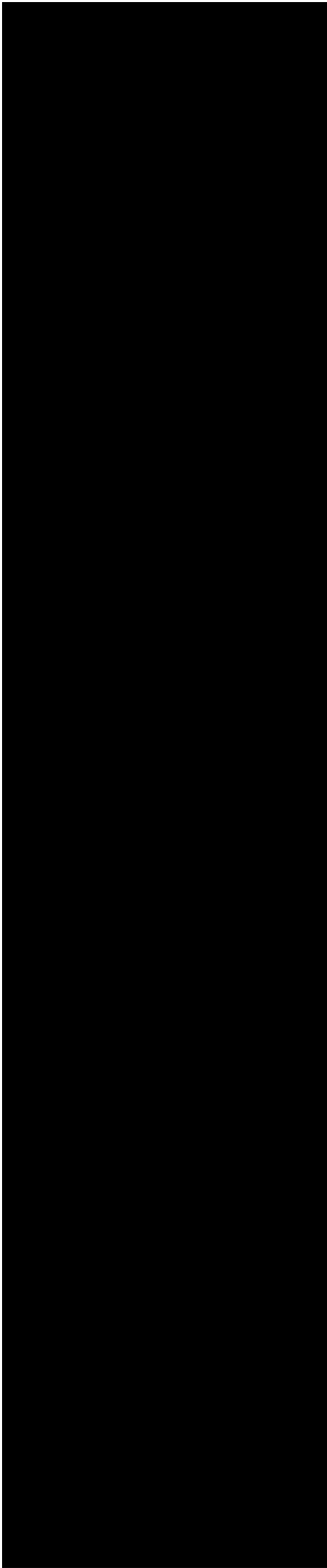












DISTRIBUTOR CHECKLIST



Roles & Responsibilities Evaluation Checklist - Distributor

Introduction

The following Roles & Responsibilities Checklists were developed by Tamarron's Alliance for Beer. The Alliance is comprised of whose charter is *"to clearly outline the interrelated roles and responsibilities of the 3 tiers and positively impact the industry those roles and responsibilities."* The following materials do not intend to give a competitive advantage to any one tier or org; the value that suppliers and distributors add to all 3 tiers in selling more beer profitably".

This unbiased and mutually developed checklists of primary roles and responsibilities can serve as a springboard for open and Suppliers and Distributors. Suppliers and/or Distributors can use the model individually as a self-assessment or jointly as a tool holding each other accountable. The materials do not intend to impose a standard course of action nor should they be used as **& Responsibilities documents serve as a foundation for discussion on opportunities to improve the efficiency of the entire 3**

Potential Uses

Following are potential opportunities to use the Roles & Responsibilities Checklists

Both Supplier and Distributor

Collaborative mutual Roles & Responsibilities assessment

Supplier Checklist

Internal Supplier assessment - self-evaluate performance against key Supplier roles & responsibilities

Distributor assessment - partner Distributors to provide Suppliers with collaborative feedback on key Supplier roles & res
Identification of opportunities and action planning

Distributor Checklist

Internal Distributor assessment - self-evaluate performance against key Distributor roles & responsibilities

Supplier assessment - partner Suppliers to provide Distributors with collaborative feedback on key Distributor roles & res
Identification of opportunities and action planning

DISTRIBUTOR CHECKLIST



Roles & Responsibilities Evaluation Checklist - Distributor

Name of Organization:

Directions: Please rate (under Rating column) each Distributor responsibility listed in the Responsibilities column using the following scale:

(1) No Action Necessary;

(2) Not Urgent, possible future consideration;

(3) Action Necessary.

Document your rationale and/or actions required to improve performance in the Comments/Actions column.

Name/Role/Time Period: document the responsible party (Name), what role the responsible party has in the organization (Role), and Target Completion Date

Portfolio Leadership

Responsibilities	Rating	Comments/Actions
1. Develops and communicates to the supplier an overall portfolio strategy based on the distributor's share and profit growth objectives, includes the role the supplier and its respective brands will play in the total portfolio		
2. Shares local market knowledge with suppliers in order to strengthen their overall portfolio strategy by market		
3. Provides a clear vision for success with specific, measurable targets and strictly evaluates progress through a mutually agreed upon performance plan		
4. Proactively communicates to the supplier fact-based concerns with a brand/package prior to taking any action		
5. Proactively communicates with the brand owner whenever brand quality becomes compromised and cannot be maintained (e.g., lack of product sell through the marketplace)		
6. Ensures that brand performance is a result of market conditions, positioning, etc., and not due to poor retail execution		

Planning & Operational Excellence

Responsibilities	Rating	Comments/Actions

7. Develops and takes ownership of an annual business plan for each supplier that addresses the execution objectives for each brand		
8. Identifies and acts on local marketing opportunities that are relevant and consistent with the national brand strategy and conducive to long-term brand growth (e.g., the media delivery vehicle must be appropriate for the brand message and brand image)		
9. Builds timely, professional, and creative displays in all accounts that are supported by feature activity (the displays should remain in the store for the entire time the features are active to consumers)		
10. Ensures competitive capability with a supplier approved shelf management software program and ensures it is properly staffed and effectively operated		
11. Utilizes computerized sign-making capability in-house or through a 3rd party that is competitive in appearance and durability		
12. Operates with an effective and competitive outlet sales call plan and an appropriate sales organization structure		
13. Executes effective and competitive retail service policies for delivery, merchandising, product breakage / exchange policies, quality assurance (including draft line cleaning where legal), and tel-sell accounts with properly trained employees		

Planning & Operational Excellence (cont.)

Responsibilities	Rating	Comments/Actions
14. Designates a properly trained individual responsible for the distributor quality assurance program		
a. Ensures that product is sold to retail within prescribed code dates with a reasonable expectation to be sold to consumers within prescribed code dates		

b. Properly rotates shelf and displays in retail accounts to ensure that the shortest code date product sells through first		
c. Where legal, removes and destroys any out-of-code or damaged product from retail or in distributor inventory		
d. Ensures that retail accounts comply with recommended cleaning specifications to maintain the quality of their draft beer		
e. Performs ongoing training to ensure that product quality standards are understood and consistently executed by distributor and retail personnel		

Planning & Operational Excellence (cont.)

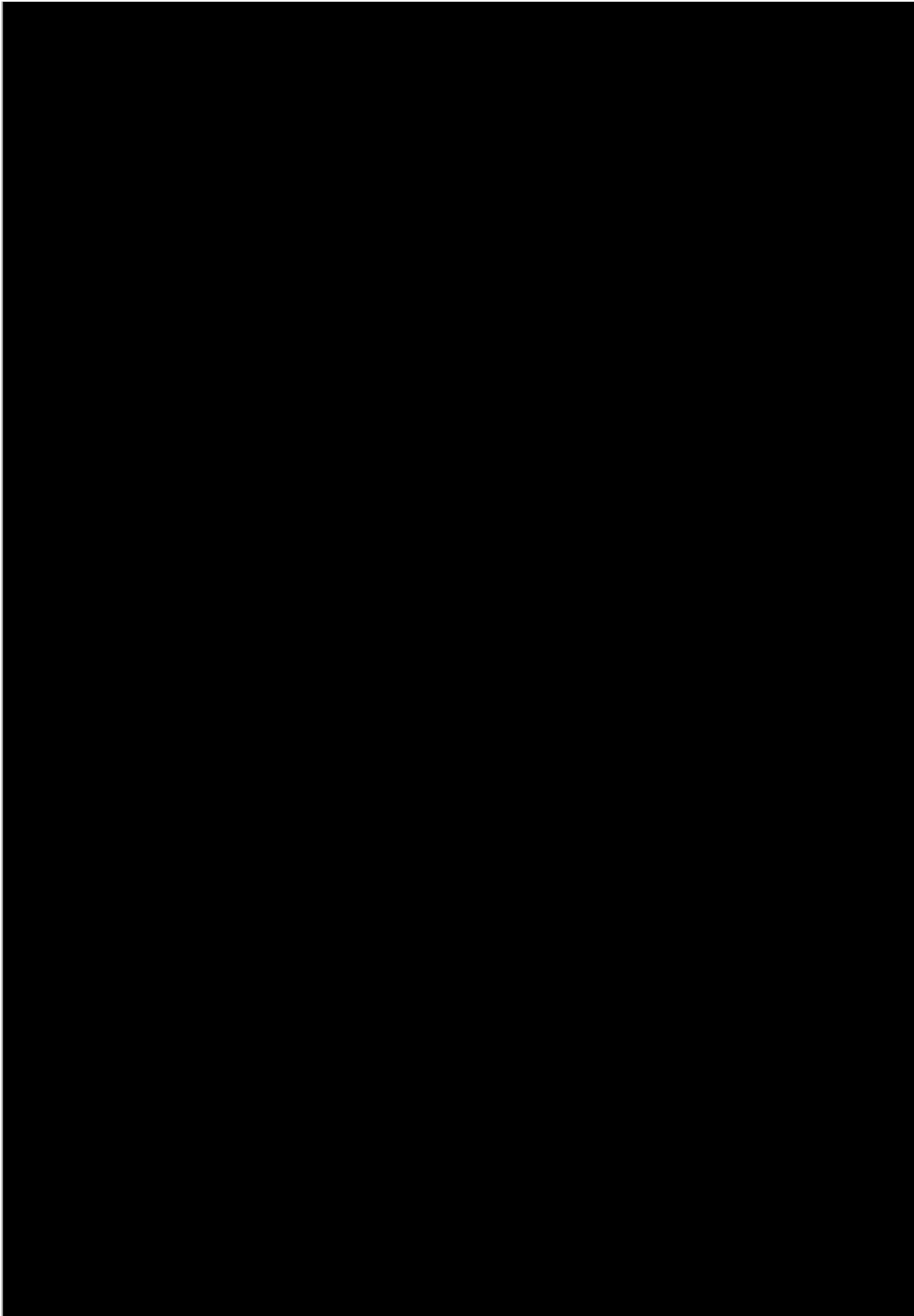
Responsibilities	Rating	Comments/Actions
15. Maintains a clean and orderly warehouse to prevent contamination or damage to product		
a. Forecasts inventory needs and carries adequate inventory levels		
b. Invests in warehouse upgrades, equipment and maintains adequate staffing levels to service the marketplace		
c. Trains distributor operations employees in their job functions and the brands they represent		
d. Insists on a professional delivery staff and provides adequate delivery service levels to meet the customer's needs (i.e., "frequency")		
e. Consistently rotates product in warehouse to ensure that product is first in first out		
f. Ships product to retail that meets both the distributor and supplier quality standards		
g. Works with supplier to quickly identify and remove from the market any product which is found to have defective packaging and/or		

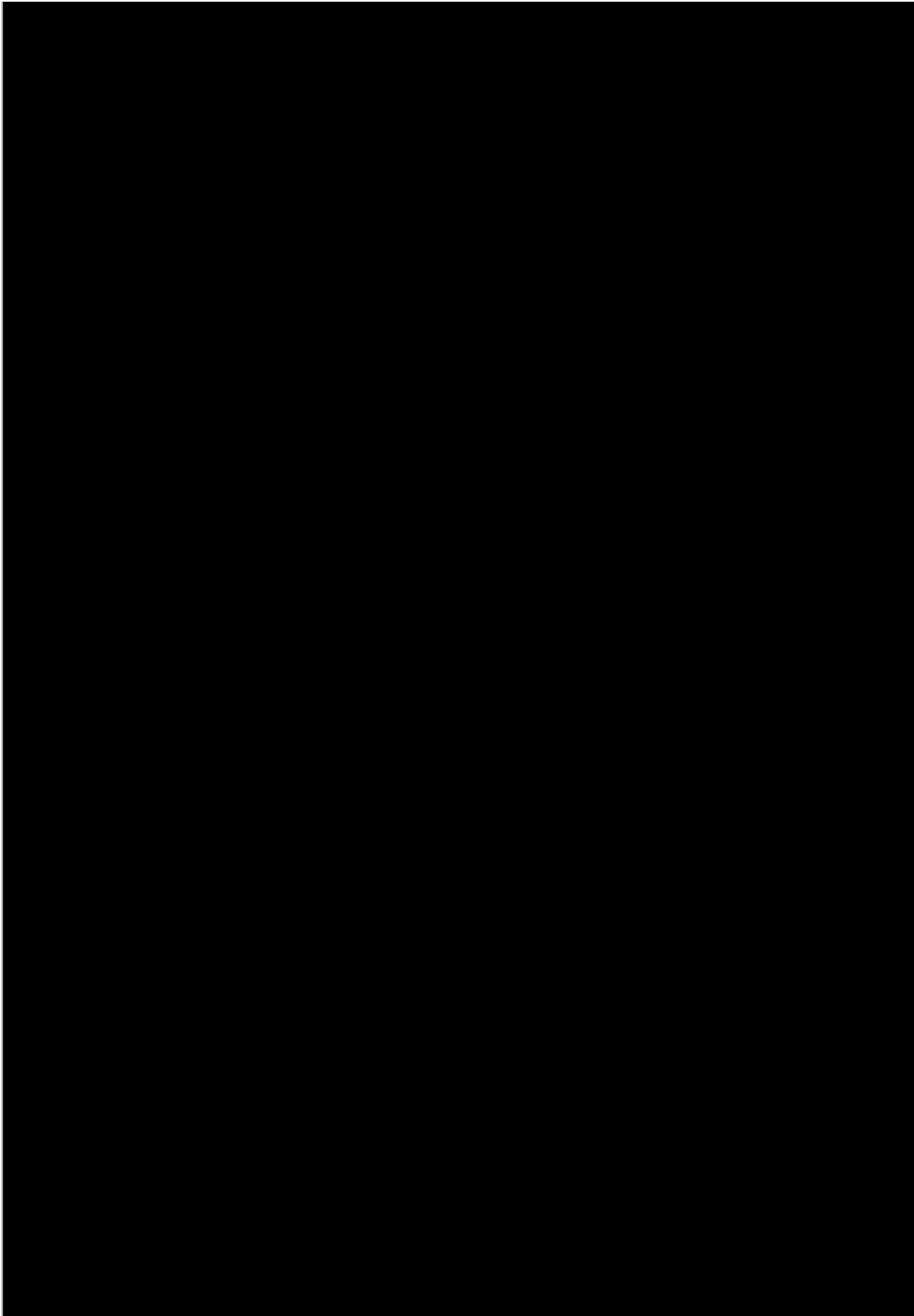
market any product which is found to have defective packaging and/or subject to product recall		
16. Ensures that the sales personnel can effectively present, sell, and market the supplier's brands with a proficient understanding of the attributes, features, and benefits of individual products		
17. Enables suppliers reasonable access to train sales personnel on their products, including classroom and in-field training		

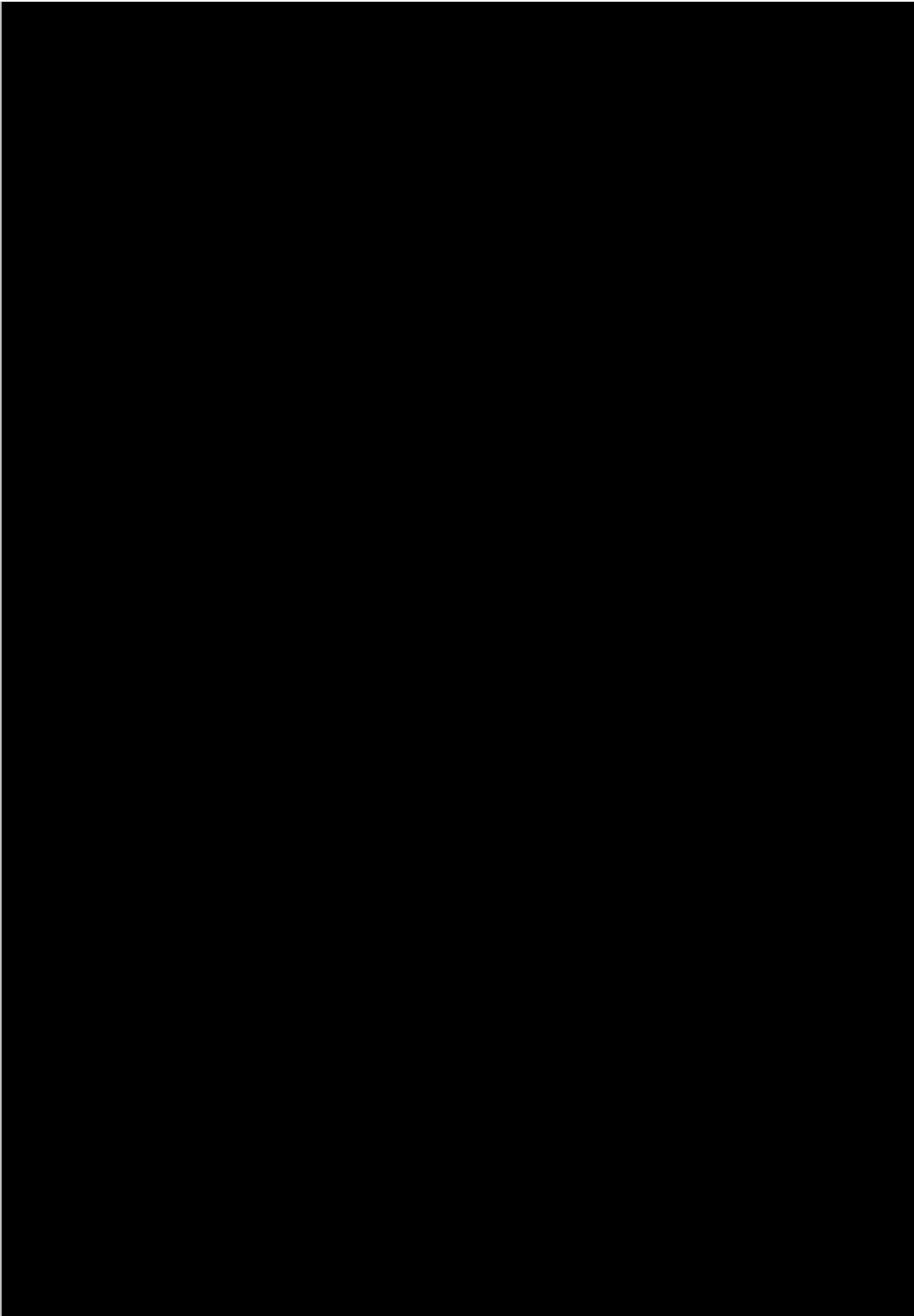
Customer

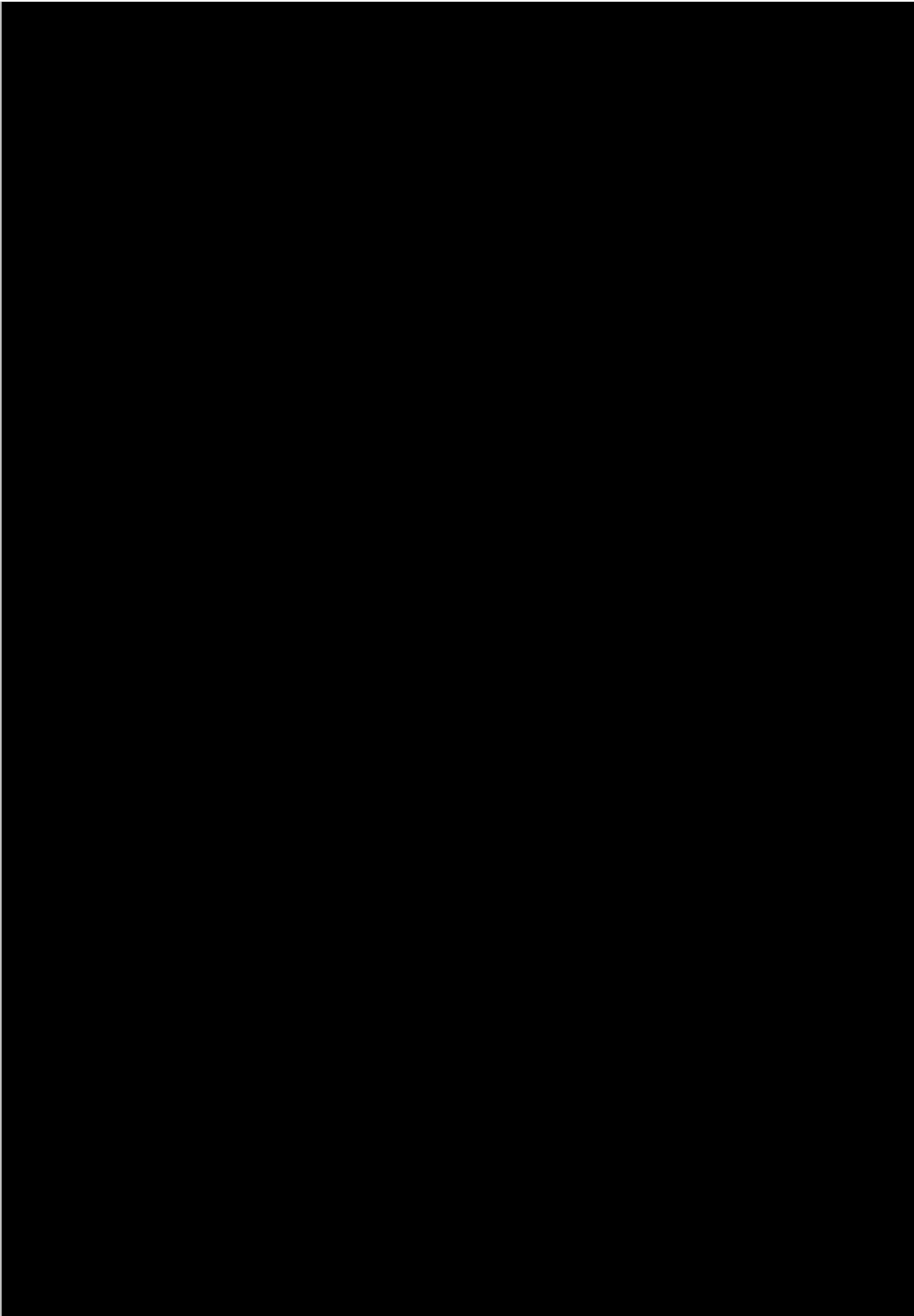
Responsibilities	Rating	Comments/Actions
18. Invests to add value to the customer and/or develop sustainable business building initiatives (e.g., Impact Selling, Zone POS, Single Serve Tactics, etc.)		
19. Gains distribution of brands and packages by channel and class of trade as agreed to by the annual planning process		
20. Establishes and implements an effective internal communication process to ensure that the distributor sales force understands upcoming feature activity and acts on it in a timely manner for both chain and independent accounts		
21. Effectively tracks and shares the results of retail activity and proactively communicates to suppliers any accounts that are non-displayable		
22. Actively engages suppliers with recommendations for retail programming in the market		
23. Applies adequate resources to execute retail programming in market		

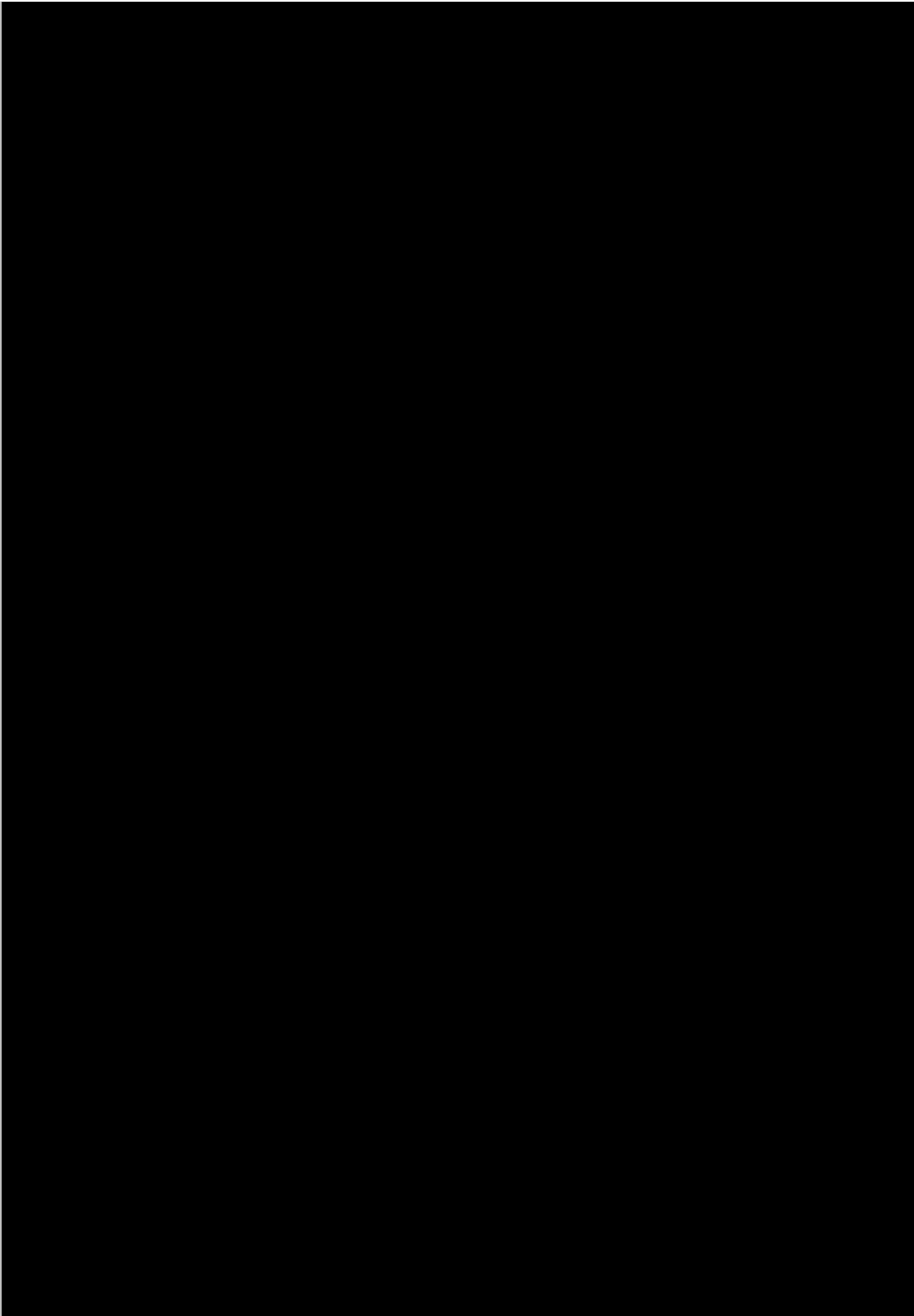
24. Competitively merchandises retail accounts with permanent point of sale provided by suppliers (as allowed by law) by placing paper point of sale on the shelf, display, table top, etc. and ensures correct pricing		
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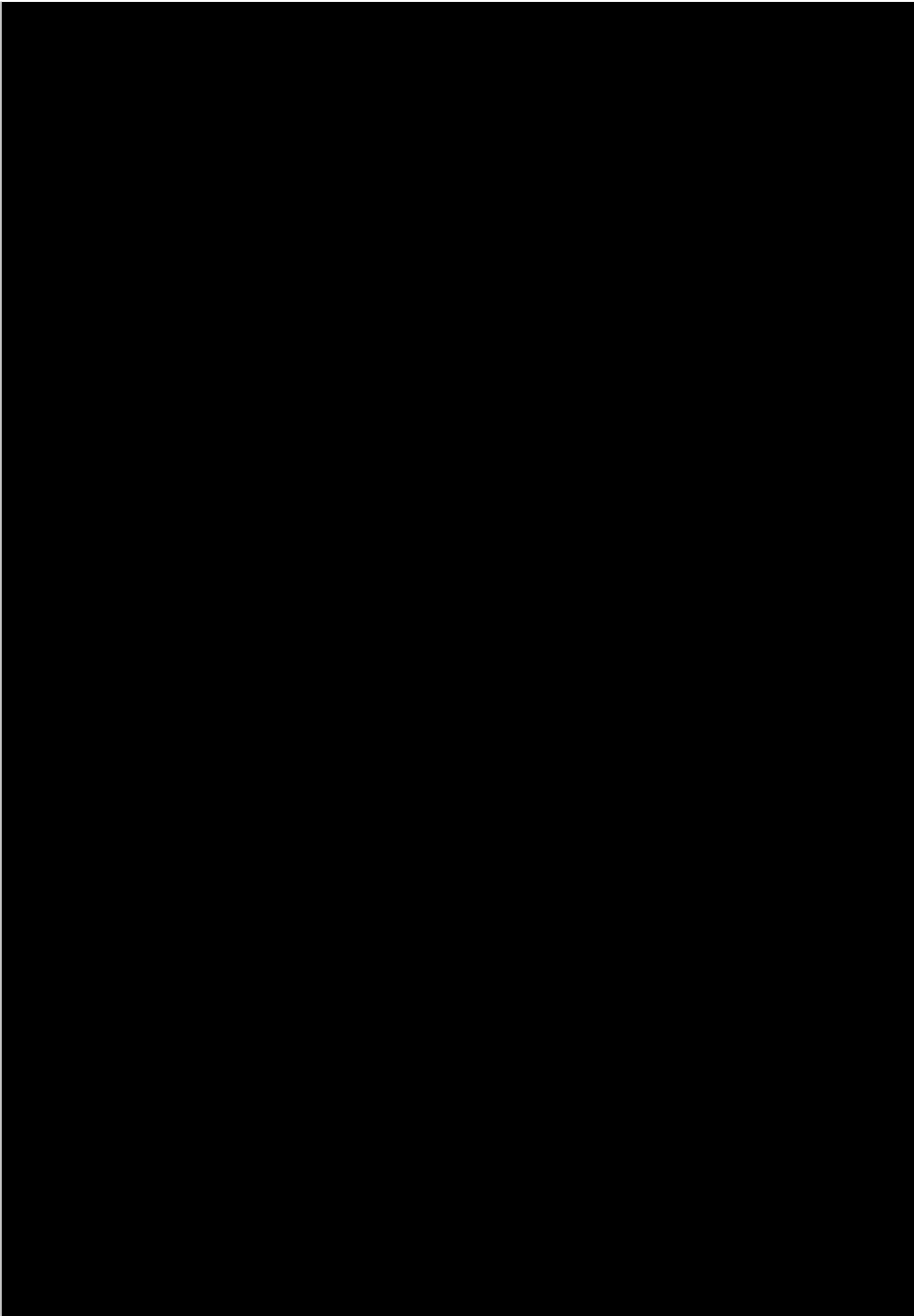


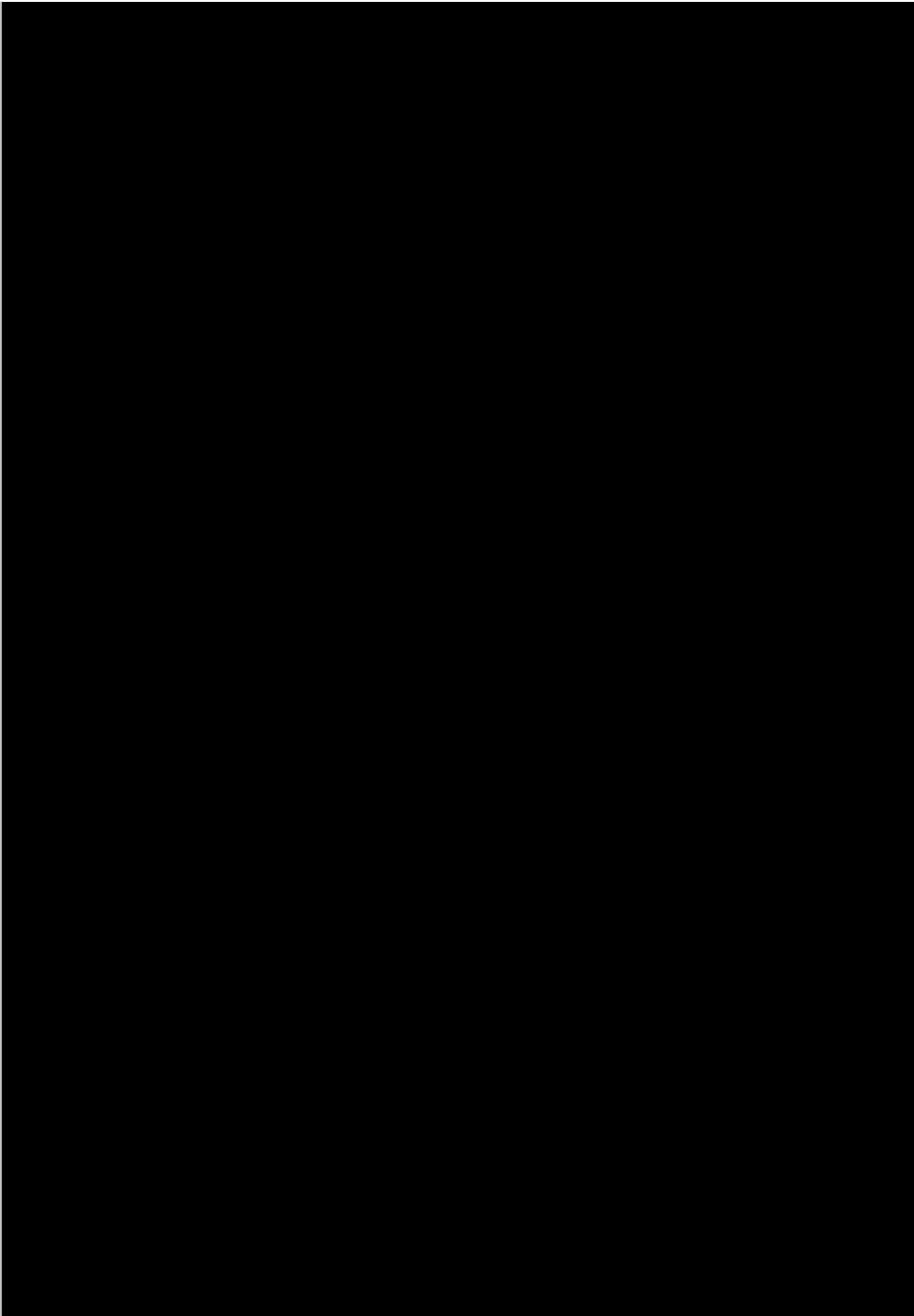


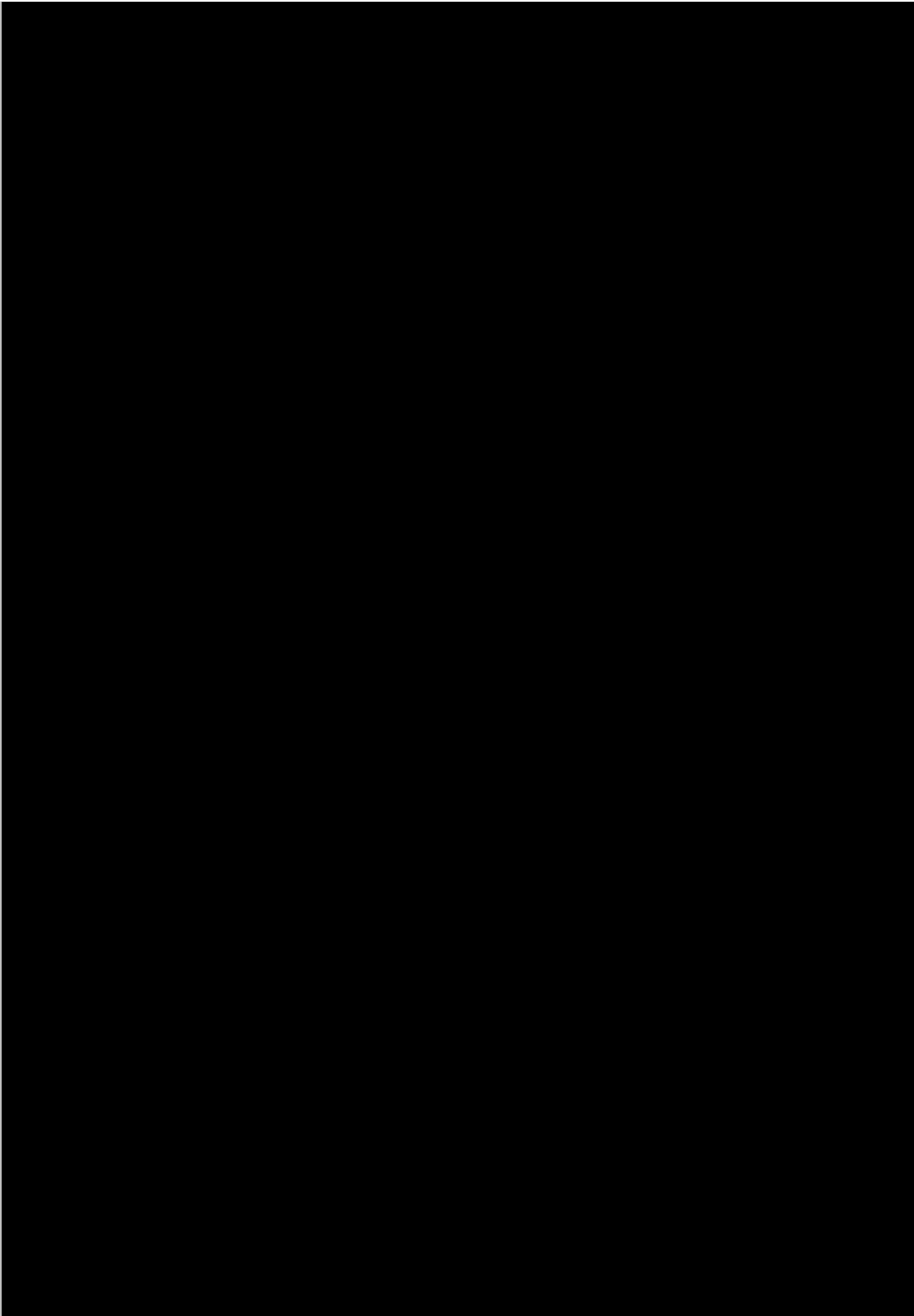


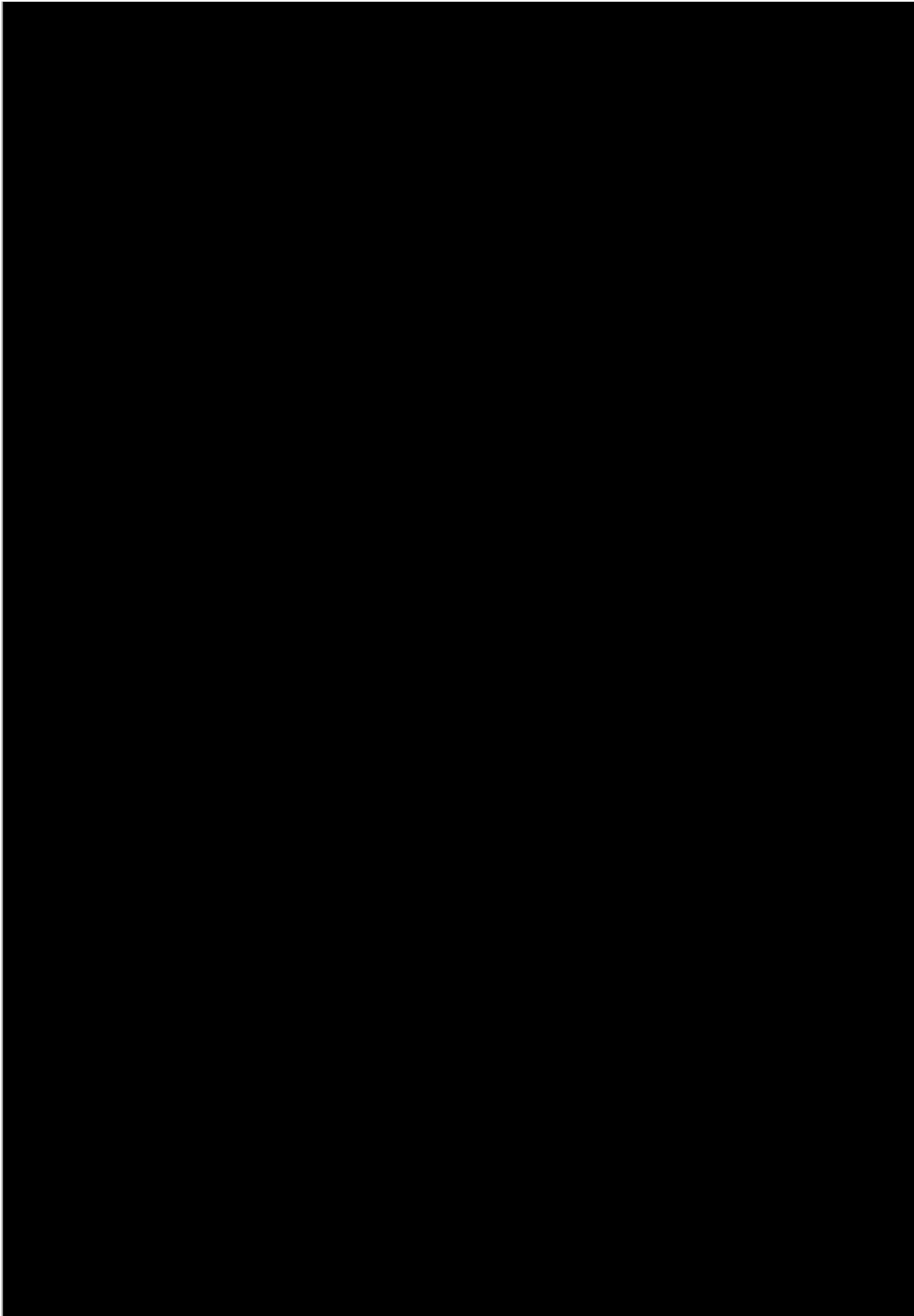


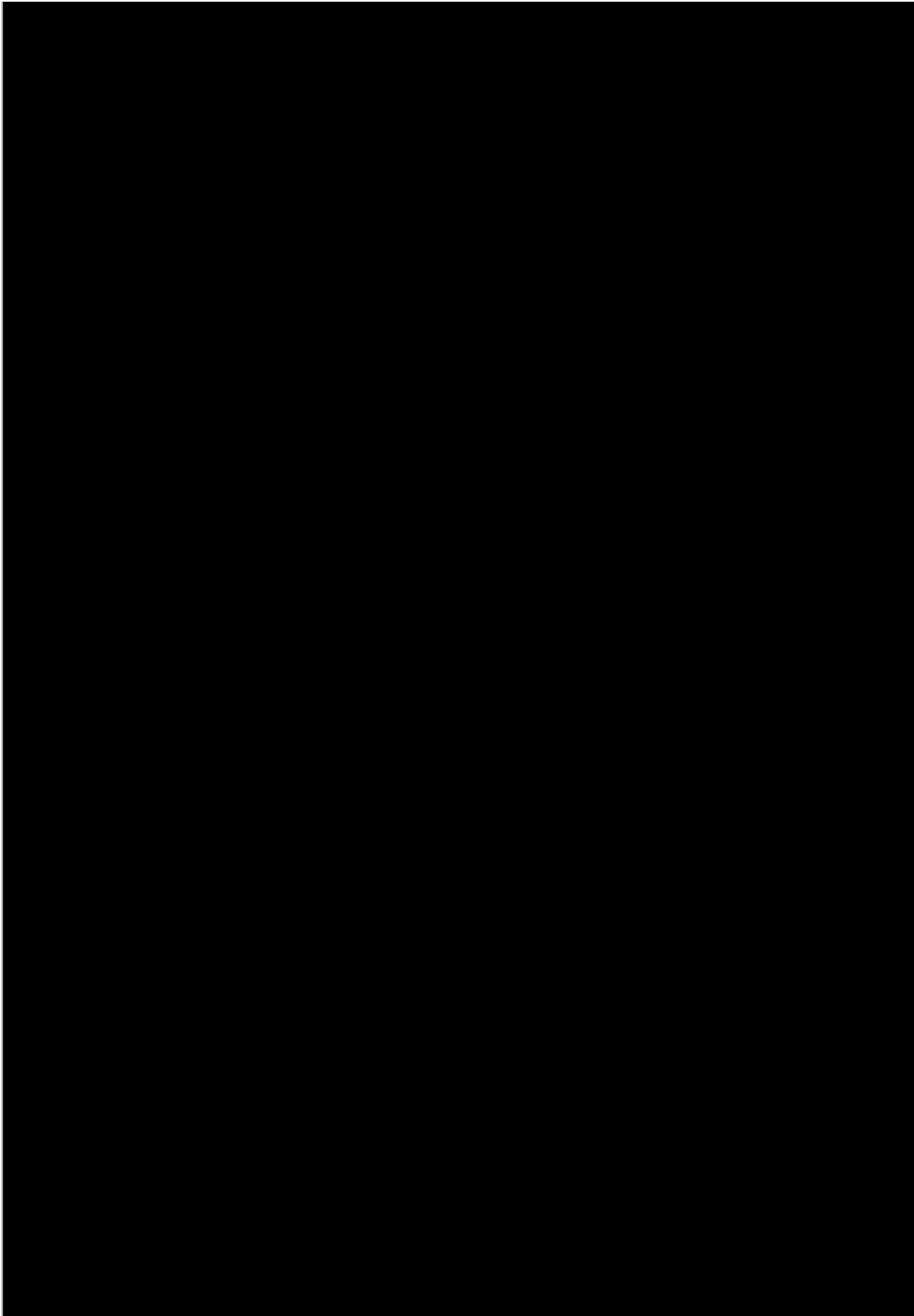


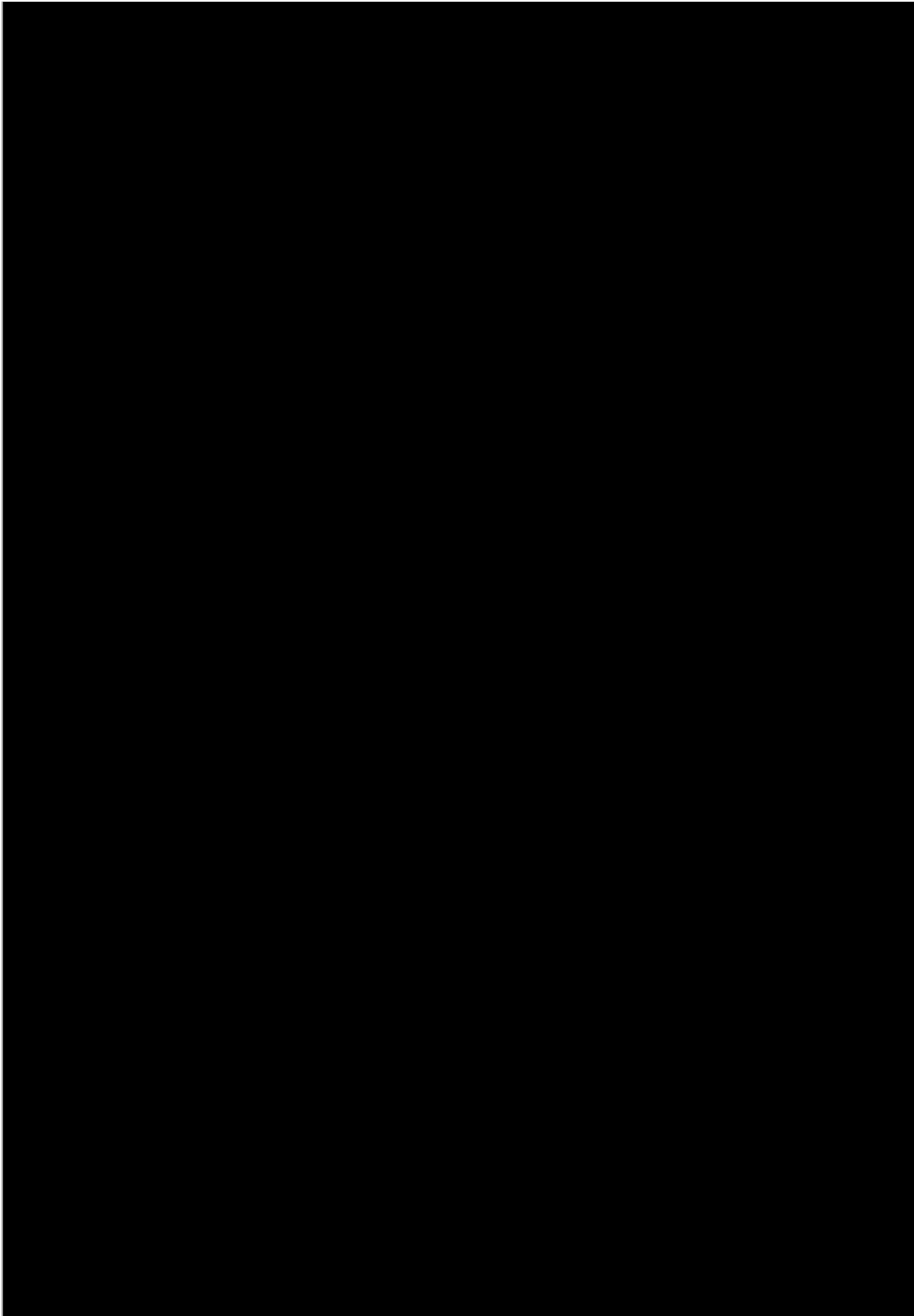


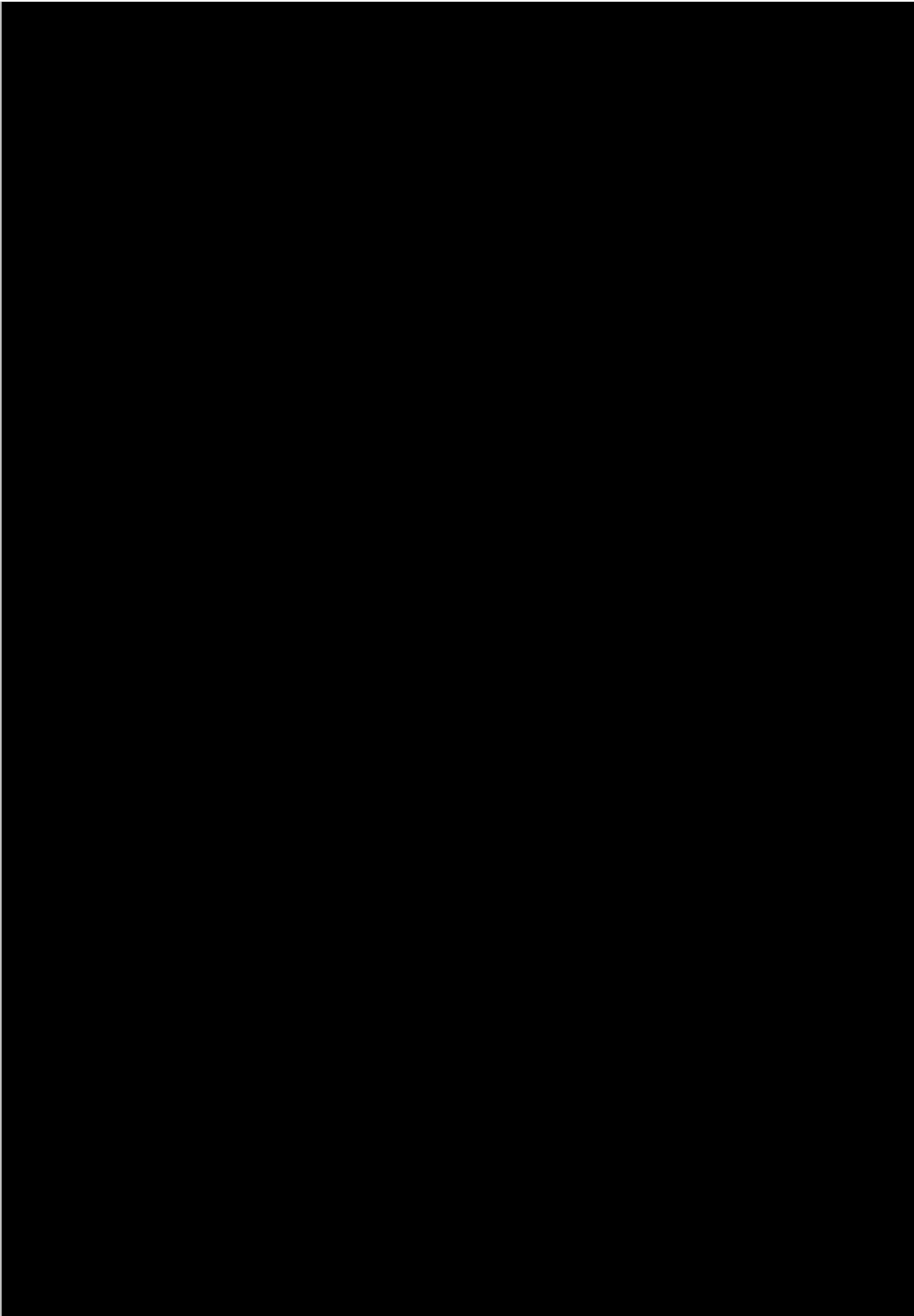


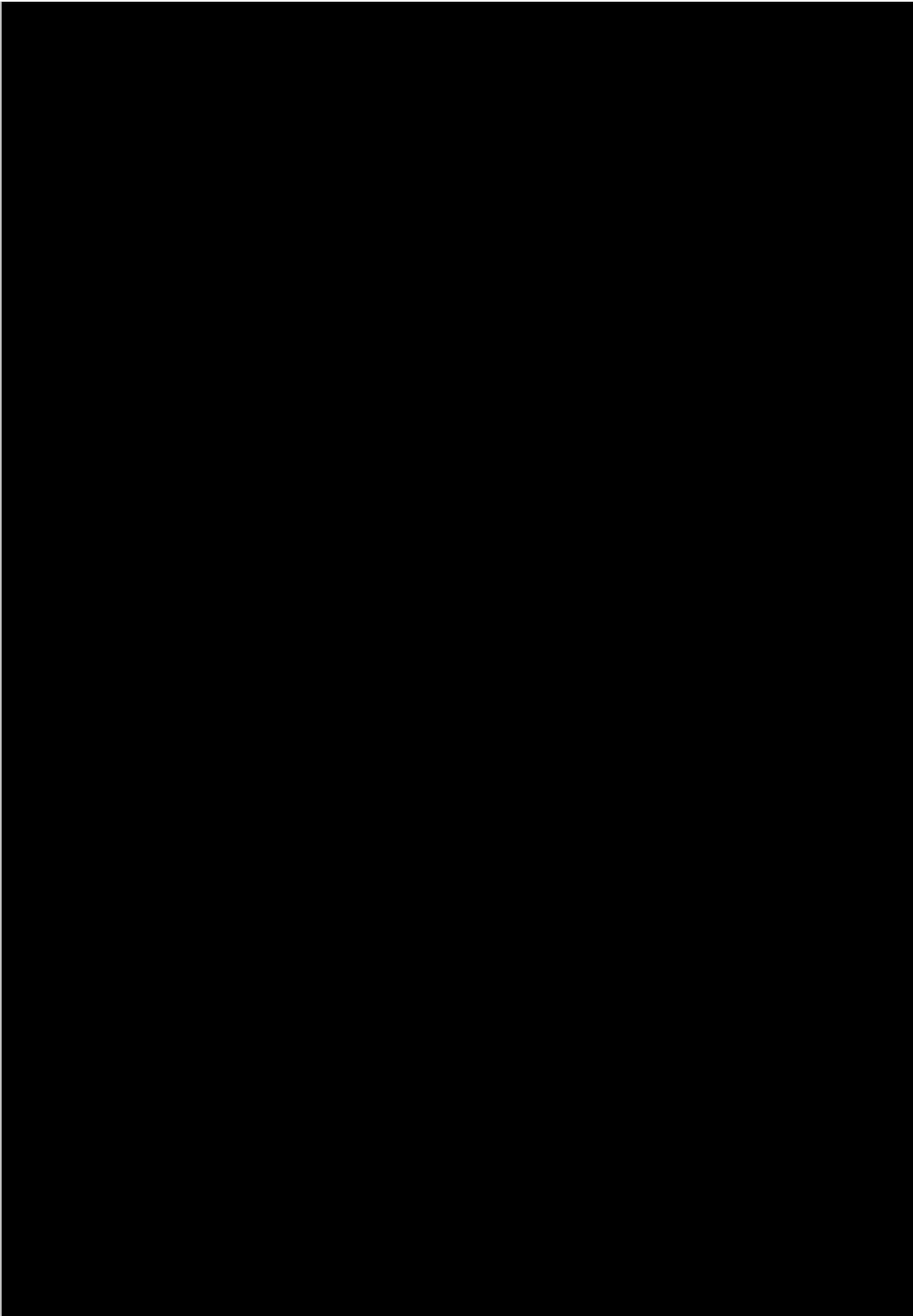


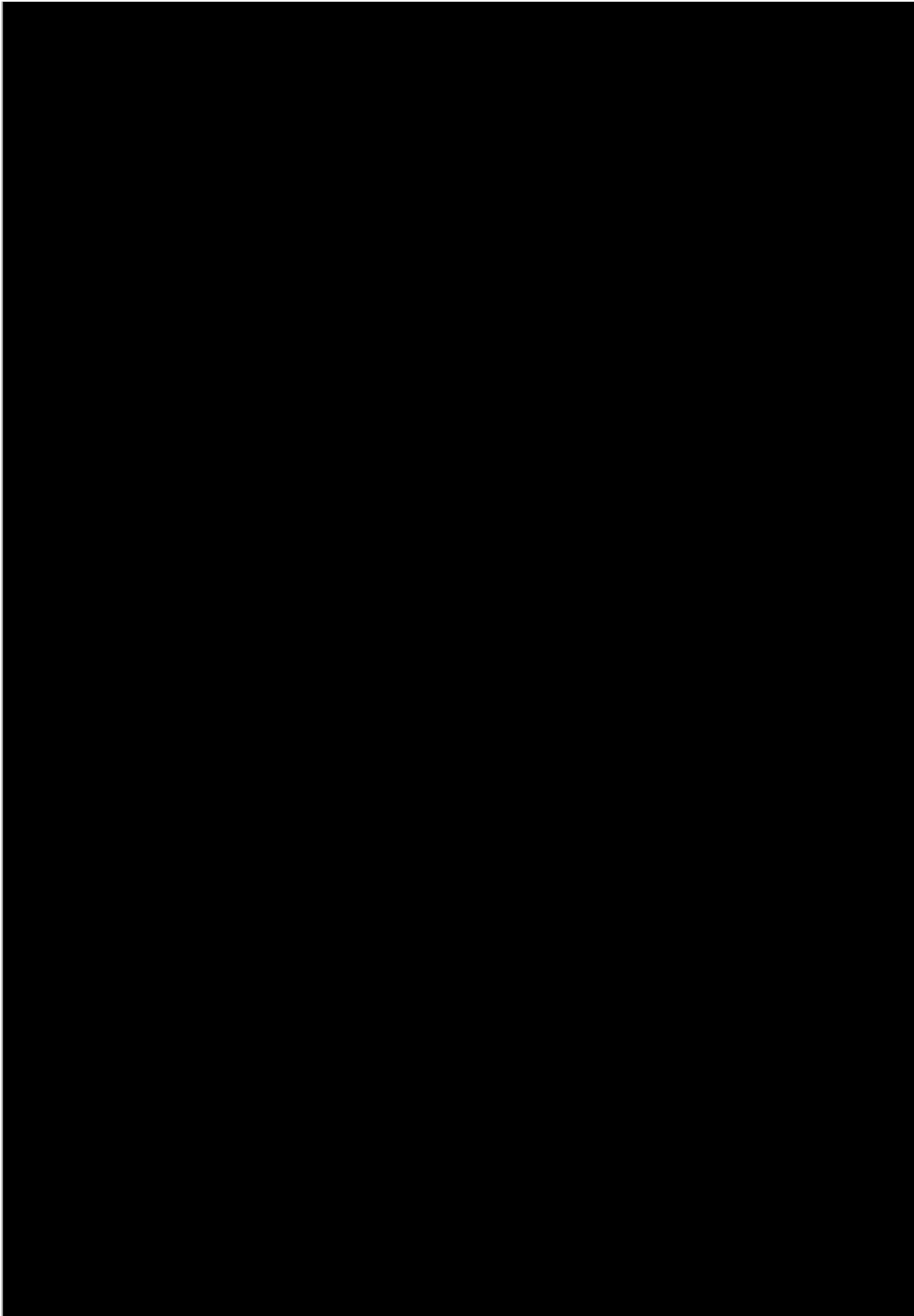


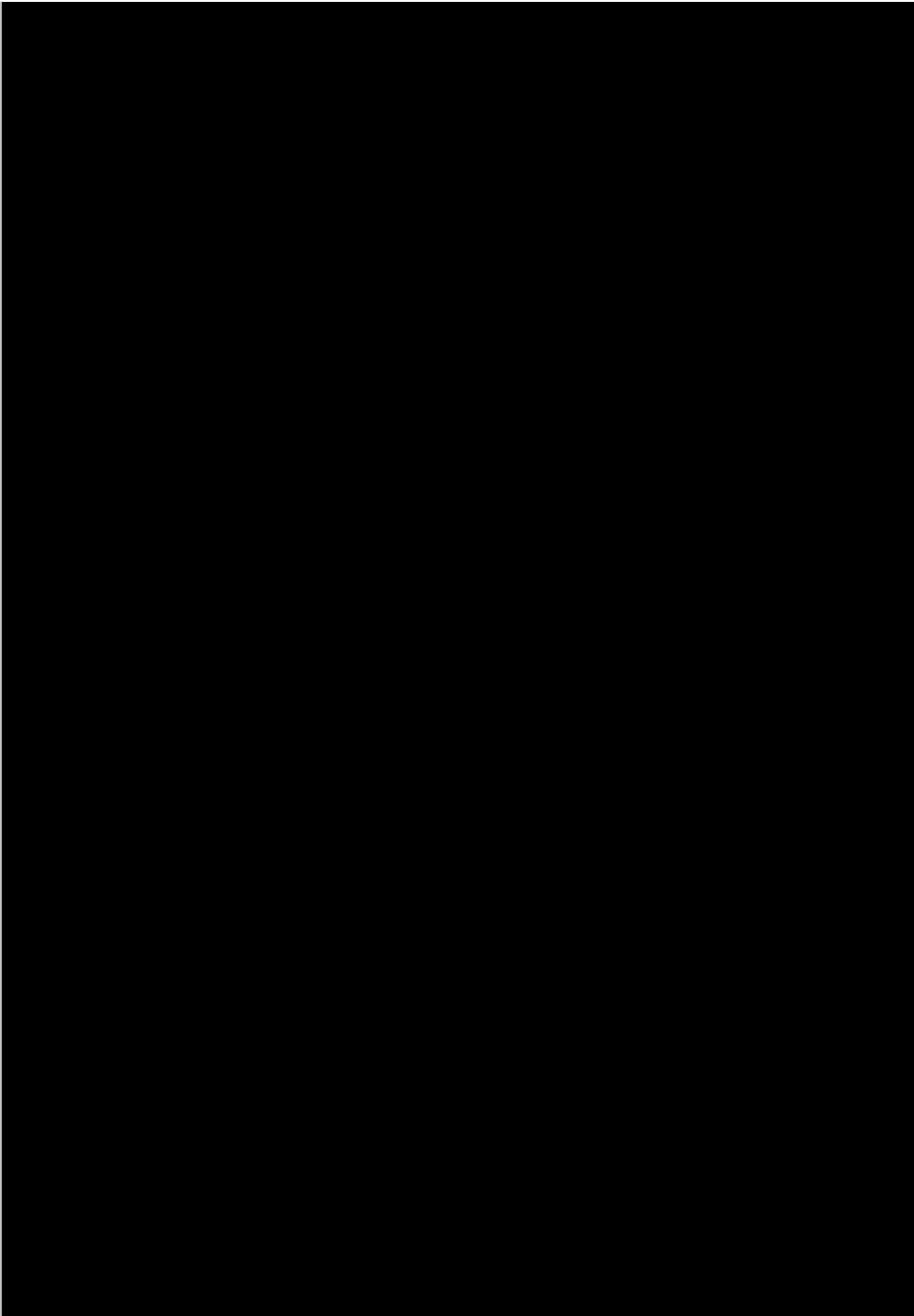


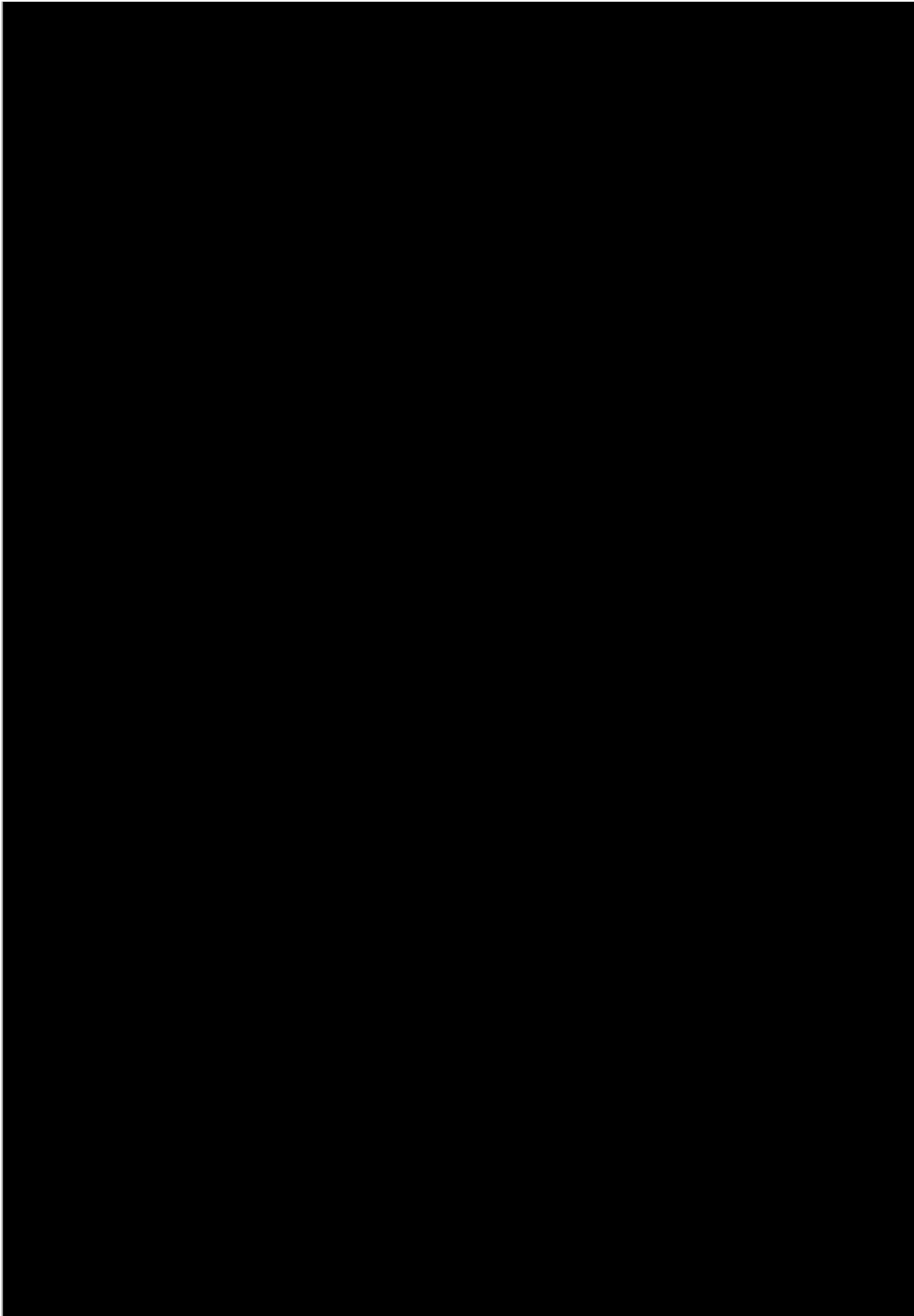


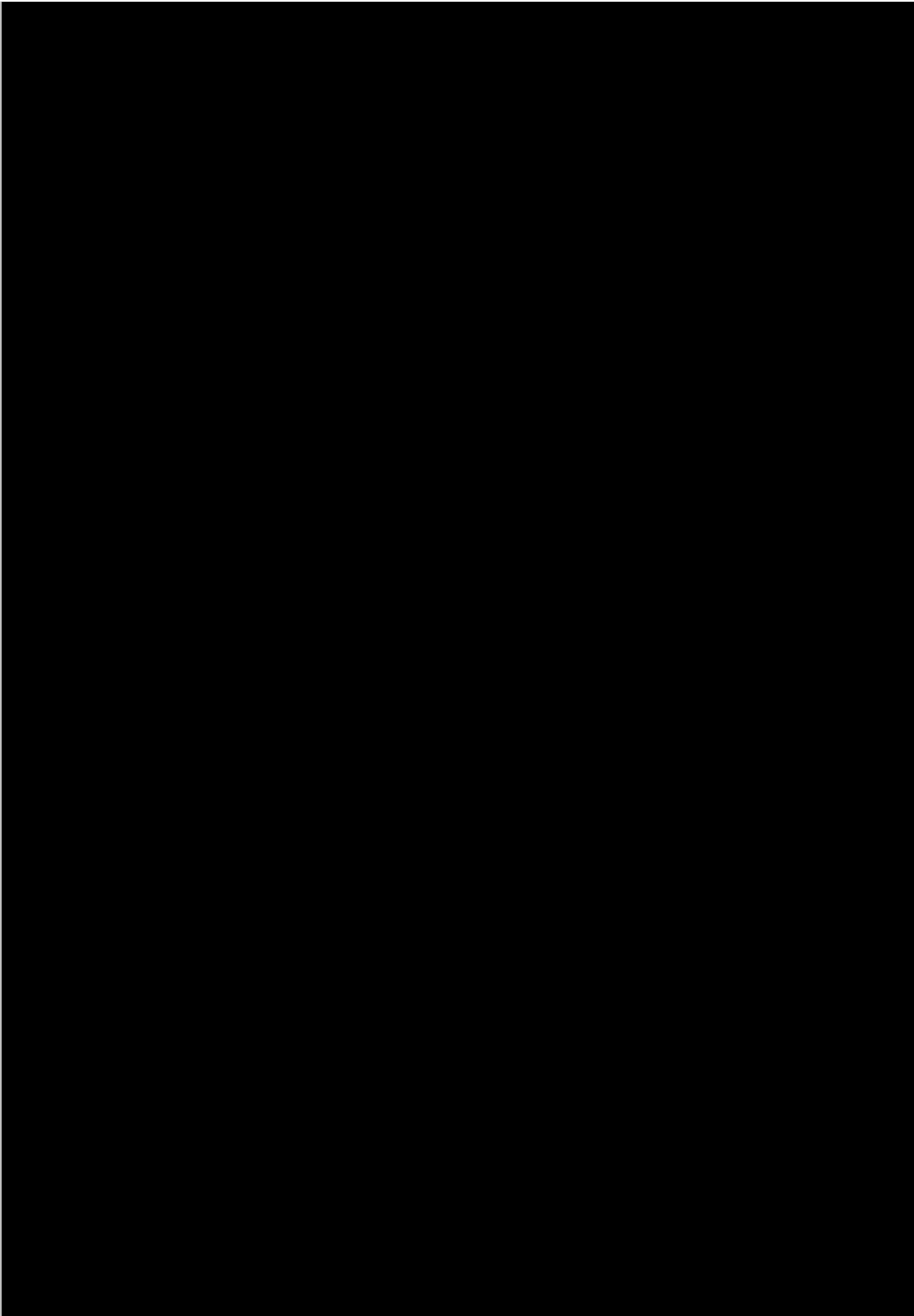


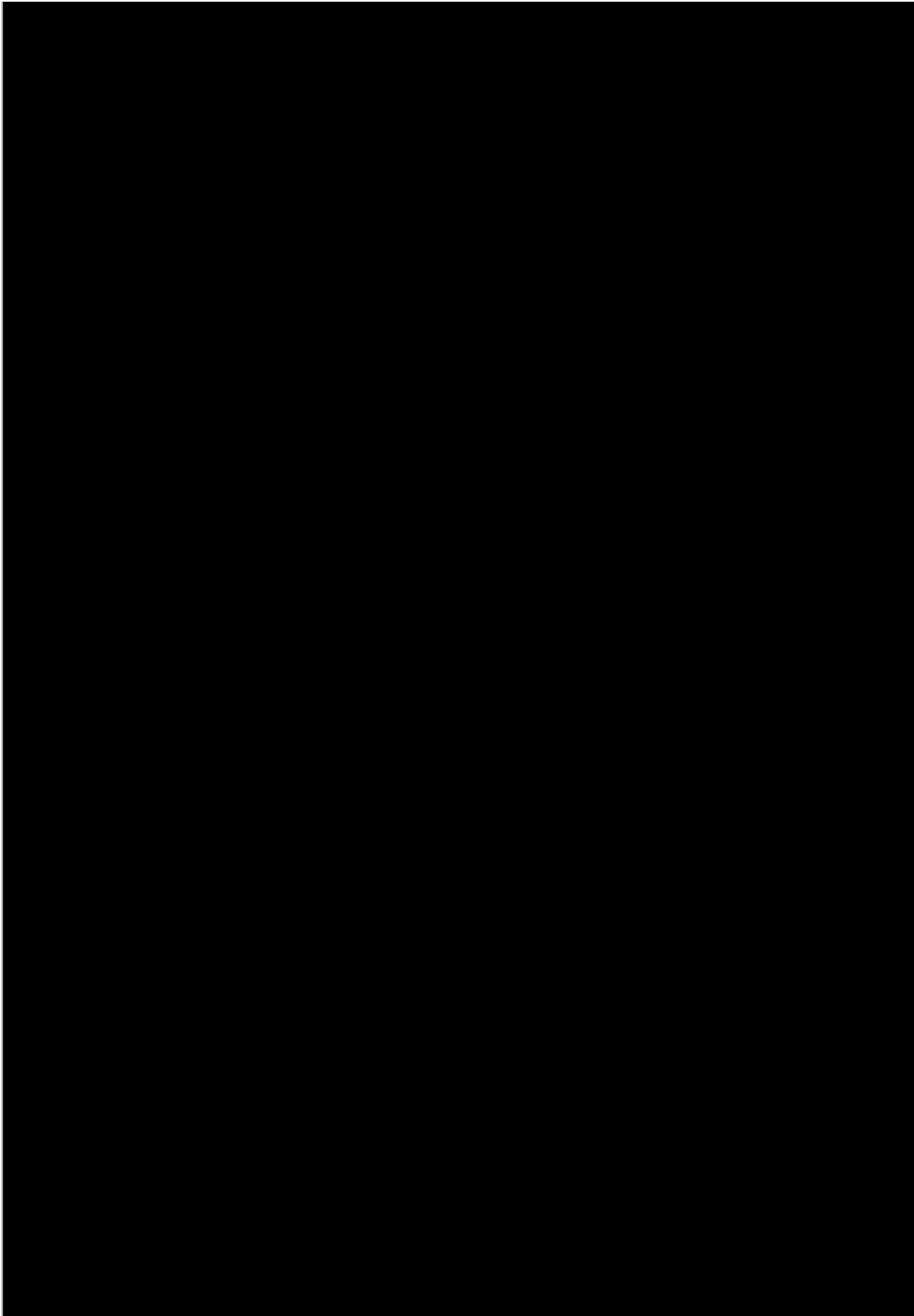


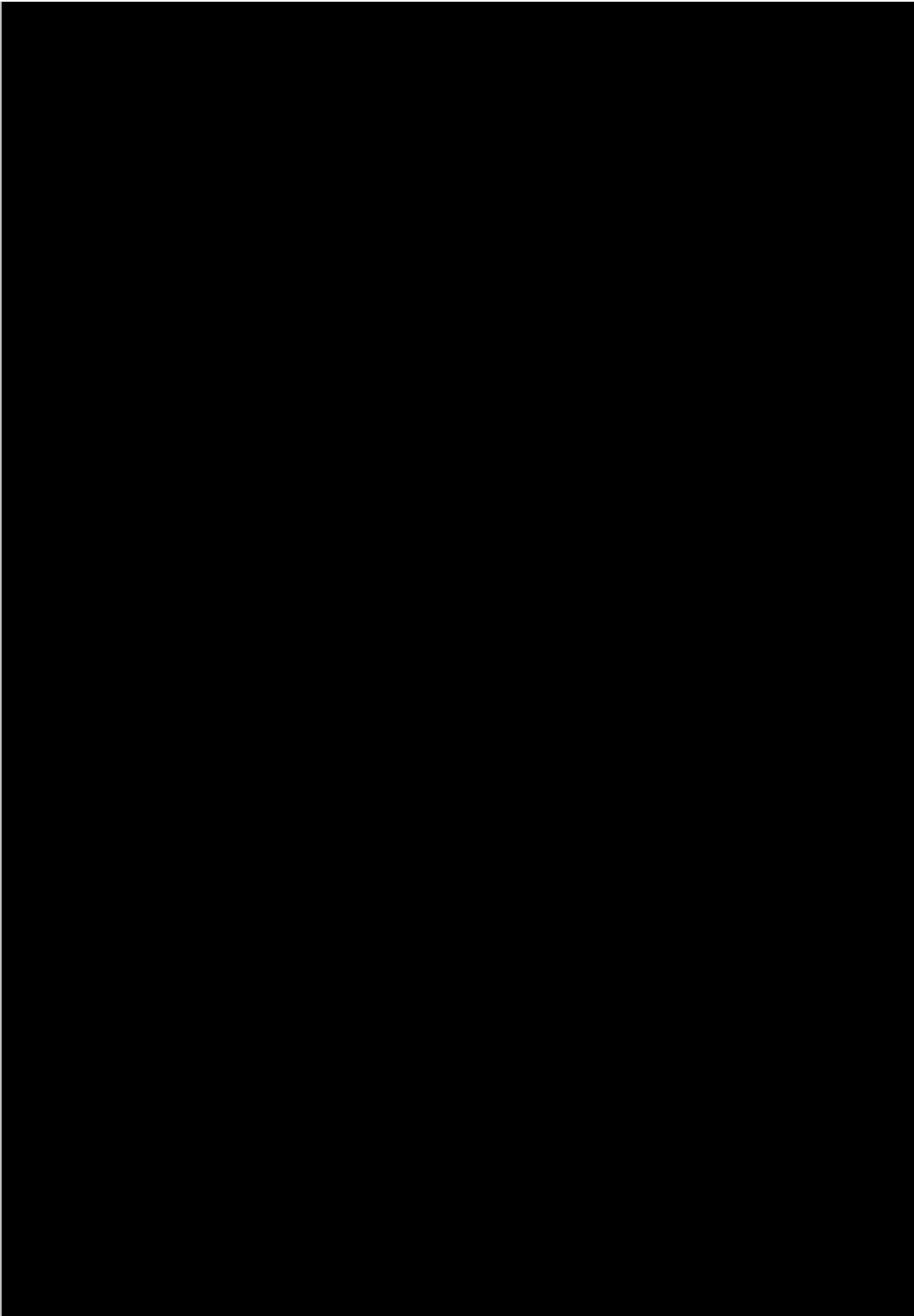


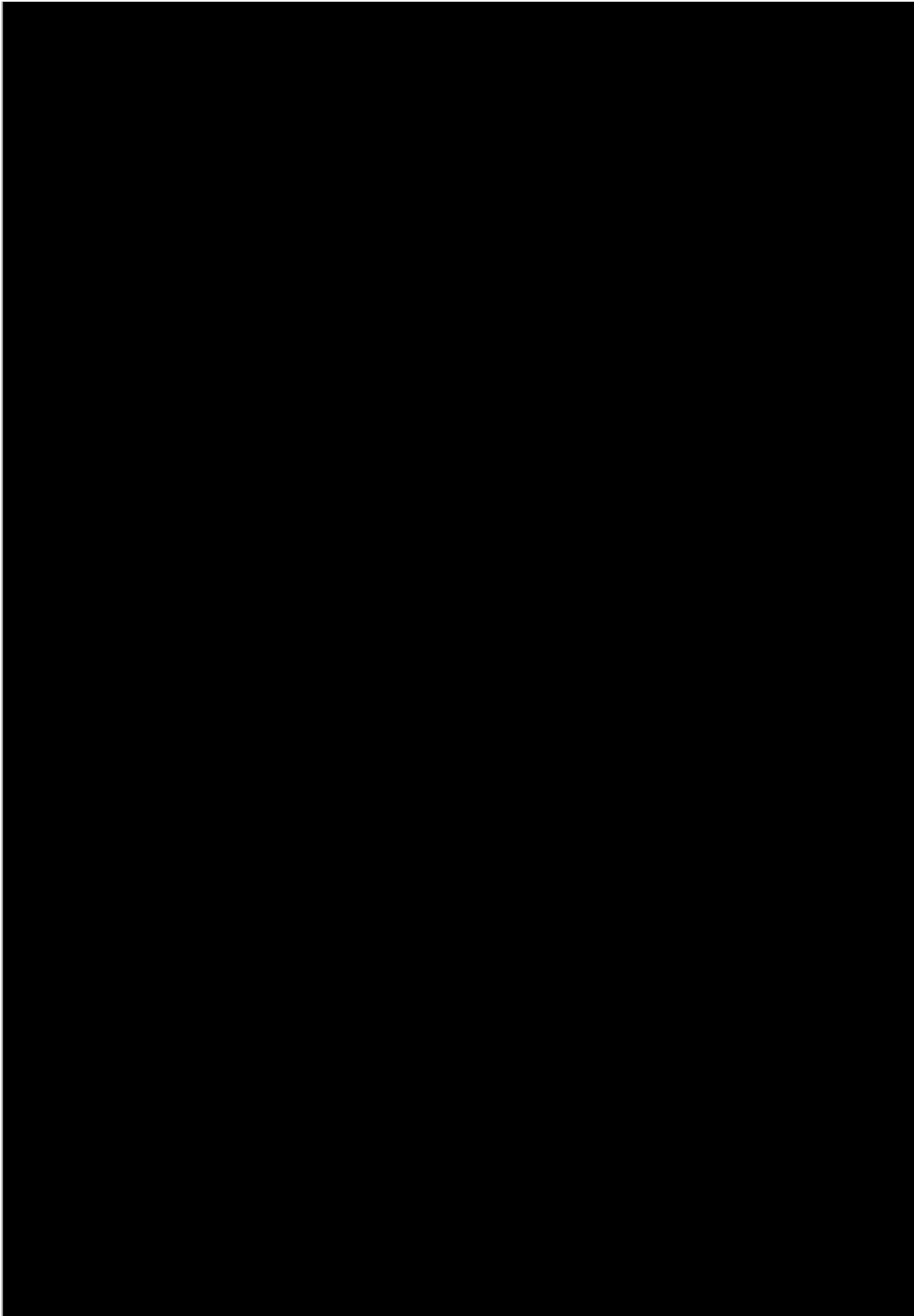


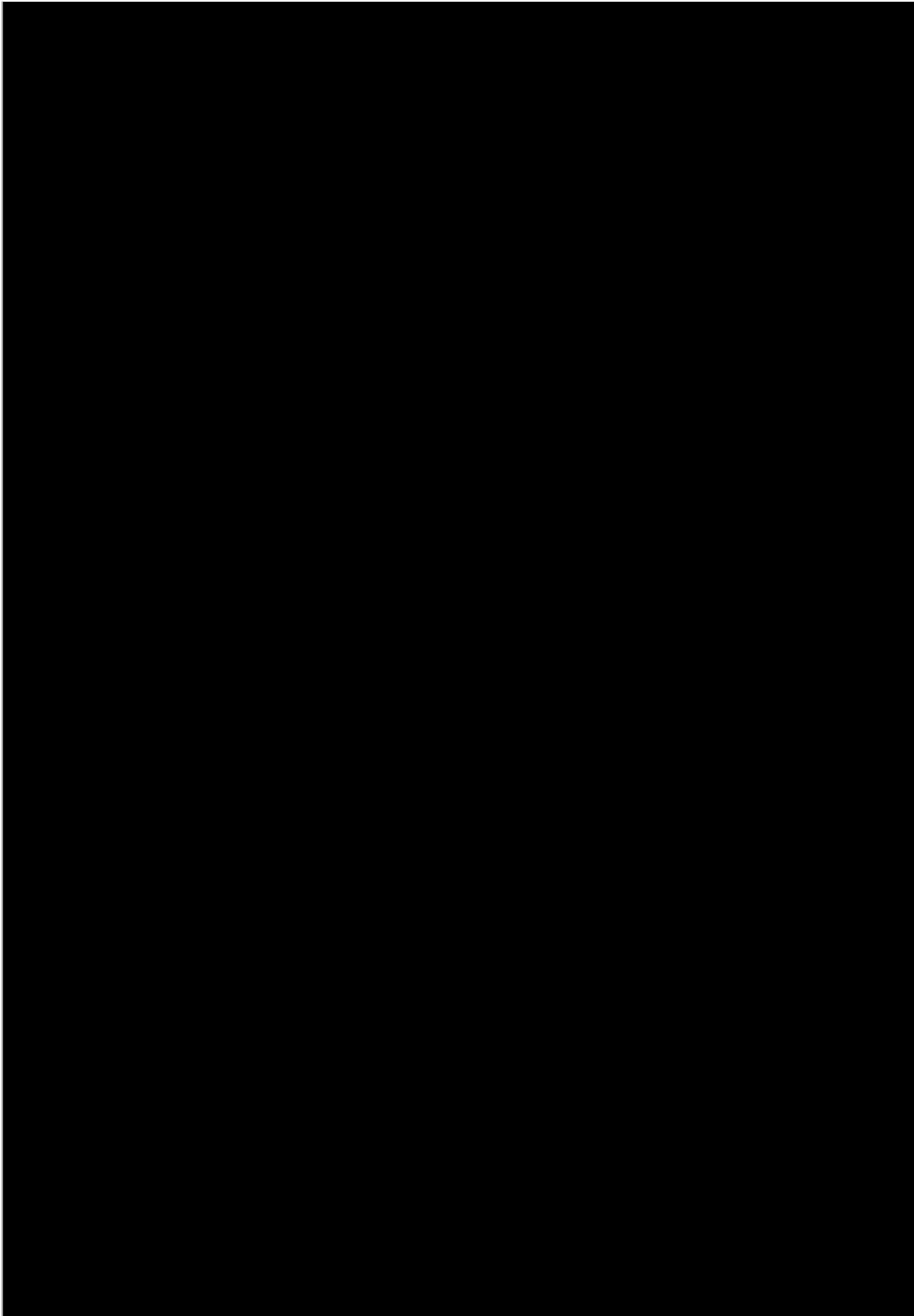


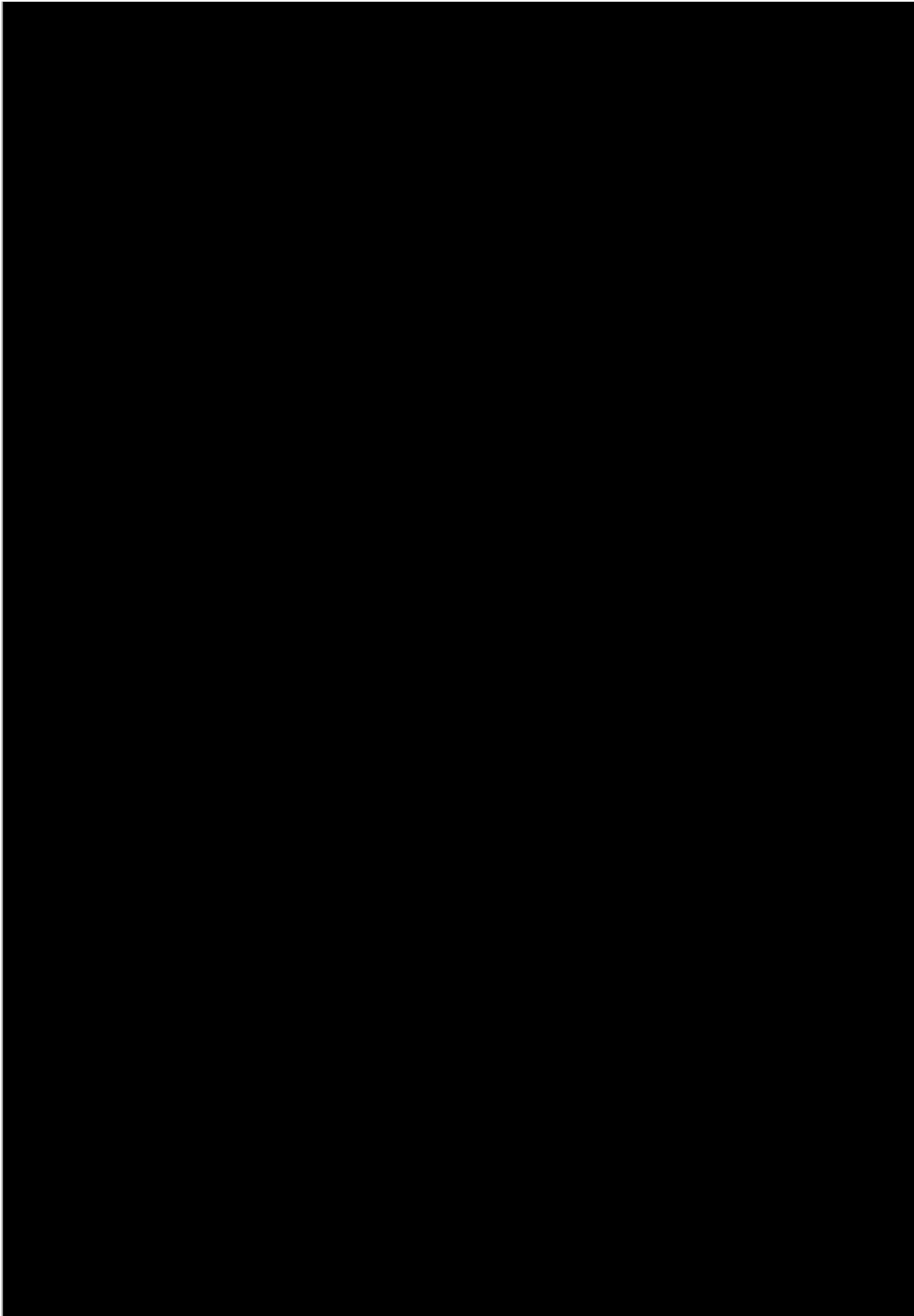


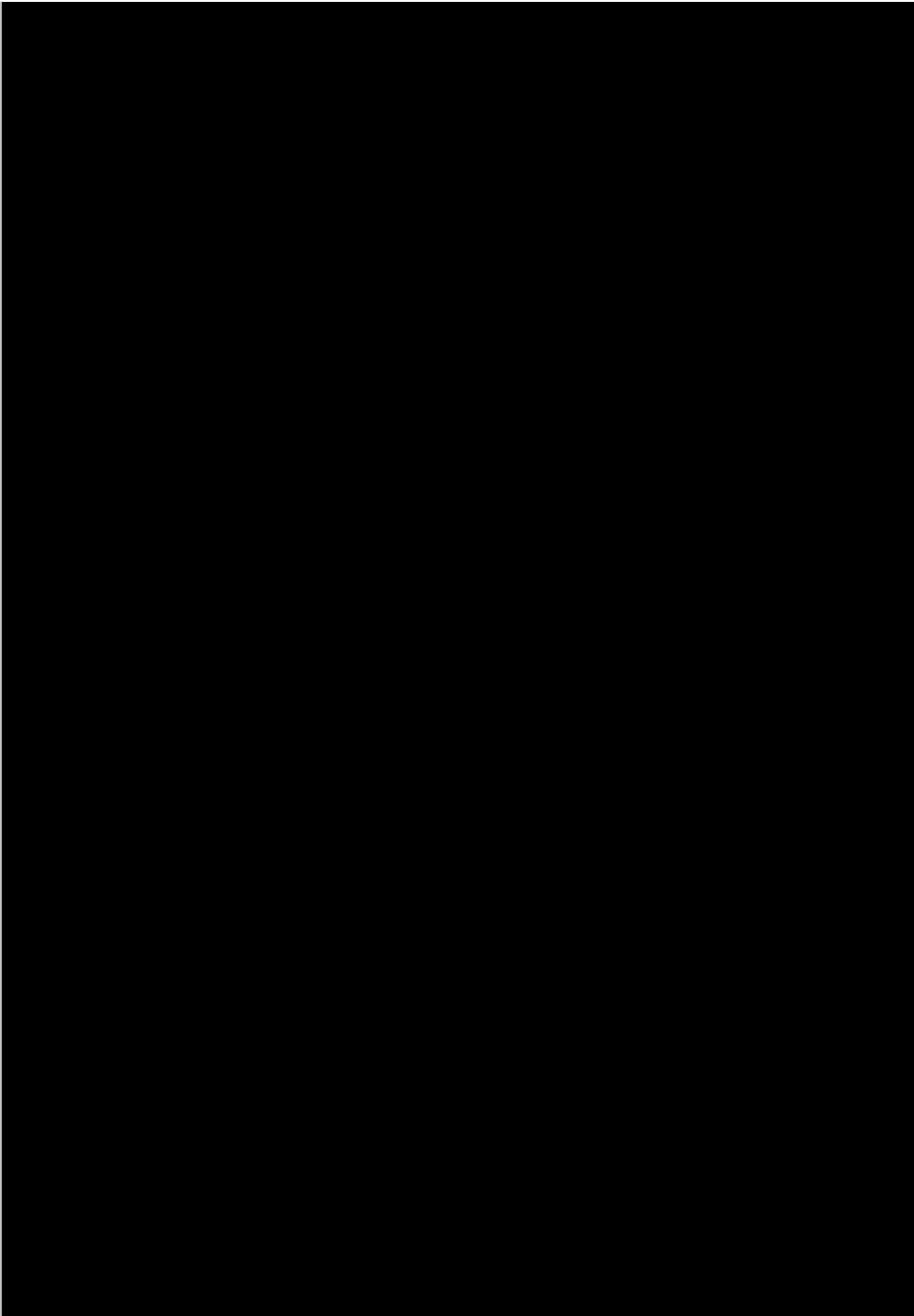


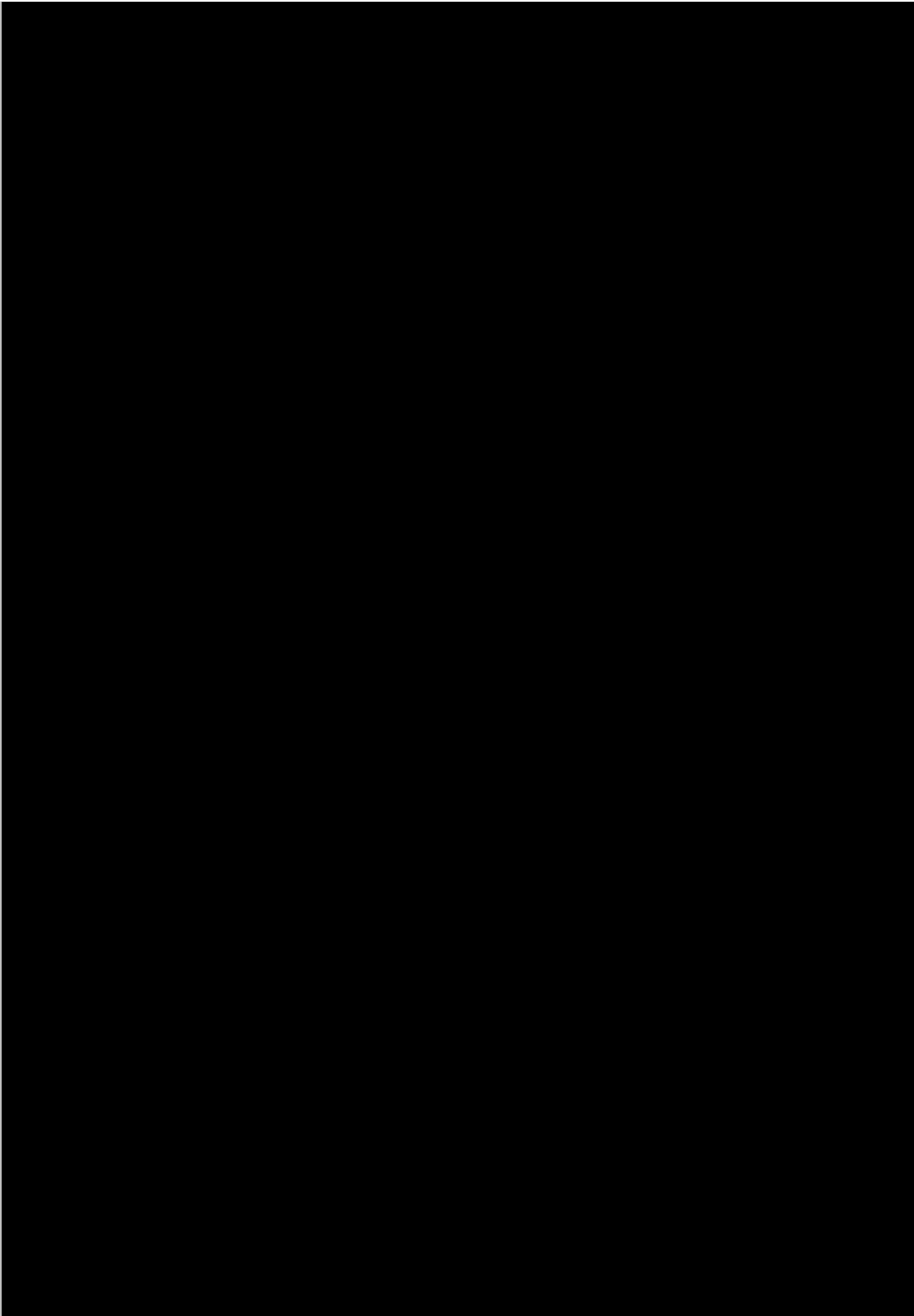


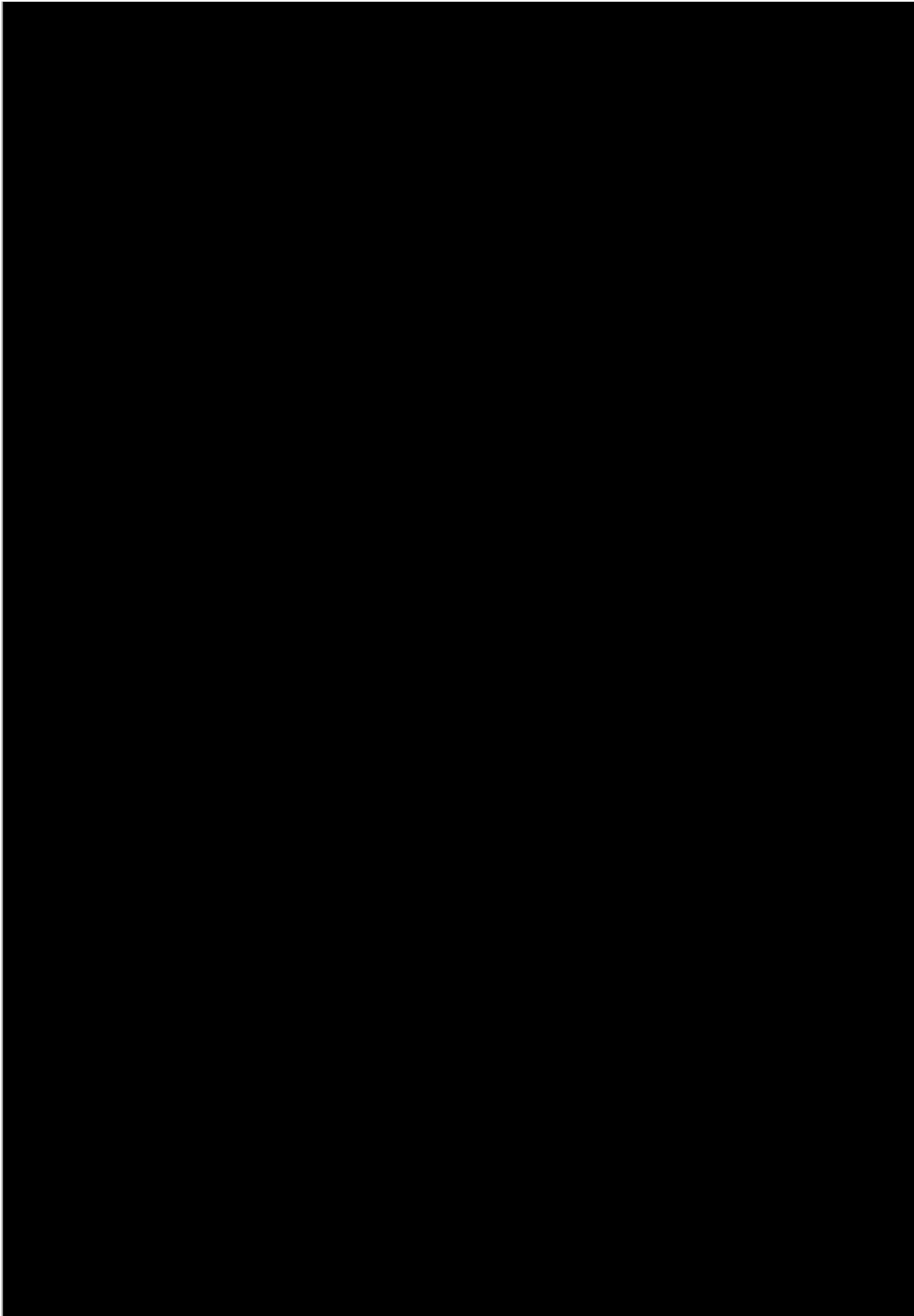


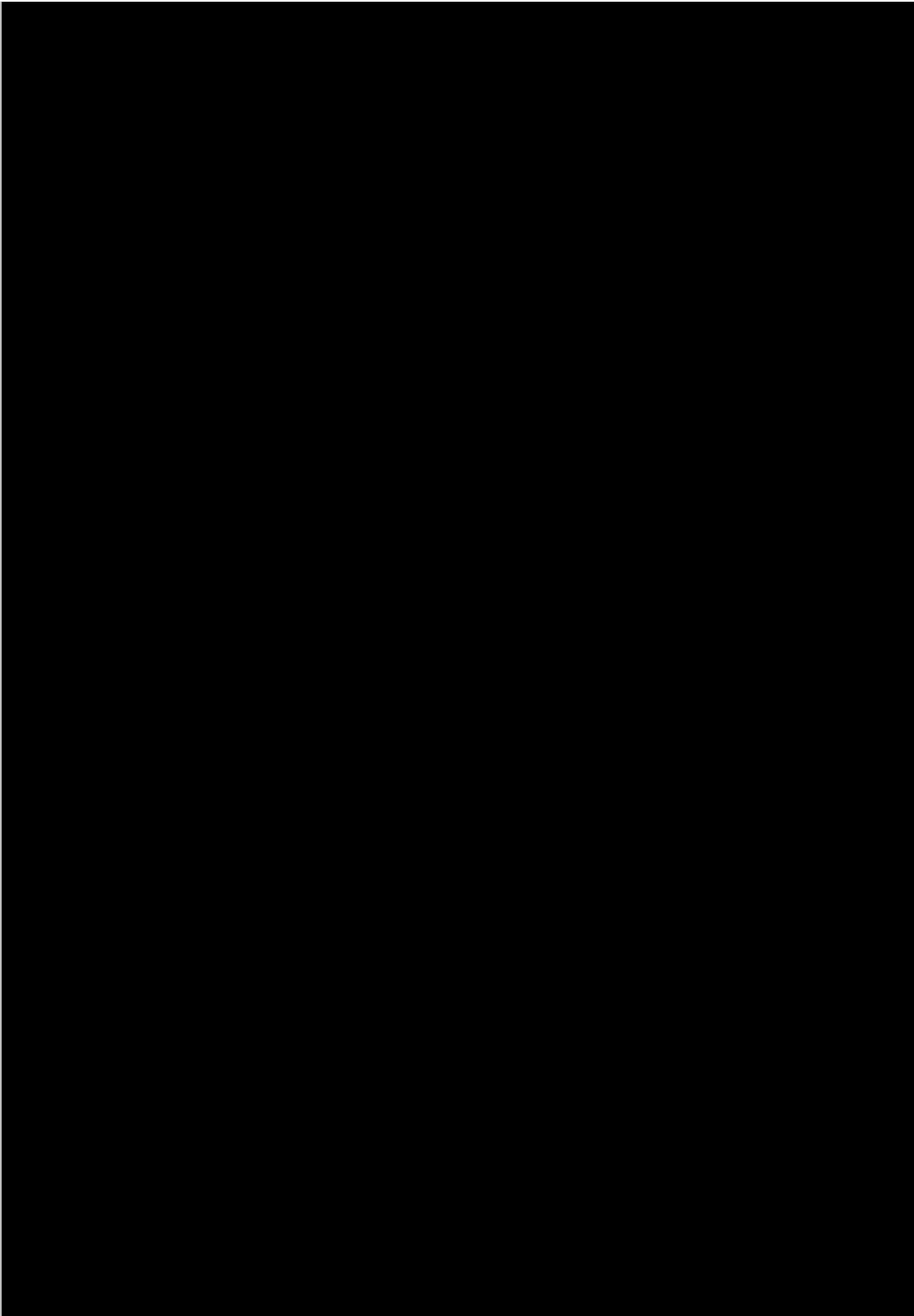


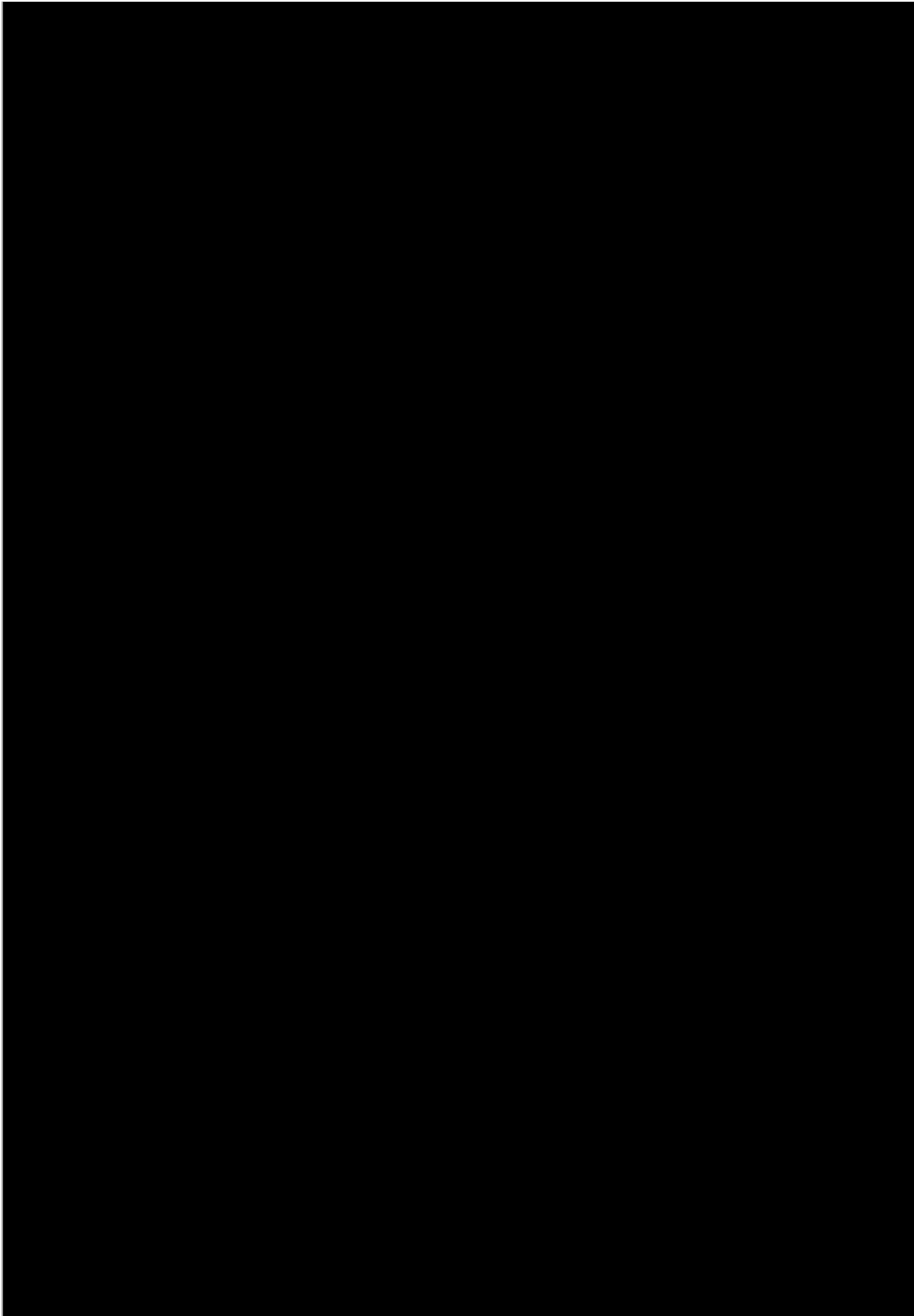


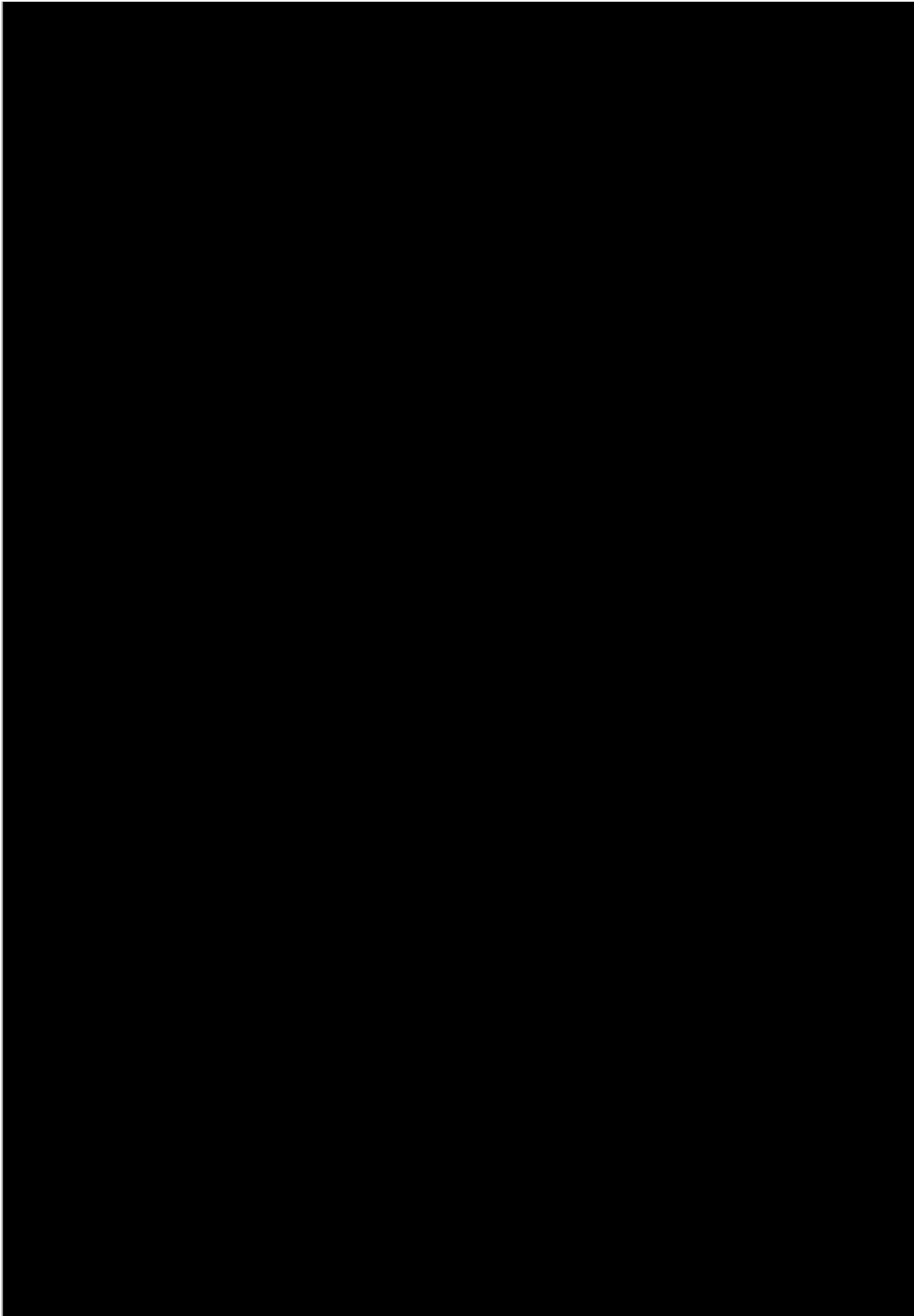


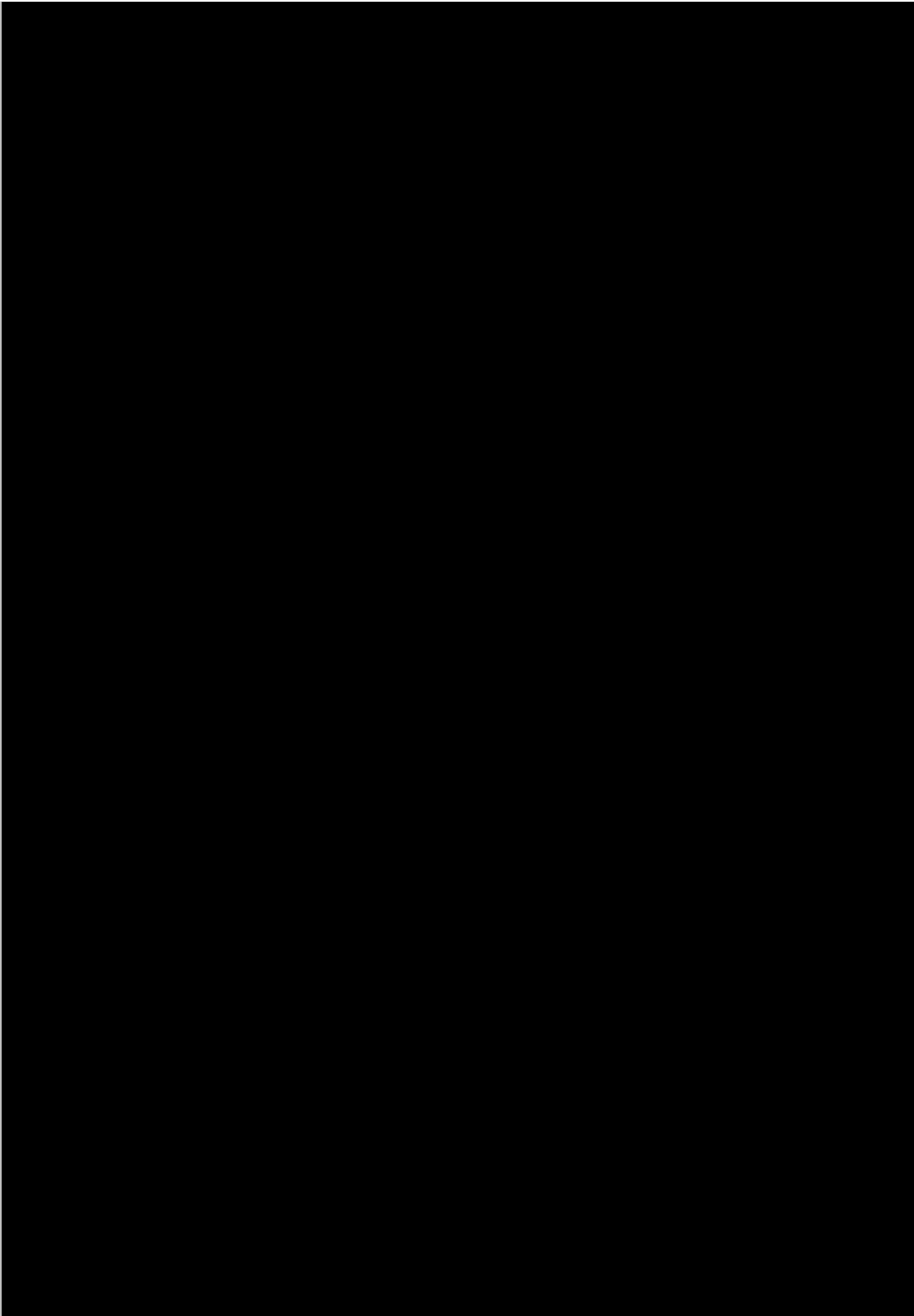


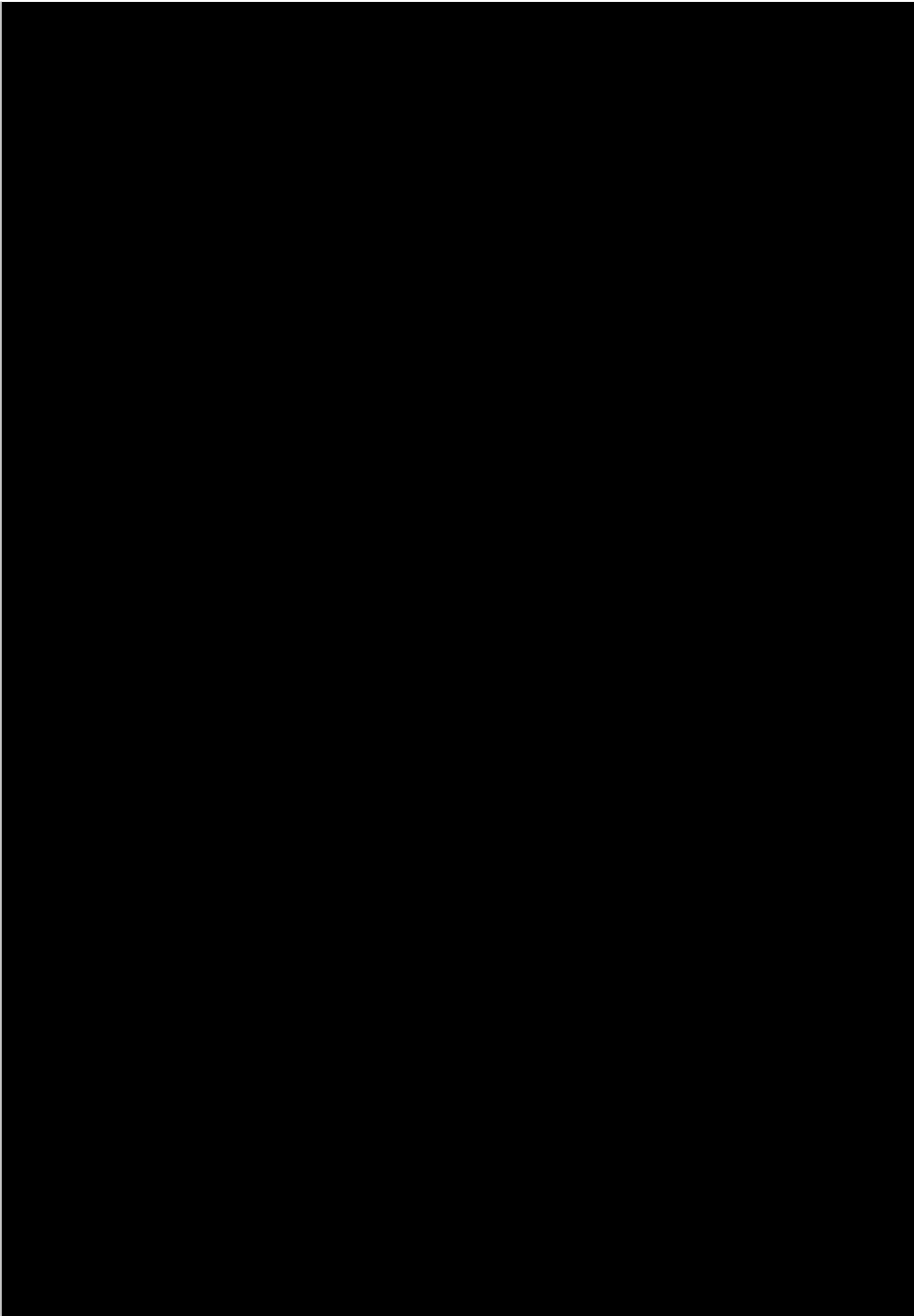


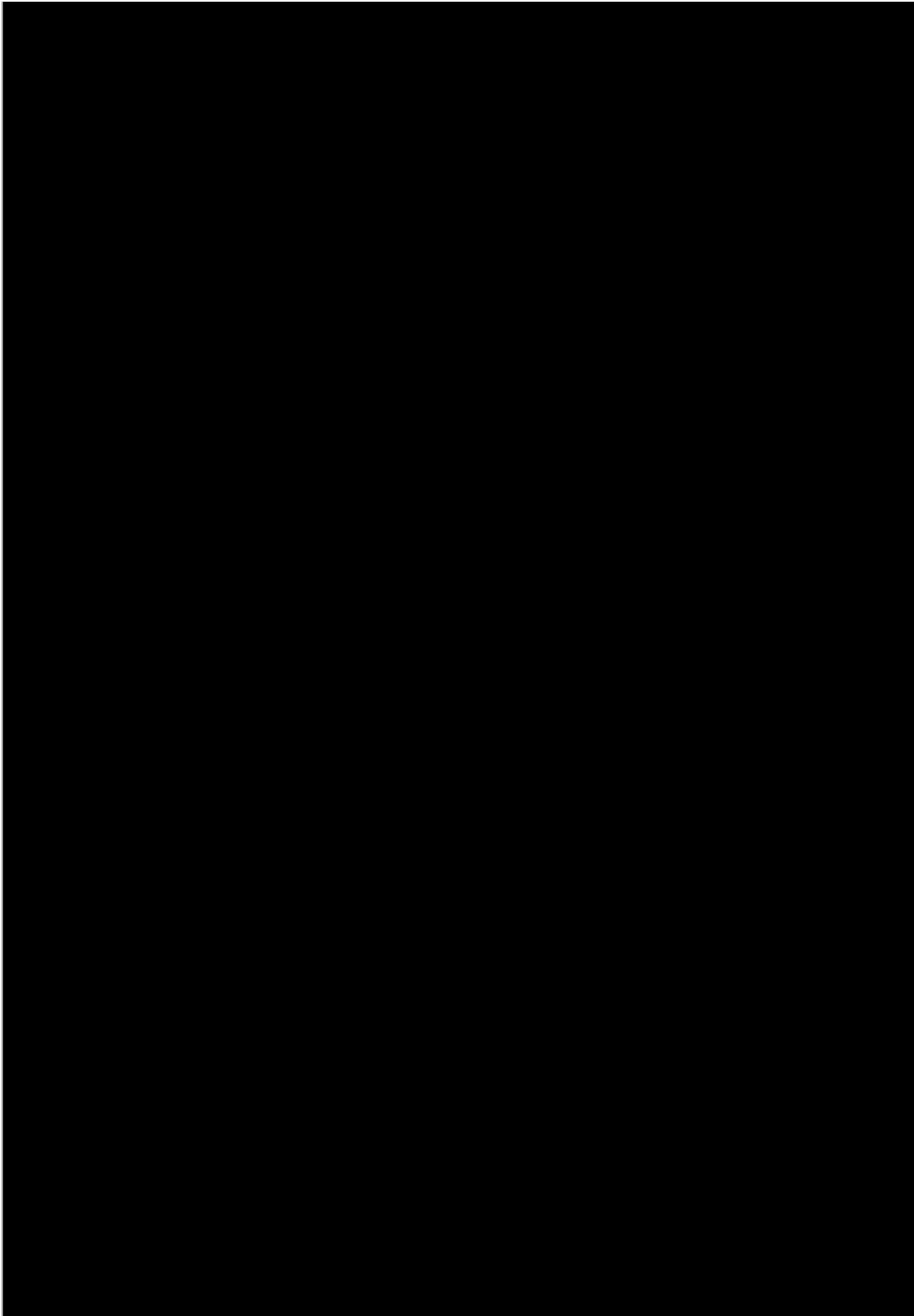


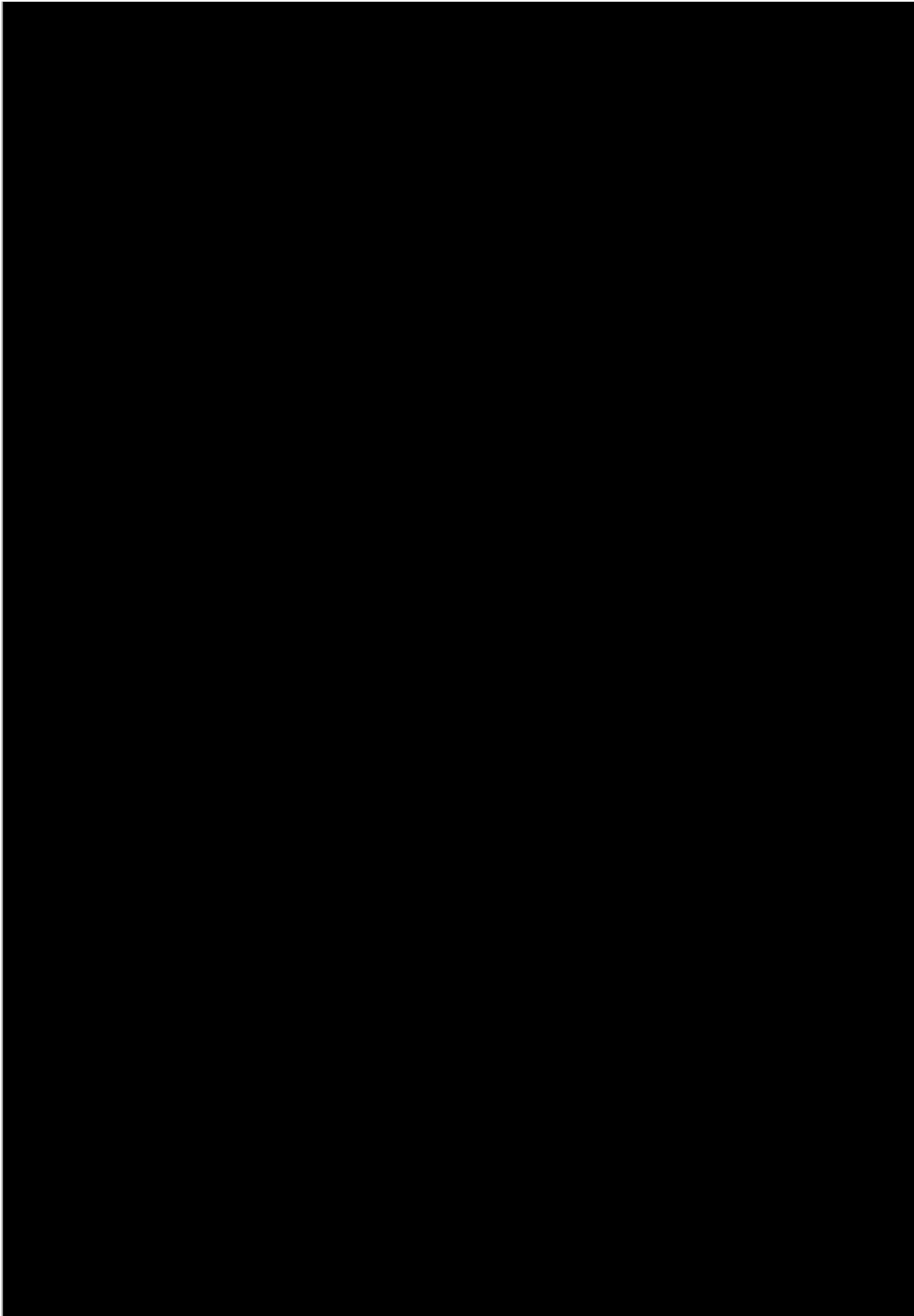


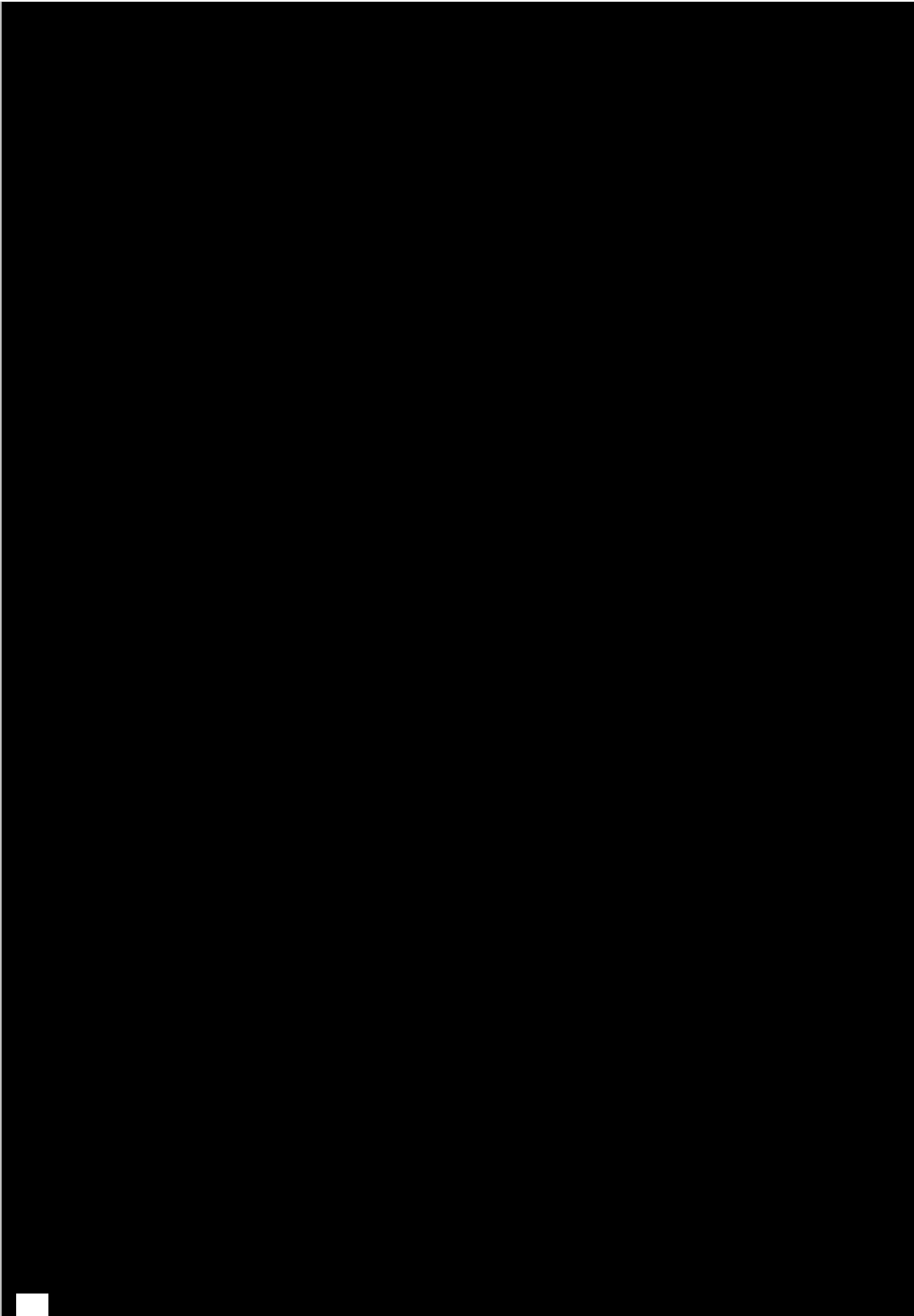


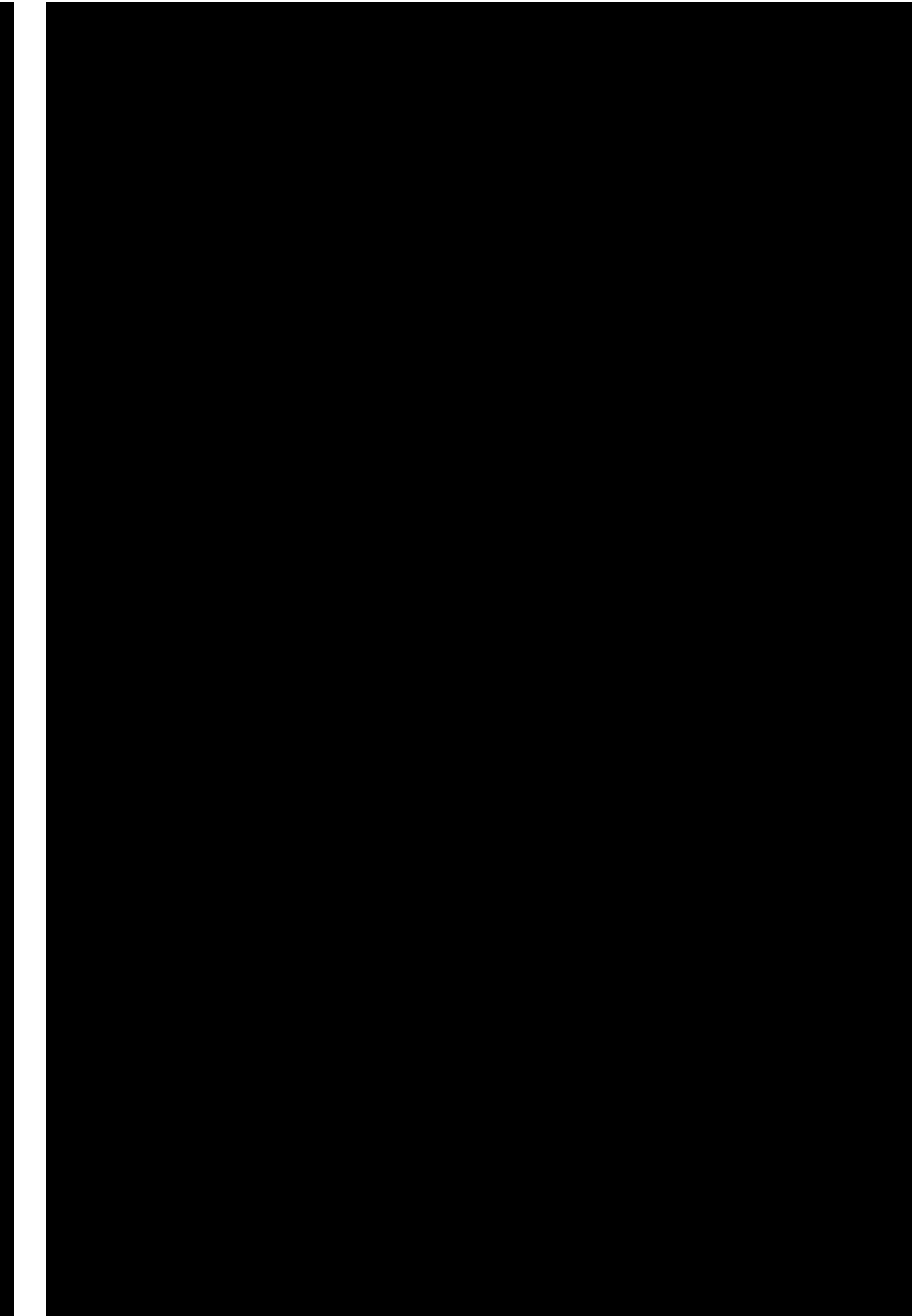


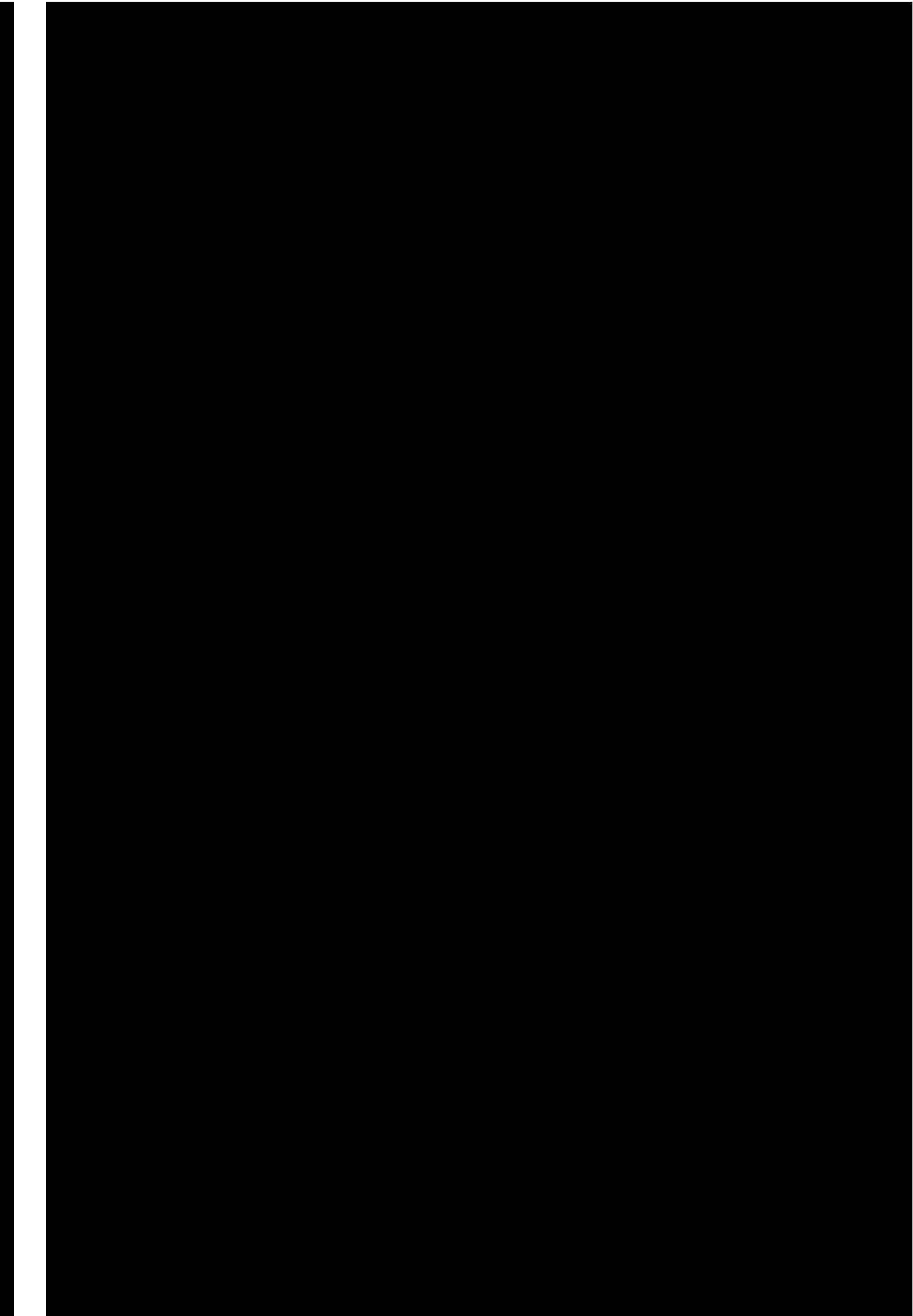


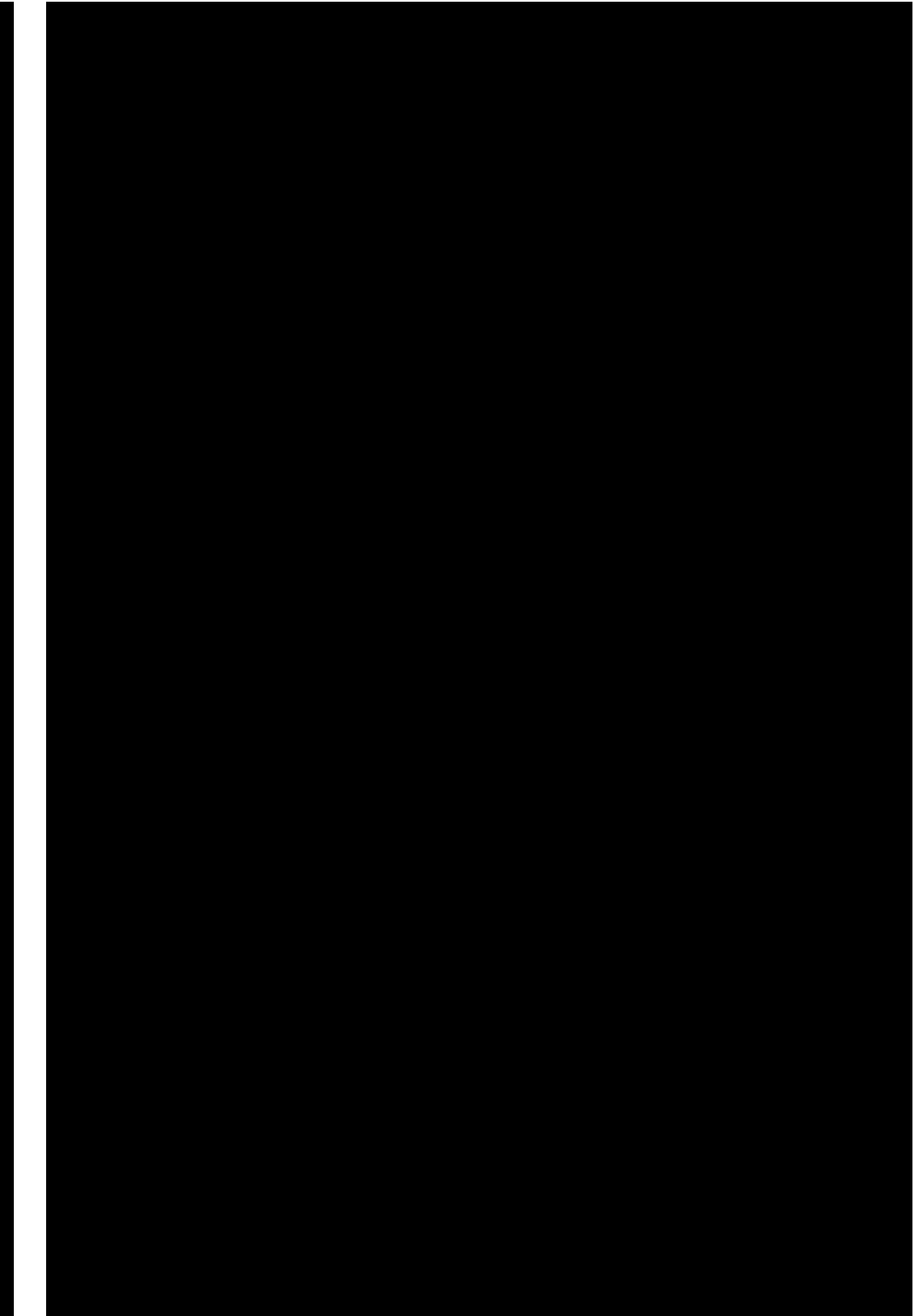


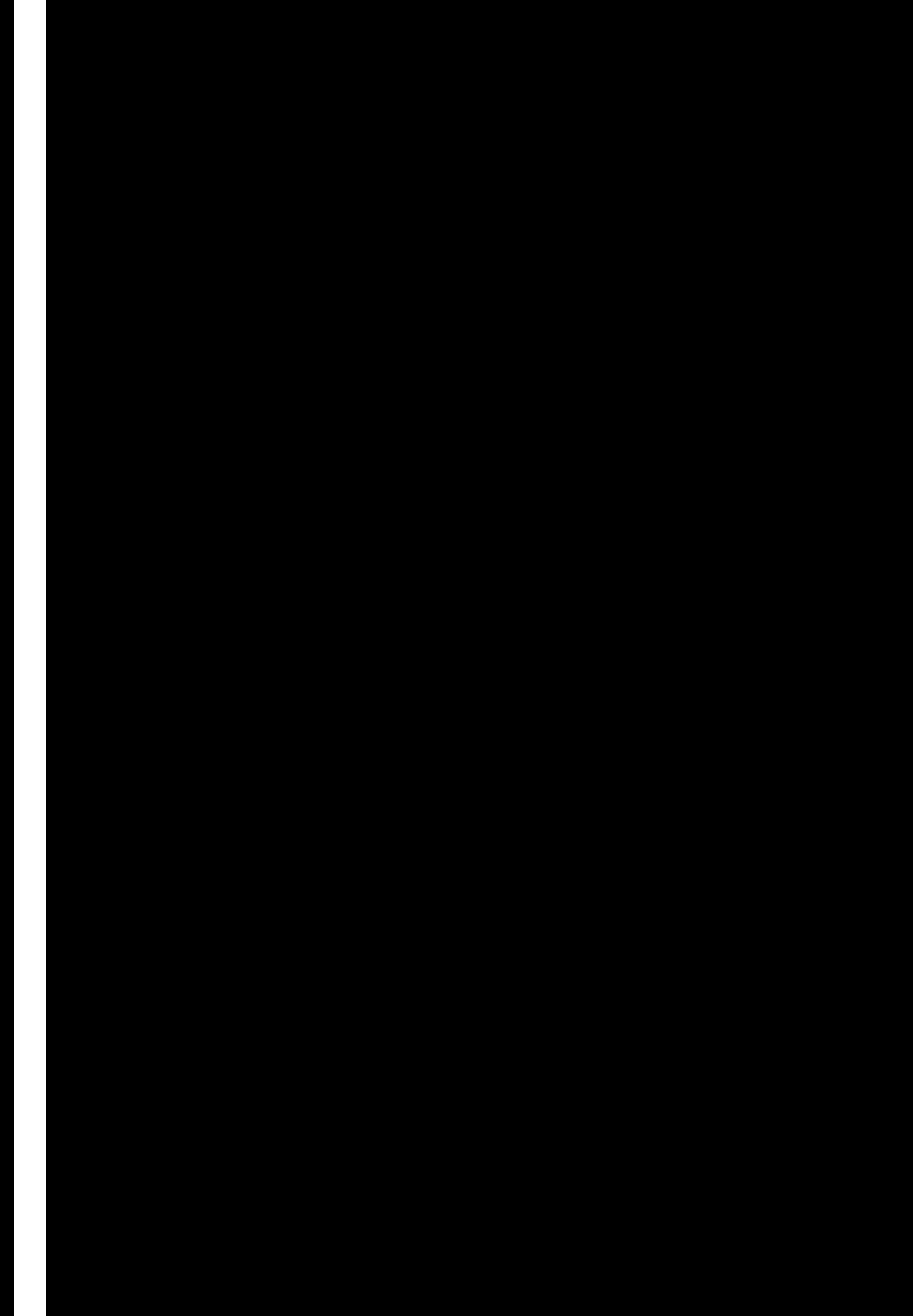


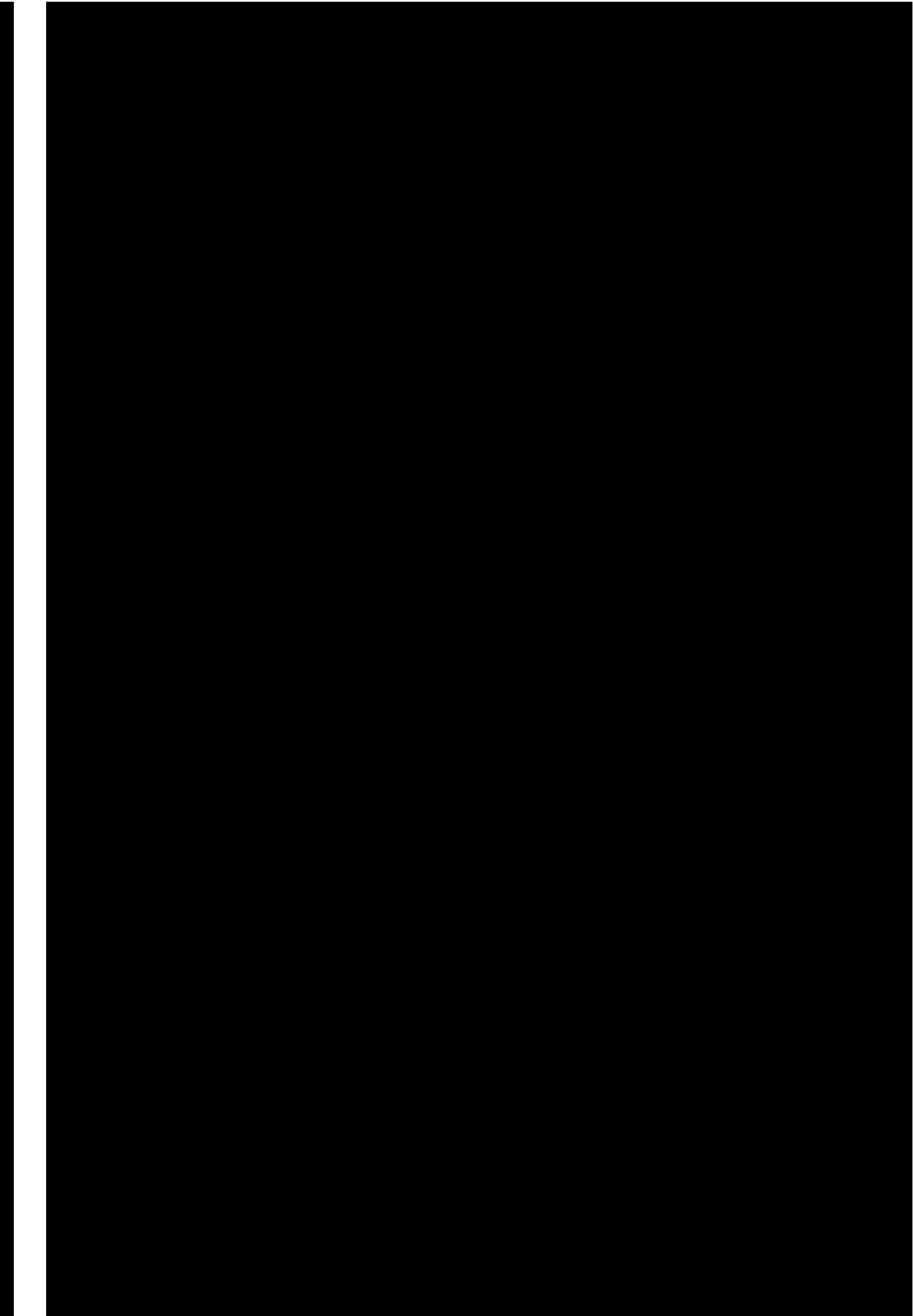


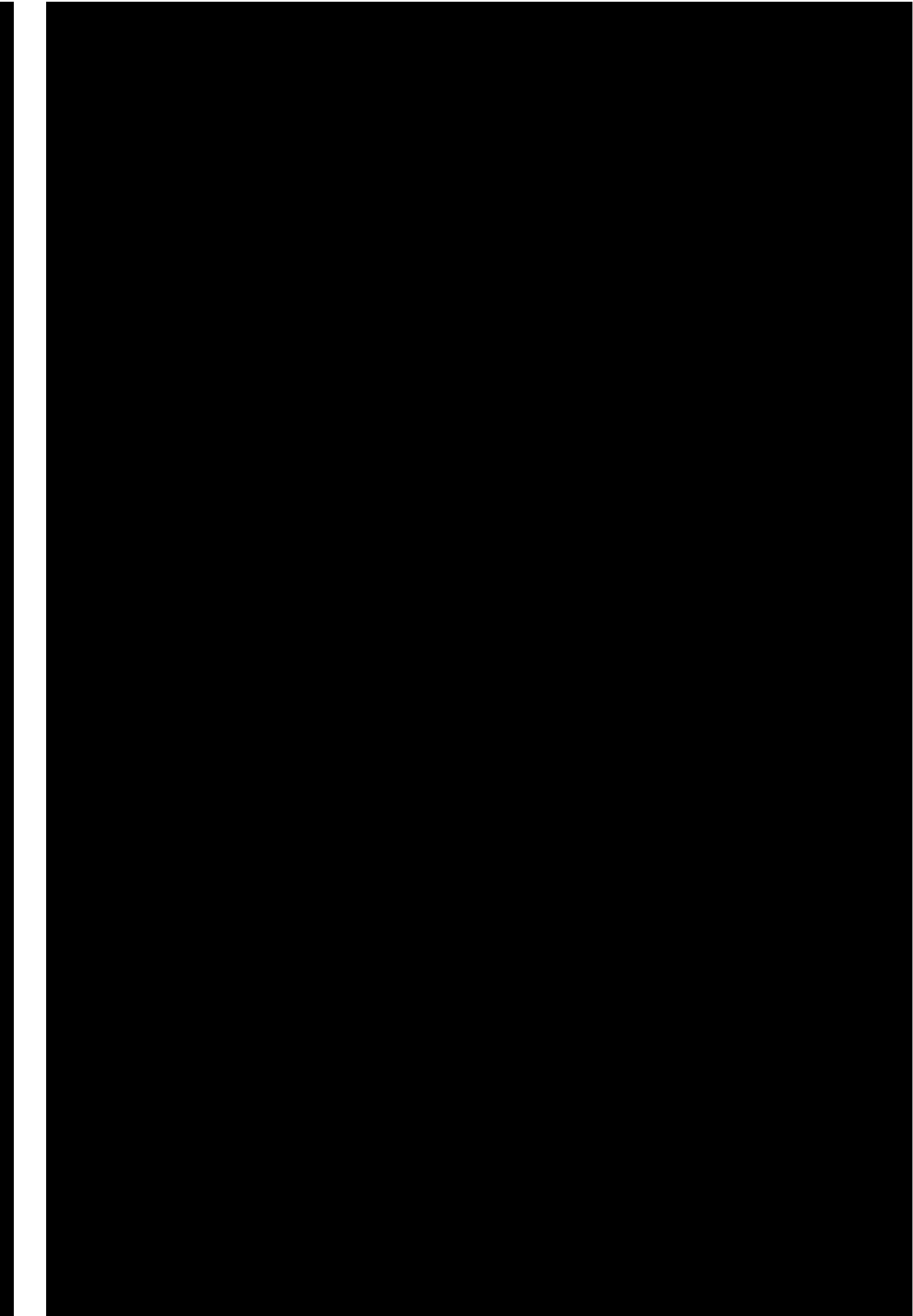


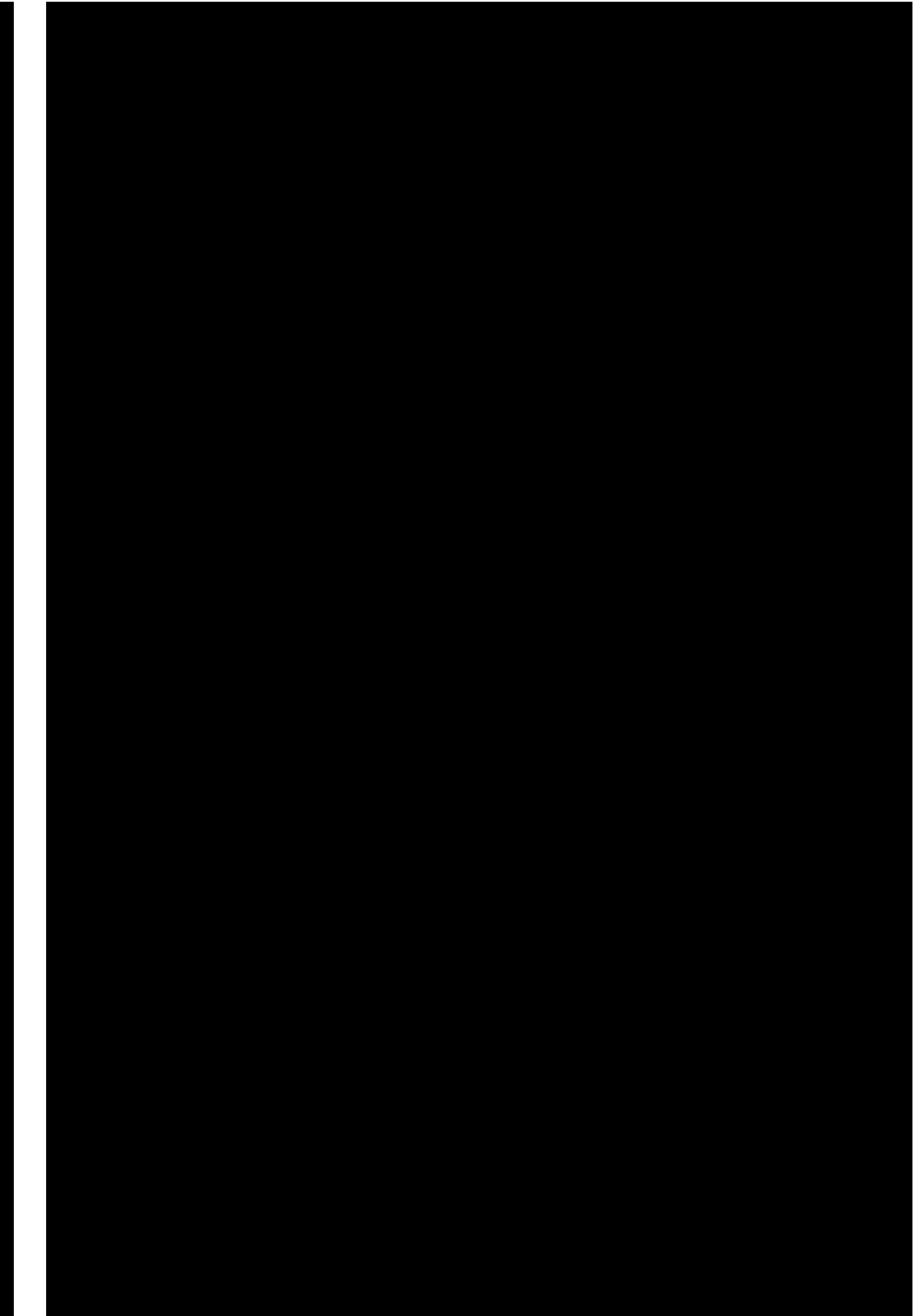


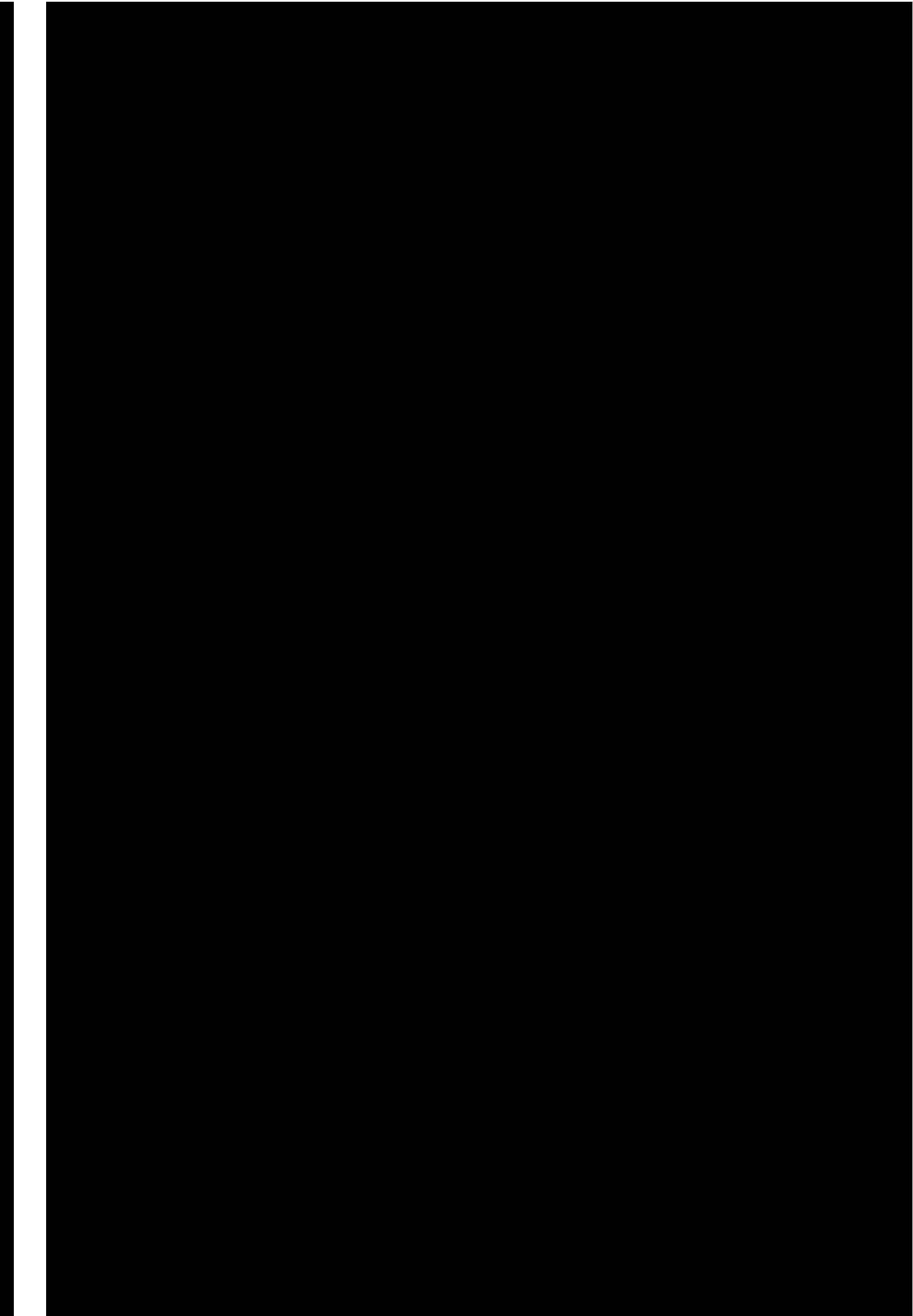


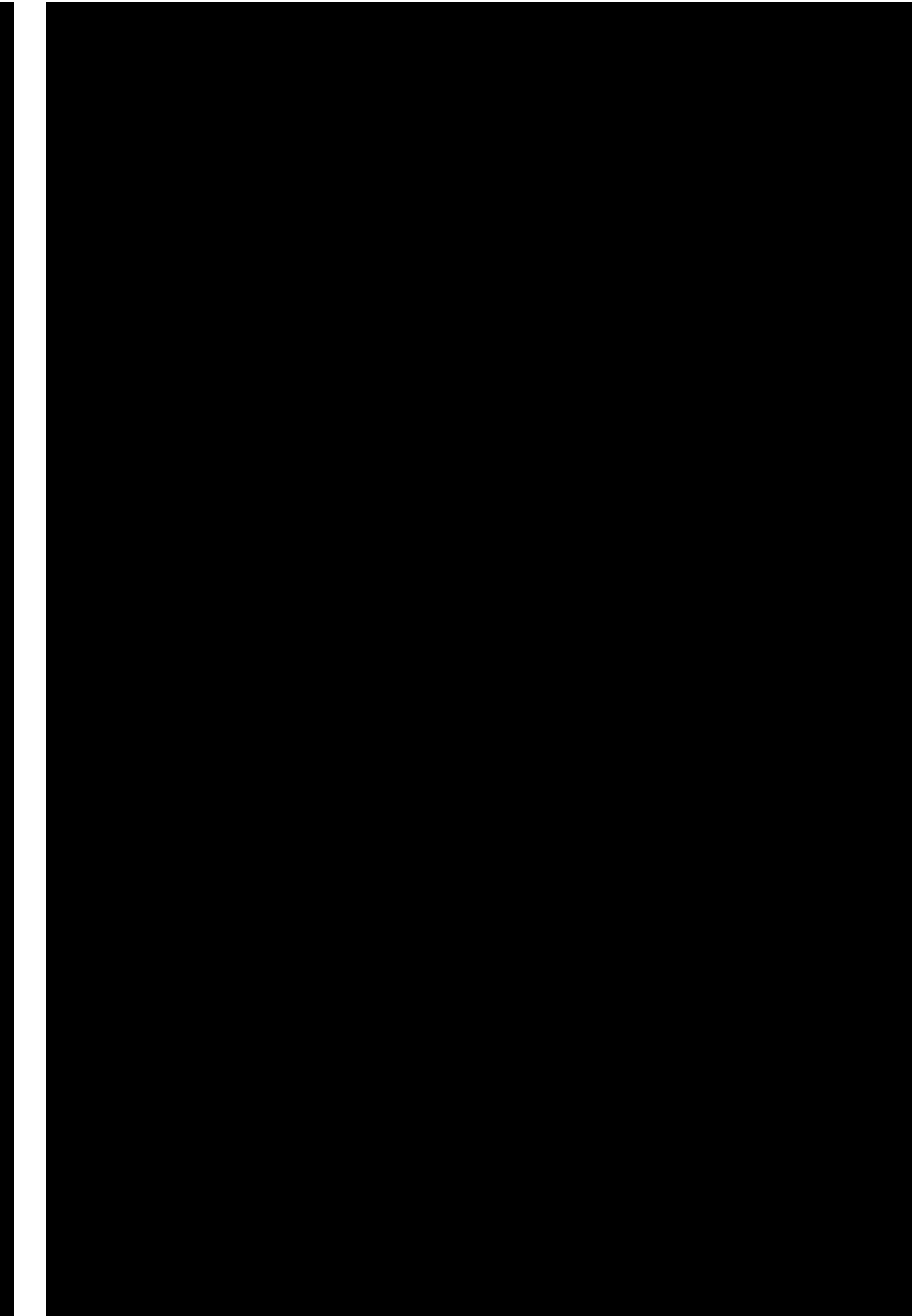


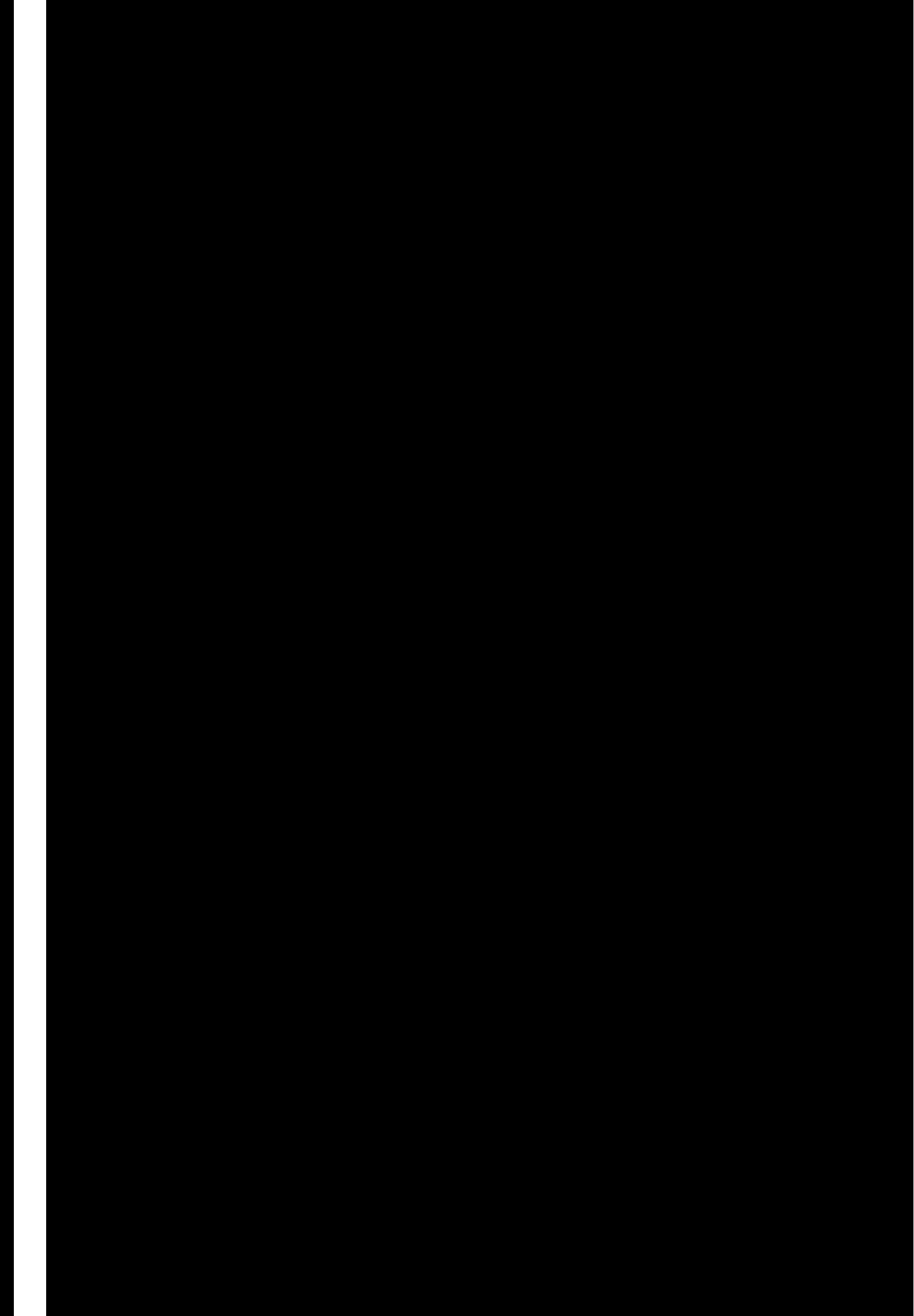


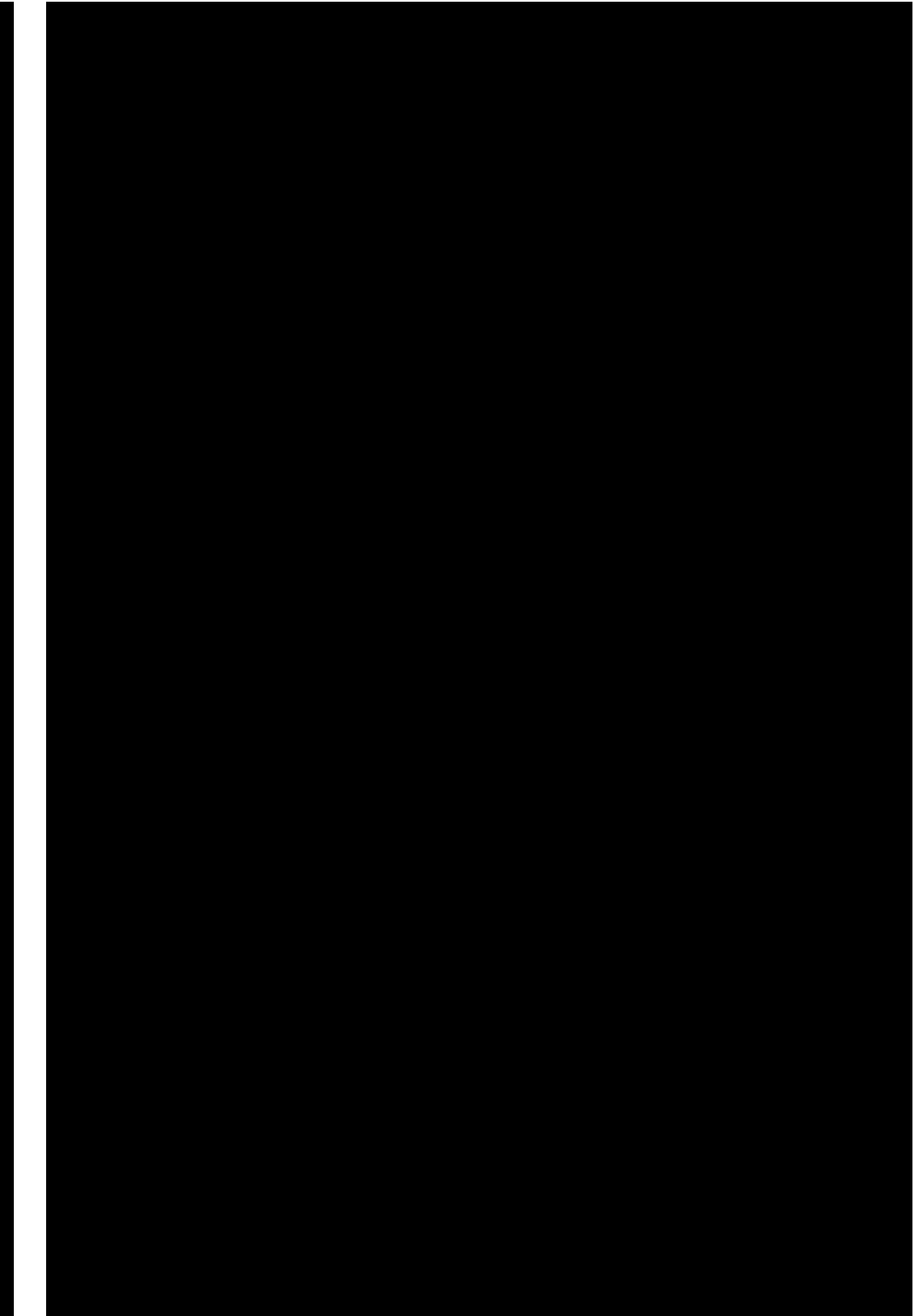


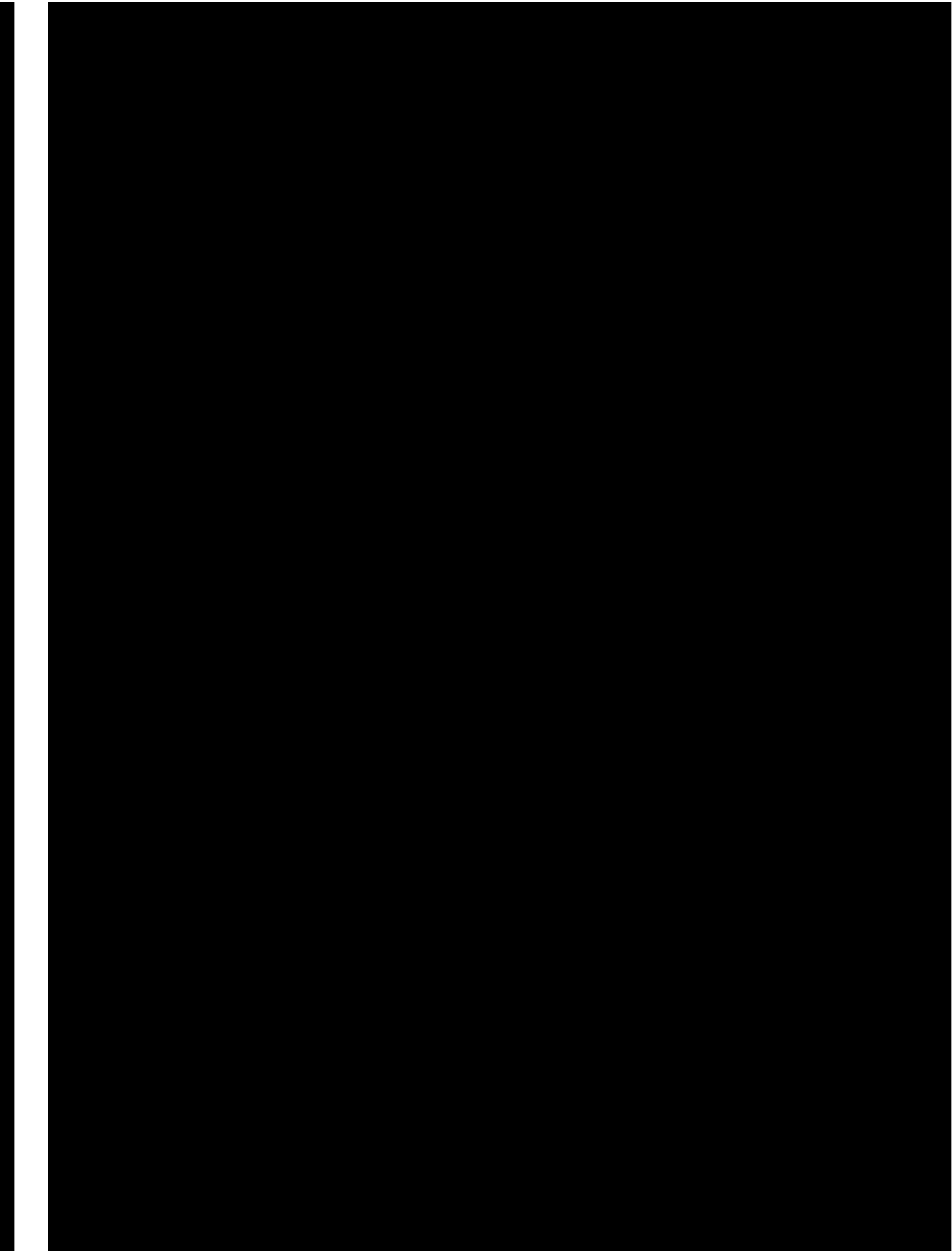














Supplier and Distributor leaders
not **its adoption and performance of**
organization but rather to "enhance

candid conversation between
to evaluate performance while
is a scorecard; instead, **the Roles**
3-tier distribution network.



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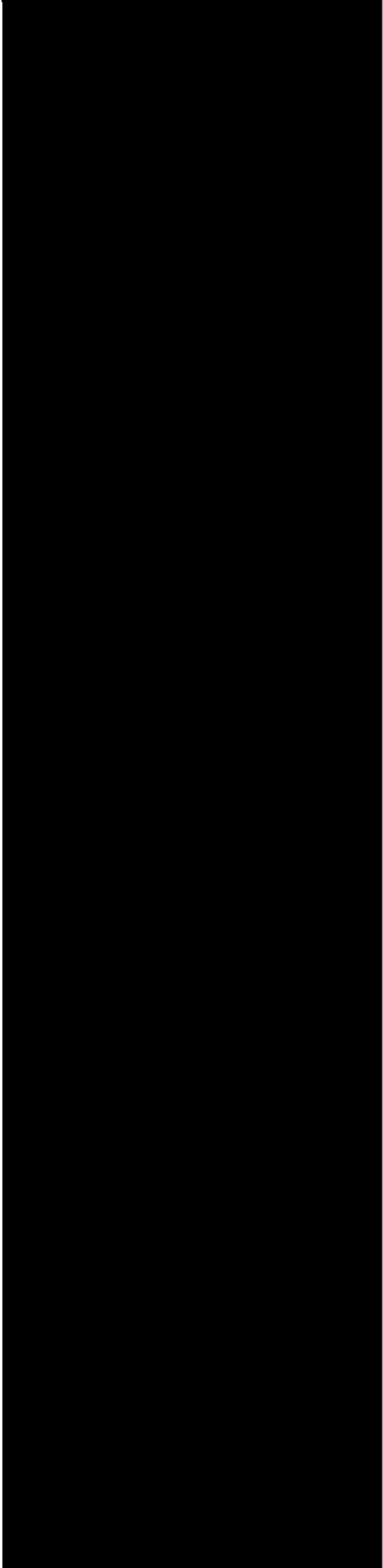
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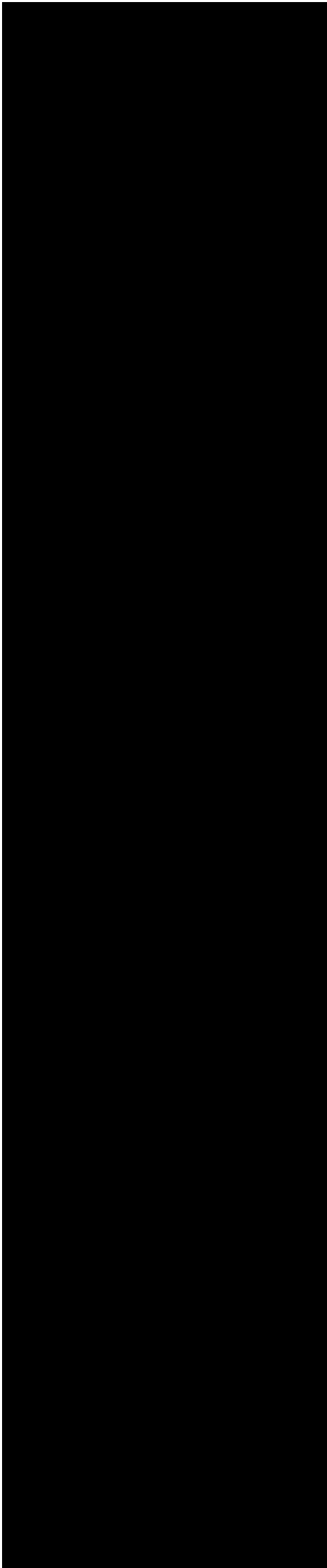
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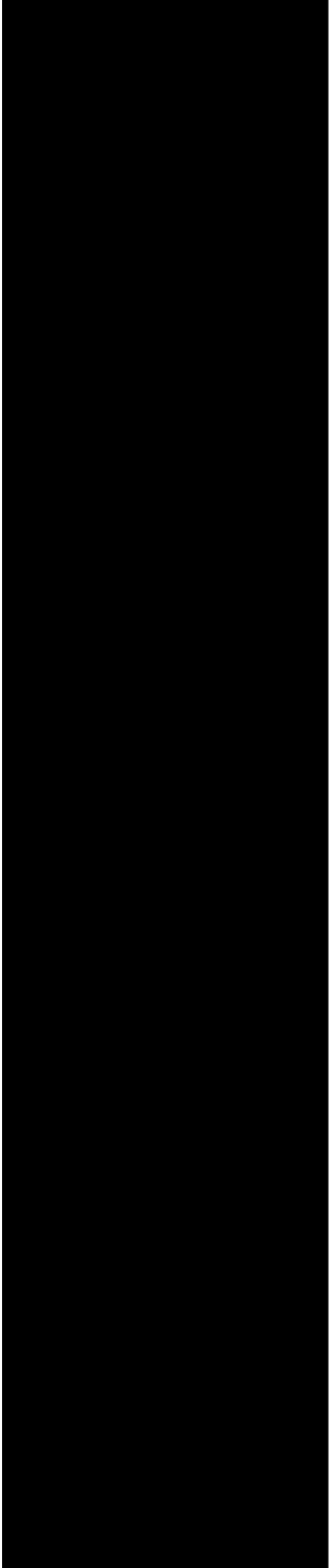
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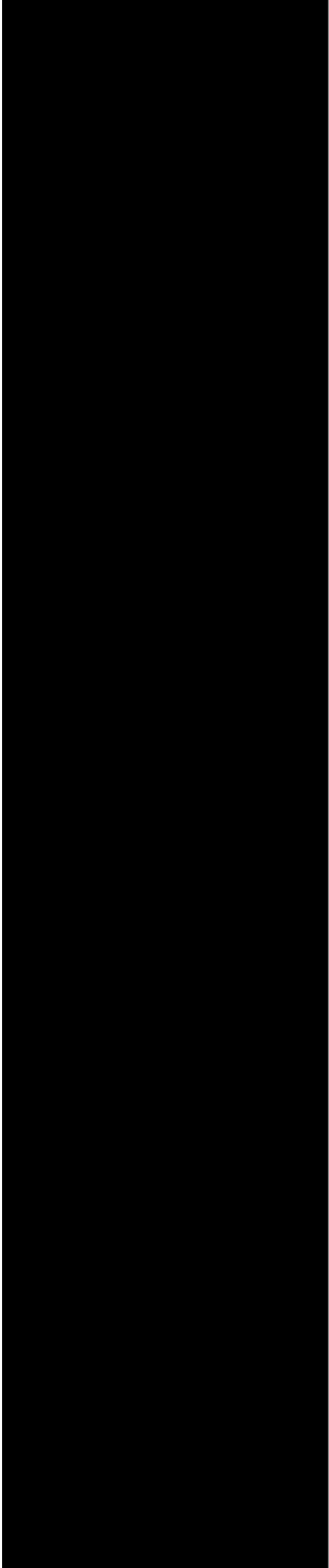
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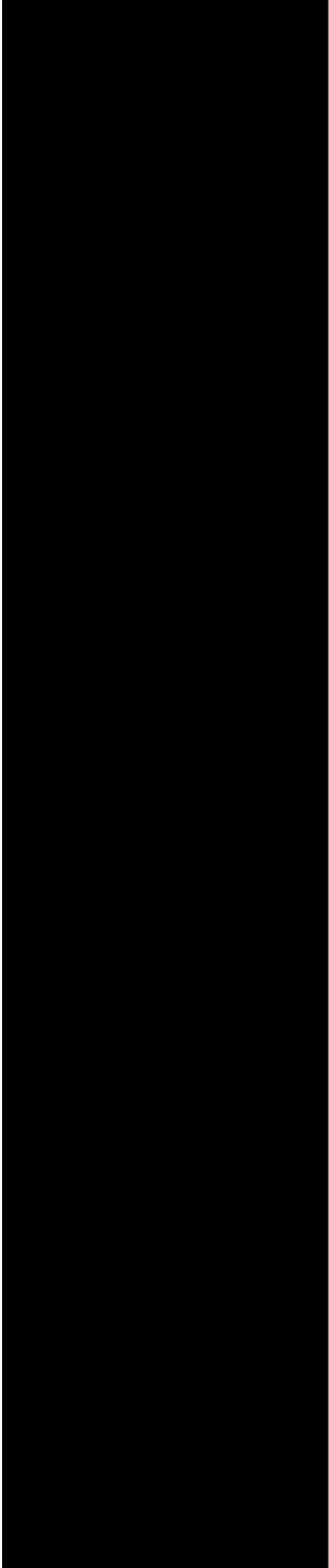
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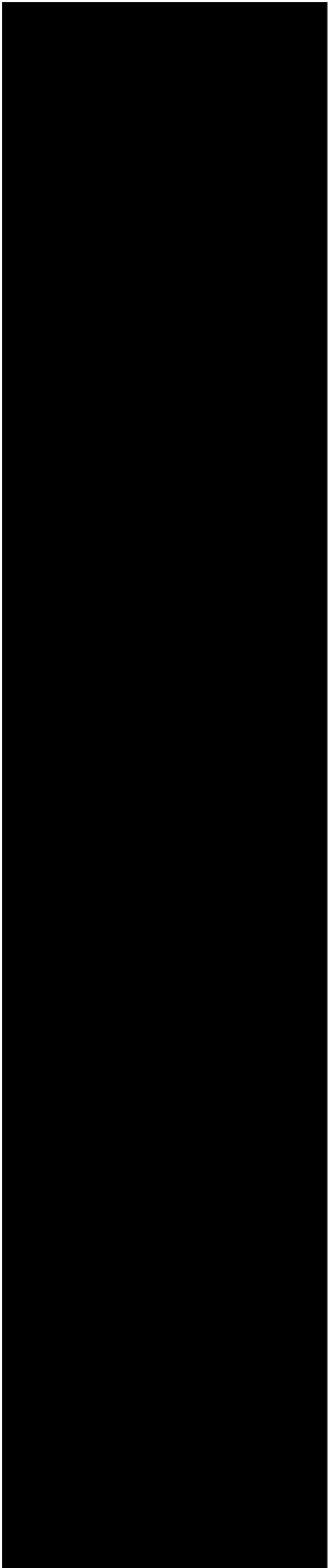


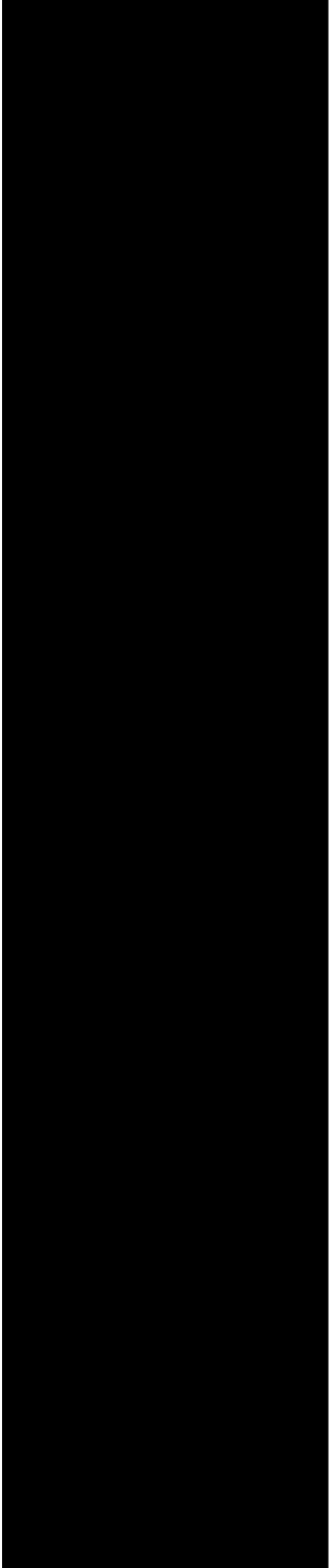


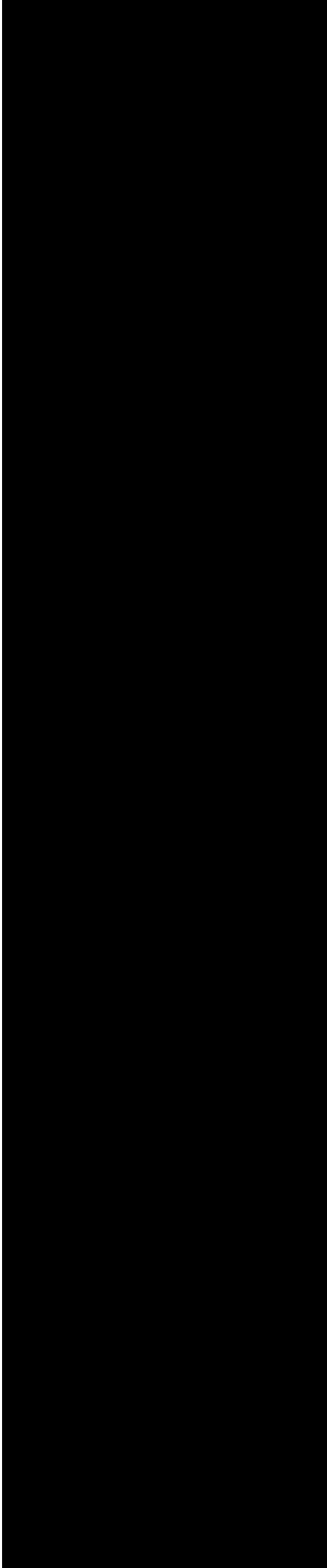


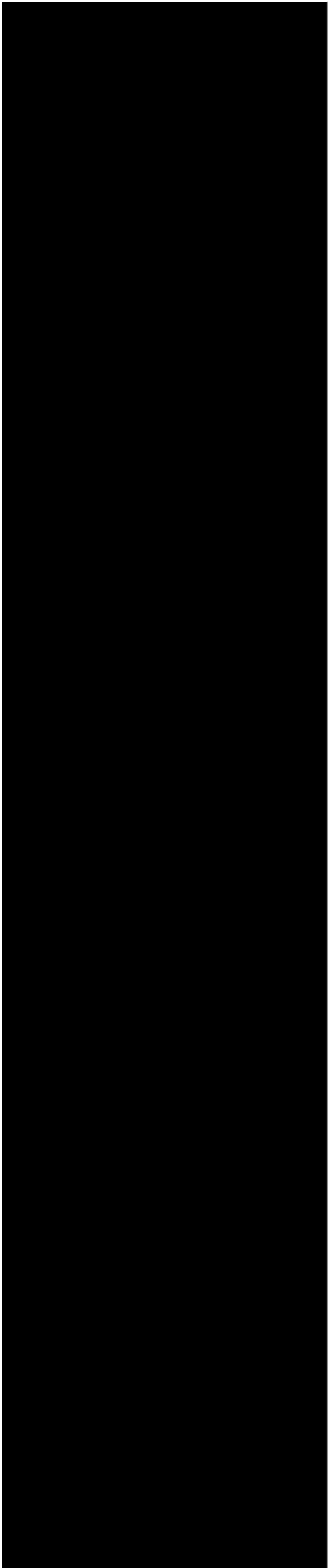


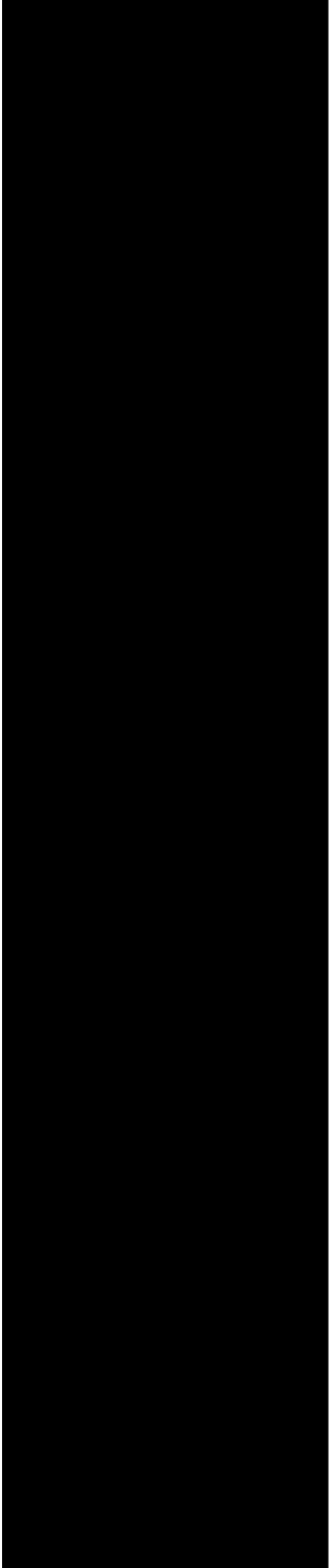


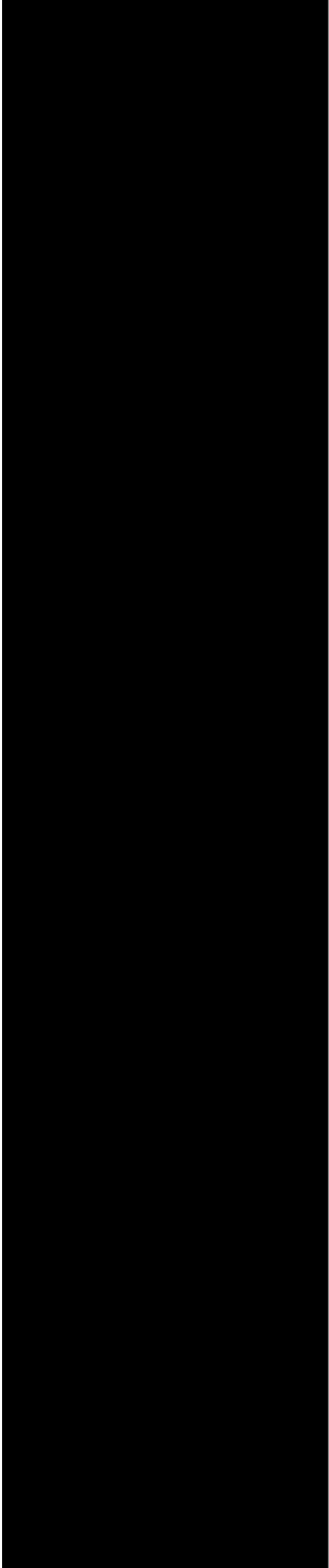


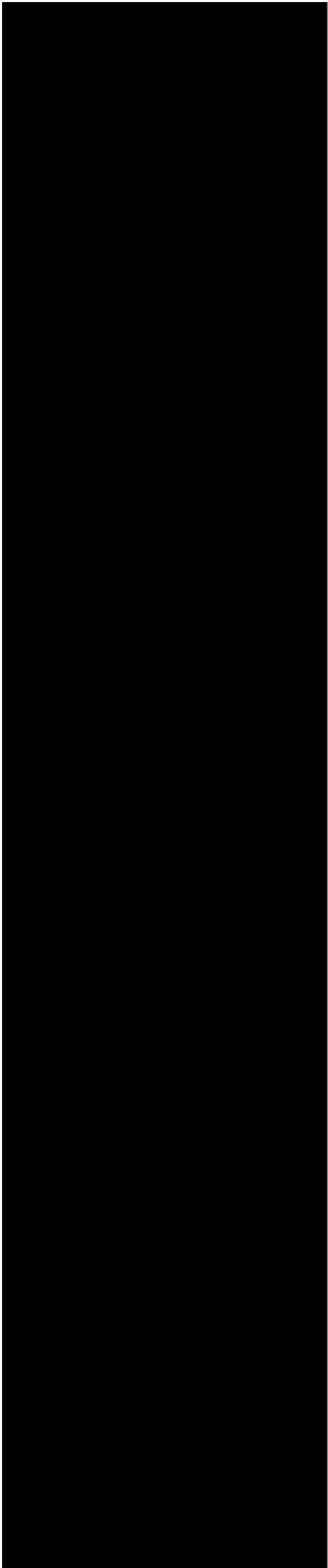


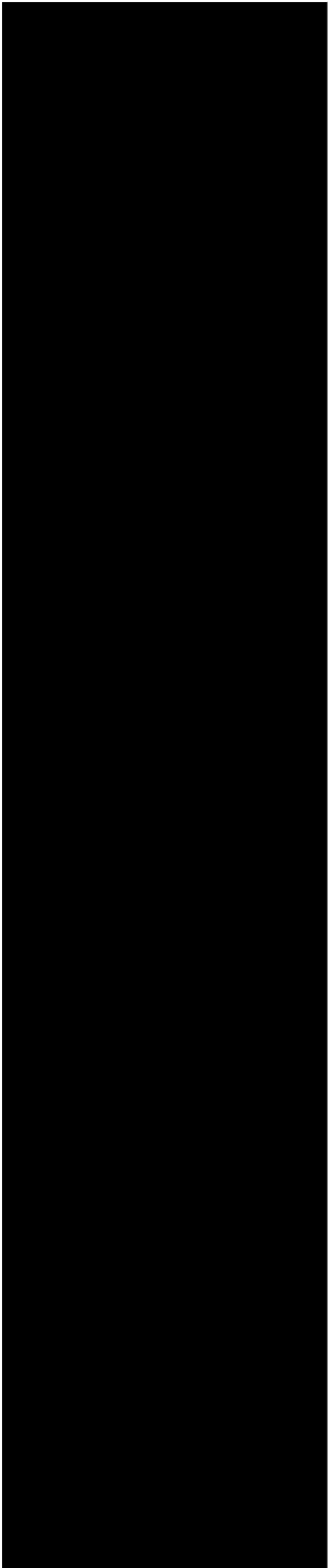




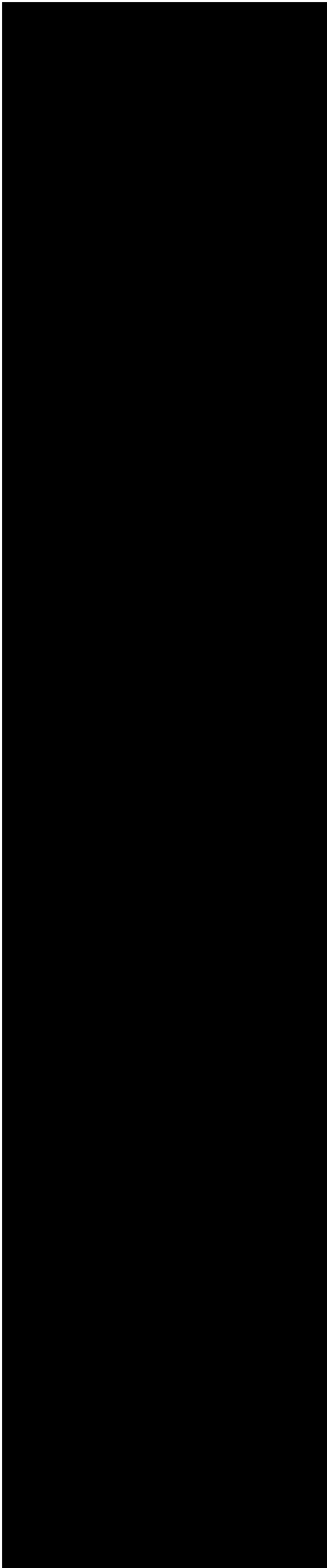


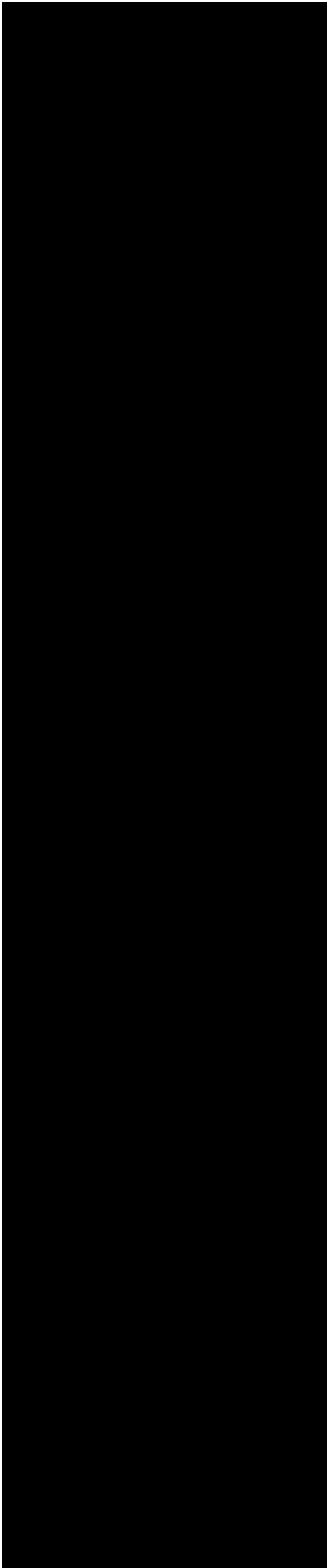


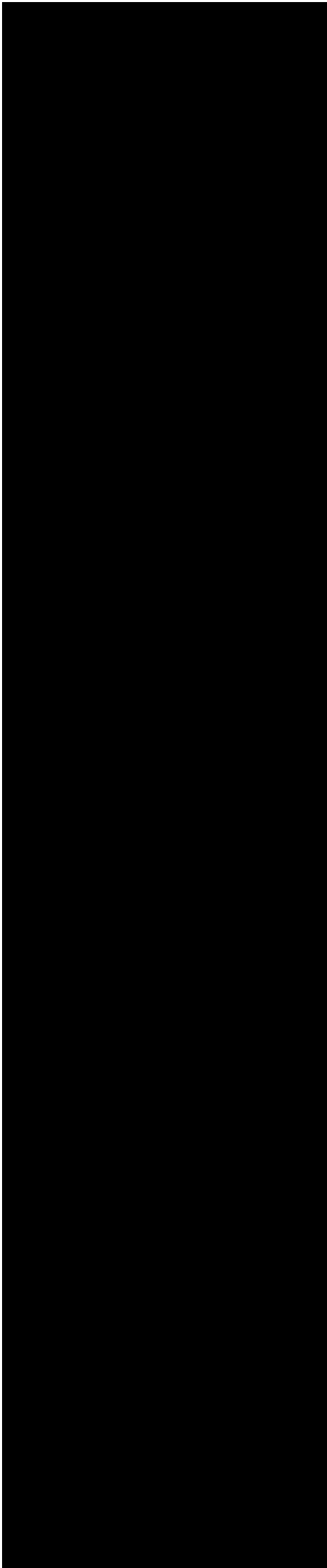


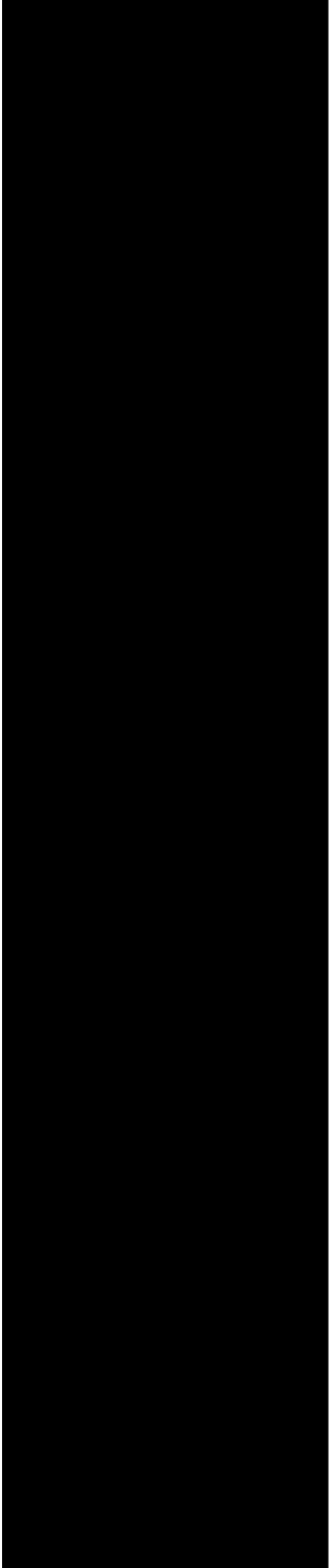


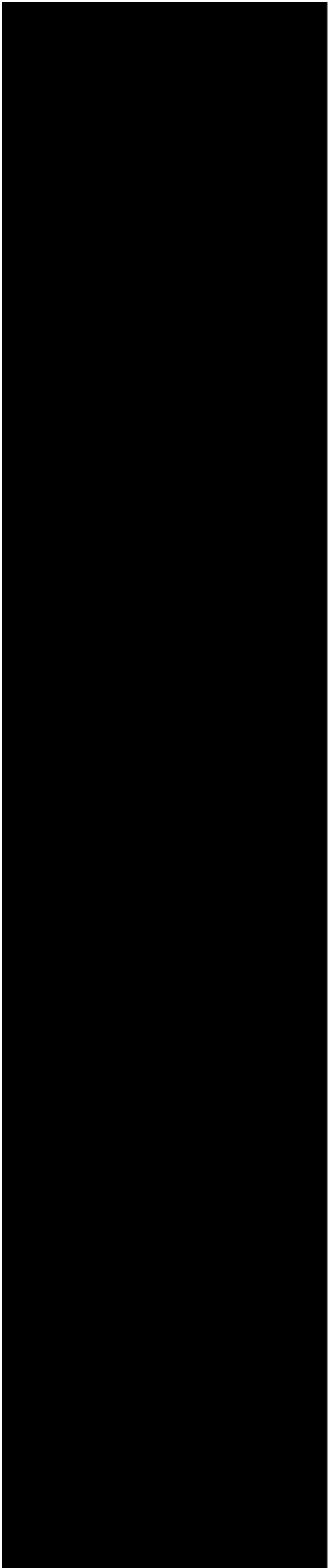


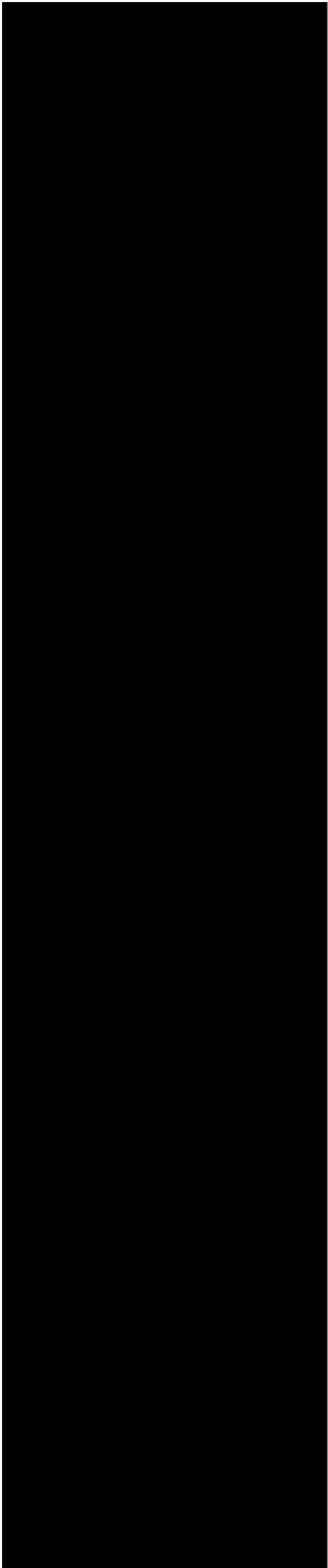






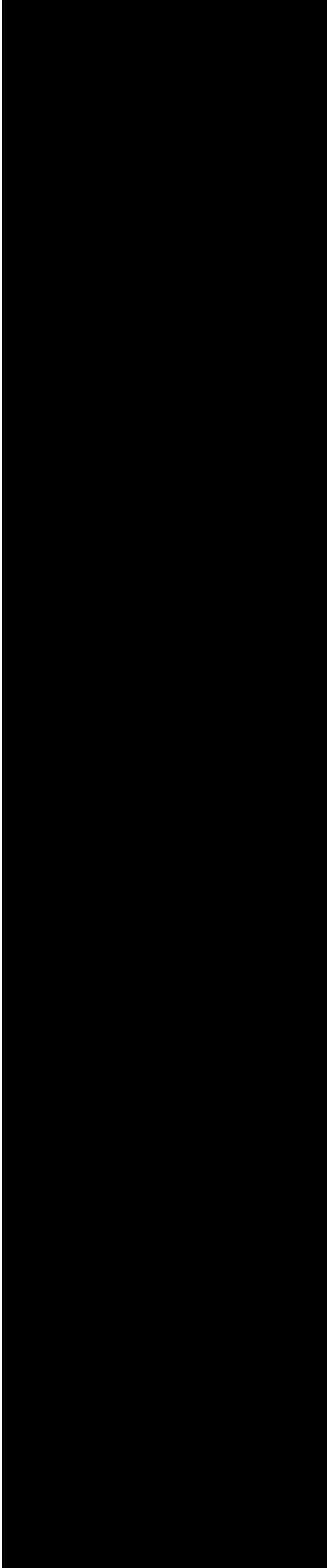


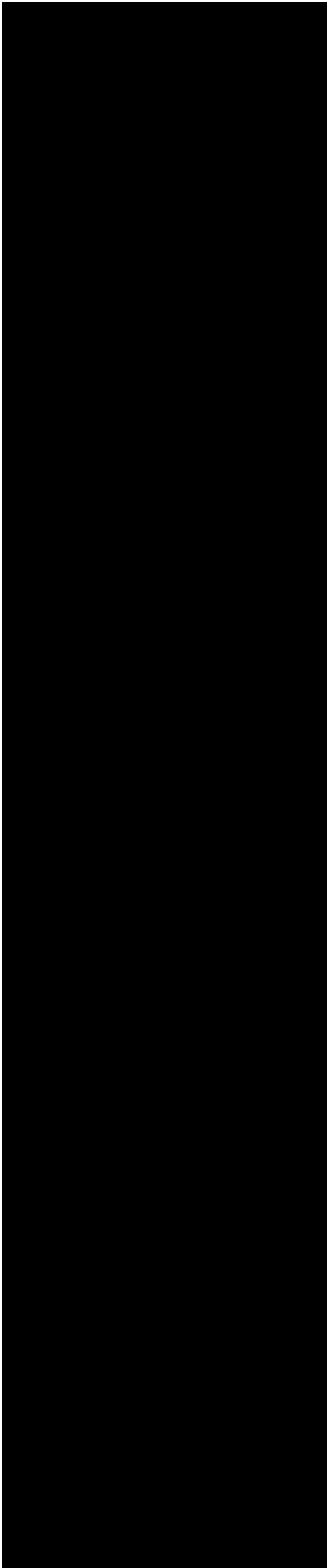


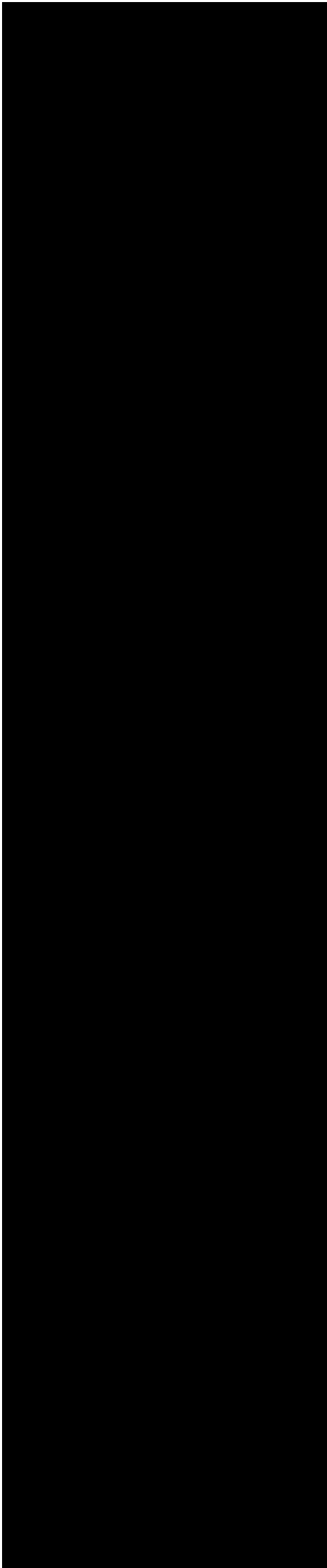


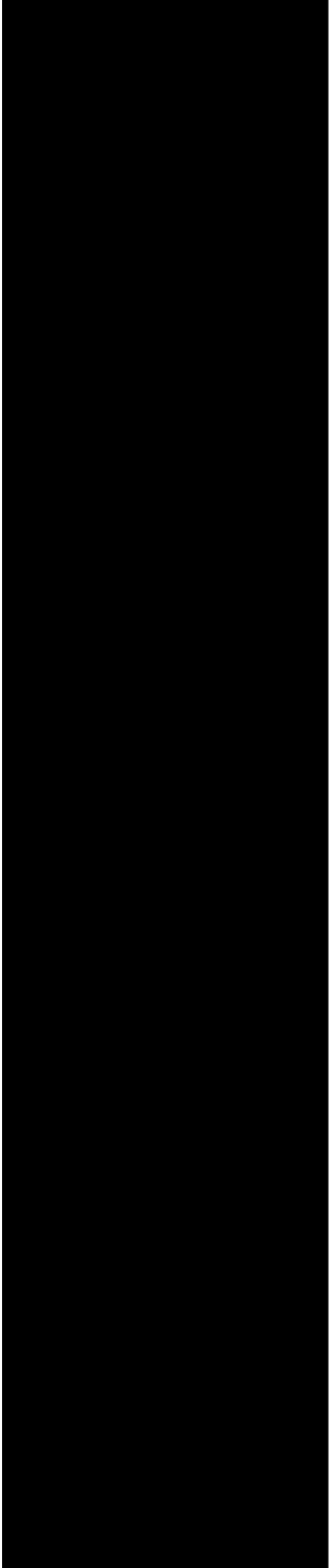


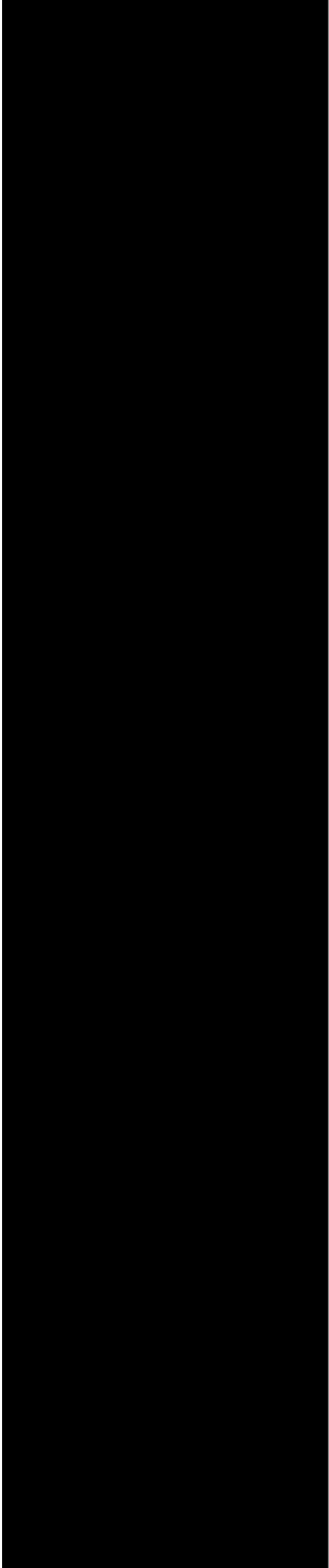


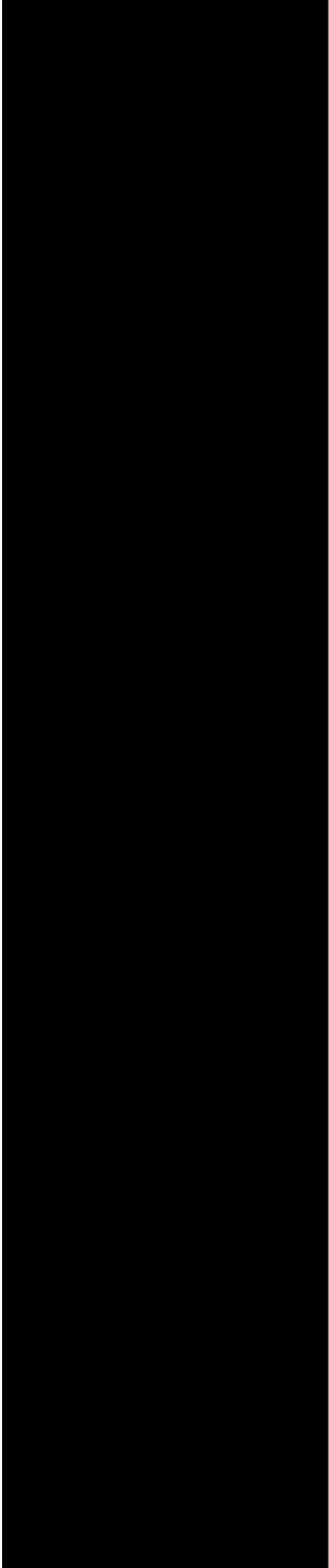






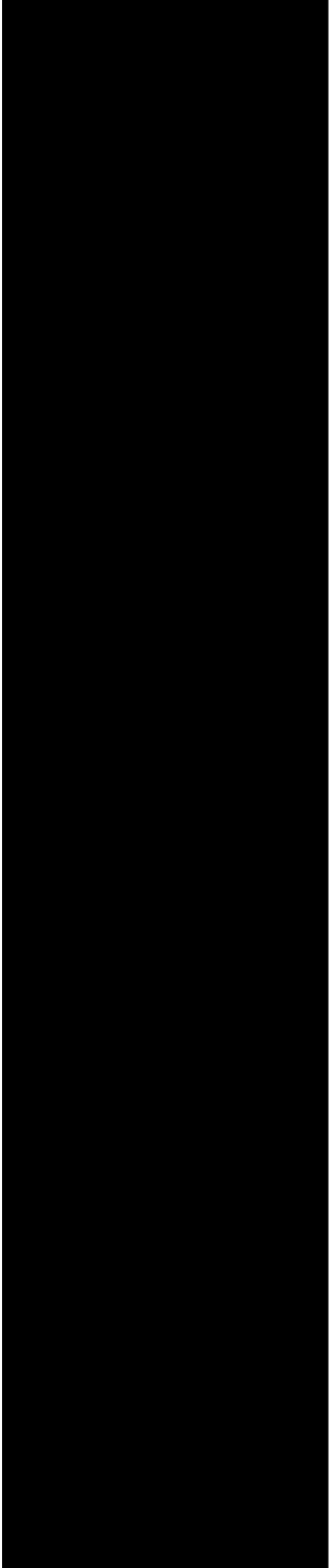


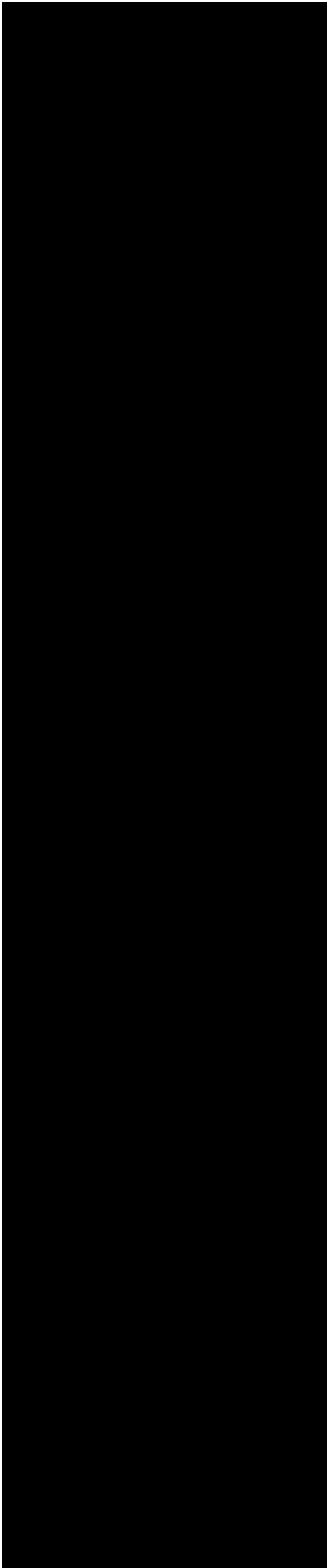


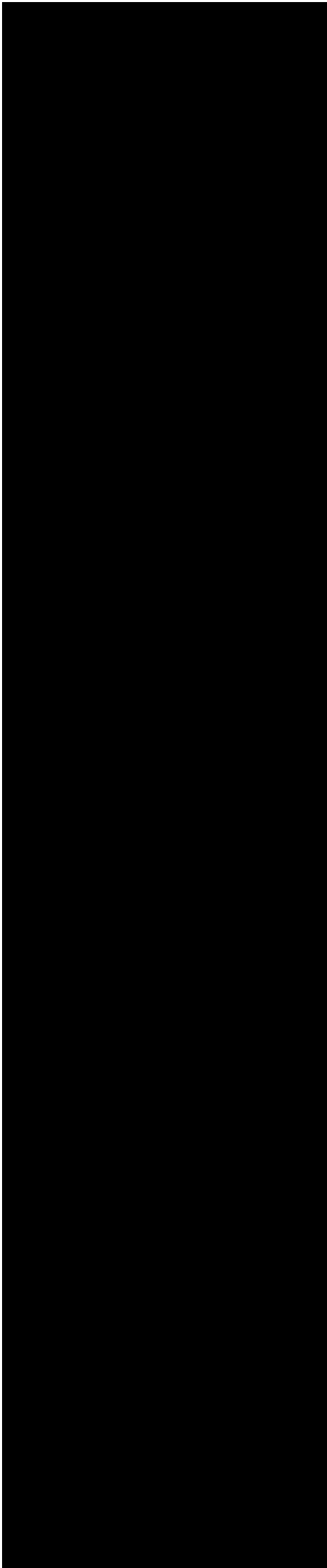


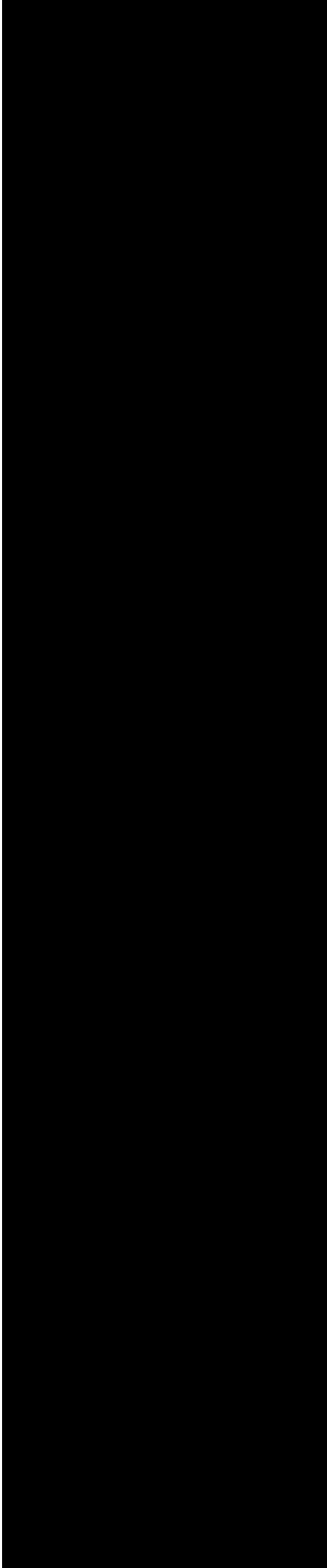


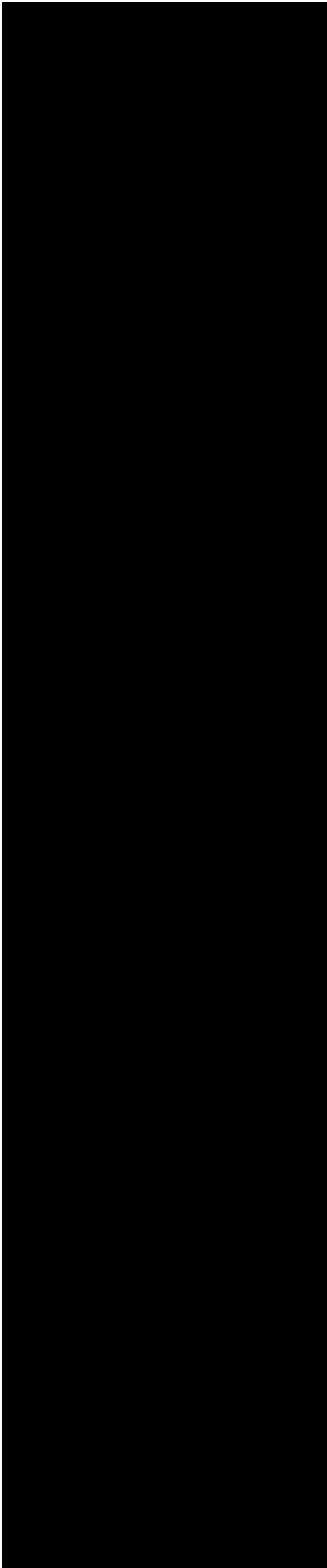


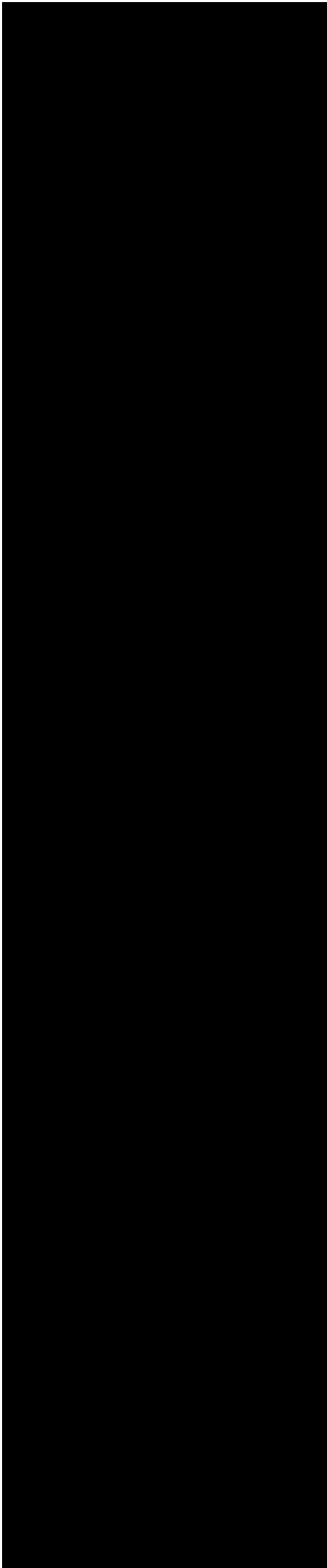


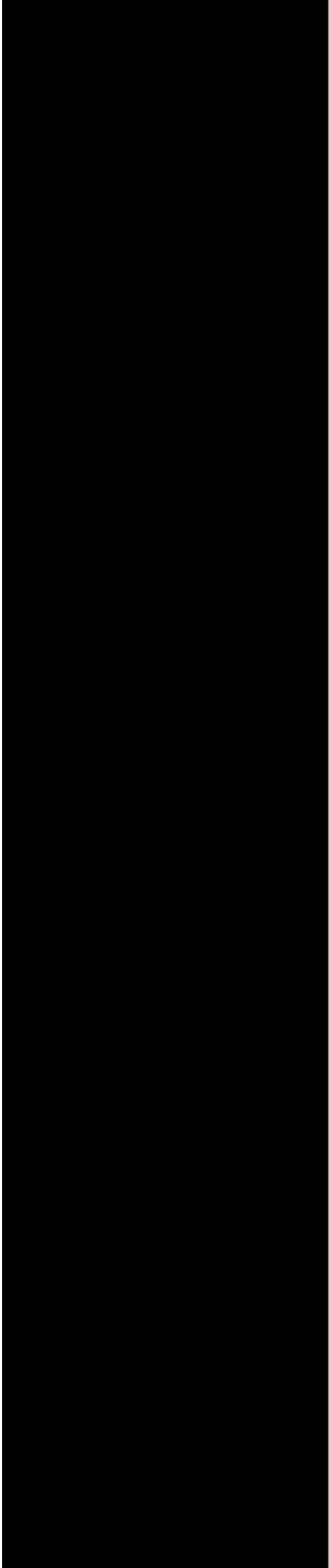




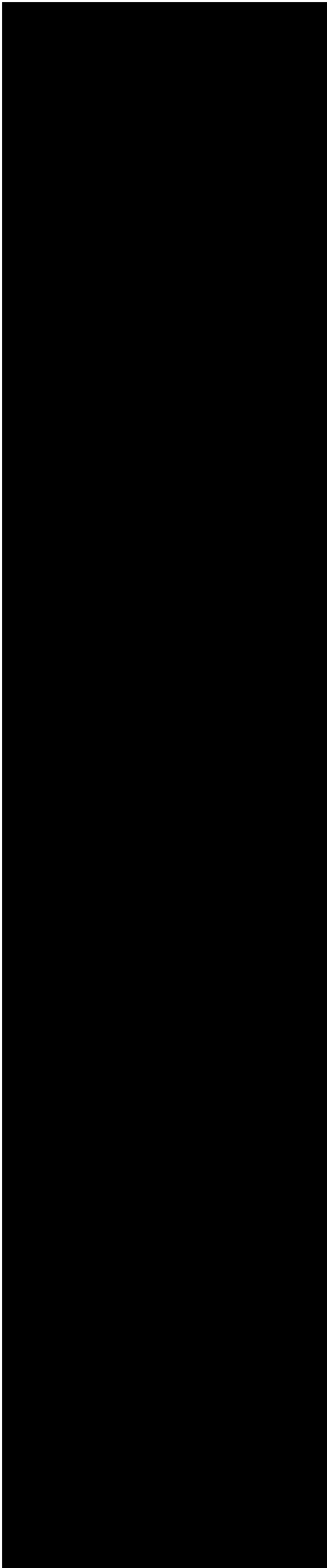


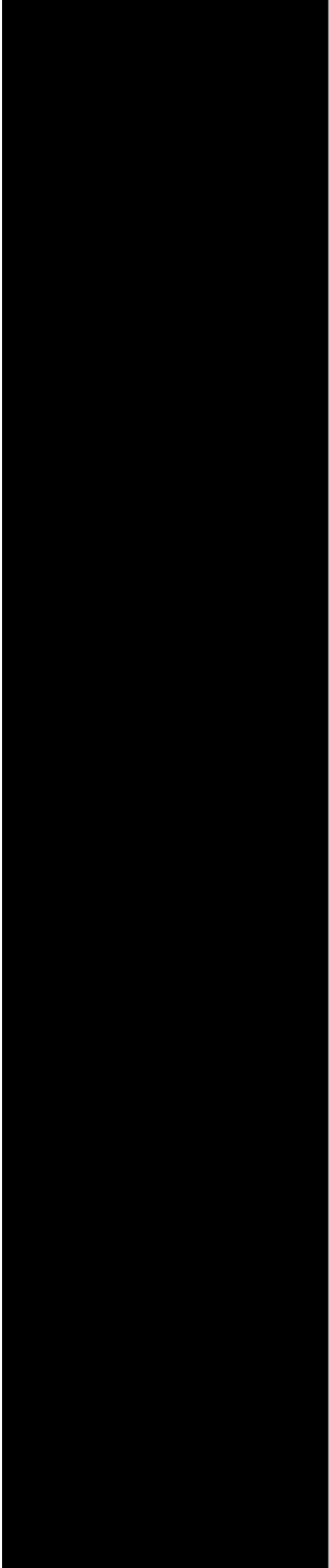


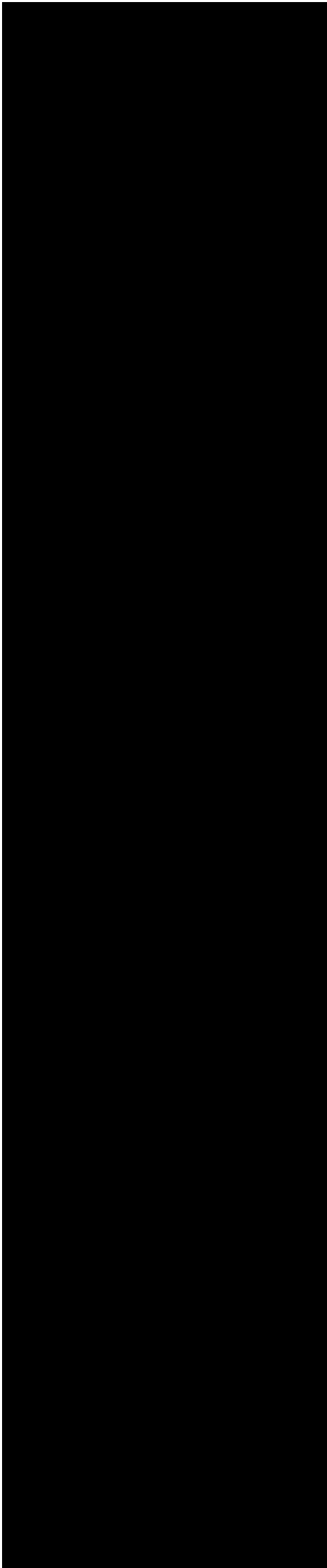


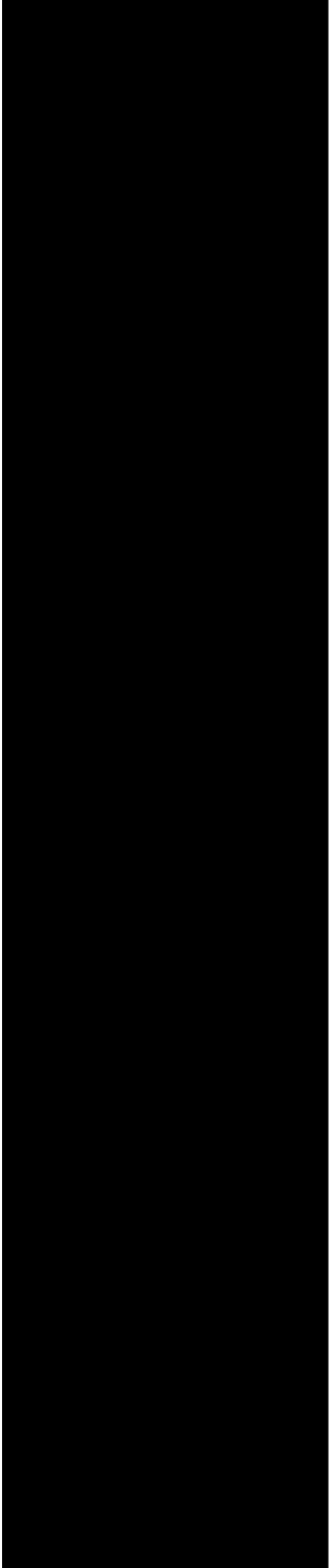


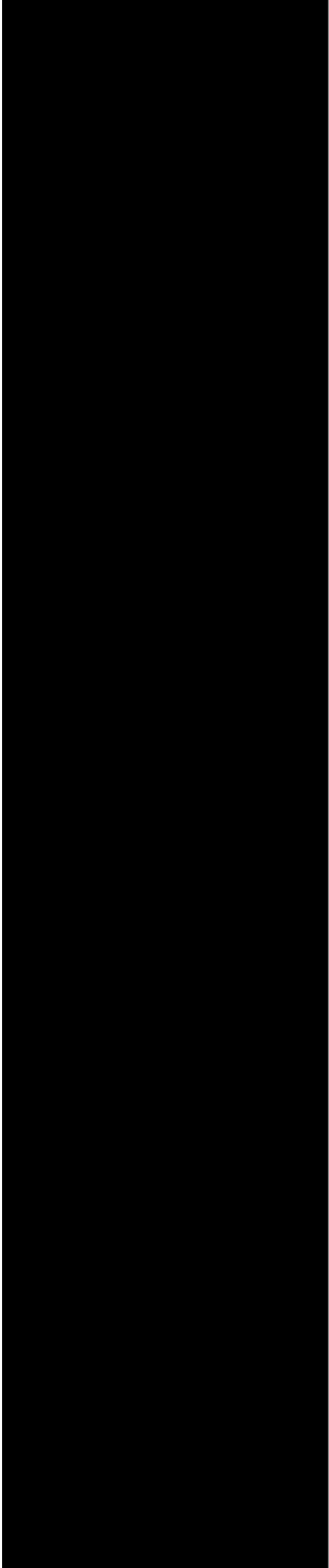


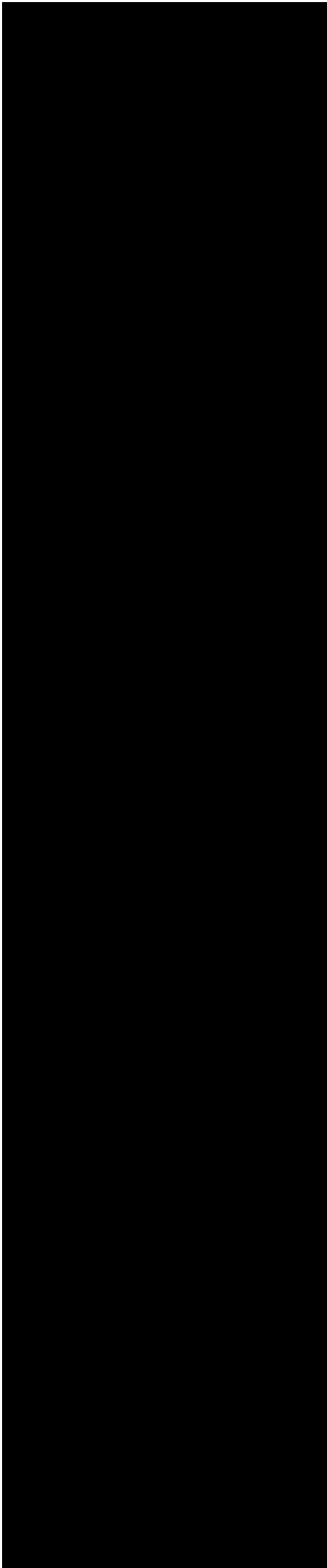


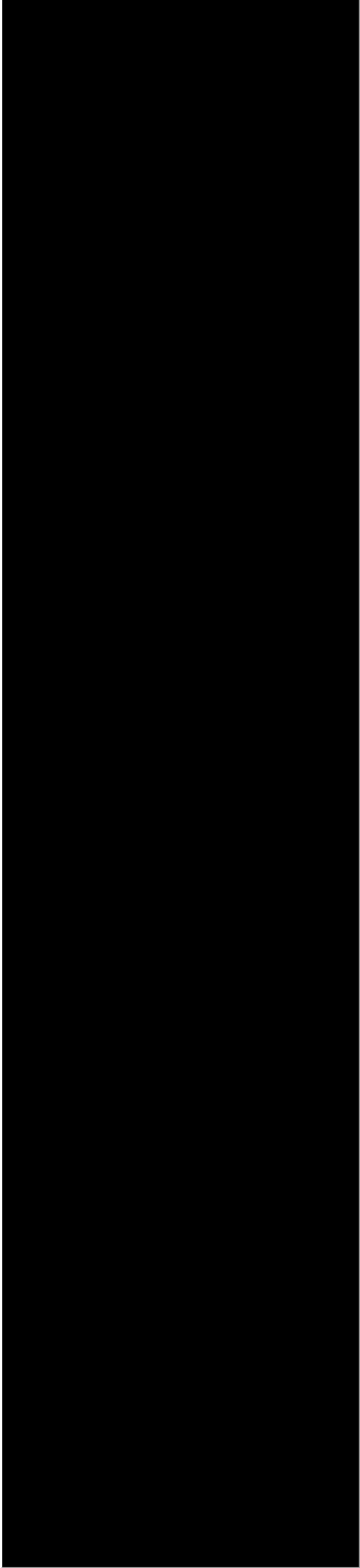












		Senior Leadership - Dist		
		Senior Leadership - Sup		
		Sales Management - Dist		
		Sales Rep - Sup		
		Operations		
		Finance		
		Other		