

# Case Study

**Company:** Bacardi U.S.A., Inc.

**Region:** Americas

**Company Size:** Large Enterprise

**Industry:** Consumer Packaged Goods

**Function:** Sales Channel Management



*"In comparison with the previous fully outsourced approach to collecting data, the cost of operating the national survey is now reduced considerably."*

- Greg Maloney,  
AVP Business Analytics,  
Bacardi U.S.A., Inc.

## Bacardi Cuts Costs by Automating Retail Audits

### Challenge

Bacardi is one of the world's leading spirits and wine producers. The \$5.5 billion brand sells over 200 million bottles per year in nearly 100 countries. Bacardi U.S.A., Inc. runs national surveys multiple times a year capturing store-level information that is a key indicator of retail performance. In the past, a paper form was used to gather information on inventory, branding, shelf positioning and competitive products.

The paper forms were cumbersome to complete, and many came back with errors and inconsistencies. The manual processes delayed the turnaround time for business reports and impacted the ability to act on crucial information during important selling periods. It could take up to three months to get information back from the surveys and by then it was too late to act on issues or take advantage of any key selling opportunities. Bacardi management needed highly accurate, almost immediate data that they could act on right away.

### Solution

Bacardi U.S.A., Inc. selected **Flowfinity Actions**, a packaged wireless application platform that blends business process automation with decision support, to solve its business challenges by automating their retail performance surveys. Bacardi U.S.A., Inc. liked how easily the user can take advantage of pre-built application templates. With a point-and-click editor, users can customize the application to make their own forms without needing a developer. Flowfinity Actions is flexible enough to allow the addition of more forms or business processes to the application.

Another advantage of the solution to Bacardi U.S.A., Inc. is detailed, timely, and actionable reporting. As survey information is collected on smartphones, Flowfinity Actions flows the data quickly and securely to an enterprise server where it is stored in a report-friendly format in a Microsoft SQL server database. On demand, business managers and executives can now access reports on the current status of retail performance.

### Benefits

Using Flowfinity Actions, custom and timely reporting have dramatically influenced the ability to act on market situations. Bacardi U.S.A., Inc. has reinforced its position as a leading beverage manufacturer through building competitive advantage in the channel:

- Information is easy to capture in the field, saving cost and time of re-keying data
- Reduced overall survey costs by 75%
- High quality reports influence business decisions
- Timely information increases business responsiveness
- Flexibility in form design and information gathered keeps maintenance costs down and helps the business adapt to changing needs



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