



## THE FOURTH DIMENSION

June 1999

Have you heard enough about consolidation and eliminating redundant costs from the distribution system? Are you tired of hearing that wholesalers must become more efficient and execute better? All of us hear these same themes over and over; and make no mistake, they partially define the trends shaping our industry for the foreseeable future. IBG understands these trends; we've talked about them in previous Industry Overviews.

During the past several years IBG has taken a leadership role in thinking critically and constructively about systems and methods that will accomplish what everyone in this industry wants - and needs - a successful, growth-oriented, market-directed wholesaler. We have written about our impact selling system, which has now been implemented successfully by several wholesalers around the country; and we have written about creating wealth in your businesses. For those of you who regularly read our Industry Overviews, or who have participated in our seminars, you know that we believe wholesalers must be successful for suppliers to be successful. We also believe both suppliers and wholesalers have a common goal of influencing consumers, in a positive way, at the point of purchase when a significant portion of the purchase decision is made. The key to a successful future, for both suppliers and wholesalers, will be developing and exercising the ability to positively influence consumers and their purchase decision at the point of purchase. This is IBG's Fourth Dimension, and what this Industry Overview is all about.

For years, suppliers have said to wholesalers, "We'll provide the products and take care of advertising - create "pull" - you take care of warehousing and delivery and keep the retailers happy." These traditional roles still define our industry, but the responsibilities for creating "pull," is now shared to a greater extent than ever before. IBG believes, and for years has advocated, that the working relationship between suppliers and wholesalers must improve for each to be successful. The relationship must be characterized by constructive dialogue, and, when necessary, constructive criticism. The adage of walking a mile in the other man's shoes suggests dozens of topics for beginning the dialogue. Still this isn't happening, at least to the extent at management levels, that IBG sees as essential for change to happen, as opposed to change simply being talked about.

While we can make a compelling argument for a “kinder, gentler, and more constructive” working relationship between suppliers and wholesalers, and we do believe a more cooperative working relationship will evolve over time, our purpose in this Industry Overview is to talk about influencing the consumer, why you should do it and how you can begin doing it now.

Lets begin with a few basics:

\* Becoming more efficient, by reducing costs and eliminating waste, is important. Every good businessman understands that controlling operating expenses is essential to profitability. But every good businessman also realizes that growth is essential to success. In today’s intensely competitive business environment, without sustainable growth neither long term success nor profitability are possible. Even the most ruthless cost-cutter cannot “save” a business into long term success and profitability.

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\* In this industry, and every other industry in which independent wholesalers are an essential link in the distribution chain, suppliers and retailers have argued for years that wholesalers must become more “value-added.” But, the reality of regulation in our industry is simple: “value-added” services which are common in other industries are restricted and may even be prohibited by law. The more important reality in our industry, and IBG’s market research confirms this reality, is that many suppliers and wholesalers have no concrete idea about how to become “value added” and look for excuses to rationalize their failure to become “value-added”. IBG’s definition of rationalization is “acceptable reasons for unacceptable behavior”.

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\* The ability to change and evolve along with changing conditions in the market place is critical to long term success. In recent years, consumers have changed faster than we have; their tastes, value perceptions, spending habits, and demands on retail - for new products, more choices, and more product information - have outpaced our industry’s ability to respond.

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\* What all this means for wholesalers is that revitalizing your sales effort is essential. You can do it now! Much of what you need to do can be accomplished with existing manpower and within established budgets. The basic change necessary is in how you approach the sales function - to influence consumers. Suppliers eventually must participate too, but this is a variable outside your immediate control as a wholesaler. Thus, at IBG, we suggest to wholesalers: change what you can, control what you can, and make decisions that are good for your whole business.

### ***The Ability To Influence The Consumer Is The Future***

Revitalizing your sales effort is necessary because consumers have changed so rapidly. Put another way, the external rate of change by consumers has been greater than the internal rate of change of the industry’s marketing efforts. Our highest consumption demographic is now, “Generation X.” This is a term coined by advertisers who have tried unsuccessfully to market consumer goods to this age group using traditional advertising. Generation X hasn’t been motivated by traditional media advertising; the type of advertising that has driven the growth of

today's mega brands (Bud, Bud Light, Lite, and Coors Light). Radical changes in advertising, simply to appeal to Generation X, will not happen on a large scale. And, that's fine as long as industry advertising continues having a broad, mainstream appeal that maintains a positive consumer impression about the malt beverage category. In short, suppliers must focus on making malt beverages a growing percentage of the consumers beverage purchases.

Because traditional advertising doesn't motivate Generation X, and because research tells us that in-store purchase decisions are influenced by many factors, some of which are listed below, IBG believes that significant share points are "up for grabs" to those wholesalers who do the best job of store level retail marketing. Store level marketing is more critical today than at any time since Phillip Morris turned beer marketing upside down. Never before have consumers enjoyed such a large set of acceptable brands with which to satisfy their preferences. And, more importantly, with such a large set of acceptable choices, more consumers than ever before are making their purchase decision at the point of purchase. Some factors will never change. Brand loyalty still drives a significant percentage of purchase decisions. However, for some consumers neither brand loyalty, nor price, influence their purchase decisions today the way they did just a few short years ago. The phenomenal growth of craft beers and imports tells us that. Other factors that affect purchase decisions, and that you cannot control, are these:

- \* Time of Day
- \* Disposable Income
- \* Available Time
- \* Peer Pressure
- \* Habit
- \* Social Activity Planned
- \* Lottery \$ Amount
- \* Weather

IBG's research, and in-store surveys, confirms that at least 70% of today's consumers make their purchase decision in the store. Think about it; 70% of beer sales can be influenced in some way at the time the purchase decision is actually made. Of course, if no one steps up to take advantage of this opportunity, then nothing changes, and existing trends continue. Weak brands become weaker, and ineffective marketing lowers the overall image of the category.

We believe the "beverage dollar" as a percentage of the consumers market basket of goods probably has not changed much in recent years. The battle is to ensure that the percentage of the "beverage dollar" spent for beer does not decline, and more importantly, that you influence the consumer to make a purchase decision for your brands. Remember, if brand selection of beer sales can be influenced at the time the purchase decision is made, the most effective in-store marketer will grab share points. This is why IBG believes that those wholesalers who embrace a consumer focused, store oriented, approach to selling will win!

Understand this: suppliers can no longer deliver "product demand" and sales growth like they did in the 1970's and 1980's. Even though growth in the legal drinking age population will soon occur, traditional advertising and marketing will not create "demand-pull" like it has in the

past. Again, this is why in-store marketing is so important. We can take the path of wine and spirits and have a slow, but consistent decline, of volume, margins and equity value or we can enjoy the wild world of soft drinks with its continually changing local effort with volume, margin, and equity value growth. We are at a consumer crossroads. We can step up our efforts to provide legitimate benefits to retailers and consumers or we can argue about what happened as our industry slowly moves down the proverbial doom loop. This can be frightening or fun. The consumers are saying come and get me if you can. Those that do will win, those that wait for their suppliers to deliver consumer demand or attempt to do it with price will go away. IBG has specific ideas and services to help you accomplish this consumer approach.

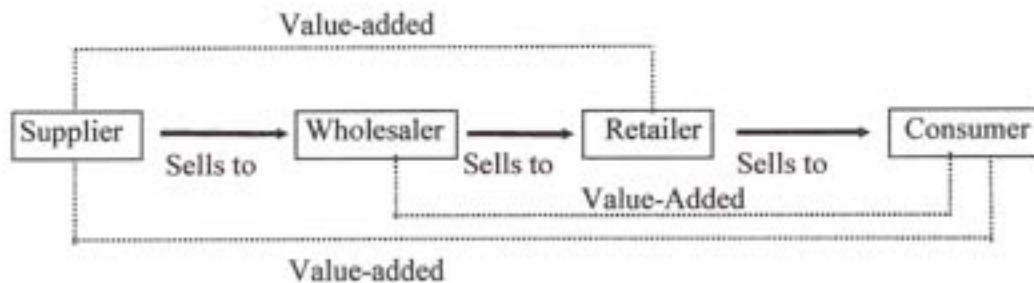
### ***What does value-added mean?***

The term value-added is used frequently, but rarely explained, and even more rarely understood. Below we use a flow chart to help explain the difference between the customer relationship and value-added benefits.

The arrow represents the customer relationship. The dotted line represents the target if you are to be value-added. IBG also believes it will help you understand the difference between customer expectations and value-added services if you begin to separate them.

#### **Flow Chart**

Typical 3 Tier System



The malt beverage industry is struggling to meet the basics of our customer responsibilities. Consequently, we often think that when the basics of customer service are provided, we are through. In order to be value-added however, this is when the game begins, not ends. Currently, it is IBG's opinion that very few suppliers or wholesalers are actually value-added in the eyes of our retailers or consumers. Most of the time our internal discussions center around price increase splits, cost cutting, new brands or margins. This is somewhat justified but must not dissuade us from the task at hand. If we do not become value-added soon our retailers and consumers will make these topics far less relevant. IBG believes that wholesalers must get the basics covered and then assume more of the consumer effort for brands. When this occurs, the appropriate benefits of success will follow.

We recently visited a large multi-brand wholesaler who was able to obtain \$800,000 of incremental marketing support from his suppliers over a 12 month period of time. This was

accomplished by focusing on being a marketing company with a distribution arm attached. This wholesaler is becoming a locally focused consumer marketing company which makes it more valuable to its suppliers and value-added to its retailers. The money invested in marketing activities generated equity in its brands and thus increased the consumers perceived value of its brands. Consequently, volume, profits, and the equity value of the business also improved. Retail relations improved because the wholesaler is now providing value-added services such as local promotions tied to local media.

In another instance, a group of wholesalers hired a National Accounts Representative to represent their common brands. Two suppliers changed their discount split to 60/40 and one reduced F.O.B.'s in order to off-set the wholesalers increased cost. This type of progressive and cooperative approach needs to occur much more frequently because it puts the wholesaler at the forefront of retail and consumer changes.

Will the retailer and consumer respond? Absolutely! Will the suppliers adjust? Slowly, but yes they will. When you strive to be consumer focused it will improve virtually every phase of your operation because consumer marketing is fun. It will cause you to look past basic service to the next level which is consumer interaction and value-added benefits for your customer, the retailer. IBG feels we have come full circle. Local marketing is the wave of the future and most suppliers, retailers and consumers recognize and support this trend. This is the best news that wholesalers have had in a long time because no one knows more about what goes on in a local market and at store level than an active, progressive wholesaler that is striving to positively influence the consumers of today. For wholesalers, a big part of being value-added is located in the relationship between your sales representatives, your local marketing effort, and how these interact through your retailers with the consumer.

### ***Changing Your Sales Organization For The Fourth Dimension***

From our observations, and interviews, of a large number of wholesale operations, IBG has identified three dimensions necessary in every selling system. Successful wholesalers, those who are enjoying sustained growth, excel in each of these dimensions. These are the wholesalers on the threshold of the Fourth Dimension. How many of you are already there? Not very many. Many of you are good, many more are getting better, but still very few have progressed to the Fourth Dimension of excelling at in-store, consumer directed marketing. We feel that an objective self-appraisal will tell you that you need to improve substantially. And, an objective appraisal of your competition will tell you whether any of your competitors are on the threshold of the Fourth Dimension. Getting to the Fourth Dimension is the result of a process, and that process starts with a conscious decision to excel in each of the three dimensions found in a selling system. These are:

- \* Organization of the selling system (optimizing utilization of people and systems)
- \*
- \* Performance evaluation and measurement
- \*
- \* Consumer knowledge

In our seminars and consulting projects, we ask wholesalers to evaluate their sales personnel and systems. A substantial majority recognize immediately that they do not optimally utilize their people or their systems. We also ask wholesalers to evaluate their current performance levels, and we test their consumer knowledge. In our experience, confirmed by thousands of in-store interviews of retailers, a significant majority of wholesalers greatly over estimate their present level of performance. Consumer knowledge, as important as it is, remains a dimension of wholesaler competence in its infancy. Relatively few wholesalers have made significant efforts to understand or motivate consumers, or to even identify consumer demographics in their markets. Think of these three dimensions of selling as parallel lines or paths. Every wholesaler is at a different point on each path. Wholesalers ready to enter the Fourth Dimension are well advanced along each path: sales personnel are well trained and highly motivated; retailers highly regard your sales organization; and consumers make decisions to purchase your brands, at least in part, because they have been influenced at the point of purchase.

Based on our experience, and our research, we believe most wholesalers can cause the greatest positive change in their overall business by taking the first step of revitalizing their sales organization. This is a process IBG addresses with its Impact Selling System. It is the process we believe gives wholesalers the biggest return for their time and effort. By no means is this the only dimension of selling you should change, but it is the one dimension that virtually every wholesaler can change to the benefit of his entire business.

### ***Step 1. Revitalizing The Sales Organization***

**Restructure.** No longer can we simply shuffle the organization around. We must create a new structure that has fewer supervisors and more people selling and servicing our retailers. We need more people working at retail execution so management can focus on consumer attitudes instead of “putting out fires”. IBG calls this new structure our Impact Selling System and we believe it is the future structure of our industry. By identifying and placing your best sales people in your highest volume accounts, you place an enormous amount of pressure on the system to provide the quickest and most dramatic results. Impact Selling is a performance-based structure and in today’s environment we must have a structure that rewards performance and eliminates non-performers. IBG firmly believes that in the future there will be 2 types of wholesalers, “the quick and the dead”.

**Re-engineer.** Take a hard look at the tools necessary for you to achieve your revitalization objective. Are your current systems adequate? Do you have adequate computer hardware and software to meet changing market needs? Is your method of delivery able to take advantage of current market realities? Do you have proper inventory controls in this time of increasing SKU’s? Are you ahead or behind the curve in regards to systems?

**Train and Upgrade.** IBG believes your two most important assets are your people and products. From our experience, we see that most wholesalers do not have enough well-trained sales personnel to execute at a consistently high level in all their retail accounts. We often see poor utilization of a wholesalers most skilled and talented sales personnel. In every wholesale operation we have visited, the difference in skill levels among sales personnel is significant. From product knowledge, to knowledge about the basic elements of a successful sales call, the

differences in skills are huge. The conclusion couldn't be more obvious. Better training is essential. On the job training has been woefully inadequate, and retailers don't have the time or patience to do your training. We know there is no better investment of time, effort and money than an aggressive twelve month training program for every sales, delivery and merchandising person in your organization. And after the initial training, make sure recurrent training is available as well. Effective training will improve your sales organization at retail, and you will see the results of their improved performance with increased sales. In this industry, this is as close to a guarantee as you can get! If you do not have a good, basic training program give us a call.

Besides improving the skill levels of your existing employees, an excellent training program is essential to attract talented candidates as prospective future employees. Speaking generally, our industry must create more motivated and exciting sales organizations in order to attract more talented people. Sales and delivery organizations are boring, but marketing organizations are exciting. Also, as a general statement, diversity brings energy and creativity to an organization. Our research tells us that a typical wholesaler's sales force is 93% Anglo, 35 years old, male, has fourteen years of formal education, and six years experience in the malt beverage industry. IBG believes that a more diverse sales organization will be better positioned to understand and effectively market to the diverse consumer groups within every wholesaler's market.

### ***Step 2. Retail Execution***

IBG has performed retail audits on over 500 wholesalers and in excess of 5,000 retail accounts. We understand store level retail selling better than anyone else. In 1987, IBG measured retail performance at 64%. In 1996, using the same basic format and criteria, we measured retail performance at 67%. In short, the stores look the same. Merchandising is a little better, but quality is much worse. We are getting better but not fast enough to keep up with our retailers, consumers or outside competition. After you have completed the revitalization process (Step 1), you should have in place the personnel and structure capable of taking retail execution to a higher, more consistent level. Your target should be in the 80% range as measured by reasonable standards and should be repeatedly and consistently audited. Volume should not be the only measurement. You should raise your retail execution expectations for your organization. This not only helps to build a solid customer relationship, but completes the second dimension requirement as you approach the fourth dimension. You know you have completed this step when you stop putting out fires, become action oriented, and are no longer reacting to problems from the marketplace. You will be proactive and not reactive.

### ***Step 3. Consumer Knowledge***

This is the dimension of selling excellence least developed in our industry today. In our experience we have found very few wholesalers who really understand, or make an effort to understand, consumers. For most wholesalers, their only consumer data comes from their suppliers, and this usually consists of Scantrack data or something similar. IBG sees this dimension of selling as a key to entering the Fourth Dimension. Augmenting a strong selling organization and excellent retail execution with consumer knowledge brings you to the threshold of the Fourth Dimension. So, how do you obtain consumer knowledge? Sources of information

are everywhere. Some may be more scientific or objective, such as demographic information, but everything you can learn about consumers in your market is important. Demographic information (age, ethnicity, gender, income, etc) is readily available by zip code from government statistical abstracts found in most libraries. Ask your retailers; store managers can be excellent sources of information. Their observations may not be scientific, or even very objective, but they can be invaluable. Ask your employees, they, too, can be excellent sources of information because they are consumers. Contact the business school or marketing department at a local college or the state university. There may be a great deal of public domain information compiled from various business and marketing projects. Utilize readily available information to develop special localized in-store events in a few high volume accounts. Ask the store managers to help evaluate these programs. Involve your sales personnel; delegate the responsibility for developing the promotions and identifying the locations. These localized promotions need not be expensive or complex. We believe the results will always be positive - both in terms of increased sales and improved retail relations. Our experience making retail calls tells us that retailers are hungry for your ideas about ways to influence consumers. Almost every retailer we talk with tells us that he or she welcomes creative, consumer directed sales ideas from wholesalers. Most retailers realize they need to forge a mutually beneficial marketing effort with their wholesalers that isn't based solely on price. Remember that 70% of beer purchases are influenced in some way at the point of purchase. You can't control every factor that influences a consumer's purchase decision, but learning when consumers buy, and how their brand preferences change in response to price, in-store displays, local promotions, and other "points of difference" will help you gain the consumer knowledge necessary to enter the Fourth Dimension.

### ***The Fourth Dimension***

Only by excelling at the first three dimensions will you arrive at the threshold of what IBG calls the fourth dimension of Value-Added Services. The benefits can be great. In a well trained, highly motivated sales force you experience less turnover, absenteeism and related personnel problems. Your volume and margins improve as you perform at a higher level and as you become the preferred vendor in the store -- not just the preferred beverage vendor, but the preferred vendor. Volume and revenue goals become easier to attain and supplier and retail relations will improve because your entire selling system will be designed around aggressive product marketing. With this success you have entered the early stages of IBG's fourth dimension of "Retail Marketing".

### ***Entering the Fourth Dimension - 2 Examples of Retail Marketing***

Assume you have a high-volume account which has shown little, if any, sales volume increases recently. Typically, your sales force attempts to increase sales by offering the retailer the latest deal on whatever brand or package happens to be on promotion that week. In other words, sales rise and fall based on the current promotion. If you are aggressive you get a display.

IBG's approach would be to look at the situation differently by asking, "What type of consumer shops at the store?" By identifying the unique attributes associated with this account's consumer demographics you put yourself in a position to be able to satisfy the particular needs of the consumer in any specific store.



Let's say this account is located near a military base. You have identified through available demographic information that the typical customer is female, between 22 and 34 years of age, is married with one child and has a total household income of \$27,000 per year. Pay days are on the 1st and 15th of each month. You know from your own sales records that the number one brand and package in this account is sub-premium, 6-pack cans. Utilizing this type of information and sharing it with the store manager could cause the two of you to significantly change the way everyone merchandises and markets your brands in this store. To become value-added, you would incorporate several different elements to drive additional sales volume: setting the cold box to reflect consumer preferences, displaying the preferred brand/package in addition to the featured product and utilizing merchandising aids to reflect this consumer's preferences. As local market events change (i.e., pay days, time of year, neighborhood special events, etc.) your in-store activity also changes. Further, this approach changes the conversation with your retailer from 'This is what I have on deal', to 'Let's talk about what I can do to help you better serve your customer'. Because the services outlined here are value-added, the dialog will shift from your sales personnel and the section manager to your sales personnel and the Store Manager. As you develop a more professional relationship with the store manager, what you can do in the store expands.

Our second example involves what has recently become a major holiday event in the country -- Halloween.

All major suppliers place major emphasis on this event utilizing national themed promotions with extremely creative merchandising. Most wholesalers we know, however, have ethnic areas in their territory where the Halloween event may mean little or nothing to that particular consumer due to ethnic or cultural differences.

In this example, targeting your high volume ethnic accounts, you could feature a popular package or unique brand that this consumer may prefer to strengthen your supplier's national themed promotions. The addition to the promotion of the preferred brand or package introduces value-added benefits, making you more valuable to your retailer.

If your goals are to slow the shopper, make the shopping experience more pleasant, increase the purchase size, increase the traffic count and enhance the price/value relationship you are one step closer to success. You have moved closer to becoming the preferred vendor in this store.

Realistically this approach is most effective in your high-volume accounts utilizing your best sales personnel. We call this "Impact Selling" and it has been proven time and again to be the most effective means to improve sales. Additionally, suppliers who work with wholesalers to move beyond simple execution to this type of value-added consumer focused selling can grow dramatically along with their wholesalers.

### ***A Plea for Change!***

If the industry is to begin to solve fundamental problems it must do so from the bottom up. Revitalization is part of the answer, training is part of the answer, more talented people is part of

the answer. Changing restrictive laws is part of the answer and effective wholesaler/supplier partnerships is part of the answer. These take time and are not all within your control. We know that consumers are shopping and deciding what to purchase in the store and yet we are still allowing our products to be marketed utilizing the same traditional methods, if they are marketed at all. We continue to focus on electronic media or price, two opposite ends of the spectrum. The current micro and hand-crafted phenomena is an exception to this statement and this in IBG's opinion helps explain their success. They seem to have found the middle ground. Consumer effort is virtually non-existent today at the wholesale level. We have talked a lot but we have changed very little at the retail and consumer level. We need to create more excitement in the store. If this means changing laws that restrict our ability to influence the consumer at store level then so be it. We need to examine every element of how our products interact with the consumer. This means quality, displays, shelf position, point of sale, ad features, sampling, coupons, location of product, price, packaging, etc. This scares most people but the negatives facing this industry are undeniable. Fundamental changes in our retail and consumer approach by wholesalers and suppliers are necessary if our industry is to prosper in the future.

If we continue to talk about the need to change and discuss becoming value-added while focusing on protecting our antiquated methods of doing business, we will continue to struggle as an industry. IBG supports most state and federal regulations. We recognize most of them as benefits to the past, present, and future of this industry. However, we oppose legislation that inhibits our ability to interact with our retailers and consumers or puts us at a competitive disadvantage with other consumer products. We use the phrase "continue to struggle" because the facts are undeniable. Industry volume is declining, margins are eroding at both the supplier and wholesaler level and our equity values have decreased. Several large retailers are not satisfied with our current D.S.D. system, consumers are not flocking to us in droves, social issues continue to be a problem and pressure for raising taxes on malt based products appears to be escalating. Retailers and consumers will not change direction until we actually do something different. The time for talking has passed. The time for action is now.

### ***Is it Worth The Risk?***

Yes! You must believe with all your heart that a wholesaler can dramatically influence the consumer with retail performance and focused local marketing. We need the energy and creativity of progressive people who enjoy working through firmly imbedded issues. We need leaders who are willing to invest with faith in the future, not people who hide behind fear of change. To attempt to remain status quo is to commit slow suicide. The people that made this industry great worked through enormous changes like Prohibition, TV Marketing, changing pricing policies, escalating discounts, and a rash of legislative issues to get us where we are today. It is up to us to take it to the next level. There is good news and bad news. The good news is that everyone is now convinced that a two tier system will not work for malt beverages. The bad news is that the retailers and consumers are not responding to the current way our three tier system is operating. The top 2 or 3 suppliers in this industry will do a credible job of keeping consumers interested in beer from a macro standpoint. However, in order to entice these consumers to purchase in quantities and at a price sufficient for us to grow, all wholesalers must go to the next level quickly or other consumer products will take our customers.

## *Summary*

IBG is not suggesting that changes have not occurred. We have participated with you in drastically changing many aspects of our industry such as: lowering operating cost, driversales to presales, having 300 SKU's vs. 50 SKU's , CDL issues, delivery windows, EDI, DEX, NEX, escalating discounts, and consolidations at the wholesale and supplier levels. We could go on forever listing the positive adjustments this industry has made. Everyone is to be commended. Even after all the revolutionary changes we have been through, one critical element remains fundamentally unchanged and that is our attitude towards those around us. Suppliers too frequently have an enabling attitude toward wholesalers. Wholesalers often have an indifferent attitude toward retailers. Retailers have a condescending attitude towards wholesalers. As we argue about what's going on and whose fault it is, consumers are giving our industry what our attitudes dictate, less time, money, and attention. They have picked up on our struggles and inability to adopt change. As an industry we are saying to our retailers and consumers "We already know what we are doing". Necessary changes will only occur when we honestly and sincerely create organizations consisting of systems and people that say to our retailers and consumers "**How can we better serve you?**" One of our biggest fears for wholesalers is that someone will ask, "What are you doing to be value-added?" and the answer will be on-time delivery, weekend pull-up, product rotation, and tax collection. While this has value, it is easily duplicated outside the three tier system and is not value-added. Our fear for suppliers is that they allow this to happen thus facilitating the methodical deterioration of the three tier system. Put another way, our fear is we will destroy ourselves from the inside out due to our own stagnation and misplaced fears.

None of us really enjoy the soul-searching, the leveling of our pride or admitting our company's shortcomings. But this is exactly what you must do before you can truly change. Once you commit to change and commit to excelling at the dimensions of selling, as we have described them, you can expect to be rocketed into a fourth dimension of performance that you never knew existed.

The fact is this, and nothing else: attitudes must change and action must occur faster and more frequently. A new attitude coupled with positive action can, will, and must revolutionize your entire approach toward your retailers and consumers. We must ask them what they want instead of telling them what we want. IBG firmly understands that the first component of success for any business is service to others.

Every share point is up for grabs. There is no one who cannot win if they embrace this philosophy. As IBG has stated on many occasions, the suppliers and wholesalers that create a legitimate team approach that is focused on a higher and more consistent level of retail performance will grow their businesses. If they then move forward to the fourth dimension and begin to positively influence the consumer at store level, they will enjoy sustained success and long-term collective prosperity. They will create wealth for each other.

## ***IBG Services***

IBG is a full-service consulting firm with satisfied supplier and wholesaler clients located throughout the United States. IBG's professionals have over 100 years real-life experience managing and changing sales organizations at both the wholesale and supplier levels. IBG's professionals are available to provide assistance identifying specific areas where our services will produce positive results. We will be happy to provide references upon request.

As always we appreciate your time and attention. If you want to aggressively move your company forward by improving your retail and consumer performance then give IBG a call or fax.