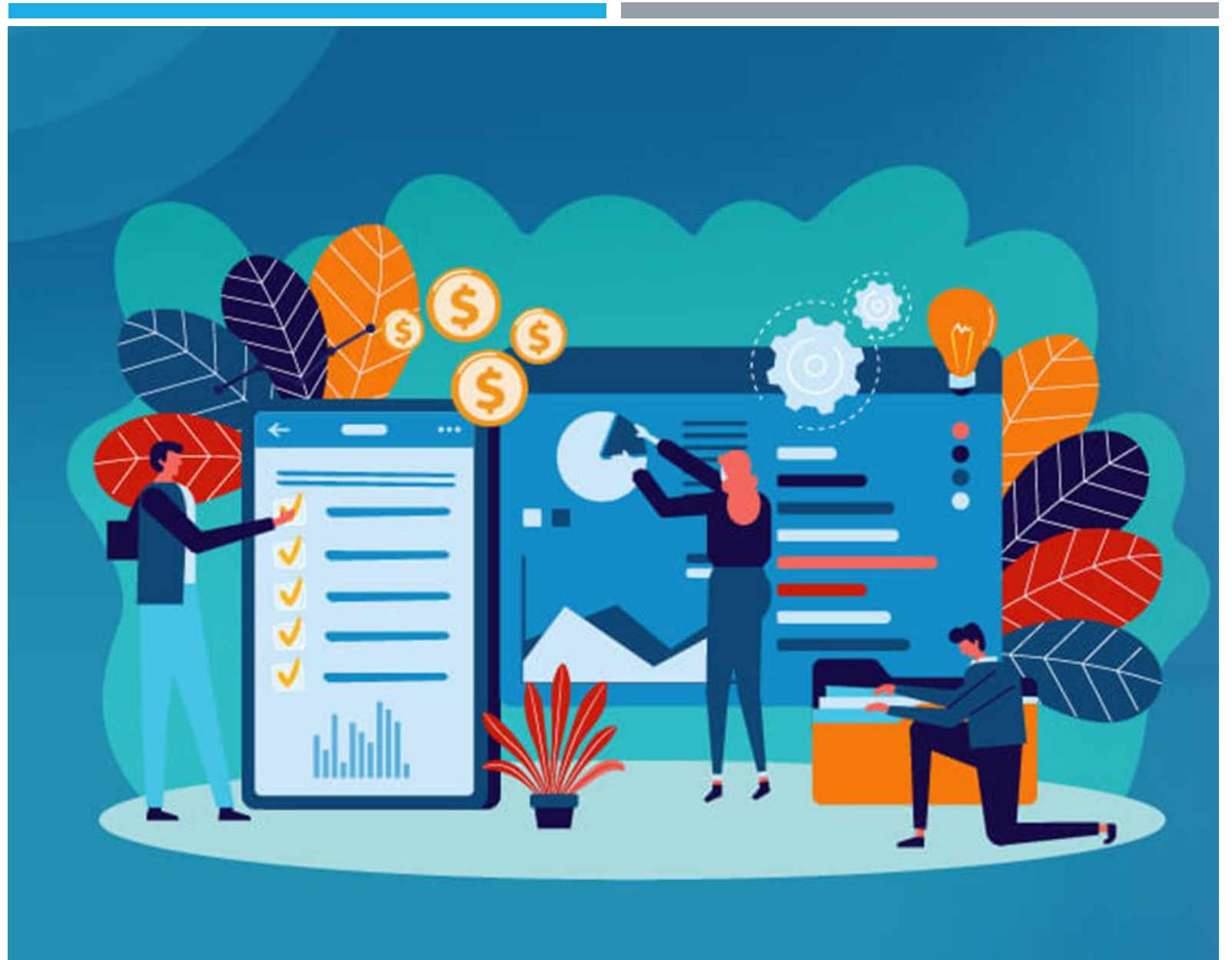


STRATEGIC ADVISORY

Creating PATHWAYS for
businesses to

WIN BIG

India GTM stories





FUTURE OF DISTRIBUTION...

Global CPG giant...
Project focused on India

Question/ Context :

- Given the rapid changes in the GTM landscape post Covid, what does the future of distribution in India look like ?

Action Steps ::

- Approach : Funnel ...start wide at the top of the funnel & narrow down to specifics for the overall business & various categories. Boil it down to a play by play catalogue of actions needed to be on the winning side of change.
- Top of the funnel
 - Understand & articulate GTM trends for the FMCG industry in general
 - Identification of key forces that are causing the change.
- Mid funnel
 - How are the forces of change impacting the company in general & categories in specific.
 - Implication of this in the near, mid & next term.
- Bottom of the funnel
 - Playbook by category.
 - Step by step guide to what happens now & next.

Results, Impact & Status ::

- View of what's likely to come in the next 24,48 & 60 months.
- Capabilities to strengthen, modify & build....including;
 - Organization culture – areas of focus & change management.
 - Tech/Digital interventions.
 - Coverage & assortment optimization
 - Organization structure & capacity changes needed.
- Trigger points where GTM switches have to be made.
- Phase 1 capabilities piloted & encoded for scale across 2023/24.
- Phase 2 capabilities being piloted for scaling in 24/25.



DISTRIBUTOR OF TOMORROW (DOT)

...

Global CPG giant...
Project focused on India

Question/ Context :

- Current distributors are facing severe headwinds from ; (i) reduced top lines due to modern trade, e.com, others taking away chunks of business (ii) reduced bottom lines – distributor is no more the sole source of product supply for most large retailers (iii) Low growth – sluggish industry growth in the last 5+ years due to -De-Mo, GST, Covid lockdowns, inflation etc.
- With low growth, increased costs, reduced top & bottom lines , what does a sustainable distributor of tomorrow look like ?

Action Steps ::

- Approach :
 - This exact transition happened in China 10 years ago. Extract key lessons from there, contextualize them to India & create a winning plan for the business.
 - End to End project split into 5 smaller pieces (Sprints) following the agile approach to – “go fast , learn fast & fail fast”- adjust & move to the next step.
- Sprints
 1. Discovery : Outside <>In :: Understand the realities on ground, develop & articulate an organization wide common understanding of the here & now.
 2. Expectations :: Inside <>Out :: Organizations (across levels, global, regional & in country teams) needs & expectations.
 3. Gap analysis :: Data amalgamation to articulate the gaps between what’s today & what's needed for the future.
 4. Solutions : Based on Gap analysis , input & output data : articulation of solutions.
 5. Testing :: In market piloting of solutions to learn, tweak & adjust.
 6. Codify for scale.

Results, Impact & Status ::

- Visualization of a DoT who is...
 - Not only a seller of products but also a service provider.
 - Not only sells in but actively enables sell out.
 - Has multi-dimensional capabilities & flexibility that allows them to chase demand.
- Intervention in to create a winning future across ;
 - Capabilities, culture & organization.
 - Digital tech & data science.
 - Logistics – 1st & last mile.
 - Enhanced productivity for the system via coverage, assortment & people optimization.



INDIAN RETAIL & FMCG ...

New normal & way forward

National Industry body, annual white paper

Question/ Context :

1. Define the “post pandemic new normal”.
2. Layout a set of “considerations & actions” Indian FMCG & Retail companies need to take, to thrive in the new normal.

Action Steps ::

1. Redefine channels
 - GTM landscape redefined
 - New FMCG channels & growth trends.
 - On-line world – approaches & challenges
2. Leveraging innovation in technology
 - Agile planning and forecasting
 - Digital procurement
 - Agile 1st & last mile
 - Flexi infrastructure
 - Flow to demand
3. Enabling Kirana stores
 - Evolving channels in India
 - Changing ecosystem around Kirana
 - The way forward for the Kirana
4. The work included other larger organization areas like : (i) Connected employees in a new work environment (ii) Sustainable initiatives to conduct business responsibly

Results, Impact & Status ::

- This white paper gets circulated to all major industry players, leaders & the government.
- This document is used across companies for strategic mid & long range planning. Also by the government for creating policy frameworks.



DIGITAL COMMERCE...

eB2B & eB2C

Global CPG giant...
Project focused on India

Question/ Context :

1. Do we need to play with eB2B , if yes Why ? How? When? Where?
2. Profitable growth with eB2C...How ? What needs to be true?

Action Steps ::

- **Approach** : Broaden perspectives of key leaders & enable building an organization vision that helps leverage ::
 - eB2B as a distribution complement/multiplier creating value.
 - eB2C as a growth multiplier that delivers both sales & brand edge at reasonable costs.
- **Sprints:**
 1. Discovery : Understand what is being sold, where, rates of sales – Value, volume, productivity etc.
 2. eB2B work - Create a give <>get model to leverage eB2B as a distribution multiplier.
 - Areas where current distribution system in not creating enough value; Surgical identification of District X Brand /Pack combination where eB2B could create distinct incremental value.
 - Areas of sufficiency where some goodies can be shared with eB2B.
 3. eB2C work
 - Deep dive into growth & profitability drivers <> drainers.
 - Playbook detailing – Where to play, How to win & what to execute.
 - Double clicks & details on differentiated play by sub category X customer.
 4. Piloting, tweaking & codification of game plan for scaled execution

Results, Impact & Status ::

1. New eB2B GTM in place ;
 - Negotiations & agreements done
 - Phase 1 testing done , scaled execution progress
 - Phase 2 testing in progress..
2. eB2C play ;
 - Creative use of spends to build sales (promo \$s) & brand (explainers, new products, brand store etc).
 - Net costs in line with ROI expectations
 - Model for sustained profitable growth in place.