

# SUPPLY CHAIN CONFERENCE

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**Connect. Transform. Deliver.**

April 15-17, 2018 | Orlando, FL  
Hyatt Regency Grand Cypress

*Trading Partner Alliance*  
FMI and GMA



**Ashley MacLearn, Retail Business Services, an Ahold Delhaize USA Company**



**Ula Iriarte, Senior Customer Supply Chain Manager, Procter & Gamble**



**Louise Briguglio, Head of Product, Alloy**

**\$6.7 Billion**





# #IRLOSA... Nooooooooooooo!



**38,441** supermarkets in the U.S.

**38,900** SKUs

**\$668.7 B** in revenue

*Source: Progressive Grocers, via Food Marketing Institute and Statista*

Leading  
Supermarkets in  
the US 2016,  
based on Sales in  
Billion US \$

*Source: Progressive Grocers,  
via Food Marketing Institute and  
Statista*

Retailer	Sales Billions
A	\$103.6
B	\$58.6
C	\$43.86
D	\$34.05
E	\$21.73
F	\$17.03
G	\$15.28
H	\$14

**\$6.7 Billion**





## Retail Business Services

A Company of Ahold Delhaize USA

- **3,500 associates**
- Providing **services to six East Coast grocery brands**: Food Lion, Giant of Landover, Giant Martin's, Hannaford, Stop & Shop and Peapod
- **One common promise**: to innovate solutions by leveraging scale and providing industry-leading expertise, insights and analytics to local brands so they can focus on serving their customers

**THE NEXT  
GENERATION  
OF GROCERY  
RETAIL**



## P&G Today

Sales	\$65.1 Billion
Earnings	\$15.3 Billion
Countries of Operations	~70
Countries Where Our Brands are Sold	180+

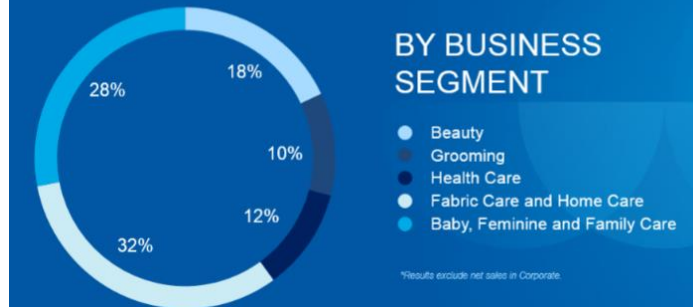


## Our Portfolio – Leading Brands

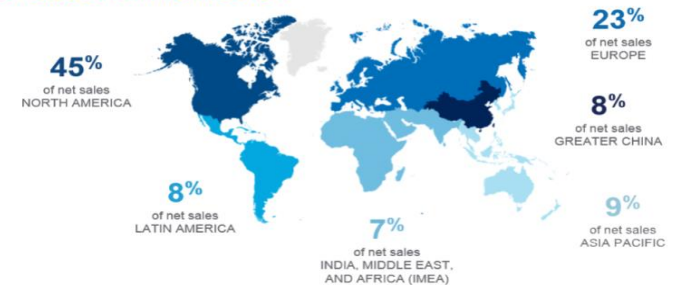
P&G focuses on 10 Categories with about 65 Brands

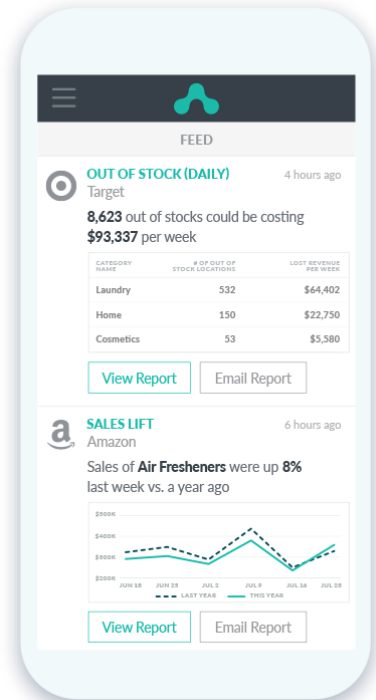
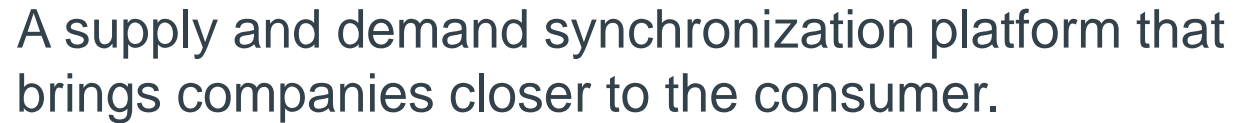


## 2017 Net Sales



## 2017 Net Sales BY GEOGRAPHIC REGION





## On-shelf Availability

“Great knowledge and decision making without speed becomes obsolete fast (we do not need to predict the past). Great technology without business acumen cannot provide the right strategic or operational prescriptions. The two together democratize data and insight across the entire supply chain.

The partnership between Alloy (with their technology and agility) and P&G (with our resources and business expertise) has resulted in the capabilities that neither side would be able to achieve on its own. The most classic example of the whole being greater than the sum of its parts.”



— Ursula “Ula” Iriarte







# Measure & Understand True Demand

#irldemand

## Why don't we measure true demand today?

- Wrong tools and infrastructure
- Data paralysis
- KPIs and organizational processes

## Three Learnings:

- Aggregate metrics
- Human attention
- Root-cause analysis

One: Let's talk about...

# AVERAGES

## Where is my worst On Shelf Availability?

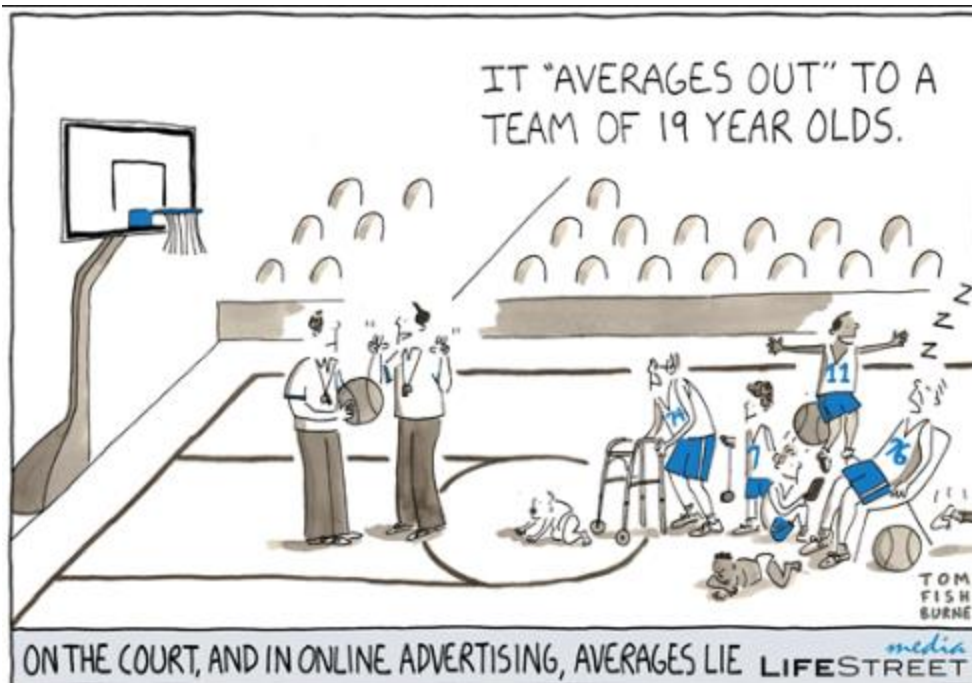
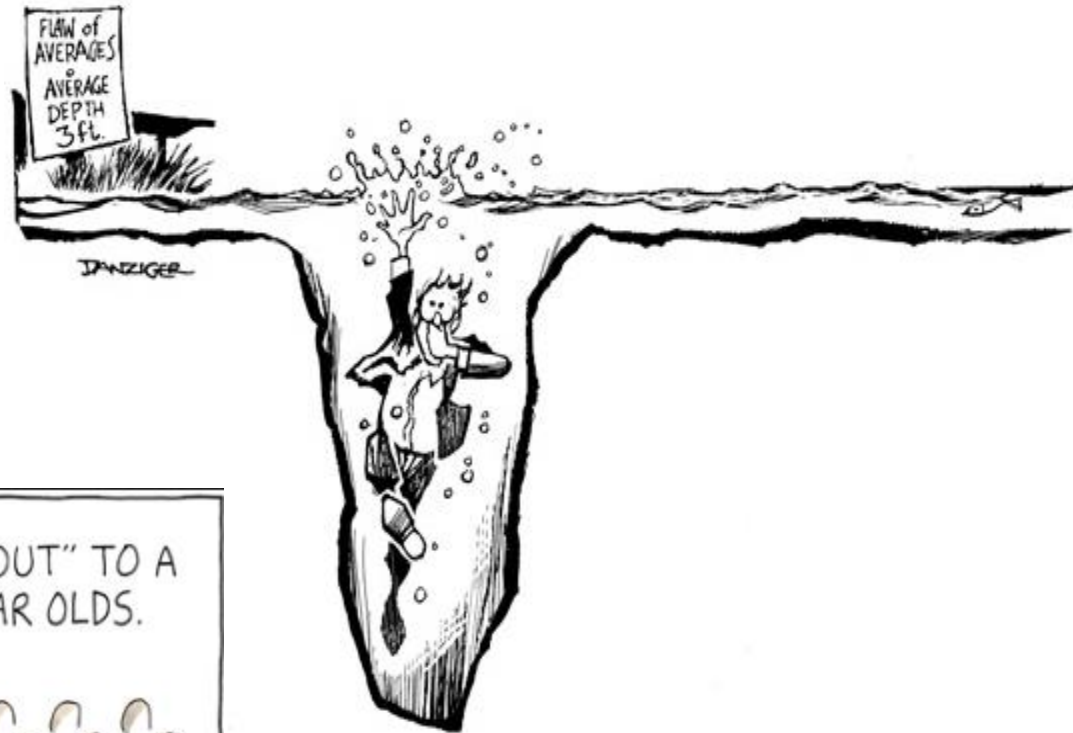
**In the Average all these products had a 97% Instock**

Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Average
85%	99%	98%	100%	100%	100%	100%	97%
97%	97%	97%	97%	99%	95%	99%	97%
100%	99%	99%	95%	97%	97%	95%	97%
100%	100%	95%	95%	95%	95%	100%	97%
100%	80%	100%	100%	100%	100%	100%	97%
95%	90%	100%	100%	100%	100%	95%	97%
100%	99%	97%	97%	97%	97%	95%	97%
95%	95%	95%	95%	95%	100%	100%	97%

**#IRLOSA**



# GOT AVERAGES?



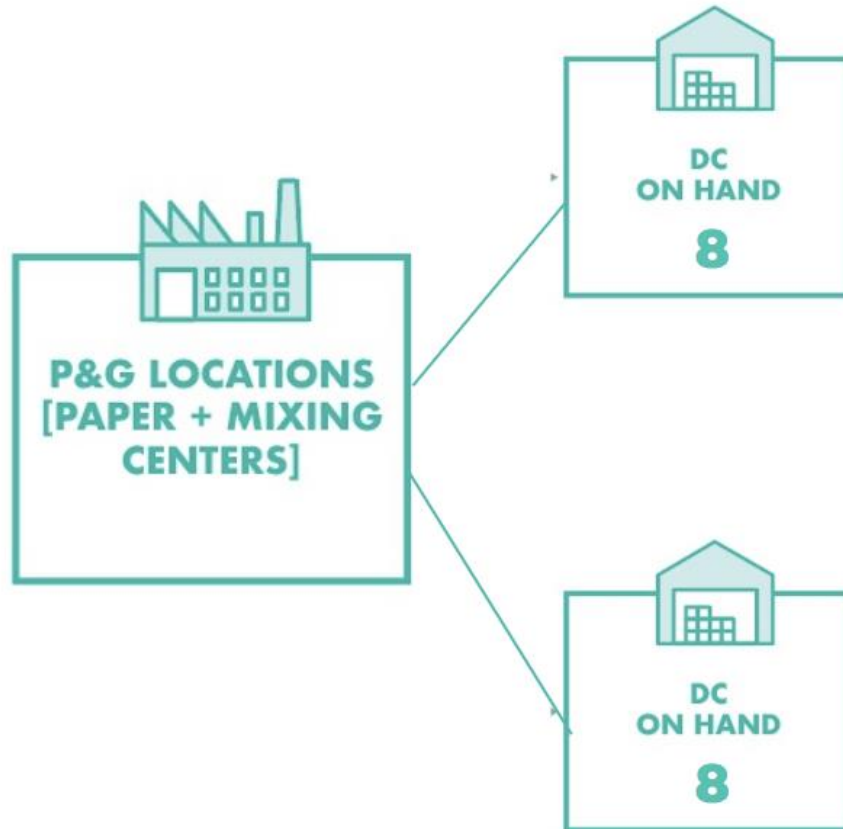
**#IRLOSA**



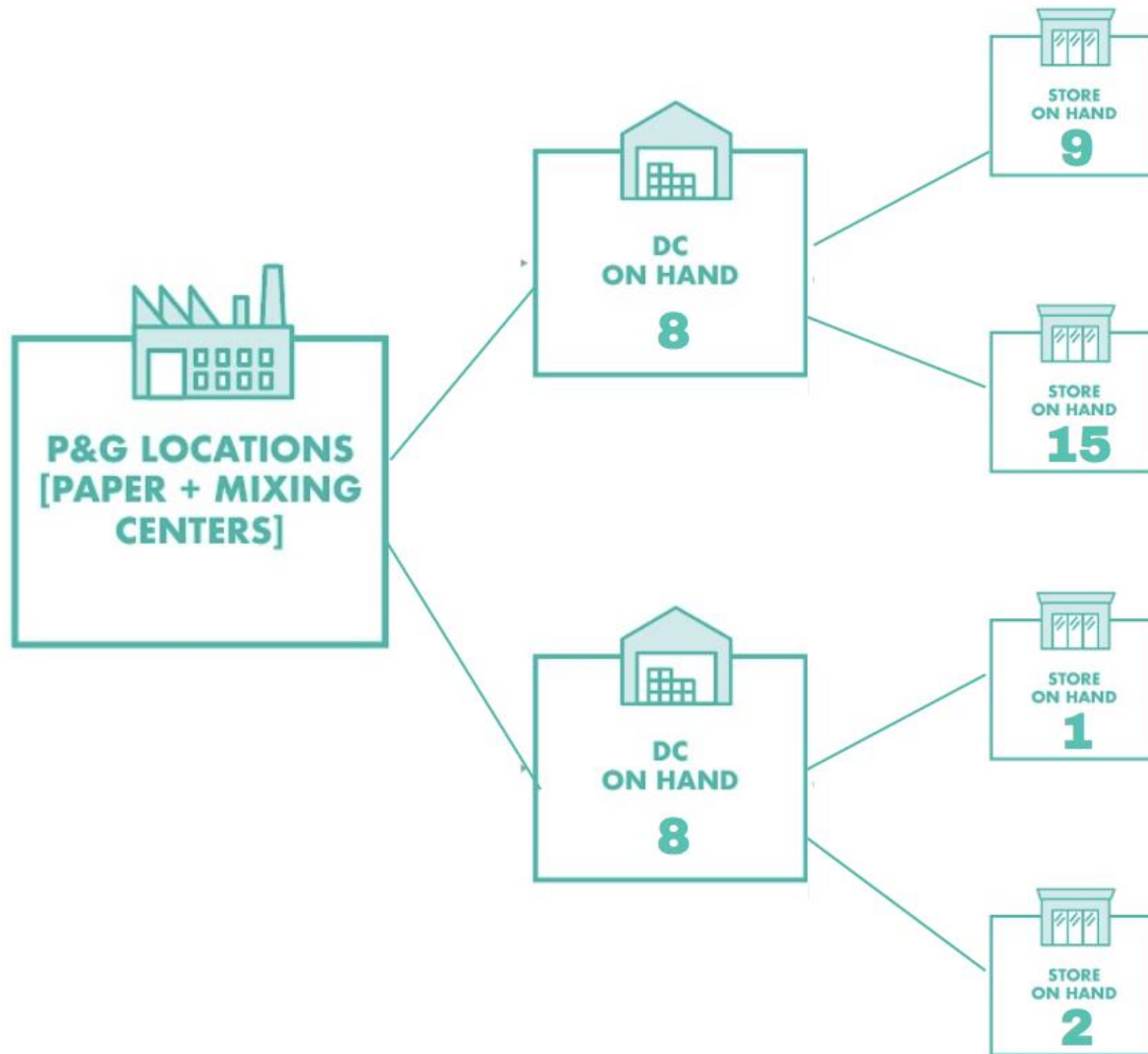
Two: Let's talk about...

**ATTENTION**

<https://youtu.be/iiEzf3J4iFk?t=50s>









Three: Let's talk about...

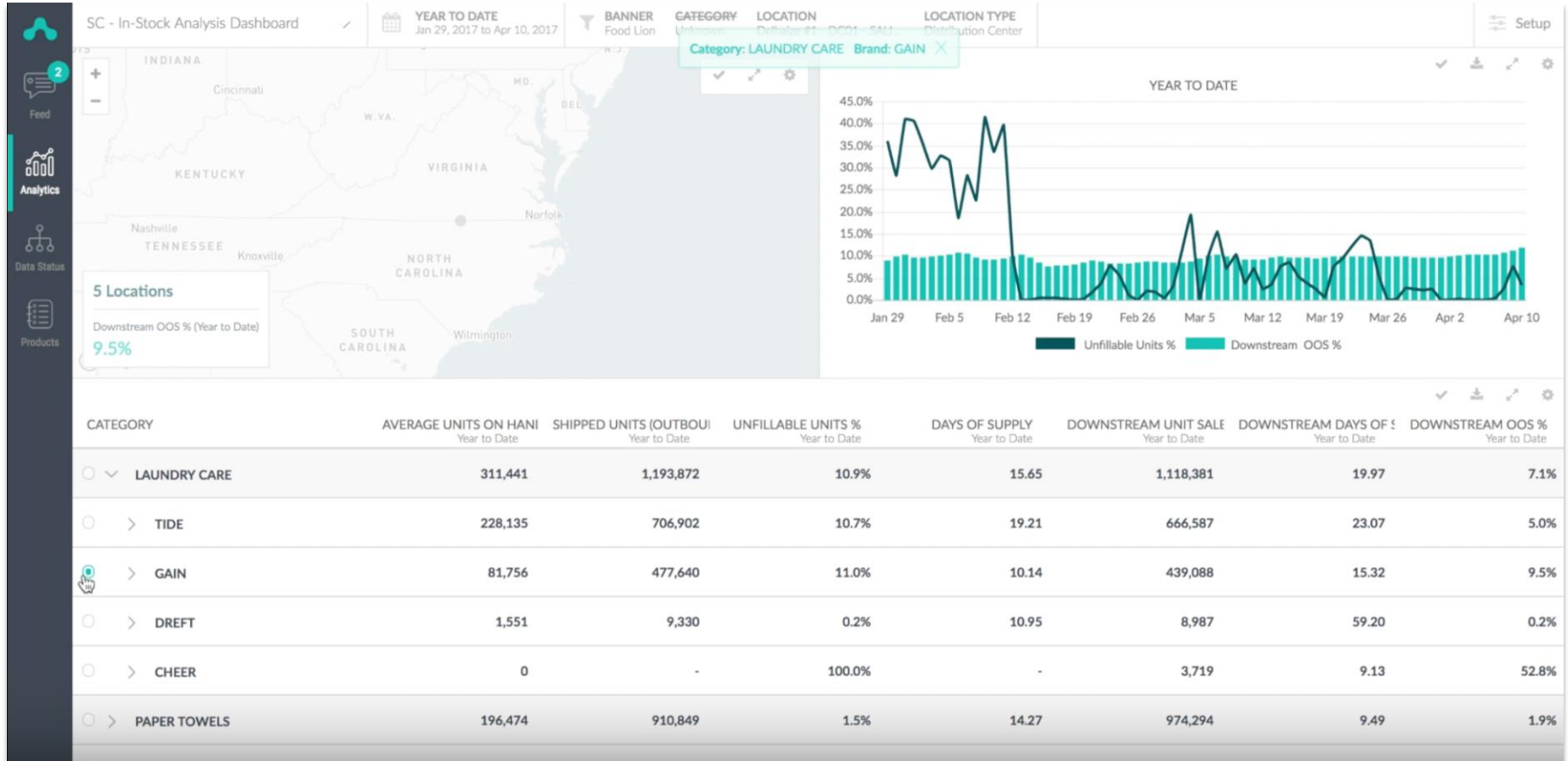
# ROOT CAUSE ANALYSIS





<https://youtu.be/BEQvq99PZwo>







## Three Learnings:

- Aggregate metrics (like averages) can be misleading
- Human attention is limited
- Don't skip root-cause analysis

# Measure & Understand True Demand

#irldemand

## Things to think about...

- Data and infrastructure challenges
- Process challenges
- Culture & collaboration challenges

**\$6.8 Billion**



