



CASE STUDY

FEDWAY ASSOCIATES:

IMPROVING SALES EFFECTIVENESS IN A CONSTANTLY CHANGING INDUSTRY WITH PROGRAM ADVISOR



KEY TAKEAWAYS

GOALS:

- Improve program success
- Have greater visibility into programs
- Ensure sales reps are working in the same direction
- Increase revenue
- Reduce administrative time on programs

RESULTS:

- 80% increase in the number of program goals achieved
- 40% of sales staff overachieves on goals to make annual reward trip
- Improved sales person morale
- Drastically reduced time spent on program administration
- Improved reputation as a brand builder
- Greater insight as to why certain programs aren't working

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QUICK FACTS

ORGANIZATION:
FEDWAY ASSOCIATES

INDUSTRY:
WINE & SPIRITS DISTRIBUTION

LOCATION:
BASKING RIDGE, NJ

EMPLOYEES:
500 EMPLOYEES

CUSTOMER SINCE:
2000

WEBSITE:
WWW.FEDWAY.COM

SOLUTION:
PROGRAM ADVISOR

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BACKGROUND

Fedway Associates is a wine and spirits distributor based in Basking Ridge, New Jersey that services more than 7,000 restaurants, clubs, taverns, and retail stores. The company markets products that cover every category of the beverage alcohol industry, and it represents the world's leading distillers, wineries, and importers.

Fedway Associates has been a Dimensional Insight customer since 2000. The company's relationship with Dimensional Insight has led to a deeply ingrained data culture at Fedway, with employees feeling empowered to make their own decisions using the data available to them.

THE CHALLENGE

Change is constant. It's the reality that all businesses face, but not all are prepared for.

Fedway Associates is acutely aware of the constant changes in the wine and spirits industry. Consumer preferences are always changing, the product mix they sell to retailers and restaurants is always changing, and promotions are always changing.

Every month, Fedway's top suppliers give the company about 15 promotional goals. Examples of these goals include:

- Sell a certain number of cases
- Sell a certain volume of product
- Sell into a number of new accounts

Rob Felton, VP and General Sales Manager at Fedway, says the company used to approach programs by saying, "Let's sell as much as we can, get as much done as we can, put as much on the trucks as we can, and hopefully everything falls into the right boxes and our suppliers are satisfied with what we accomplished."

While that approach was successful to a certain extent, Felton says Fedway realized there was a lot of data the company needed to better understand, and management wanted to make sure the right information was getting out to sales reps and that they were all "rowing in the same direction."

In addition, all of the programs were being tracked manually or in Excel spreadsheets. This was a time-consuming process, and often resulted in sales reps having fragmented or convoluted information.



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As Fedway sought to improve its process of managing programs, key questions were:

- 01 How can we streamline the process and make it more efficient?
- 02 How can we share information and use positive reinforcement to improve staff productivity?
- 03 How do we best set ourselves up to adapt to constant change and be more successful in the future?



THE GOAL

In order to improve the process of managing programs, Fedway sought a technology solution that would:

- 01 Organize its various programs and allow sales reps to see their progress on goals
- 02 Provide greater insight into the data necessary for program success
- 03 Ensure sales reps worked on all goals, not just the top-of-mind ones



WE BELIEVE THAT EMPOWERING PEOPLE TO MAKE DECISIONS AND BE EFFECTIVE IN THEIR ROLE IS THE WAY IN WHICH WE'LL BE SUCCESSFUL."

MAX LEVENTHAL,
DIRECTOR OF BUSINESS DEVELOPMENT

THE SOLUTION

Fedway is a long-standing customer of Dimensional Insight, having first bought the company's analytics platform in 2000. To Fedway, the analytics provided by Dimensional Insight and the data-driven decision-making that results from it are critical components of the company's long-term strategy.

Max Leventhal, Director of Business Development at Fedway, says, "We believe that empowering people to make decisions and be effective in their role is the way in which we'll be successful."

In order to better manage its programs and focus on sales success, Fedway created the Platinum Club several years ago. This is a rewards-based program in which sales staff earn points based on their success in meeting program goals. At the end of the year, staff who earn more than 24 points earn certain company rewards.

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When it came time to use technology to support Platinum Club, Dimensional Insight's Program Advisor application was an easy choice for Fedway. In a typical month, Fedway will have close to 100 programs that reps are selling against. Fedway will take all of these goals and load them into Program Advisor. When sales reps log into the application, they are able to see all of the goals they are working towards, as well as their progress on each. The Program Advisor dashboard makes it much easier for the reps to quickly understand what they're working on and decide where they need to focus their time.



THE PROGRAM ADVISOR DASHBOARD MAKES IT MUCH EASIER FOR THE REPS TO QUICKLY UNDERSTAND WHAT THEY'RE WORKING ON AND DECIDE WHERE THEY NEED TO FOCUS THEIR TIME.

"I always pre-plan my day and one of the things is to go on Program Advisor to see my goals and what needs to be done each day," says David Schmidt, one of Fedway's sales reps. "Program Advisor helps me walk into an account with a plan so we can hit our goals."

When Fedway's sales managers log into Program Advisor, they can see how each sales rep is performing on goals and can make adjustments to programs if they see that something isn't working or if reps have hit goals early in the month.

"Success is defined as being 'in the green.' As sales manager, I want to make sure dollars are coming in and we're in the green there, and I want to make sure my field managers and reps are in the green," says Samantha Schiekman, Federal North Sales Manager at Fedway. "You're only as strong as your weakest link, and Program Advisor helps us quickly understand everything in a very user-friendly way."



ONE OF THE BENEFITS OF PROGRAM ADVISOR IS THAT... NOW, FEDWAY CAN BRING SOME OF THE LESS TOP-OF-MIND GOALS FRONT AND CENTER. THESE GOALS MIGHT INCLUDE THOSE FOCUSED ON BUILDING BRANDS AND INTRODUCING NEW PRODUCTS TO THE MARKET.

One of the benefits of Program Advisor is that previously, many sales reps would only focus on the top-of-mind goals—the bigger brands, the more reliable numbers that they knew they could hit. Now, Fedway can bring some of the less top-of-mind goals front and center. These goals might include those focused on building brands and introducing new products to the market.

"You can take some of these incubation brands that you're hoping to move and put a focus on them," says Joe Surdo, VP and Senior Brand Manager—Spirits at Fedway. "It helps to build momentum and take brands like Tito's or Casa Amigos from the infancy stages to a more successful brand."

From a program management standpoint, Fedway finds Program Advisor easy to use and maintain. Evy DeCola, Program Advisor analyst, says, "One great feature of Program Advisor is that you can enter all kinds of program information into it, and reps will see only the information relevant to them. You can control exactly who sees what, and that is a big advantage."

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THE RESULTS

“We could not be the wholesaler we are today without the granularity of data that Dimensional Insight provides to us,” says Leventhal. “That ability to shine a light on things and direct resources—not just on the gut—but to be able to back it up with quantifiable data is a competitive advantage.”

With Program Advisor, Fedway has been able to gain new levels of insight into program performance. According to Felton, “Having Program Advisor to support Platinum Club was just perfect timing, because it’s really helped us track things on a daily basis. It’s a key reason for our success of Platinum Club, because we’re able to track everything, see exactly where we are with our goals, and if something’s not working, we can pivot and change our strategy.”

01

Since Fedway has implemented Program Advisor, it has seen an 80% increase in the number of goals its sales reps achieve on a monthly basis.

02

It has also seen more than 40% of sales staff overachieve on their goals in order to make the annual Platinum Club goal.

Fedway also says Program Advisor has changed the way staff approaches programs and makes them more efficient with their time. Felton says, “In the past, we’d have our goals, we’d get a lot them done, and we’d come back the next month to work on the balance. Program Advisor now gives us a start time and a finish line. That ultimately saves us a lot of time because we’re not circling back to finish things up, and our time spent on goals is focused and productive.”

“I couldn’t do half of what I do if I didn’t have Program Advisor,” says Casey Crehan, field sales manager of Federal North. “I’m able to look at each program, break it all down and figure out what’s going on. If I had to go back to paper and pen, I wouldn’t be able to leave the office. I would just spend my day doing that, so it’s freed up my entire day.”

In addition, Fedway has been able to build a reputation as a brand builder due to the data insights it has gotten from Program Advisor. By examining the data, Fedway is able to see the number of cases it sells to stores, and how the brand performs to consumers. Because of this insights-driven focus, Fedway is then able to design successful programs around the brand.



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PROGRAM ADVISOR HAS CHANGED THE WAY STAFF APPROACHES PROGRAMS AND MAKES THEM MORE EFFICIENT WITH THEIR TIME.

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WHAT'S NEXT

In the future, Fedway is looking forward to using Program Advisor to dive even further into the data, particularly as it relates to building business for specific brands. Felton says, "There are so many new brands coming on board that you're going to have to keep track of them, and do it in an intelligent way."

And—because change is constant—Fedway will continue to use Program Advisor to adapt to any new trends or business conditions that arise. At Fedway, data-driven decision making is a part of the culture and will continue to be a focus for employees.

"There is a sense of pride here at Fedway that I don't think its similar in other companies," says Felton. "Everybody at the end of the day wants to see Fedway win and they want to be a part of that team that succeeds. The insights provided by Program Advisor are invaluable in helping us to succeed."



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