

March GSM

March 11th , 2022

Beam SUNTORY

Agenda

▪ March Priorities

- Q1 KPI Update
- Q1 Incentive Update
- Innovation Launch
- Key Deals, VAPS, Closing Comments

March Close Priorities

- 100% ACV KPI Execution
- 100% GSC Achievement
- Close out All National Programs
 - Uno, Dos, Tres
 - Perfect Bar
- Academy of Excellence Completion
- Drive Volume to close out Q1 Strong
 - Focus on Excess Inventory incremental deals
- Drive Volume to achieve Local Fast Start Incentive

Agenda

- Introduction
- **Q1 KPI Update**
- Q1 Incentive Update
- Innovation Launch
- Key Deals, VAPS, Closing Comments

Q1 GSC KPI Goals

H1 Menus	Menu Goal	Actual
2022 Sipsmith Family	17	1
2022 Courvoisier Family	10	2
2022 Prem+ Tequila	120	31
2022 House of Suntory	40	6
2022 Legent	10	1
2022 Knob Creek Rye	20	5
2022 Maker's Mark Family	135	25
2022 Basil Hayden Family	75	5

Q1 Displays	Display Goal	Actual
2022 Courvoisier Family	10	17
2022 Tres Gen Family	8	1
2022 Hornitos Family	40	33
2022 Jim Beam Family	100	100
2022 Maker's Mark Family	85	68
2022 Basil Hayden Family	50	18

Q1 Off Premise EKPI Execution	Goal	Actual
Digital Shelf	1	1
Digital Messaging	2	1

Q1 On Premise EKPI Execution	Goal	Actual
Social Media	3	1

Q1 Shelves	Shelf Goal	Actual
JB White (Location)	445	200
JB Flavors (Adjacency)		
Makers Mark (Location)		
Makers Mark (Adjacency)		
Maker's 46 (Adjacency)		
Basil Hayden (Location)		
Knob Creek Rye (Location)		
Knob Creek Rye (Location)		
Legent (Location)		
Courvoisier (Adjacency)		

Q1 ACV KPI Goals

Q1 ACV Off Premise	Goal	Actual
JB Orange	60.00	18.87
Makers CS & 46	115.00	38.64
Basil Hayden Family	113.00	9.86
Knob Creek Rye	64.00	37.22
Hornitos Family	126.00	135.13
Tres Gen Family	78.00	59.50

Q1 ACV On Premise	Goal	Actual
JB Orange	10.00	14.07
Makers CS & 46	41.50	39.16
Basil Hayden Family	65.00	18.04
Knob Creek Rye	28.00	20.03
Hornitos Family	38.00	41.47
Tres Gen Family	15.00	21.80

Reminder: ACV Goals start from 0; no longer based on R12 sales history

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- **Q1 Incentive Update**
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Q1 Uno, Dos, Tres National Program

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Uno, Dos, Tres Goals

Refresh Data
(Must Have Access)

OFF PREMISE

Perfect Stores

Market	Total # Accounts in KPI Saleable Universe	Hornitos				Tres Gen			
		Goal	Act	% Ach	Bal	Goal	Act	% Ach	Bal
MN - SGWS	830	490	289	59.0%	(201)	26	43	165.4%	17
South Carolina	990	661	624	94.4%	(37)	162	211	130.2%	49
Indiana	809	121	112	92.8%	(9)	44	55	125.0%	11
Maryland	1095	183	117	64.1%	(66)	49	77	156.2%	28
New Mexico	143	119	95	80.0%	(24)	36	49	137.3%	13
Delaware	310	175	131	74.9%	(44)	36	34	94.4%	(2)
Kentucky	771	167	102	61.3%	(65)	32	68	200.0%	36
Tier 3 Total	4,948	1,915	1,470	76.8%	(445)	385	537	139.4%	152

Refresh Data
(Must Have Access)

ON PREMISE

PODs

Market	Total # Accounts in KPI Saleable Universe	Hornitos				Tres Gen			
		Goal	Act	% Ach	Bal	Goal	Act	% Ach	Bal
MN - SGWS	914	415	187	45.1%	(228)	32	14	43.8%	(18)
South Carolina									
Indiana	2036	424	192	45.3%	(232)	192	141	73.4%	(51)
Maryland	1577	221	110	49.8%	(111)	122	80	65.4%	(42)
New Mexico	470	250	206	82.4%	(44)	124	97	78.2%	(27)
Delaware	577	207	148	71.4%	(59)	58	55	95.2%	(3)
Kentucky	954	211	164	77.8%	(47)	54	67	123.2%	13
Tier 3 Total	6,528	1,728	1,007	58.3%	(721)	583	454	77.9%	(129)

Q1 Fast Start Program

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Off-Premise Update

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SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
JON STEVENSON	MAKER'S FAMILY	300	217.5
JON STEVENSON	BASIL FAMILY	140	-36.71
JON STEVENSON	JIM BEAM FAMILY	984	367.41
JON STEVENSON	KNOB CREEK FAMILY	100	32.21
JON STEVENSON	HORNITOS FAMILY	115	94.7
JON STEVENSON	LEGENT	3	2
JON STEVENSON	HOUSE OF SUNTORY	15	12

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
JOE SHUKITT	MAKER'S FAMILY	208	188.77
JOE SHUKITT	BASIL FAMILY	55	-18.04
JOE SHUKITT	JIM BEAM FAMILY	1394	432.11
JOE SHUKITT	KNOB CREEK FAMILY	107	17.83
JOE SHUKITT	HORNITOS FAMILY	168	179.53
JOE SHUKITT	LEGENT	3	7
JOE SHUKITT	HOUSE OF SUNTORY	15	17.67

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
PAUL QUIRK	MAKER'S FAMILY	173	45.15
PAUL QUIRK	BASIL FAMILY	44	-13.63
PAUL QUIRK	JIM BEAM FAMILY	1061	493.75
PAUL QUIRK	KNOB CREEK FAMILY	51	20.3
PAUL QUIRK	HORNITOS FAMILY	90	84.81
PAUL QUIRK	LEGENT	3	0.5
PAUL QUIRK	HOUSE OF SUNTORY	8	6.67

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
AMY MAULE	MAKER'S FAMILY	230	81.07
AMY MAULE	BASIL FAMILY	50	-8.67
AMY MAULE	JIM BEAM FAMILY	845	335.47
AMY MAULE	KNOB CREEK FAMILY	96	43.04
AMY MAULE	HORNITOS FAMILY	156	127.14
AMY MAULE	LEGENT	3	2.5
AMY MAULE	HOUSE OF SUNTORY	15	13.67

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
CARLOS ALFARO	MAKER'S FAMILY	317	181.93
CARLOS ALFARO	BASIL FAMILY	84	-3.94
CARLOS ALFARO	JIM BEAM FAMILY	910	398.59
CARLOS ALFARO	KNOB CREEK FAMILY	43	13.5
CARLOS ALFARO	HORNITOS FAMILY	295	289.39
CARLOS ALFARO	LEGENT	3	4.5
CARLOS ALFARO	HOUSE OF SUNTORY	8	6.5

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
CHUCK RIFE	MAKER'S FAMILY	49	15.96
CHUCK RIFE	BASIL FAMILY	10	-4.25
CHUCK RIFE	JIM BEAM FAMILY	485	114.06
CHUCK RIFE	KNOB CREEK FAMILY	11	10.82
CHUCK RIFE	HORNITOS FAMILY	27	54.97
CHUCK RIFE	LEGENT	2	0
CHUCK RIFE	HOUSE OF SUNTORY	5	1.33

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
FAHEEM AMEEN	MAKER'S FAMILY	45	9.87
FAHEEM AMEEN	BASIL FAMILY	7	-1
FAHEEM AMEEN	JIM BEAM FAMILY	271	133.48
FAHEEM AMEEN	KNOB CREEK FAMILY	4	5.37
FAHEEM AMEEN	HORNITOS FAMILY	71	58.73
FAHEEM AMEEN	LEGENT	2	0.17
FAHEEM AMEEN	HOUSE OF SUNTORY	2	0

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
ED MCGOVERN	MAKER'S FAMILY	40	25.78
ED MCGOVERN	BASIL FAMILY	13	-1.49
ED MCGOVERN	JIM BEAM FAMILY	520	244.26
ED MCGOVERN	KNOB CREEK FAMILY	26	5.46
ED MCGOVERN	HORNITOS FAMILY	48	43.37
ED MCGOVERN	LEGENT	2	0
ED MCGOVERN	HOUSE OF SUNTORY	2	1

On-Premise Update

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
STEPH HAWKE	MAKER'S FAMILY	86	68.61
STEPH HAWKE	BASIL FAMILY	20	2.76
STEPH HAWKE	JIM BEAM FAMILY	71	55.13
STEPH HAWKE	KNOB CREEK FAMILY	25	13
STEPH HAWKE	HORNITOS FAMILY	130	57.48
STEPH HAWKE	LEGENT	1	0
STEPH HAWKE	HOUSE OF SUNTORY	2	2.33

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
MIKE PACE	MAKER'S FAMILY	72	89.1
MIKE PACE	BASIL FAMILY	14	7.84
MIKE PACE	JIM BEAM FAMILY	26	26.7
MIKE PACE	KNOB CREEK FAMILY	12	22.22
MIKE PACE	HORNITOS FAMILY	35	12.93
MIKE PACE	LEGENT	1	1.33
MIKE PACE	HOUSE OF SUNTORY	4	3

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
FRITZ ABLAO	MAKER'S FAMILY	62	54.26
FRITZ ABLAO	BASIL FAMILY	15	2.31
FRITZ ABLAO	JIM BEAM FAMILY	50	53.05
FRITZ ABLAO	KNOB CREEK FAMILY	14	10.54
FRITZ ABLAO	HORNITOS FAMILY	24	19.04
FRITZ ABLAO	LEGENT	1	0.25
FRITZ ABLAO	HOUSE OF SUNTORY	2	5.66

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
JOHN PALKA	MAKER'S FAMILY	30	25.76
JOHN PALKA	BASIL FAMILY	4	0.58
JOHN PALKA	JIM BEAM FAMILY	76	72.66
JOHN PALKA	KNOB CREEK FAMILY	8	4.03
JOHN PALKA	HORNITOS FAMILY	21	7.76
JOHN PALKA	LEGENT	1	0
JOHN PALKA	HOUSE OF SUNTORY	2	0.67

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
KRISTIN ALBERT	MAKER'S FAMILY	25	28.34
KRISTIN ALBERT	BASIL FAMILY	7	0.42
KRISTIN ALBERT	JIM BEAM FAMILY	46	41.71
KRISTIN ALBERT	KNOB CREEK FAMILY	5	6.79
KRISTIN ALBERT	HORNITOS FAMILY	12	12.93
KRISTIN ALBERT	LEGENT	1	0
KRISTIN ALBERT	HOUSE OF SUNTORY	1.5	0

SALES REP	BRAND FAMILY	Q1 2022 GOAL	ACTUAL
JAIME PHIPPS	MAKER'S FAMILY	26	32.02
JAIME PHIPPS	BASIL FAMILY	2	0.64
JAIME PHIPPS	JIM BEAM FAMILY	47	45.79
JAIME PHIPPS	KNOB CREEK FAMILY	3	4.44
JAIME PHIPPS	HORNITOS FAMILY	10	6.71
JAIME PHIPPS	LEGENT	1	0
JAIME PHIPPS	HOUSE OF SUNTORY	1	1.5

Q1 Perfect Bar Program

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Perfect Bar: Goals

Program Baseline: To build out the program goal we bench marked your POD sales on the 'brand/sku groups' using Q3 2021. On the tracker you can see we have included the "Average PODs Sold Q3 2021" as a reference point for you. The national average was 2 PODs.

Perfect Bar is meant to focus on Priority Sku presence on the back bar, compliment our KPI Menu goals and drive our premiumization goals in the First-Class incentive.



2022: Q1 Perfect Bar: The Beginning

To be a 'Perfect Bar' in Q1: an account MUST have a Minimum of 5 PODs from the 'Brand/Sku Groups' **PLUS** meet the Qualifier condition of 1 American Whiskey & 1 Tequila POD

Updated: 3/10/22

*State Goal MUST be Achieved to receive payment

Market	Active Universe	Average PODs Sold Q3 2021	Goal	Goal % of Universe	Q1 Ach Perfect Bar	Bal	% Ach to Goal	*BONUS Potential*
AR - SGWS	457	1	90	19.6%	27	(63)	30.1%	\$1,000
Colorado	2,224	2	425	19.1%	268	(157)	63.1%	\$4,250
Illinois	6,234	2	1,246	20.0%	602	(644)	48.3%	\$16,500
Indiana	2,063	3	406	19.7%	104	(302)	25.6%	\$4,000
Louisiana	2,345	2	450	19.2%	136	(314)	30.2%	\$4,500
MN - SGWS	942	2	182	19.3%	49	(133)	26.9%	\$1,800
Nebraska	1,001	2	207	20.7%	31	(176)	14.9%	\$2,000
North Dakota	574	2	113	19.7%	28	(85)	24.7%	\$1,100
Oklahoma	606	2	118	19.4%	74	(44)	62.8%	\$2,000
South Dakota	596	2	116	19.4%	33	(83)	28.5%	\$1,150
Central Region	17,042	2	3,352	19.7%	1,352	(2,000)	40.3%	\$38,300
Delaware	584	3	113	19.3%	66	(47)	58.6%	\$1,150
Florida	7,302	3	1,410	19.3%	450	(960)	31.9%	\$14,000
Kentucky	948	4	183	19.3%	141	(42)	77.1%	\$1,800
Maryland	1,309	2	261	19.9%	44	(217)	16.9%	\$3,100
Metro NY	6,536	2	1,288	19.7%	190	(1,098)	14.7%	\$12,850
Upstate NY	3,448	2	704	20.4%	120	(584)	17.1%	\$7,000
Washington DC	513	3	96	18.7%	20	(76)	20.8%	\$1,150
East Region	20,640	3	4,054	19.6%	1,031	(3,023)	25.4%	\$41,050
Alaska	593	2	116	19.6%	53	(63)	45.5%	\$1,150
Arizona	2,520	3	483	19.2%	363	(120)	75.2%	\$4,800
Northern California	5,339	2	1,082	20.3%	336	(746)	31.1%	\$10,750
Southern California	6,103	3	1,232	20.2%	582	(650)	47.2%	\$12,300
Hawaii	717	2	136	19.0%	40	(96)	29.4%	\$1,350
NV - SGWS	1,337	1	259	19.4%	160	(99)	61.7%	\$2,600
New Mexico	518	3	98	19.0%	85	(13)	86.4%	\$1,000
Washington	2,986	3	563	18.8%	537	(26)	95.4%	\$5,600
West Region	20,113	2	3,970	19.7%	2,156	(1,814)	54.3%	\$39,550
Total	57,795	2	11,376	19.7%	4,539	(6,837)	39.9%	\$118,900

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- Introduction
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- Q1 Incentive Update
- **Innovation Launch**
- Key Deals, VAP, Closing Comments

Truly Innovation Program

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Off-Premise Program Overview

Timing:

- April 1st – May 31st POD Incentive
- April 1st – June 30th Display Incentive

Brands: Truly Vodka (Strawberry Lemonade, Pineapple Mango & Wild Berry)

Objective: Execute Aggressive 60-day Innovation launch and target cross-promotion with Truly Seltzers

Off Premise Details:

House POD Goal: 350

Reps earn \$75 per combo sold (Buy 3 btls of Each flavor 750ml & 375ml get 3 sleeves of each flavor 50ml for \$1)

Additional Promo to Target Displays: Buy 2 cases of each flavor 750ml get 2 cases JBW 1.75 for \$60 each

Display Incentive: Rep earns \$50 per 5 case display

DM Payout: If we achieve 350 POD goal earn \$750 each

On-Premise Program Overview

Timing: April 1st – April 30th

Brands: Truly Vodka (Strawberry Lemonade, Pineapple Mango, & Wild Berry)

Objective: Execute Aggressive 60-day Innovation Launch & target cross promotion with Truly Seltzers

On Premise Details:

House POD Goal: 75

Rep Incentive: Sale Rep earns \$25 per POD + \$10 Kicker for Menu placement

Promo: Buy 1 btl any flavor get 1 btl JBW 1.0L for \$5

DM Incentive: If team achieves house goal earn \$500 each



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Q1 Incremental Deals

- Toki
 - March ONLY - 5 cases @ \$23.33/btl
- Jim Beam Black 1.0L
 - March ONLY – 1 case @ \$12/btl
- On the Rocks Combo Pack 200ml
 - March ONLY – 2 cases @ \$191.52
- On the Rocks Combo Pack 100ml
 - March ONLY – 1 case @ \$90
- Courvoisier Avant Garde
 - March ONLY – 1 case @ \$20/btl
- Maker's (46/CS/PS) 375ml
 - March ONLY – 1 case @ \$120
- Maker's Mark Holiday 750ml
 - March ONLY – 1 case @ \$20/btl



Q1 Incremental Promos

- **On Premise Program Support**






- Buy 1 btl Knob Creek Rye Liter get 1 btl Hornitos Plata Liter for \$5
- Buy 1 btl Legent get 1 btl Hornitos Plata Liter for \$5
- Buy 1 btl Toki get 1 btl Hornitos Plata Liter for \$5
- Buy 1 btl Haku Vodka get 1 btl Hornitos Plata Liter for \$5
- Buy 1 btl Roku Gin get 1 btl Hornitos Plata Liter for \$5
- Buy 1 btl Hornitos Plata Liter get 1 btl Makers Mark Liter for \$15
- Buy 1 btl Hornitos Repo Liter get 1 btl Makers Mark Liter for \$15

- **Off Premise Program Support**

- Buy 2 btls Knob Creek Rye 750ml get 1 btl Knob Creek Rye 750ml for \$1
- Buy 3 btls each of Hornitos Plata & Repo 750ml get 1 btl JB White 750ml for \$1
- Buy 5 btls Maker's 101 get 1 btl for \$1
- Buy 5 btls Legent get 1 btl for \$1

Off-Premise VAP's

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	CC 1.75 w/ 2 50ml CC Apple	Hornitos Repo 750ml w/ Shot Glass	Hornitos Plata 750ml w/ Shot Glass	HR Plata 1.75 w/ 200ml Repo	HR Repo 1.75 w/ 200ml Plata
					
	Timing: May	Timing: April	Timing: April	Timing: April	Timing: April
QTYs	400	40	40	90	90

Off-Premise VAP's

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	JBW 1.75L + 2x50ml JB Orange HH	JB Orange 750ml Highball VAP	Maker's 750ml Summer Throw
			
	Timing: March	Timing: April	Timing: May
QTYS	520	50	50

Academy of Excellence

Name	State	Area	Email	Aoe Credits Earned
quirk, paul	Delaware		PQUIRK@SGWS.COM	145
Maule, Amy	Delaware		AMAULE@SGWS.COM	130
Alfaro, Carlos	Delaware		CARLOSMALFARO@SGWS.COM	125
Stevenson, Jon	Delaware		JSTEVENSON@SGWS.COM	75
Shukitt, Joseph D.	Delaware		JSHUKITT@SGWS.COM	75
Oberholzer, Brad	Delaware		BRADLEY.OBERHOLZER@SGWS.COM	50
Aiello, John	Delaware		JAIELLO@SGWS.COM	20
Souza, Michelle	Delaware		MSOUZA@SGWS.COM	20
Hawke, Stephanie	Delaware		SHAWKE@SGWS.COM	0
pace, mike	Delaware		MIKEPACE@SGWS.COM	0
rife, charles	Delaware		CRIFE@SGWS.COM	0
Van Horn, Laurie	Delaware		LAURIEVANHORN@SGWS.COM	0
McGovern, Ed	Delaware		EDMCGOVERN@SGWS.COM	0
Miller, Harvey James	Delaware		HJMILLER@SGWS.COM	0
Albert, Kristin	Delaware		KALBERT@SGWS.COM	0
Schaerer, Eric	Delaware		ESCHAERER@SGWS.COM	0
Phipps, Jaime	Delaware		JAIMEPHIPPS@SGWS.COM	0
Ablao, Fritz	Delaware		FRITZ.ABLAO@SGWS.COM	0
Ameen, Faheem N.	Delaware		FAMEEN@SGWS.COM	0

Sales Consultants: \$500 for each rep that achieves Platinum Status in Q1

Silver	100 - 149 credits
Gold	150 - 199 credits
Platinum	200 + credits

Calls to Action

- **Start 2022 Fast & Strong!**
- **On Premise: Drive Core Brands & Perfect Bar Execution**
- **100% KPI Execution**
- **Drive Innovation, LTOs & VAPs**

THANK YOU



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