



Improved Secondary
Claims for a
**Fortune 500 Spirits
conglomerate**

Client Overview



This privately held, family-owned spirits company has earned its place as a global leader in the industry. The company's portfolio has expanded to encompass over 200 distinctive brands and labels. With a legacy spanning seven generations, this company boasts a rich heritage of craftsmanship and tradition.

Employing a workforce of more than 8,000 dedicated individuals, their products reach **Consumers** in approximately 170 countries worldwide.

Distributors play a vital role in the distribution network. They have exclusive rights to distribute specific brands within a particular region. So, technically, they are the **Customers** for the company, and the company is more interested in the depletion (secondary) sales.

In recent years, a new channel of distribution emerged, i.e. online sales (e-commerce & D2C) of alcoholic beverages. However, managing sales from Retail, E-commerce and D2C channels posed a new challenge for the Client.

Problem Statement

- The client was grappling with inefficiencies in their current secondary sales incentive and payout processes, leading to reduced visibility and a surge in dealer complaints regarding delayed payouts.
- This issue caused considerable time and resources expended on data validation from diverse sources (company & distributor).
- The client required a holistic solution that addresses these challenges by implementing a robust data management system, facilitating visual analytics, and seamlessly integrating Anaplan to optimize workflow management.



Key Challenges

1

Difficulty pushing the product

Due to a lack of motivation by distributors, the product was not moving to the end consumer, as a result, the primary sales were good but there was a lack of secondary and tertiary sales. This warranted more visibility into the secondary and tertiary sales figures.

2

Increased Administrative Burden

Discrepancies lead to increased administrative work for both parties involved. This included additional time spent on reconciling accounts, chasing payments, and resolving disputes. Could also lead to potential lawsuits.

3

Impacted brand reputation

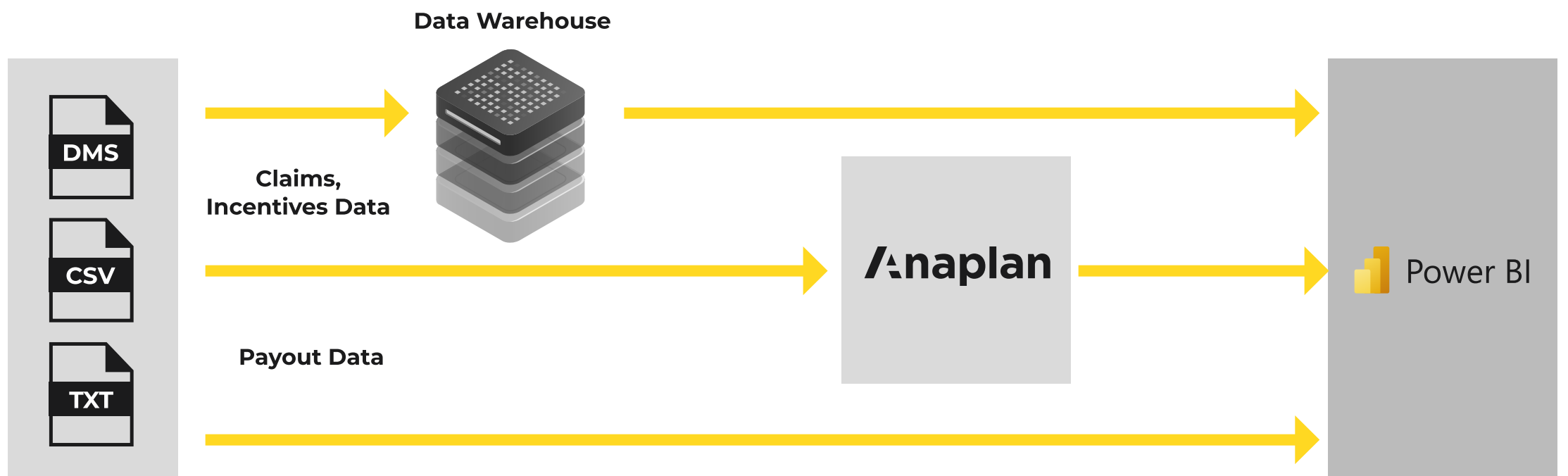
It was perceived as unprofessional deterring potential partners (both distributors and retailers). Moreover, it was challenging for the company to accurately forecast sales and plan for inventory levels.

4

Impacted Distributor cash flow

Late payment and discrepancies caused an impact on the cash flow of the distributors which restricted them from purchasing fresh stock in advance for the next month.

Our Solution



The solution architecture for secondary claims processing for Distributors, Wholesalers, Group Retailer, and Retailers, along with reports and analysis for payouts.

➤ Data Sources and Integration:

- Distributor management systems and CSV/TXT files from distributors were taken up as primary data sources.
- Established Master Data Management (MDM) practices before moving the data to the data warehouse.
- Integrated data from Anaplan, warehouse and DMS to Power BI for real-time data synchronization and validation.

➤ Secondary Claims Processing:

- Implemented a robust system for processing secondary sales claims, ensuring accuracy and efficiency.

➤ Reports and Analysis:

- Designed custom reports and dashboards for stakeholders to visualize key performance indicators (KPIs).
- Enabled dynamic filtering and drill-down capabilities for in-depth analysis.

Solution Implementation



- 1 Master Data Mapping and Metrics Definition:** Conducted an in-depth analysis of the client's existing data structure and sales hierarchy. Mapped master data elements to relevant metrics, ensuring comprehensive coverage for analysis.
- 2 Cost Budget Planning in Anaplan:** Collaborated with the client's finance and admin teams to establish a robust cost budgeting process within Anaplan. Implemented easy payout export ensuring financial compliance.
- 3 Actual vs Planned Secondary Claims Data Tracking:** Designed a data tracking mechanism to capture real-time depletion data. Developed a reporting module to compare actual depletions against planned targets for actionable insights.
- 4 Workflow Automation:** Engineered an automated workflow management system integrated with Anaplan. Streamlined the process of claims processing for Distributors, Wholesalers, Group Retailers, and Retailers.
- 5 Interactive Reporting through Power BI:** Set up an interactive reporting system using Power BI for data visualization Platform allowed exploration of data, helped in gaining deeper insights into sales trends and performance metrics.



Impact Delivered

- ✓ ROI Achieved in 6 Months
- ✓ Reduction in Reporting and Tracking Time
- ✓ Payment Processing Time Reduced by 23%
- ✓ Middlemen Satisfaction Score Increased by 25 Points
- ✓ Operational Efficiency Gains of 10,000 man hours
- ✓ 47% Reduction in Payment Discrepancies
- ✓ Middlemen Retention Rate increased by upto 6-8%.



- **Efficient Data Management:** Achieved seamless integration of data sources, ensuring a unified view of secondary sales operations.
- **Streamlined Workflow:** Automated secondary claims processing, reducing manual effort and accelerating turnaround time.
- **Cost Optimization:** Enabled precise budget planning and tracking, leading to better financial management and compliance.
- **Real-time Insights:** Provided stakeholders with real-time visibility into actual versus planned depletion data, enabling timely decision-making.

Client Testimonial

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The seamless integration of Anaplan alongside cutting-edge data visualization techniques revolutionized our secondary sales management. The Polestar team helped streamline our operations, and provide insights in efficiently managing our claims. We now wield a robust engine for in-depth claims automation and disbursal, leading to an increased competitive edge in the market

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