

Optimizing the Business Investment Framework

This client is a well-known wine and spirits company that manufactures, markets, and distributes products globally. The company works with various distribution channels and has continued to grow and innovate over the years.

The client needed awareness and underlying data to support their five-year investment roadmap that would cover technology, processes, and data dimensions. The client needed maturity rankings and understanding for each functional capability across the North American business. They engaged Clarkston to lead up this initiative for both our industry knowledge and ability to perform within a condensed timeline, something the client would not have been able to resource with their current capacity.

The client engaged Clarkston's assistance in creating a thorough portrait of maturity across the company using the Business Investment Framework. Clarkston performed an evaluation within this methodology and identified actionable needs within otherwise unevaluated areas of the company. To do this, Clarkston had to create an understanding of complex concepts, and foster an environment of open communication, with each participant.

Consumer Products Case Study

PROJECT OVERVIEW



INDUSTRY:



Consumer Products

PRODUCTS AND SERVICES:



Spirits and Wine

PRIMARY OBJECTIVES:

- Map the North America (US / Canada) business capabilities and identify and engage capability owners across all functions
- Assess current technology, process, and data maturity through stakeholder surveys and live interviews
- Provide data analytics and guidance on priorities for investment areas

RESOLUTION:

- Scheduled and conducted over 90+ interviews, across 182 capabilities, with client capability owners
 - Recordings and notes made available for the client
- Created the BIF survey using Qualtrics survey tool, which became the basis for our analysis and final deliverables
 - Delivered and tracked survey completion and data accuracy for all 182 surveys
- Analyzed interview and survey data to create executive report out
 - Delivered deep-dive reports for each functional area and each BIF dimension

KEY BENEFITS:

- Identified capabilities, systems, and functions that were lower in tech/process/data maturity and in need of investment.
- Delivered insights, not otherwise available, on how previous investments are working in day-to-day life and what areas have been void of investment.
- Created over a dozen presentation decks that were leveraged to drive alignments and prioritization across executive leadership, cross-functional leadership, and end-user participants.
- Provided numerical data and key metrics that were used to support the strategic portfolio presentation and roadmap for Fiscal Year 23.

182

Capabilities Assessed,
across US and Canada

180

Surveys Completed &
Analyzed

90+

Interviews Conducted

CONTACT US

