Outlet Query Tool GenAI – Wiki Template

Analytics & Insights Platform Services



**Version:** Draft 0.01

**Date:** January 26, 2024

Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version #** | **Date** | **Description** | **Author** |
| Draft 0.01 | Jan 26, 2024 | Initial Document Structure | C. Louie  K. Ezzine  M.Downs |
|  | Jan 29, 2024 | Added Outlet Tab to show example for the Elements section |  |
|  | Jan 31, 2024 | Added placeholder sections for the remaining tabs in the Elements section |  |
|  | Feb 1, 2024 | Updated existing sections to align with the new version of the tool |  |
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Purpose of the Wiki

The purpose of this Wiki is to provide an overview of the Outlet Query Tool with details on how to use the tool with example business uses cases and common questions.

Additionally, as part of the GenAI initiative, the content in this Wiki will be leveraged as a data source to feed into the LLM model to generalize and output responses to support users in becoming more familiar with report tabs and filters to be able to find the answers to their questions.

About the Outlet Query Tool

The Outlet Query Tool is designed to assist you in targeting outlets that matter most to your intended executable outcome. We live in a world with limited capacity and resources, and this tool will help you identify outlets that match your intended audience. This starts with a business question and an action you will take from answering that question. Export the outlet list or see a dynamic overview of your selected outlets and how they compare them on the summary page.

For example, if you have 100 coolers you want to place with a hydration theme, you may want to know how many Convenience Stores in your territory are within a quarter mile of a high school, that are high volume, that are currently under index in water and/or sports drinks. This tool will populate the list of stores and give you an overview of the DNA of stores selected compared nationally or at bottler level.

Geography

United States

Scope

Retail

Bottle

Can

Data Source

Customer Master

Outlet Master

Bottler Master

Nielsen Spectra

Outlet Segmentation

Bottler Volume Data

Business Rules & Assumptions

Indexing is a ratio of the actual value of an outlet attribute divided by the average value of the outlet attribute for all outlets of the selected bottler. If no bottler is selected, the average value of the outlet attribute is based on all outlets.

Outlets with an attribute index above 115 are considered “Over Indexed”.

Outlets with an attribute index below 85 are considered “Under Indexed”.

Volume is measured in purchase units.

Outlet Clustering is only available when an outlet has complete demographic, proximity, and shipment data.

Prerequisites (Access Needed)

|  |  |  |
| --- | --- | --- |
| Requirement | Location | Access Approver |
| Power Apps |  |  |
| Power BI |  |  |
|  |  |  |

Key Stakeholders

|  |  |  |
| --- | --- | --- |
| Name | Email | Role |
| Melanie Daigle |  |  |
| Allison Maloney |  |  |
| Rob Hancharick |  |  |
| Jay Caplan |  |  |
| Nitin Sharma |  |  |
| Tarun Mehra |  |  |
| Scott Yee |  |  |
|  |  |  |

Architecture Diagram

A diagram of a diagram

Description automatically generated

Elements

The purpose of this page is to identify and define the report controls and navigation controls.

Tabs



These Outlet Query Tool tabs contain a set of filters that are grouped into the following categories:

Outlet Tab

Demographics Tab

Product Tab

Category Tab

Brand Tab

Pack Group Tab

Flavor Group Tab

SKU Tab

Summary Tab\*

\*The Summary Tab provides users the capability to export the outlet list or see a dynamic visualization of selected outlets.

Outlet Tab



The purpose of the Outlet Tab is for users to select filters pertaining to Outlet attributes.

Report Controls

Bottler

Bottler Region

Sales Center

Bottler Branch

Banner

Customer

NRS Designation

Channel

Sub Channel

Outlet by Name

Delivery Point ID

City

State

Zip Code

Time Period

Matched Outlets

CONA Bottlers

National YPO Segment by Channel

VPO Segment by Bottler/Channel

National Cluster

Local Cluster

Distance (miles) from closest High School

Distance (miles) from closest University

Distance (miles) from closest Interstate Exit

optiCORE

optiHYDRATE

optiLYTE

optiPREMIUM

Navigation Controls

Intro

Back

Next

Clear Selections

Report Controls

Bottler

A white rectangular object with black lines

Description automatically generated

Definition

Bottler is a dropdown allowing users to filter on the report metrics and visualizations on specific bottlers.

Bottler is located on the first page of the Outlet tab, in the first column.

For NAOU users, the dropdown would display all Bottlers in the system.

For Bottler users, the dropdown would default to display the Bottler the user is assigned to.

Bottler Region

A white rectangular object with black text

Description automatically generated

Bottler Region is a dropdown allowing users to filter on the report metrics and visualizations on specific bottler regions.

Bottler Region is located on the first page of the Outlet tab, in the first column.

Sales Center

A screenshot of a computer

Description automatically generated

Sales Center is a dropdown allowing users to filter on the report metrics and visualizations on specific sales centers.

Sales Center is located on the first page of the Outlet tab, in the first column.

Bottler Branch



Bottler Branch is a dropdown allowing users to filter on the report metrics and visualizations on specific bottler branches.

Bottler Branch is located on the first page of the Outlet tab, in the first column.

Banner

A white rectangular object with black lines

Description automatically generated

Banner is a dropdown allowing users to filter on the report metrics and visualizations on specific banners.

Banner is located on the first page of the Outlet tab, in the second column.

Customer

A white rectangular object with black lines

Description automatically generated with medium confidence

Customer is a dropdown allowing users to filter on the report metrics and visualizations on specific customers.

Customer is located on the first page of the Outlet tab, in the second column.

NRS Designation

A close-up of a sign

Description automatically generated

NRS Designation is a dropdown allowing users to filter on the report metrics and visualizations on specific NRS Designations.

NRS Designation is located on the first page of the Outlet tab, in the second column.

Channel



Channel is a dropdown allowing users to filter on the report metrics and visualizations on specific channels.

Channel is located on the first page of the Outlet tab, in the second column.

Channel Type



Channel Type is a dropdown allowing users to filter on the report metrics and visualizations on specific channel types.

Channel Type is located on the first page of the Outlet tab, in the second column.

Sub Channel



Sub Channel is a dropdown allowing users to filter on the report metrics and visualizations on specific sub channels.

Sub Channel is located on the first page of the Outlet tab, in the second column.

Outlet by Name

A close-up of a computer screen

Description automatically generated

Outlet by Name is a dropdown allowing users to filter on the report metrics and visualizations on specific outlets by name.

Outlet By Name is located on the first page of the Outlet tab, in the third column.

Delivery Point ID

A close-up of a box

Description automatically generated

Delivery Point ID is a dropdown allowing users to filter on the report metrics and visualizations on specific delivery point IDs.

Delivery Point ID is located on the first page of the Outlet tab, in the third column.

City

A white rectangular object with black text

Description automatically generated

City is a dropdown allowing users to filter on the report metrics and visualizations on specific cities.

City is located on the first page of the Outlet tab, in the third column.

State

A screenshot of a computer

Description automatically generated

State is a dropdown allowing users to filter on the report metrics and visualizations on specific state.

State is located on the first page of the Outlet tab, in the third column.

Zip Code

A screenshot of a computer code

Description automatically generated

Zip Code is a dropdown allowing users to filter on the report metrics and visualizations on specific zip codes.

Zip Code is located on the first page of the Outlet tab, in the third column.

Time Period

A screen shot of a computer

Description automatically generated

Time Period is a dropdown allowing users to filter on the report metrics and visualizations on specific time periods.

Time Period is located on the second page of the Outlet tab, in the first column.

Matched Outlets

A white rectangular object with black text

Description automatically generated

Matched Outlets is a dropdown allowing users to filter on the report metrics and visualizations on matched outlets.

Matched Outlets is located on the second page of the Outlet tab, in the first column.

CONA Bottlers

A white rectangular object with black lines

Description automatically generated

CONA Bottlers is a dropdown allowing users to filter on the report metrics and visualizations on CONA bottlers.

CONA Bottlers is located on the second page of the Outlet tab, in the first column.

National YPO Segment by Channel

A close-up of a screen

Description automatically generated

National YPO Segment by Channel is a dropdown allowing users to filter on the report metrics and visualizations on National YPO Segment by Channel.

National YPO Segment by Channel is located on the second page of the Outlet tab, in the second column.

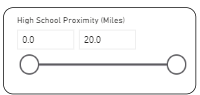
VPO Quartile



VPO Quartile is a dropdown allowing users to filter on the report metrics and visualizations on VPO Quartile.

VPO Quartile is located on the second page of the Outlet tab, in the first column.

High School Proximity (Miles)



High School Proximity (Miles) is a slider allowing users to indicate the range in miles from the closest high school.

High School Proximity (Miles) is located on the second page of the Outlet tab, in the second column.

University Proximity (Miles)



University Proximity (Miles) is a slider allowing users to indicate the range in miles from the closest university.

University Proximity (Miles) from closest University is located on the second page of the Outlet tab, in the second column.

Interstate Exit Proximity (Miles)



Interstate Exit Proximity (Miles) is a slider allowing users to indicate the range in miles from the closest interstate exit.

Interstate Exit Proximity (Miles) is located on the second page of the Outlet tab, in the second column.

Coastal Proximity (Miles)

A screenshot of a computer

Description automatically generated

Costal Proximity (Miles) is a slider allowing users to indicate the range in miles from the closest coast.

Coastal Proximity (Miles) is located on the second page of the Outlet tab, in the second column.

Number of Checkouts

A screenshot of a checkout

Description automatically generated

Number of Checkouts is a slider allowing users to indicate the checkout amount.

Number of Checkouts is located on the second page of the Outlet tab, in the third column.

Total Selling Area

A screenshot of a computer

Description automatically generated

Number of Checkouts is a slider allowing users to indicate the checkout amount.

Number of Checkouts is located on the second page of the Outlet tab, in the third column.

Total Grocery Selling Area



Number of Checkouts is a slider allowing users to indicate the checkout amount.

Number of Checkouts is located on the second page of the Outlet tab, in the third column.

National Cluster

A screenshot of a computer

Description automatically generated

National Cluster is a dropdown allowing users to filter on the report metrics and visualizations on specific national clusters.

National Cluster is located on the second page of the Outlet tab, in the fourth column.

Local Cluster

A white box with black text

Description automatically generated

Local Cluster is a dropdown allowing users to filter on the report metrics and visualizations on specific local clusters.

Local Cluster is located on the second page of the Outlet tab, in the fourth column.

optiCORE



optiCORE provides summary information for core brands.

optiCORE is located on the second page of the Outlet tab, on the top right above National Cluster.

optiHYDRATE



optiHYDRATE provides summary information for packaged water and advanced hydration products.

optiHYDRATE is located on the second page of the Outlet tab, on the top right above National Cluster.

optiLYTE



optiLYTE provides summary information for lyte brands.

optiLYTE is located on the second page of the Outlet tab, on the top right above National Cluster.

optiPREMIUM



optiPREMIUM provides summary information for premium brands.

optiPREMIUM is located on the second page of the Outlet tab, on the top right above National Cluster.

Navigation Controls

Intro



Intro navigates users to the overview page providing scope summary of the tool, when user is on the first page of the Outlet tab.

Intro is located on the first page of the Outlet tab, in the bottom navigation row.

Back



Back navigates users to the first page of the Outlet tab, when user is on the second page of the Outlet tab.

Back is located on the first page of the Outlet tab, in the bottom navigation row.

Next



Next navigates users to the first page of the Outlet tab, when user is on the second page of the Outlet tab.

Next navigates users to the first page of the Demographic tab, when user is on the second page of the Outlet tab.

Next is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Clear Selections



Clear Selections removes all the selected filters to allow users to start fresh.

Clear Selections is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Demographics Tab



The purpose of the Demographics Tab is for users to select filters pertaining to Demographics attributes.

Report Controls

Attribute Column

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

Navigation Controls

Back

Next

Clear Selections

Moneyball Breakdown

Hispanic Breakdown

Report Controls

Attribute Column

A screenshot of a screen

Description automatically generated

Attribute Column includes the following sections for each Demographics attribute:

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

The Demographics attributes include the following:

HH Income Index

Avg Age Index

HH Size Index

Urban % Index

Suburban % Index

Rural % Index

White Ethnicity Index

Hispanic Ethnicity Index

Black Ethnicity Index

Asian Ethnicity Index

Attribute Column is located on all pages of the Demographic tab, for each Demographic attribute.

Index Checkbox

A white background with black text

Description automatically generated

Index Checkbox removes all the selected filters to allow users to start fresh.

Index Checkbox is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Index Visualization

A close-up of a graph

Description automatically generated

Index Value Slider

A screenshot of a number

Description automatically generated

Actual Value Slider

A screenshot of a graph

Description automatically generated

Index Metrics

A screenshot of a screen

Description automatically generated

Navigation Controls

Back

A close up of a sign

Description automatically generated

Back navigates users to the second page of the Outlet tab, when user is on the first page of the Demographics tab.

Back navigates users to the first page of the Demographics tab, when user is on the second page of the Demographics tab.

Back is located on all pages of the Demographics tab, in the bottom navigation row.

Next



Next navigates users to the second page of the Demographic tab, when user is on the first page of the Demographics tab.

Next navigates users to the Product tab, when user is on the second page of the Demographics tab.

Next is located on all pages of the Demographics tab, in the bottom navigation row.

Clear Selections



Clear Selections removes all the selected filters to allow users to start fresh.

Clear Selections is located on all pages of the Demographics tab, in the bottom navigation row.

Moneyball Breakdown

A sign with text on it

Description automatically generated

Moneyball Breakdown navigates users to additional filters for Moneyball Demographic Attributes such as:

Younger (Age < 55)

Older (Age ≥ 55)

Struggling (< $75K)

Affluent (≥ $75K)

Couples/Singles (HH < 3)

Families (HH ≥ 3)

Non-Multicultural

Multicultural

Moneyball Breakdown is located on the first page of the Demographics tab, above the Clear Selections button.

Hispanic Breakdown

A sign with black text

Description automatically generated

Hispanic Breakdown navigates users to additional filters to further Hispanic ethnicity attributes such as:

Mexican Heritage

Other Hispanic Heritage

Puerto Rican Heritage

Cuban Heritage

Hispanic Breakdown is located on the first page of the Demographics tab, above the Clear Selections button.

Product Tab



The purpose of the Product Tab is for users to select filters pertaining to product attributes.

Report Controls

Attribute Column

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

Navigation Controls

Back

Next

Clear Selections

Report Controls

Attribute Column

A screenshot of a screen

Description automatically generated

Attribute Column includes the following sections for each Product attribute:

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

The Product attributes include the following:

Sparkling Index

Still Index

Regular Calorie Index

Low Calorie Index

IC Index

FC Index

Attribute Column is located on all pages of the Product tab, for each Product attribute.

Index Checkbox

A white background with black text

Description automatically generated

Index Checkbox removes all the selected filters to allow users to start fresh.

Index Checkbox is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Index Visualization

A close-up of a graph

Description automatically generated

Index Value Slider

A screenshot of a number

Description automatically generated

Actual Value Slider

A screenshot of a graph

Description automatically generated

Index Metrics

A screenshot of a screen

Description automatically generated

Navigation Controls

Back

A close up of a sign

Description automatically generated

Back navigates users to the first page of the Outlet tab, when user is on the second page of the Outlet tab.

Back is located on the first page of the Outlet tab, in the bottom navigation row.

Next



Next navigates users to the second page of the Outlet tab, when user is on the second page of the Outlet tab.

Next navigates users to the first page of the Demographic tab, when user is on the second page of the Outlet tab.

Next is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Clear Selections



Clear Selections removes all the selected filters to allow users to start fresh.

Clear Selections is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Category Tab



The purpose of the Category Tab is for users to select filters pertaining to category attributes.

Report Controls

Attribute Column

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

Navigation Controls

Back

Next

Clear Selections

Report Controls

Attribute Column

A screenshot of a screen

Description automatically generated

Attribute Column includes the following sections for each Category attribute:

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

The Category attributes include the following:

SSD Index

Sports Drinks Index

Water Index

Enhanced Water Index

Tea Index

Juice Drinks Index

Dairy Beverages Index

Juice 100% Index

Attribute Column is located on all pages of the Category tab, for each Category attribute.

Index Checkbox

A white background with black text

Description automatically generated

Index Checkbox removes all the selected filters to allow users to start fresh.

Index Checkbox is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Index Visualization

A close-up of a graph

Description automatically generated

Index Value Slider

A screenshot of a number

Description automatically generated

Actual Value Slider

A screenshot of a graph

Description automatically generated

Index Metrics

A screenshot of a screen

Description automatically generated

Navigation Controls

Back

A close up of a sign

Description automatically generated

Back navigates users to the first page of the Outlet tab, when user is on the second page of the Outlet tab.

Back is located on the first page of the Outlet tab, in the bottom navigation row.

Next



Next navigates users to the second page of the Outlet tab, when user is on the second page of the Outlet tab.

Next navigates users to the first page of the Demographic tab, when user is on the second page of the Outlet tab.

Next is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Clear Selections



Clear Selections removes all the selected filters to allow users to start fresh.

Clear Selections is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Brand Tab



The purpose of the Brand Tab is for users to select filters pertaining to brand attributes.

Report Controls

Attribute Column

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

Navigation Controls

Back

Next

Clear Selections

Report Controls

Attribute Column

A screenshot of a screen

Description automatically generated

Attribute Column includes the following sections for each Brand attribute:

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

The Brand attributes include the following:

Coca-Cola Index

Sprite Index

Diet Coke Index

Coke Zero Index

Smartwater Index

Powerade Index

Bodyarmor Super Drink Index

Fanta Index

Glaceau Vitaminwater Index

Dasani Index

Gold Peak Index

Minute Maid Index

Powerade Light/Zero Index

Sprite Zero/Diet/Light Index

Core Power Index

Glaceau VWTR Zero Index

Attribute Column is located on all pages of the Brand tab, for each Brand attribute.

Index Checkbox

A white background with black text

Description automatically generated

Index Checkbox removes all the selected filters to allow users to start fresh.

Index Checkbox is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Index Visualization

A close-up of a graph

Description automatically generated

Index Value Slider

A screenshot of a number

Description automatically generated

Actual Value Slider

A screenshot of a graph

Description automatically generated

Index Metrics

A screenshot of a screen

Description automatically generated

Navigation Controls

Back

A close up of a sign

Description automatically generated

Back navigates users to the first page of the Outlet tab, when user is on the second page of the Outlet tab.

Back is located on the first page of the Outlet tab, in the bottom navigation row.

Next



Next navigates users to the second page of the Outlet tab, when user is on the second page of the Outlet tab.

Next navigates users to the first page of the Demographic tab, when user is on the second page of the Outlet tab.

Next is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Clear Selections



Clear Selections removes all the selected filters to allow users to start fresh.

Clear Selections is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Pack Group Tab



The purpose of the Pack Group Tab is for users to select filters pertaining to pack group attributes.

Report Controls

Attribute Column

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

Navigation Controls

Back

Next

Clear Selections

Report Controls

Attribute Column

A screenshot of a screen

Description automatically generated

Attribute Column includes the following sections for each Demographic attribute:

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

The Demographic attributes include the following:

HH Income Index

Avg Age Index

HH Size Index

Urban % Index

Suburban % Index

Rural % Index

White Ethnicity Index

Hispanic Ethnicity Index

Black Ethnicity Index

Asian Ethnicity Index

Attribute Column is located on all pages of the Demographic tab, for each Demographic attribute.

Index Checkbox

A white background with black text

Description automatically generated

Index Checkbox removes all the selected filters to allow users to start fresh.

Index Checkbox is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Index Visualization

A close-up of a graph

Description automatically generated

Index Value Slider

A screenshot of a number

Description automatically generated

Actual Value Slider

A screenshot of a graph

Description automatically generated

Index Metrics

A screenshot of a screen

Description automatically generated

Navigation Controls

Back

A close up of a sign

Description automatically generated

Back navigates users to the first page of the Outlet tab, when user is on the second page of the Outlet tab.

Back is located on the first page of the Outlet tab, in the bottom navigation row.

Next



Next navigates users to the second page of the Outlet tab, when user is on the second page of the Outlet tab.

Next navigates users to the first page of the Demographic tab, when user is on the second page of the Outlet tab.

Next is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Clear Selections



Clear Selections removes all the selected filters to allow users to start fresh.

Clear Selections is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Flavor Group Tab



The purpose of the Flavor Group Tab is for users to select filters pertaining to flavor group attributes.

Report Controls

Attribute Column

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

Navigation Controls

Back

Next

Clear Selections

Report Controls

Attribute Column

A screenshot of a screen

Description automatically generated

Attribute Column includes the following sections for each Demographic attribute:

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

The Demographic attributes include the following:

HH Income Index

Avg Age Index

HH Size Index

Urban % Index

Suburban % Index

Rural % Index

White Ethnicity Index

Hispanic Ethnicity Index

Black Ethnicity Index

Asian Ethnicity Index

Attribute Column is located on all pages of the Demographic tab, for each Demographic attribute.

Index Checkbox

A white background with black text

Description automatically generated

Index Checkbox removes all the selected filters to allow users to start fresh.

Index Checkbox is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Index Visualization

A close-up of a graph

Description automatically generated

Index Value Slider

A screenshot of a number

Description automatically generated

Actual Value Slider

A screenshot of a graph

Description automatically generated

Index Metrics

A screenshot of a screen

Description automatically generated

Navigation Controls

Back

A close up of a sign

Description automatically generated

Back navigates users to the first page of the Outlet tab, when user is on the second page of the Outlet tab.

Back is located on the first page of the Outlet tab, in the bottom navigation row.

Next



Next navigates users to the second page of the Outlet tab, when user is on the second page of the Outlet tab.

Next navigates users to the first page of the Demographic tab, when user is on the second page of the Outlet tab.

Next is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Clear Selections



Clear Selections removes all the selected filters to allow users to start fresh.

Clear Selections is located on the first and second pages of the Outlet tab, in the bottom navigation row.

SKU Tab



The purpose of the SKU Tab is for users to select filters pertaining to SKU attributes.

Report Controls

Attribute Column

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

Navigation Controls

Back

Next

Clear Selections

Report Controls

Attribute Column

A screenshot of a screen

Description automatically generated

Attribute Column includes the following sections for each Demographic attribute:

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

The Demographic attributes include the following:

HH Income Index

Avg Age Index

HH Size Index

Urban % Index

Suburban % Index

Rural % Index

White Ethnicity Index

Hispanic Ethnicity Index

Black Ethnicity Index

Asian Ethnicity Index

Attribute Column is located on all pages of the Demographic tab, for each Demographic attribute.

Index Checkbox

A white background with black text

Description automatically generated

Index Checkbox removes all the selected filters to allow users to start fresh.

Index Checkbox is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Index Visualization

A close-up of a graph

Description automatically generated

Index Value Slider

A screenshot of a number

Description automatically generated

Actual Value Slider

A screenshot of a graph

Description automatically generated

Index Metrics

A screenshot of a screen

Description automatically generated

Navigation Controls

Back

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Back navigates users to the first page of the Outlet tab, when user is on the second page of the Outlet tab.

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Next



Next navigates users to the second page of the Outlet tab, when user is on the second page of the Outlet tab.

Next navigates users to the first page of the Demographic tab, when user is on the second page of the Outlet tab.

Next is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Clear Selections



Clear Selections removes all the selected filters to allow users to start fresh.

Clear Selections is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Summary Tab



The purpose of the Summary Tab is for users view metrics and visualizations based on the filters selected from the previous tabs.

Report Controls

Attribute Column

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

Navigation Controls

Back

Next

Clear Selections

Report Controls

Attribute Column

A screenshot of a screen

Description automatically generated

Attribute Column includes the following sections for each Demographic attribute:

Index Checkbox

Index Visualization

Index Value Slider

Actual Value Slider

Index Metrics

The Demographic attributes include the following:

HH Income Index

Avg Age Index

HH Size Index

Urban % Index

Suburban % Index

Rural % Index

White Ethnicity Index

Hispanic Ethnicity Index

Black Ethnicity Index

Asian Ethnicity Index

Attribute Column is located on all pages of the Demographic tab, for each Demographic attribute.

Index Checkbox

A white background with black text

Description automatically generated

Index Checkbox removes all the selected filters to allow users to start fresh.

Index Checkbox is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Index Visualization

A close-up of a graph

Description automatically generated

Index Value Slider

A screenshot of a number

Description automatically generated

Actual Value Slider

A screenshot of a graph

Description automatically generated

Index Metrics

A screenshot of a screen

Description automatically generated

Navigation Controls

Back

A close up of a sign

Description automatically generated

Back navigates users to the first page of the Outlet tab, when user is on the second page of the Outlet tab.

Back is located on the first page of the Outlet tab, in the bottom navigation row.

Next



Next navigates users to the second page of the Outlet tab, when user is on the second page of the Outlet tab.

Next navigates users to the first page of the Demographic tab, when user is on the second page of the Outlet tab.

Next is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Clear Selections



Clear Selections removes all the selected filters to allow users to start fresh.

Clear Selections is located on the first and second pages of the Outlet tab, in the bottom navigation row.

Business Case FAQs

The purpose of this page is to identify generic business cases and general strategies.

The Outlet Query Tool is designed to assist in targeting outlets based on a business question across many functions. Sample questions include:

Which outlets are under-indexed in HH Income to ensure we have affordability packages present?

Here are the steps to get a list of all the stores **under indexed for sports drinks in a 20-mile radius of the closest university**:

Go to the **Outlet tab**, select the next button to navigate to the **2nd page**.

Update the “**Distance (miles) from closest University**” field to 0 miles - 20 miles.

Go to the **Category tab**.

Update the **“Sports Drink Index”** to select the **“Under” filter**.

Go to the **Summary tab**.

Navigate to the **List** on the left to view the list of stores with your filtering criteria.

What is the demographic summary where Coca-Cola Zero Sugar over indexes?

What products are over/under indexed at a certain customer or channel?

Customer X wants to target a shopper profile. What outlets have these shoppers in their trade area?

Where do I have the opportunity to grow X brand?

How-To Tutorials

The purpose of this page is to identify common questions and provide walkthrough steps.

Questions for proximity

Questions for brand performance

Questions for demographics

References

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| --- | --- |
| Reference Name | Location |
| Outlet Segmentation Intro | [An Introduction to Outlet Segmentation](https://outletsegmentation.com/intro/) |
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