Outlet Query Tool GenAI – Wiki Template

Analytics & Insights Platform Services



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**Date:** January 26, 2024

# Version History

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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:

1. Outlet Tab
2. Demographic Tab
3. Category Tab
4. Brand Tab
5. Product Tab
6. Pack Group Tab
7. Flavor Group Tab
8. Summary Tab\*

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

### Outlet Tab

Outlet Tab navigation element

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.

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 Segment by Bottler/Channel

A screenshot of a computer

Description automatically generated

* VPO Segment by Bottler/Channel is a dropdown allowing users to filter on the report metrics and visualizations on VPO Segment by Bottler/Channel.
* VPO Segment by Bottler/Channel is located on the second page of the Outlet tab, in the second 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 third 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 third column.

Distance (miles) from closest High School

A screenshot of a computer

Description automatically generated

* Distance (miles) from closest High School is a slider allowing users to indicate the range in miles from the closest high school.
* Distance (miles) from closest High School is located on the second page of the Outlet tab, in the first column in the bottom report components row.

Distance (miles) from closest University

A screen shot of a computer

Description automatically generated

* Distance (miles) from closest University is a slider allowing users to indicate the range in miles from the closest university.
* Distance (miles) from closest University is located on the second page of the Outlet tab, in the second column in the bottom report components row.

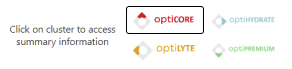
Distance (miles) from closest Interstate Exit

A screenshot of a computer

Description automatically generated

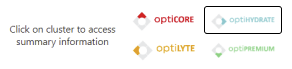
* Distance (miles) from closest Interstate Exit is a slider allowing users to indicate the range in miles from the closest interstate exit.
* Distance (miles) from closest Interstate Exit is located on the second page of the Outlet tab, in the third column in the bottom report components row.

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

A screenshot of a logo

Description automatically generated

* 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

A group of logos with text

Description automatically generated with medium confidence

* 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 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.

### Demographic Tab



The purpose of the Demographic 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

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.

### Category Tab

# 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:

1. Which outlets are under-indexed in HH Income to ensure we have affordability packages present?
2. What is the demographic summary where Coca-Cola Zero Sugar over indexes?
3. What products are over/under indexed at a certain customer or channel?
4. Customer X wants to target a shopper profile. What outlets have these shoppers in their trade area?

# How-To Tutorials

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

# References

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