Private Label: Don’t Fight It, Thrive In It

How Manufacturers and Retailers Can Collaborate on Insight-Driven Product Development and Merchandising

by Renato Scaff, Kenneth Dickman, Robert Berkey and Lori Baran
Consumers no longer view private label as a trade-down and, more often, see private label just as another branded option.

Executive Summary

Although the dust is settling from the global recession, demand for private label goods has remained strong. For a number of reasons, most experts agree private label is here to stay and should continue to grow. Retailers are getting progressively better at developing, promoting and selling their own products. They are developing private label strategies that focus efforts on improving product quality, identifying white space at the shelf, expanding price tiers and entering multiple categories—all in an effort to differentiate themselves, improve negotiating power and increase profitability. Meanwhile, consumers are becoming more aware and accepting of private label (or in some cases simply cannot tell the difference). They no longer view private label as a trade-down and, more often, see private label just as another branded option.

How does a consumer packaged goods manufacturer grow profitably in this environment? Traditionally, manufacturers have fought aggressively against the onslaught of private label by evaluating the most effective competitive strategies (such as improved innovation, direct-to-consumer, and value tiers) while also considering the strategic and financial implications of using spare capacity to produce private label products. We believe that these competitive techniques can often destroy value for both the manufacturer and retailer and in many instances the path to success lies in strategic collaboration.

Strategic collaboration requires a different mindset between manufacturer and retailer, as well as the process and capabilities that allow manufacturers to work more closely with retailers to identify consumer demand and quickly respond to it. In those instances where collaboration is deemed the appropriate response, it requires jointly focusing on category growth and consumer return on investment, thereby eliminating the inefficiencies of working against each other. By sharing consumer and shopper insights—working together on innovation, assortment and marketing toward a mutual consumer—both the manufacturer and retailer can benefit in the form of a more loyal consumer base, stronger overall category sales, better margins and lower costs across areas such as product development, marketing and promotion.
Private label is here to stay

Across the United States and many other developed countries, it is a confusing and uncertain time for consumers and businesses, including retailers and consumer packaged goods (CPG) manufacturers. In the United States, the Consumer Confidence Index—an indicator of the relative financial health, spending power and confidence of the average U.S. consumer—remains volatile, up several points one month and down the next as consumers waffle between confidence and concern for their economic well-being.

Amid such economic uncertainty lies the conundrum of private label brands. While once attractive to consumers largely because of their lower prices, private label goods now are essentially seen as on par with competing branded products across multiple categories and price points. In fact, in many cases consumers do not even realize private label brands are store-owned because of improvements in innovation, quality, packaging, increased consumer marketing and, most recently, their availability through other retail channels. Despite the economic recovery, financially cautious consumers continue to sort out how and where private label brands fit within their shopping baskets. A 2010 Nielsen survey (see Figure 1) of more than 27,000 consumers across 53 countries makes it clear that consumers are retaining their private label interest post-recession. More than half of respondents said they purchased more private label brands during the economic downturn, and an average of 91 percent of these consumers said they will continue to do so as the economy improves.\(^1\)

Figure 1. Consumer Buying Behaviour During Downturn and Beyond

Consistent worldwide sentiment: The majority of consumers purchased more private label brands during the economic downturn. When the economy improves, virtually all consumers will continue to purchase private label brands.

Source: The Nielsen Company, Global Online Survey, Q3, 2010
Furthermore, consumer acceptance of private label is growing across categories that were traditionally “taboo” from a private label perspective (such as beer and spirits). In a 2010 Private Label Manufacturers Association study, more than 40 percent of consumers reported they are trying store brands in categories where they used to buy only national brands. Wider availability and sophistication of private label products appear to have increased acceptance among consumers.

All indicators point to continued private label growth. A new report by Rabobank (see Figure 2) projects private label foods will double their global market share by 2025, driven by retail consolidation, increased consumer acceptance, intense discounter competition, more comprehensive private label strategies, and improved professionalism and quality of private label suppliers. However, now is a time of evaluation, as retailers are determining if their private label “push” in recent years is really paying off strategically and financially or just alienating consumers and suppliers, resulting in category erosion and added complexity. Similarly, CPG manufacturers are determining if the strategies they have employed to defend against private label—such as developing “value brands” and conducting more trade promotions—are actually working.

**Figure 2. Brand/Private-label Market Shares, 1999–2025**

Private Label and Value brands are growing from less than 20 percent to more than 50 percent (forecast).*

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* Source: Rabobank report: Private label vs. Brands: An Inseparable Combination
Factors behind private labels’ success

There are several reasons why private label has achieved a more permanent position in the retail category lineup. Manufacturers must understand these drivers to create a compelling approach for collaboration, with the ultimate goal of positioning themselves to take part in critical decisions with the retailer.

Private label programs have increased in sophistication and innovation. Retailers have gotten more sophisticated and innovative in positioning private labels and now are willing to make the investments in their private label products. They are increasingly entering niche and premium segments—such as organic and health and wellness—by leading with private labels. Retailers also are introducing tiered private label products to meet the needs and lifestyles of different consumer segments, and some products have evolved into “premium” brands themselves. Some private label brands are even branching out beyond own-store distribution. For instance, in 2009, UK retailers Waitrose (a grocery chain) and Boots (a pharmacy chain) entered into a deal to stock each other’s ranges. By doing so, Waitrose has made its brand much more accessible to consumers by essentially extending its distribution network.4

Retailers are focusing on better-quality private label products. Retailers’ focus on quality has had a significant impact on the growth of private label. A study of 21 private label foods by Consumer Reports last year in the United States found only seven national brand products were appreciably better than their store brand counterparts.5 For the other 14 categories, store brands were better than or equal to national brand quality. Furthermore, Mintel International reports that 44 percent of grocery shoppers in the United States believe store brand products are of better quality today than they were five years ago.6

Retailers are prioritizing Stock-keeping unit (SKU) rationalization at retail. SKU rationalization has been a priority for the world’s leading retailers. Beginning with a 2010 initiative, SUPERVALU’s ongoing rationalization efforts targeted reduction in total SKU count of up to 25 percent in some categories, while Carrefour’s category optimization program aims to result in 15 percent fewer SKUs.7 In addition to opening up shelf space for private label products, such moves increase the risk of manufacturers being delisted and shifts more power into the hands of retailers.

Retail consolidation and international expansion have made private label more viable and cost effective for retailers. Retail consolidation has enabled, and will continue to enable, private label growth. Consolidation increases economies of scale for the retailer, which allows for more efficient supply chain operations and synergies in areas such as R&D, packaging, and label production.
Mutual dependency: balance is key

While private label has grown in strength and prestige, retailers must be wary that it is possible to take private label too far. Wal-Mart’s October 2010 announcement that it would revisit its Project Impact private label strategy provides evidence that retailers are learning that too much focus on private label can alienate shoppers and valued suppliers. Bill Simon, US president and CEO of Wal-Mart, recently clarified the company’s private label position and renewed its appeal for partnership with CPG manufacturers. He acknowledged that, in response to Wal-Mart’s “across the box” branding of its Great Value store brand, “it appeared to our customers—along with the assortment reduction in many of these same categories—that we were trying to drive them into private label and not sell national brands...and that was not the intent. We prefer to sell national brands. They show our value better. When the price of Oreos in my store is less than the price of Oreos in a competitor’s store, there is no doubt who the price leader is and where the basket win is...private brands are still important to us. They play an important role in our business, different by category. They fill holes or gaps in our offering.”

Wal-Mart’s experience clearly demonstrates the need for retailers to find the right balance between private label and national brands—especially given the increasing power consumers now wield in the relationship and the importance they place on trust when buying certain brands. It is incumbent upon the retailer to gain that insight and merchandise its stores accordingly.

For manufacturers, instead of fighting the private label trend, they should focus on coexisting and even cooperating to meet consumer needs and improve profitability. In other words, manufacturers must determine where it makes sense to compete and where it is better to collaborate with retailers to find the balance for each category that drives maximum growth and profitability for both parties.
Collaborating on insight-driven product development and merchandising

In today’s consumer goods value chain, there is no one right way for manufacturers to approach private labels. Rather, an analysis of multiple factors can help manufacturers “pick their battles”—i.e., decide where to compete with private label goods or collaborate to achieve success.

Where to compete versus collaborate

This point of view does not provide guidance on where manufacturers should compete or collaborate. However, it does highlight considerations that can help manufacturers determine which is potentially the right option. When defining where to compete versus collaborate, a manufacturer must evaluate its overall brand strategy, including the role of the brand in building customer value for the retailer, as well as its retail partnership strategy. Considerations include the following:

- **Market analysis**—Where am I currently winning?
- **Category analysis**—Which categories are growing in size and profitability and where do brands really matter?
- **Brand strength**—What is the strength of my brands relative to competitors’ brands and retailers’ house brands?
- **Retailer segmentation**—Which retailers are most critical to enable growth? Which are open to collaboration?
- **Customer**—In which areas do customers appear to be the most loyal to national brands versus private label?
- **Economics**—What are the key profit drivers of my business and how do I optimize them in a world with growing private label penetration?

In the categories where competition is the best strategy, the objective should be to establish the brand in such a way—through some combination of strong brand recognition, perceived quality, or innovation—so that retailers would be reluctant to compete against it because doing so would require substantial scale and investment. Apple’s iPhone is a great example. It is such a strong product that, rather than trying to compete with it, retailers focus on securing a sufficient allocation of iPhones to meet consumer demand.

In the categories where collaboration is the chosen strategy, manufacturers and retailers should focus collaboration where it can make the greatest impact and is mutually beneficial. Specifically, we find both parties can gain substantial benefits by collaborating on insight-driven product development and merchandising across four key areas:

- Consumer insights
- Assortment planning
- Product innovation
- Marketing and promotion

We explain each area in further detail.

**Consumer insights**

To attract today’s demanding and powerful consumer, both manufacturers and retailers must develop deep insights into consumers’ and shoppers’ behavior, needs and buying patterns. Such insights—which enable retailers and manufacturers to profile, analyze, and target specific customers—are best developed by gaining a “single view” of the consumer.

However, retailers and manufacturers truly need each other to achieve such a view. Retailers typically have more sophisticated shopper data and insights that they generate through point-of-sale (POS) systems, loyalty programs, and other store-level mechanisms, but generally can only use those insights on assortment and promotion decisions (unlike manufacturers, which can leverage such insights to refine product features and positioning). Manufacturers bring broader category insights based on visibility of sales across retailers, but are not able to drill down into needs and behaviors of specific customers or customer segments.

Thus, working together, retailers and manufacturers could gain a tremendous amount of value at the category level where both parties can bring the appropriate data to bear with a focus on the same consumer segments. Combined datasets could lead to private label insights on purchase behavior, consumer behavior across stores, customer segments, and promotional or offer responses. Collaboratively analyzing data, such as purchase frequency as well as category trends and category promotions within the store could generate deep insights that could help companies identify how to enhance existing branded products or develop a new private label product to satisfy unmet consumer needs within the category—all while reducing complexity for both parties and simplifying the shopping experience for consumers.

**Assortment planning**

In today’s environment, retailers and manufacturers directly compete for the same space on the shelf. Retailers frequently increase the penetration of their brands at the expense of national brands, while manufacturers aggressively work to secure as much space as possible in prominent locations. Without coordination, the goals of each party cannibalize each other instead of increasing the combined share of consumers’ wallets. Sometimes, retailers go too far and confuse and upset consumers, as in the Wal-Mart Project Impact private label strategy mentioned earlier.

Collaborative assortment means bringing together each party’s distinct capabilities, data, and consumer insights so they can view categories in a more holistic way to drive growth. Collaboration begins with the two parties creating joint category objectives and agreeing on what data is needed, how it will be used, and how insights will be applied.
...Working together, retailers and manufacturers could gain a tremendous amount of value at the category level where both parties can bring the appropriate data to bear with a focus on the same consumer segments.
The retailer and manufacturer also must be clear on the analytic capabilities required, the outcomes desired, and how both parties will be held accountable for the results.

Through collaboration, retailers and manufacturers can jointly analyze consumer purchase behavior and the product attributes that consumers value. The results of this analysis can enable the two parties, in turn, to create a mix of national and private label brands in the store that grows instead of erodes the category. Included in this mix could be new products with attributes that fill identified gaps—such as exclusive products that meet a specific consumer need, differentiate the retailer, and can be provided at a lower cost by the manufacturer. The manufacturer might not normally launch such products (largely because the limited size of the market for the items is not large enough to justify the effort), but given the guaranteed distribution by the retailer, it might make business sense.

By factoring in the cost of complexity for both the manufacturer and retailer, the two together can identify the optimal assortment that increases volume, revenue and margin for both of them.

**Product innovation**

Innovation is the lifeblood of the consumer goods industry: Consumers want it and manufacturers and retailers must continue to provide it to remain relevant. For many retailers, a significant portion of their innovation efforts has been directed to private label products. Yet in most cases, retailers are forced to adopt a smart follower strategy because they lack deep product innovation capabilities and extensive budgets for product test, launch or advertising.

Leading manufacturers have much more robust and formal innovation capabilities in-house that enable them to develop a steady stream of new products. However, because of their position in the value chain, they typically lack the direct connection to consumers that retailers enjoy. That can inhibit their ability to bring new products to market quickly, and accurately determine which concepts will ultimately be winners or losers on the shelf. Furthermore, while manufacturers are placing an emphasis on innovation to combat the private label threat, many have fallen short and thus actually have contributed to the prevalence of private label goods.

Given their respective strengths and limitations in product development, retailers and manufacturers could benefit greatly from some type of collaboration in innovation, as illustrated in Figure 3.

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**Figure 3. Spectrum of Possible Collaboration**

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![Figure 3](image-url)
At the far-left end of the spectrum, the branded manufacturer may choose not to involve the retailer in collaborative innovation and instead differentiate itself from private label through business model and service innovation. An example of such business model innovation can be seen in Apple, which creates an ecosystem around its products that attracts users to join. Nike, in cooperation with Apple, created a community around its running shoes with Nike+, which allows runners to track and share their running data.

The “collaborate” portion of the spectrum includes four concepts:

In Capture Retailer Input collaboration, the branded manufacturer simply treats the retailer as an equal idea generator along with consumers, suppliers, and others. The retailer is just another source of input rather than a true partner in collaboration.

Retailer-Specific Tailored Products are defined as when a retailer carries exclusive products that represent slight refinements to a broadly distributed national brand. For example, both Wal-Mart and IKEA have exclusive, slightly refined appliance products from a national brand.

True Cooperation involves the branded manufacturer working closely with the retailer on innovation, sharing insights and jointly developing a pipeline of products from scratch. In some cases, joint ventures are formed with this type of collaboration. For instance, Unilever worked closely with Starbucks to develop Starbucks Ice Cream. A news release announcing the deal noted that “The agreement leverages Starbucks coffee expertise and passion for innovation and Unilever’s capabilities as the leading global manufacturer and marketer of ice cream.”

“Exclusivity” is when a branded manufacturer works closely with the retailer on innovations that will be exclusive to that retailer for at least a certain period of time. For example, Unilever developed and launched the All Small & Mighty laundry detergent with input from Wal-Mart that was focused on making a “green” product that required less shelf space. Through the exclusive arrangement, Wal-Mart agreed to aggressively promote the product.

To the right of collaboration on the spectrum is Rebranding. While not fully innovative, rebranding involves putting a store or retailer’s name on the branded product. A slightly different approach to this is when the branded label uses a third-party manufacturer to produce the product, while this manufacturer is also producing a very similar product for private label. For example, in addition to manufacturing its own branded products, 3M manufactures private label products that are then sold through retailers’ networks.

Collaborative product innovation can generate several benefits for both the retailer and manufacturer. First, it can substantially widen the innovation funnel, enabling the two parties to pursue many more innovation opportunities. Second, it can help accelerate products through the funnel more quickly based on a higher level of confidence in consumer acceptance. And third, it can dramatically improve product launches. The combined retailer-manufacturer data enables the two parties to improve demand forecasting, and by teaming up on marketing and in-store communications, they can spread the word about the new products more effectively. The end result is more products that meet the needs of consumers and are enthusiastically embraced by the marketplace—which translates into stronger growth for both parties.
Marketing collaboration begins with the manufacturer and retailer implementing appropriate processes that support joint development, design and execution of collaborative campaigns.

Marketing and promotion
As the economy continues its recovery, some manufacturers are looking to significantly increase marketing spend and R&D to help them more deeply connect with consumers. Kraft Foods, for instance, announced in February this year that it would boost spending in innovation and marketing, increasing both to 10 percent of revenue. At the same time, retailers are increasing their investment in promoting private label products in the store. For example, Food Lion and Bloom, both owned by Delhaize, offered shoppers up to $10 in free groceries every time they bought private label products. Publix went so far as to offer a free private label product when consumers purchase the branded equivalent. However, consumers are experiencing a certain level of promotion fatigue. According to SymphonyIRI, in 70 percent of package-goods categories in 2010, at least 30 percent of merchandise was sold with some kind of promotional support. Traditionally, consumers have been trained to buy on promotion. Yet these promotions are not providing the sales lift that they have in the past. If these promotions are only mildly resonating with the target consumers, it would make sense that collaboration could give both manufacturer and retailer a bigger bang for the dollars spent.

Collaboration on marketing and promotions involves the manufacturer and retailer aligning their marketing efforts to optimize spends on consumers to boost the overall category. Marketing collaboration begins with the manufacturer and retailer implementing appropriate processes that support joint development, design and execution of collaborative campaigns, the ability and willingness to share key data, and enhanced analytical capabilities that enable the parties to determine the return on marketing spend.

Rather than running separate campaigns to promote their respective products, manufacturers and retailers could combine forces to bundle both branded and private label products in the same promotion, such as offering a branded meal bundled with a private label cola. Progressive Grocer’s Store Brands magazine cites that “... when [store] brands are paired with the right national brands to create enticing promotions, customers are given even more incentive to shop at a particular retailer’s store. In the end, the category is strengthened, and all parties win: the retailer, the national brand and—perhaps most importantly—the consumer.” Safeway has been a leader in mixing both national and store brands in its promotions, and was able to improve sales and increase the total basket overall.

If executed correctly, collaboration on marketing can result in a more efficient use of marketing funds (i.e., retailers can help manufacturers understand how best to invest) and it can drive overall category growth.
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### Consumer Insights
Sharing of complementary insights to better meet consumer needs by working with a single view of the consumer. Manufacturers bring broad category insights based on visibility across retailers. Retailers bring more sophisticated shopper data and insights received through POS, loyalty and other store-level mechanisms.

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<thead>
<tr>
<th>Manufacturer Benefits</th>
<th>Retailer Benefits</th>
<th>Example</th>
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<tbody>
<tr>
<td>Improved products and offerings based on detailed shopper behavior and needs.</td>
<td>Joint insights to make decisions based on a broader category perspective.</td>
<td>A manufacturer and retailer shared operational cost and consumer purchase behavior insights on cat food. Based on this shared information, they developed a private label product bundle for cat food.</td>
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### Assortment Planning
Bringing together the distinct capabilities, data, and consumer insights to view categories and assortments in a more holistic way to drive growth. Through collaboration, retailers and manufacturers can jointly analyze consumer purchase behavior and the product attributes that consumers value to optimize assortment and space.

| Opportunities to position current or new/exclusive branded products on the shelf and avoid competing head-on with private label alternatives. | Increased differentiation, and reduced complexity to simplify the shopping experience and minimize erosion of the category (e.g., when a private label product takes away sales from a higher-price branded product versus meeting a unique consumer need). | Procter & Gamble is working with a select group of retailers to introduce new brands and flavors sold exclusively by the partner stores—for example, Great British Flavours is a line of Pringles with unique smoky bacon, kebab and curry flavors for Tesco. |

### Product Innovation
Working jointly to innovate on products, which could vary from joint concept development to simply ushering products through the pipeline. In many instances collaboration on product innovation results in an exclusive arrangement.

| Widening the innovation funnel, accelerating products through the funnel more quickly, and improved product launch success. | Faster speed to market for branded products that meets consumer needs as well as opportunities for exclusive arrangements that aid in differentiation. | Unilever worked closely with Starbucks to develop a Starbucks-branded super-premium line of ice cream that will be served at more than 11,000 Starbucks stores in the United States. |

### Marketing and Promotion
Aligning the manufacturer's and retailer's marketing efforts to optimize spends on consumers to boost the overall category.

| Easier understanding of whether campaigns are hitting the desired targets. | Access to more marketing funds and the ability to boost the whole category, not just its own private label sales. | Safeway advertised and displayed national brand and private label products together using a “mix-and-match” deep-discount promotion. “Safeway was able to drive sales of both while increasing total basket ring.” |

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**Figure 4. What does collaboration look like?**
Collaboration 3.0—Leading-edge collaboration

Traditional mindsets would seek to imply that the idea of sharing this type of data might be a frightening thought to many retailers and manufacturers. However, we also feel that the upsides to sharing far outweigh the downsides, provided adequate measures are taken to protect and ensure the confidentiality of the data involved.

One such measure is creating a collaboration environment, or “clean room,” in which a “clean team” is established to generate meaningful insights from both sets of data. This is the same “clean room” approach that has been used in the evaluation of possible merger and acquisition opportunities to identify potential synergies between the two parties. The concept of applying a clean team approach to collaboration is designed to help the two companies move to a level of cooperation where the business behaves as one virtually vertical organization, focused on creating value across the end-to-end supply chain, rather than in each part within it. The clean team (typically a third party) would be focused on collecting the data and housing it in one centralized place. The team then would be responsible for analyzing and interpreting the data, and communicating the resulting insights to the two parties. Both the retailer and manufacturer would supply “interpreters” to work with the clean team to ensure the insights are correctly applied and relevant.

Facilitated collaboration does not stop with the clean room concept. An involved third party can provide a managed service that can facilitate product innovation activities, as well as joint supply planning or execution support, synchronizing data and driving objectives from both sides. The manufacturer and the retailer would provide knowledgeable resources as well as data for a particular planning horizon, and the collaboration service could synthesize the data and raise alerts, potentially within a tool that can be accessed by all parties. This arrangement allows manufacturers and retailers alike to benefit from collaborative practices without committing to the cost of additional technology or headcount.

It’s time to retire traditional mindsets

There is no question the competitive environment in the consumer goods industry has become more intense in the past decade, especially given the impact the recent recession has had on consumers around the world. Virtually every company in the consumer goods value chain has spent some time considering changes they could make to become more attractive to consumers while improving their own balance sheets, and for many, those discussions eventually have come around to the subject of private label.

Traditionally a source of additional revenue for retailers—and a source of tension for manufacturers—private label today can become a source of growth and differentiation for both parties if approached with a collaborative mindset. For collaboration to be successful, it must be accompanied by a joint focus on category growth and consumer return on investment, as well as a process with the right capabilities that enable the two parties to work more closely together toward those objectives. It also requires a willingness to share insights, get engaged, and explore options for working jointly on product innovation, assortment planning, and marketing and promotion that improves growth and profitability for both parties.

As the balance of power has shifted squarely to the consumer, both retailers and manufacturers must respond by developing more consumer-centric strategies and operating models. By collaborating to understand and fulfill consumer needs in the most appropriate and profitable way, manufacturers and retailers each can compete and thrive as they further their pursuit of high performance.
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