



CASE STUDY

Spirits Company Goes Beyond Portfolio Optimization to Drive Business Results

[Download the PDF](#)

A spirits company, with a variety of brands within their portfolio, was struggling to balance investments across various lines of business with different targets and seasons. While they had an analytics program in place, the results weren't actionable or insightful. Analytic Partners stepped in to create a Commercial Excellence Program targeted to their unique industry dynamics.

CHALLENGE

Several brands were stagnant, particularly within on-premise, and the client did not have a clear view of marketing ROIs or how to optimize investments to drive growth. In an industry with unique dynamics, balancing investment between Sales and Marketing teams was a challenge. Moreover, new product launches increased business complexity.

SOLUTION

Analytic Partners worked with the client to create a Commercial Excellence Program turn data into expertise. An adaptive analytic approach was leveraged to understand how marketing efforts impacted consumers along the purchase funnel. By incorporating **brand equity / health metrics** the team was able to provide a balanced understanding of the impact of marketing investment. The program went beyond ROI by product/channel to support strategic needs such as:

Leveraging analytics to understand long-term impacts via word of mouth

Identifying what messages resonate

Uncovering how best to execute and how to win within on-premise

Revealing competitive insights

RESULTS

Portfolio Management Strategies were created for each brand. Spending reallocation recommendations were leveraged in scenario planning and marketing mix optimization.

Implemented recommendations led to identification of over \$31mm in profit opportunities annually and generation of +27% increase in overall marketing ROI in year one.

IDENTIFICATION OF
OVER \$31MM IN PROFIT
OPPORTUNITIES
ANNUALLY GENERATION
OF

+27%

INCREASE
IN OVERALL
MARKETING
ROI IN YEAR
ONE

“By leveraging an adaptive approach, the client went beyond portfolio optimization to increase ROI and support strategic needs.”