Grocery
Operations

LCBO

Presentation to Grocers with beer, cider & wine authorizations

September 29, 2016

This presentation aims to provide interested suppliers/agents with information about making wine products available to the LCBO's grocery customers. Some of the presentation deals with product eligibility requirements that are set out in Ontario Regulation 232/16 (which is available at https://www.ontario.ca/laws/regulation/160232). Nothing in this presentation changes any contents of the Regulation and if there is any inconsistency between the contents of this presentation and the Regulation, the Regulation governs.

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Today's Agenda

1- New rules & regulations

2- Roles & responsibilities

3- Product catalogue and ordering

4- Order fulfillment, delivery, receiving and invoicing

5 – Mandatory weekly reports

6 – Resources and next steps

7 – Q&A with LCBO team

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1 - New Rules & Regulation

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Regulatory Framework

Ontario Regulation 232/16
Sale of Liquor in Government Stores

https://www.ontario.ca/laws/regulation/160232

In this regulation you will find:

- Definitions
- Restrictions on type of beverage alcohol, package size, alcohol content
- Product display requirements
- Hours of operation
- Restrictions on promotions, loyalty programs & advertising found here

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Product Definitions

CIDER
Wine produced from apples or pears, or from the concentrated juice of apples or pears, to which is added herbs, water, honey or sugar

CREAM WINE
Alcoholic beverage made from wine and added milk ingredients

MALT BASED COOLER
Alcoholic beverage that is produced from a base of malt blended with juice, water, carbon dioxide or flavouring and that does not have the aroma or taste commonly attributed to beer

QUALITY ASSURANCE WINE
Wine (not cider) that is designated as meeting the quality control standards of a statutory appellation of origin regime that certifies, in the aggregate, < 50M litres of wine (no cider) annually

VQA WINE
Vintners Quality Alliance wine as defined in the *Vintners Quality Alliance Act, 1999*

WINE BEVERAGE
Wine-based cocktail or alcoholic beverage that is produced from a base of wine that may have added to it flavouring or flavouring preparations, juices, colour and sugar that does not have the aroma or taste commonly attributed to wine and that is available in a spritis-based version

LCBO Product catalogue will only offer products in compliance with the regulatory definitions

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Product Parameters

Beer & Cider

- Alc content ≤ 7.1%
- No container > 750ml
- No malt based coolers
- Pack size ≤ 6

Wine

- Alc content ≤ 18%
- No wine beverages
- ≤ 4 Litres in size
- Subject to grocery floor
- No cream wine

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Wine Grocery Floor Price

Size (ml)	Floor Price
375	$5.90
500	$7.60
720	$10.65
750	$10.95
1000	$14.05
1500	$20.15
2000	$25.90
2250	$28.75
3000	$37.90
4000	$49.35

LCBO Product catalogue will NOT offer products priced below the floor price

Manufacturer Definitions

Small Brewery

- Worldwide production < 400,000 hectolitres of beer
- Every affiliate of the manufacturer that manufacturers beer in the preceding production year was a small brewer

Small Cidery

- Worldwide production < 25,000 hectolitres of cider
- Every affiliate of the manufacturer that manufactures cider in the preceding production year was a small cidery

LCBO Product catalogue will identify manufacturers that meet size definitions

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Manufacturer Definitions

Small Winery

- Worldwide **sales < 200,000** litres of sales in last 12 months
- Every affiliate of the manufacturer that manufacturers wine is a small winery

Mid sized Winery

- Worldwide **sales < 4.5 Million** litres of sales in last 12 months
- Every affiliate of the manufacturer that manufactures wine is a mid-sized or small winery
- Manufacturer is **not** a small winery

LCBO Product catalogue will identify manufacturers that meet size definitions

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Beer, Cider & Wine Display Requirements

- Wine displayed in a single contiguous display area
- Beer & Cider displayed in a single contiguous display area
- At least 10% of total containers of beer & wine on display is **BEER**
- At least 10% of total containers of beer & wine on display is **WINE**
- At least 20% of containers of beer on display manufactured by **SMALL** brewery
- At least 20% of containers of cider on display manufactured by **SMALL** cidery
- At least 10% of containers of wine on display manufactured by **SMALL** winery
- If **VQA WINE** sold must have one or more signs indicating availability of VQA wines

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Beer & Cider & Wine Display Requirement

- **At least 50% of wine containers on display must contain wine produced using grape from single country & at least ONE of:**
  - **Quality Assurance wine; OR**
  - **Wine produced from SMALL winery; OR**
  - **From a country that produces less than 150M litres of wine annually from grapes grown in that country**

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Additional Eligibility Requirements…

- Grocers **cannot have** financial interest in a brand or trademark of wine offered.
- All products must be **made available to all grocers**; no exclusive products nor private label brands.
- **No retail-level discounts** or rebates for multiple package buying.

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Shelf price = Uniform price

Product pricing:

- The retail price for beverage alcohol sold to the public will be as **determined by suppliers.**
  - Pricing is **communicated and administered** by the LCBO
  - Pricing will **be the same** through all retail channels
  - Retail price **includes** container deposit and applicable taxes
  - Retail price is to the **nearest nickel** (i.e., $15.15, $25.00)
  - Price changes are communicated to store operators seven (7) days in advance

2 - Roles & Responsibilities

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What we are involved in ...

1. Business-to-Business wholesale transactions
2. Access between suppliers and grocers
3. Listing and order flow
4. Financial processing
5. Fulfillment facilitation

What we aren't involved in ...

1. Targeted consumer marketing
2. Product category management
3. Grocer sales & marketing plans
4. LCBO sales and promotions
5. Determining wholesale product mix

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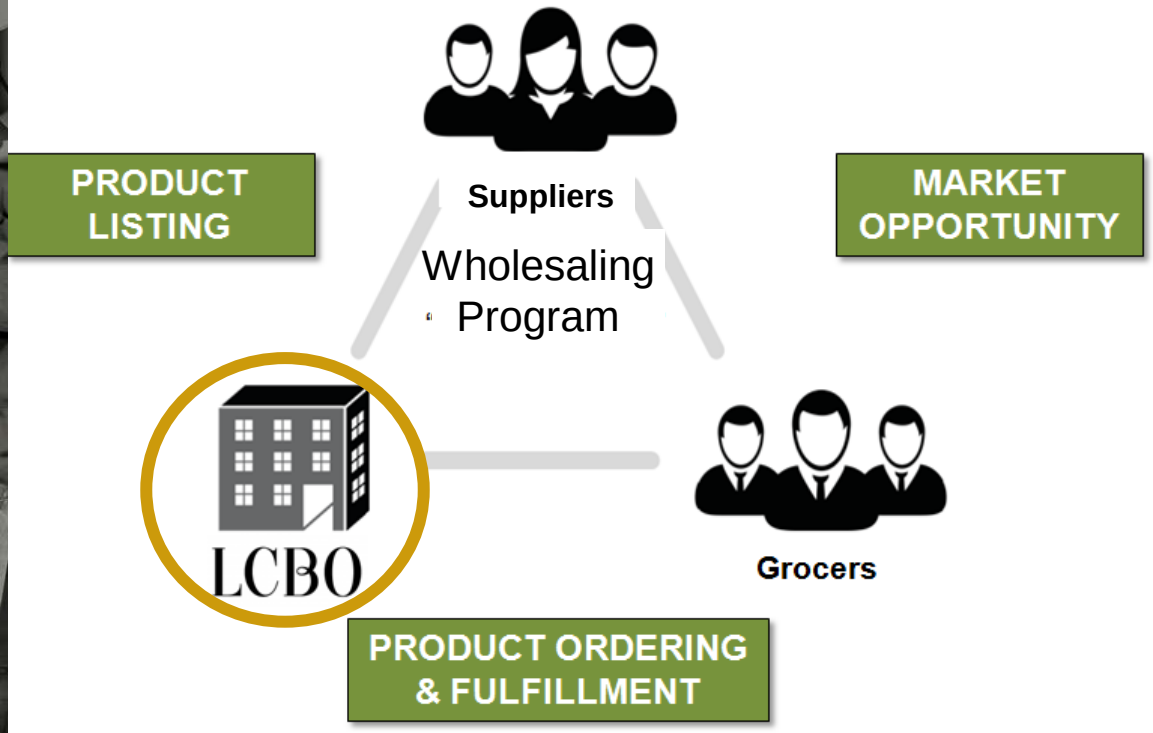
Hub of the operation



Responsible for:

- providing product catalogue to grocers
- receiving all orders for beverage alcohol from authorized grocers
- filling grocer orders through varying supplying sources
- supplying source for all imported beverage alcohol
- Invoice grocers for products received
- Pay suppliers for products grocers receive

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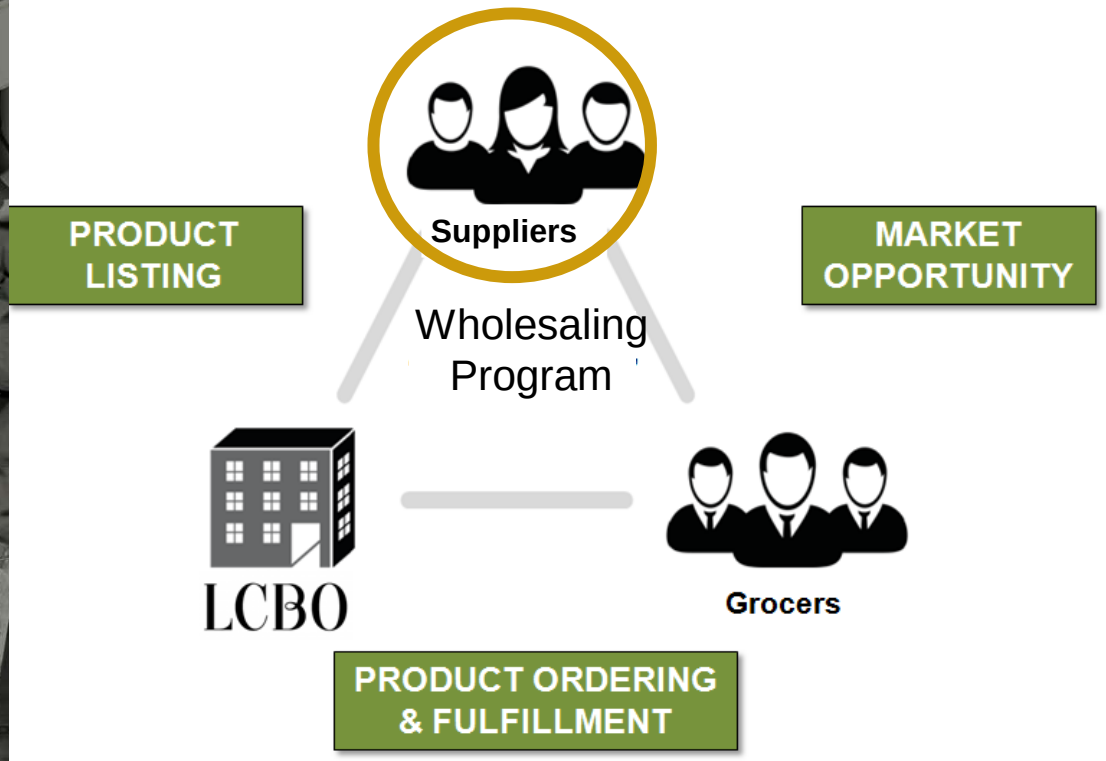
Manufacturer of Product



Responsible for:

- **manufacturing and listing products for wholesale through the LCBO**
- **setting retail prices**
- **pursuing sales and marketing opportunities with grocers**
- **supplying source to grocers for domestic beverage alcohol**

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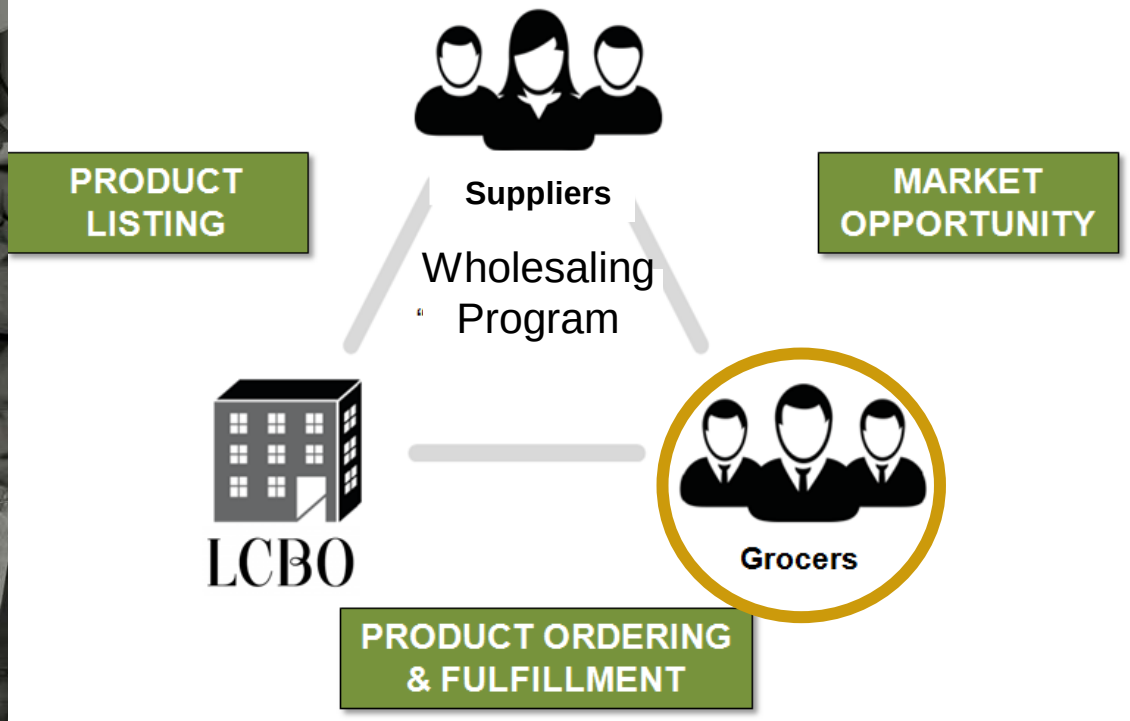
The Customer



Responsible for:

- **purchasing decisions on brands and quantity of products ordered**
- **brand and marketing relationships with suppliers**
- **Paying LCBO for beverage alcohol received**

3 – Product catalogue and ordering

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Product Catalogue & Ordering System

SUPPLIERS

NISS

Information **suppliers** submit in NISS is used to **list the products** available for sale to store operators.

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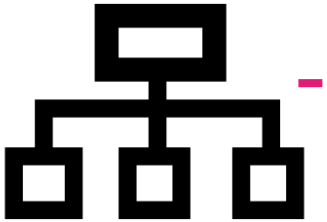
INTERNAL SYSTEMS



Enterprise-wide platform used by the **LCBO** and its partners to **manage aspects of product** listings, inventory, ordering, fulfillment, and transactions.

STORE OPERATORS

GROCERY MANAGEMENT SYSTEM

Online system which provides **store operators** view **all products available for sale** and place orders.

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Eligible product catalogue by authorization type:

- **Emailed** by end of day, tomorrow, Friday September 30
- Format is an **excel file** with **all product attributes** to populate systems, finalize assortments and plan shelf space
- If a product is not on the catalogue it is because it **does not meet** eligibility or operational requirements **at this time**

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Eligible product catalogue by authorization type:

- Critical to use LCBO's product catalogue as **source data** to populate your systems

- Before placing initial orders we strongly suggest **cross referencing** September's excel file to GMS product catalogue download to ensure **product attributes** have not changed and to account for any items **added** or **removed**

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Initial orders and preliminary demand forecast:

- To assist us in understanding your **launch plans** and **inventory requirements** an excel template will be emailed to you with the product catalogue

- It is optional, but should you wish to provide feedback on **initial order quantities** and **preliminary forecasts** please do so by end of day Friday October 7

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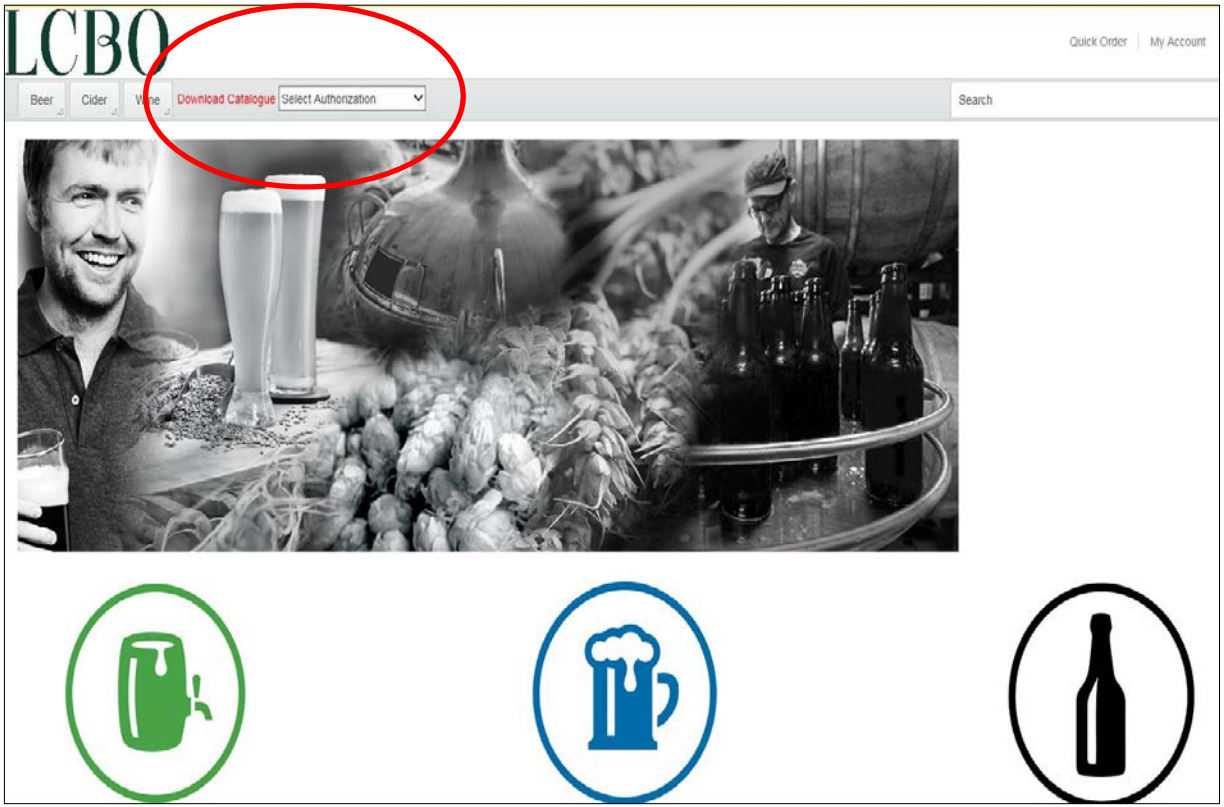
GMS catalogue online & ordering live: **Tuesday October 18**



- Download catalogue in excel or CSV file

1st legal selling day : **Friday October 28**

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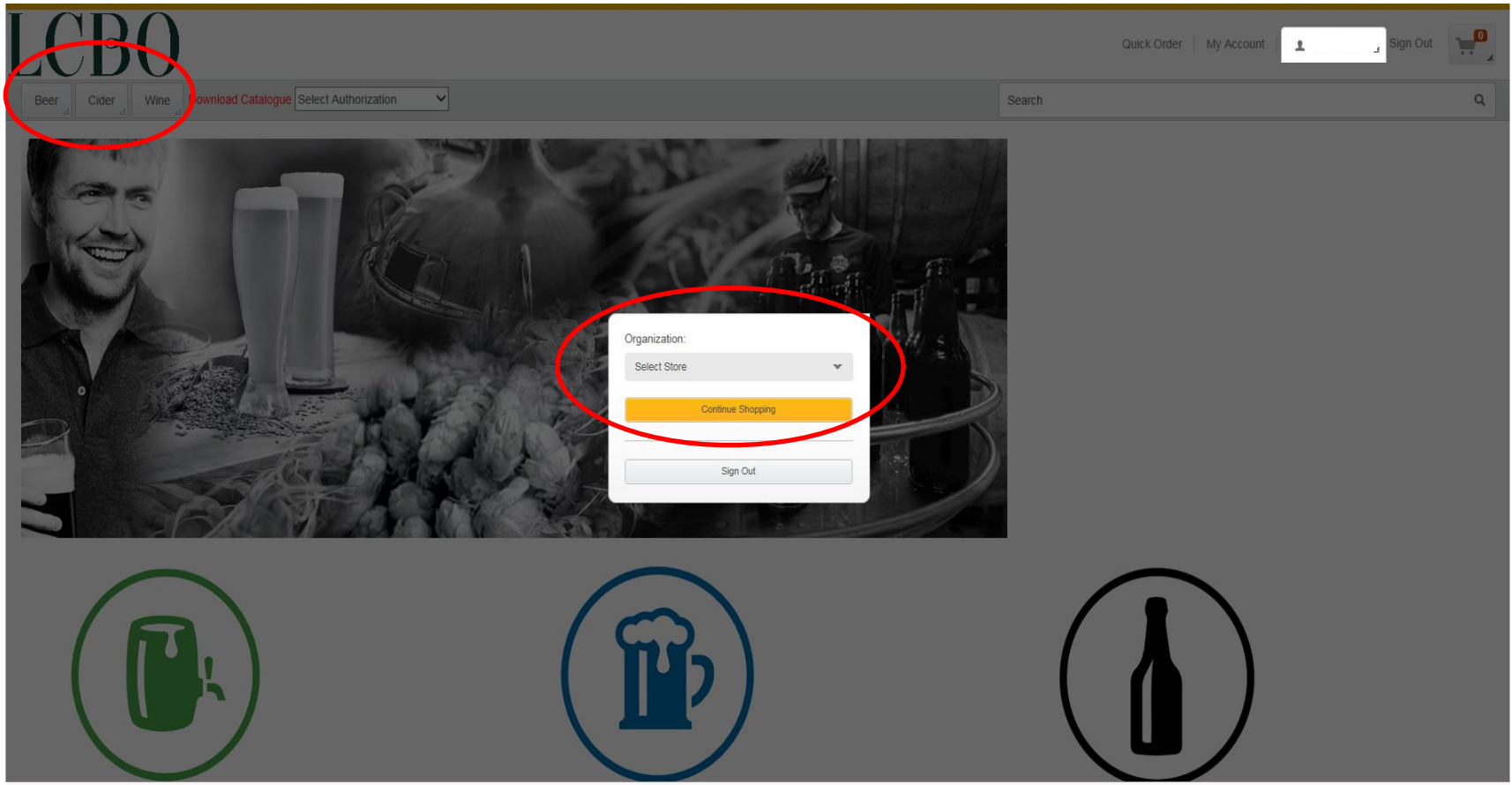
Store operator sign in: configured to authorization type



- Select a single store to place an order (LCBO assigned store number)

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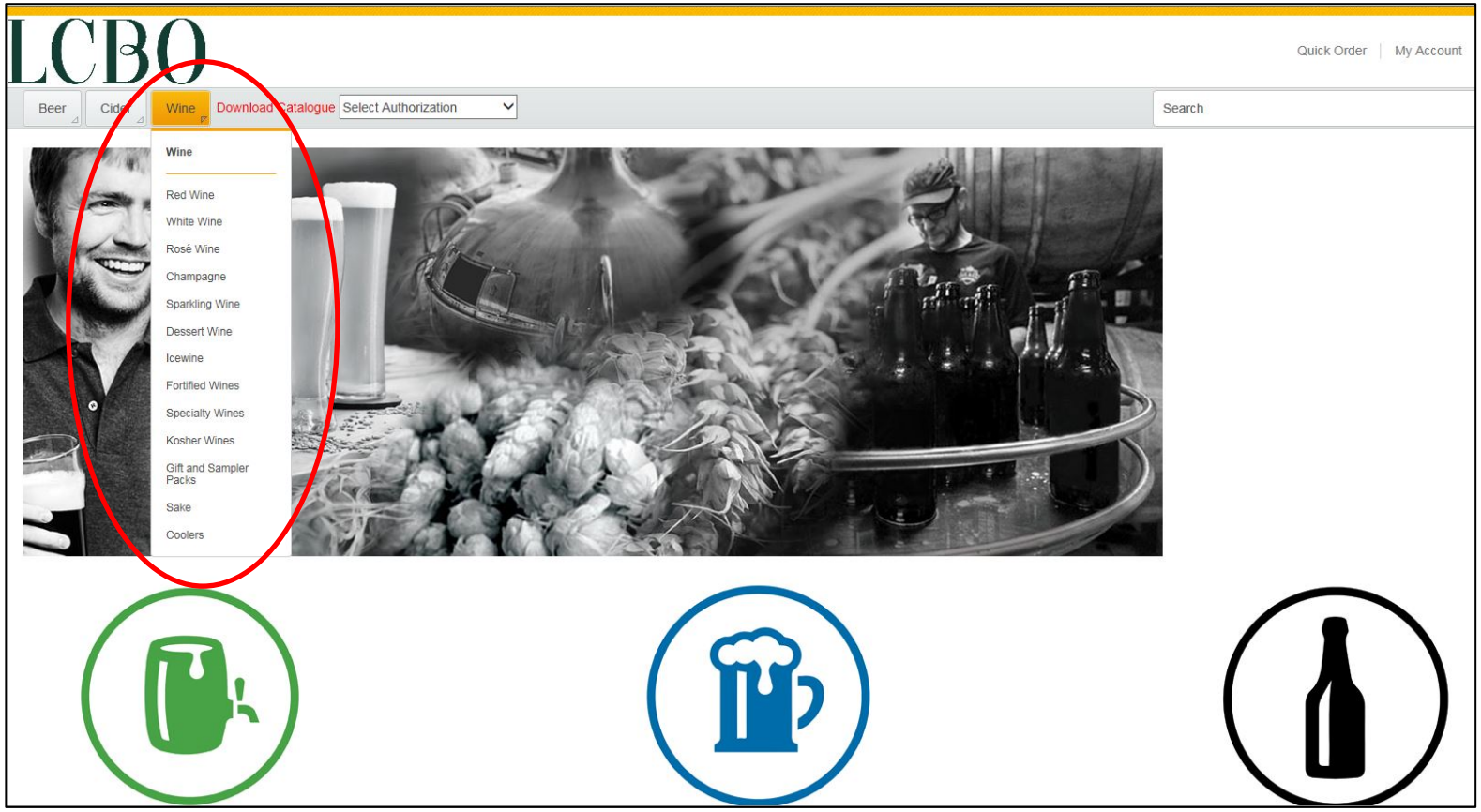
Hierarchy: filter by attributes including region, brand, producer size and wine varietal



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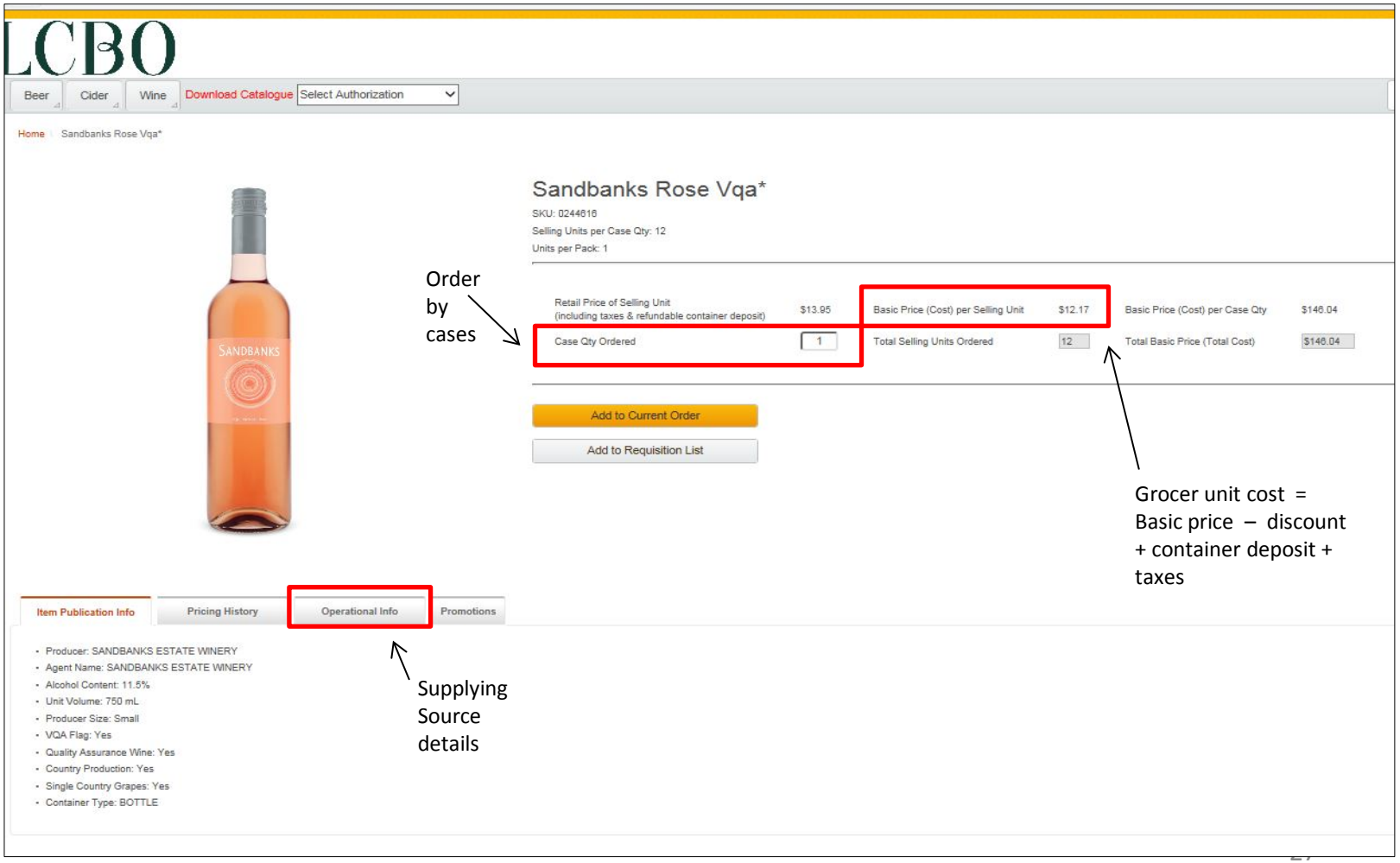
Sample Item Screen and Product Attributes



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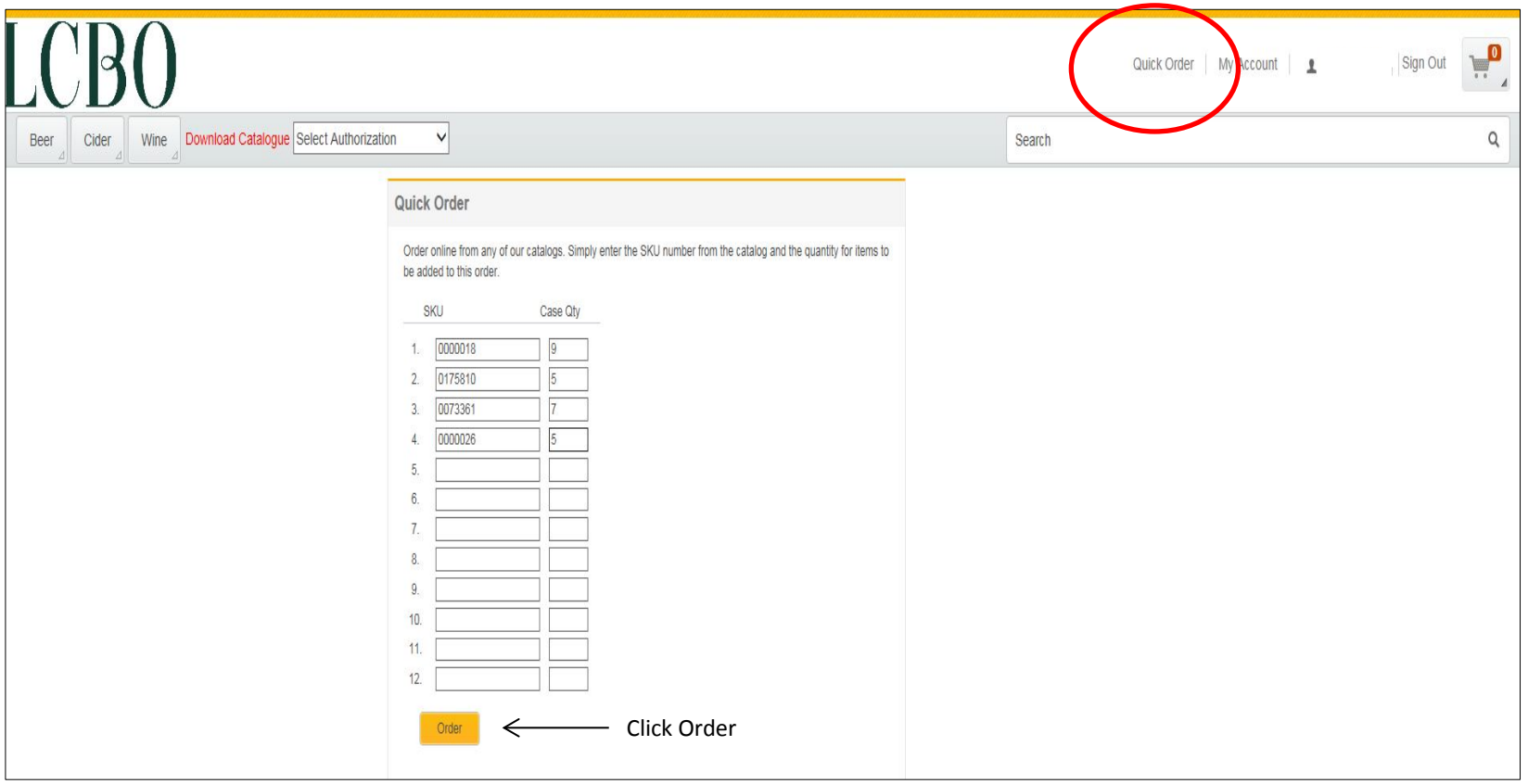
Quick Order function available for fast ordering



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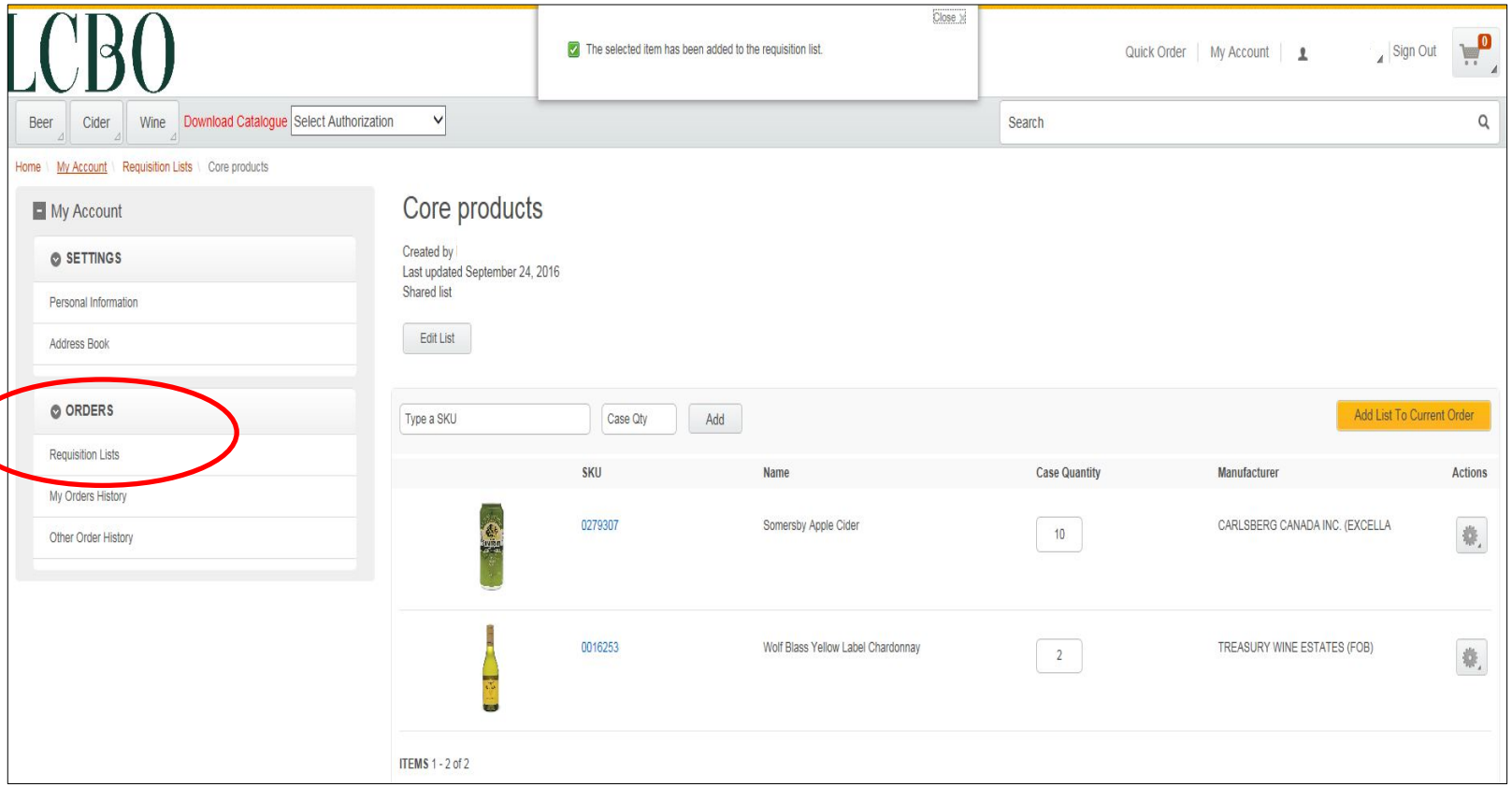
Create Requisition Lists for frequently ordered items



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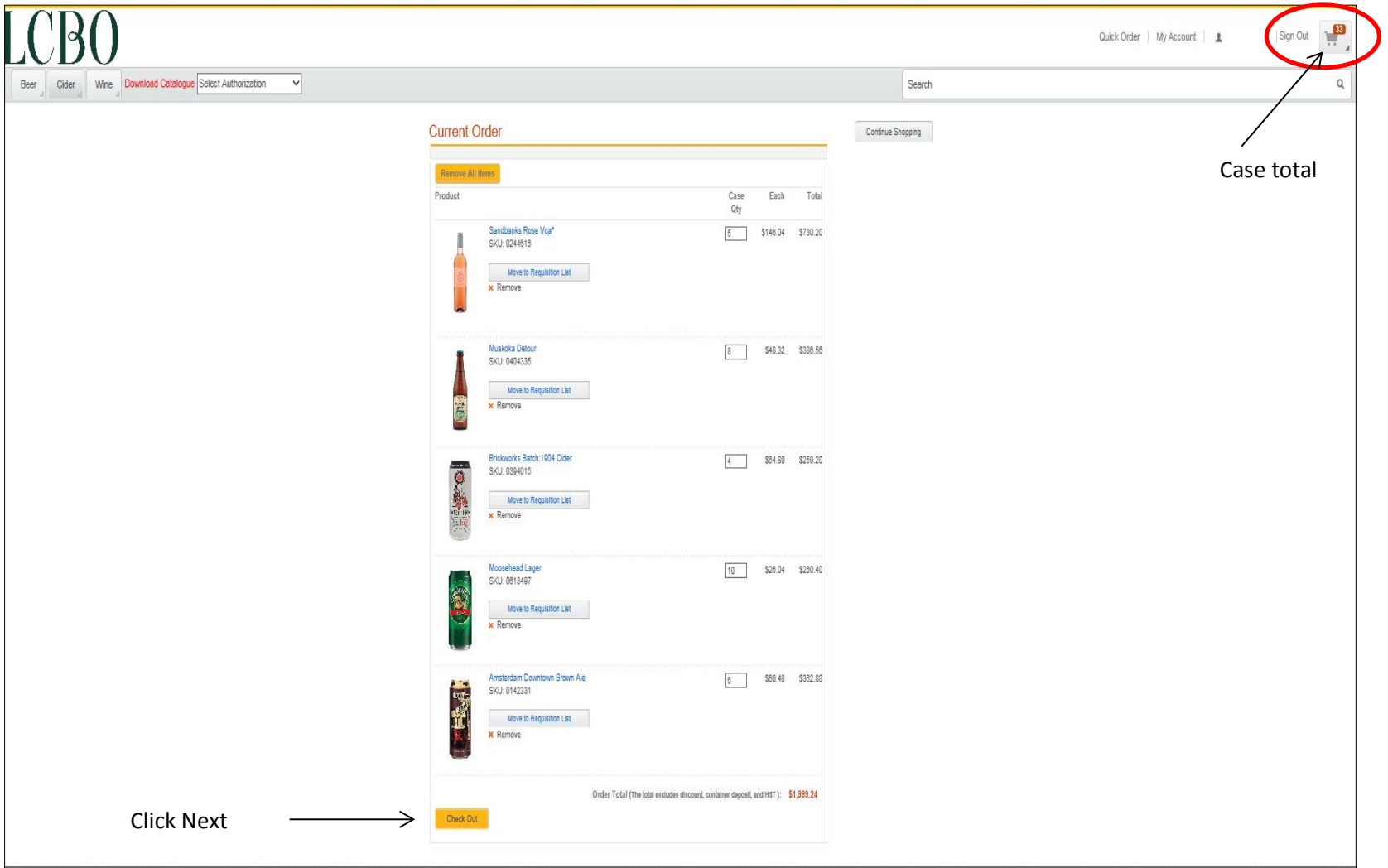
Pre Checkout: current order



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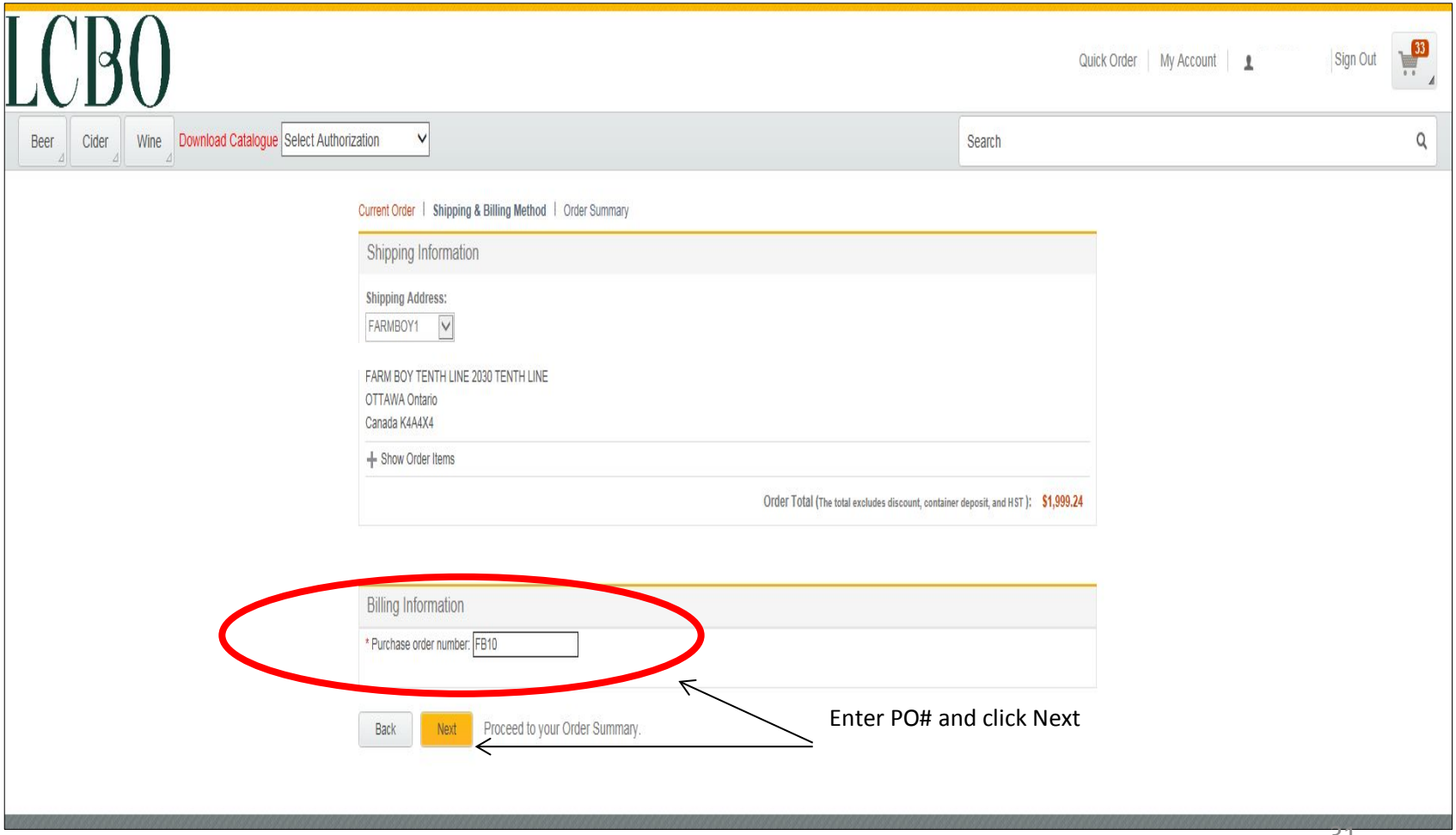
Enter Purchase Order



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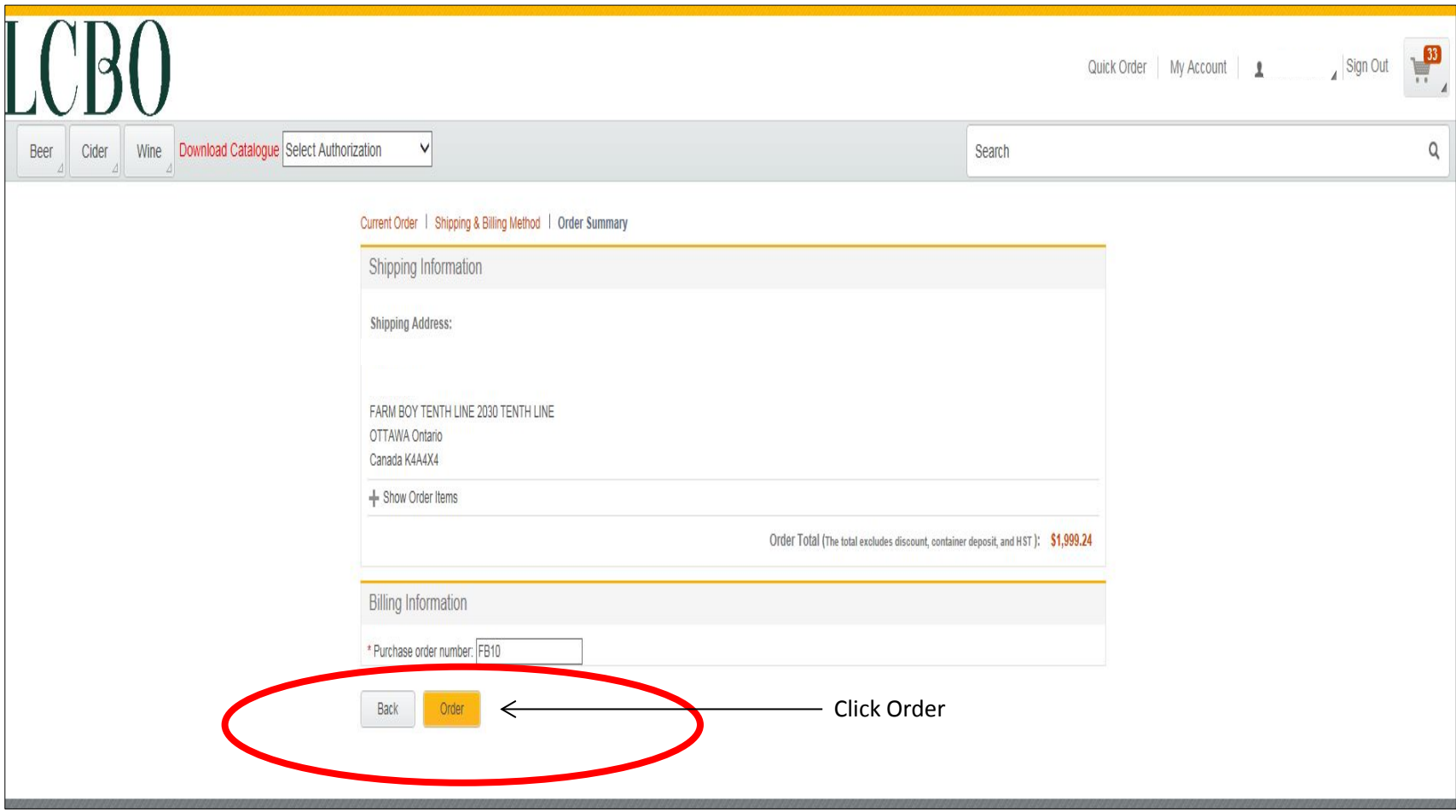
Order Summary



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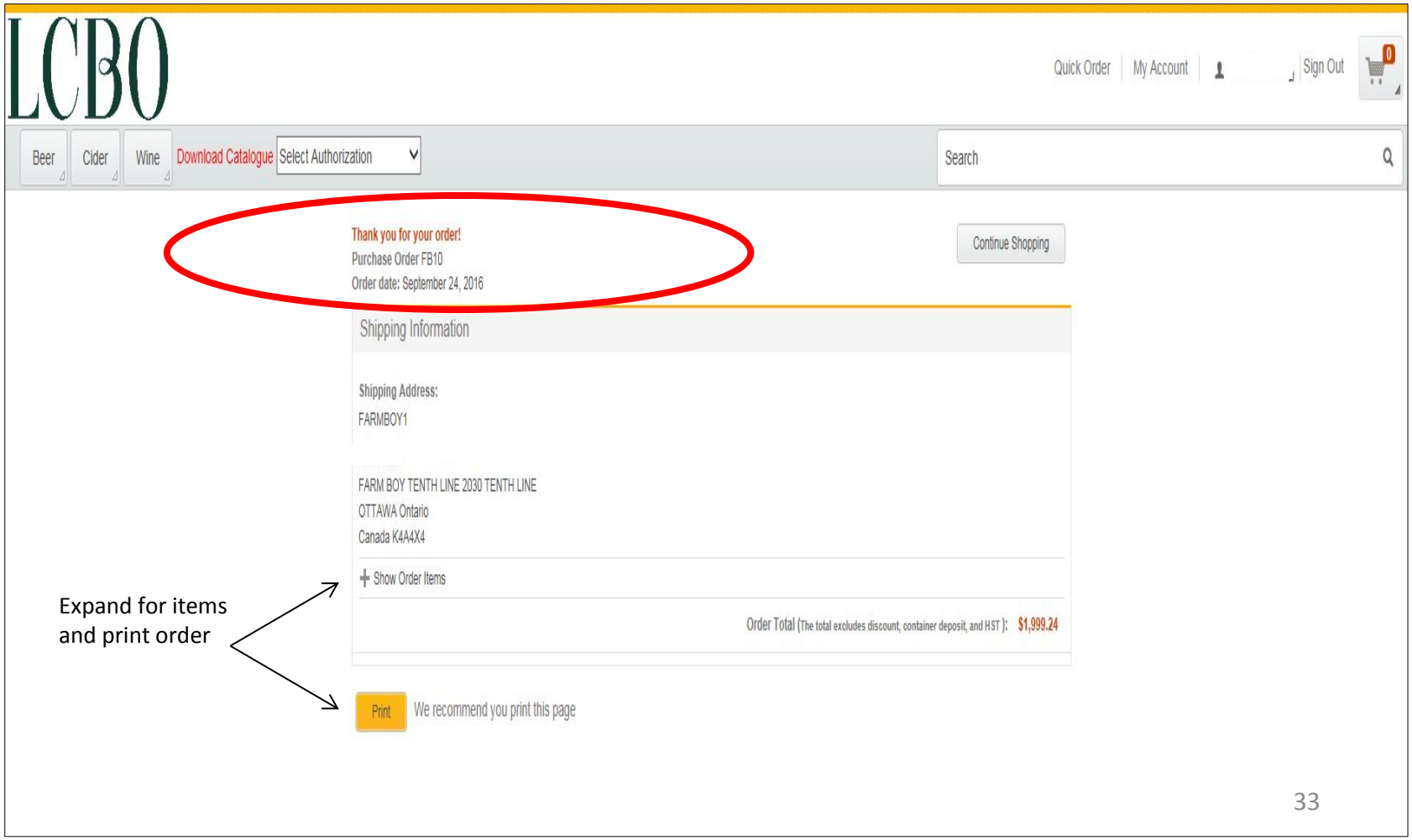
Order Confirmation



Expand for items and print order

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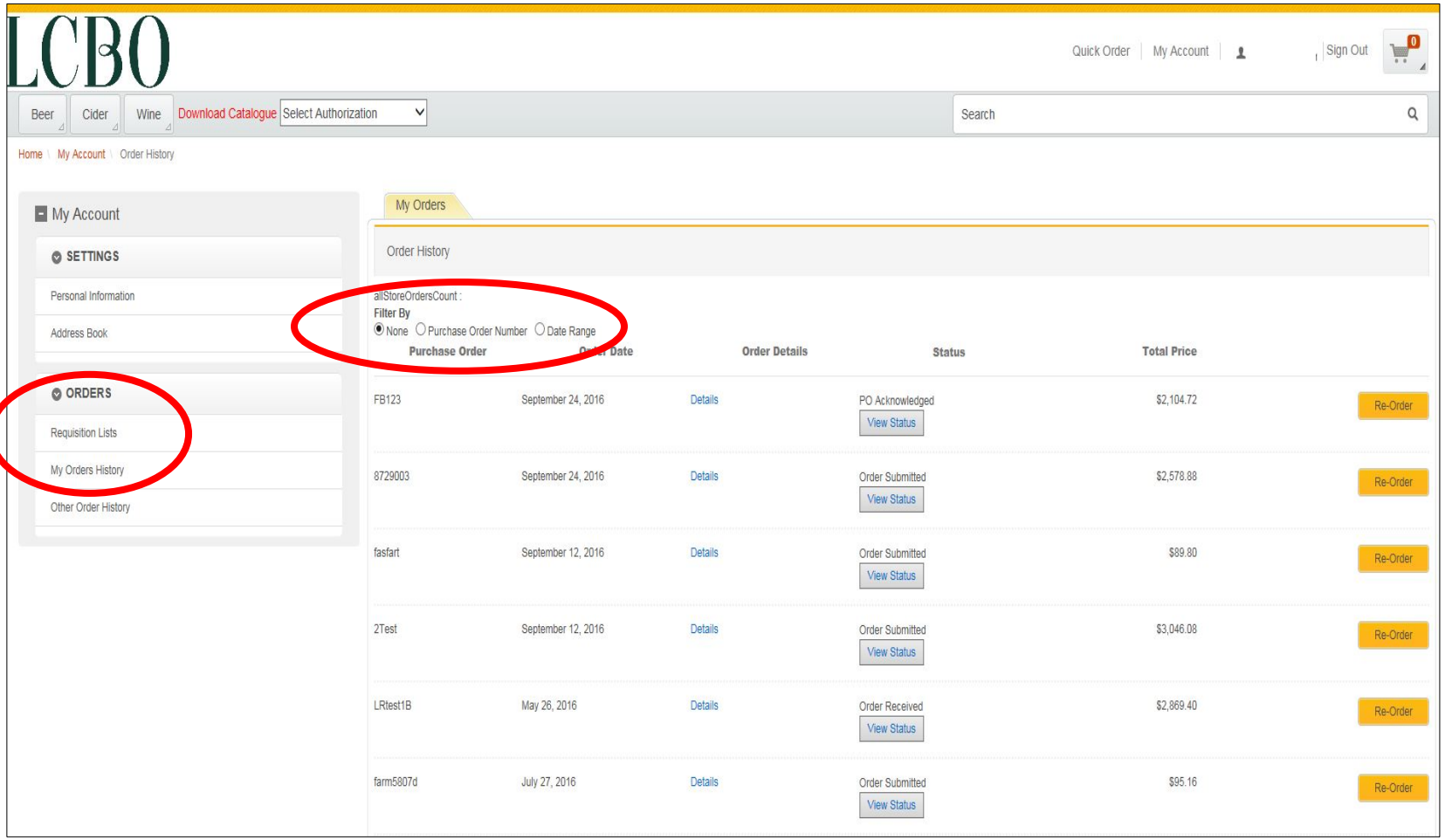
Order History



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Order Acknowledgement and Preliminary Delivery

Recent Order History

Filter By
(•) None ( ) Purchase Order Number ( ) Date Range

Purchase Order	Order Date	Order Details	Status	Total Price	
FB123	September 24, 2016	Details	PO Acknowledged View Status	$2,104.72	Re-Order

FB123	Supplying Source	Orders	Available	Preliminary Delivery Date	Estimated Delivery Date	Shipped Qty	Received Date	Received	Deemed Receipt
Sandbanks Rose Vqa* SKU : 0244616	SANDBANKS ESTATE WINERY	10	10	03-Oct-2016		0			
Muskoka Detour SKU : 0404335	LCBO	5	5	28-Sep-2016		0			
Brickworks Batch:1904 Cide SKU : 0394015	JOSEPH ZAKON WINERY	3	0			0			
Moosehead Lager SKU : 0613497	TBS	8	8	29-Sep-2016		0			

NOTIFY

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Shipped Status

Recent Order History

Filter By
(•) None ( ) Purchase Order Number ( ) Date Range

Purchase Order	Order Date	Order Details	Status	Total Price	
FB123	September 24, 2016	Details	PO Acknowledged View Status	$2,104.72	Re-Order

FB123	Supplying Source	Orders	Available	Preliminary Delivery Date	Estimated Delivery Date	Shipped Qty	Received Date	Received	Deemed Receipt
Sandbanks Rose Vqa* SKU : 0244616	SANDBANKS ESTATE WINERY	10	10	03-Oct-2016		0			
Muskoka Detour SKU : 0404335	LCBO	5	5	28-Sep-2016	28-Sep-2016	5			
Brickworks Batch:1904 Cider SKU : 0394015	JOSEPH ZAKON WINERY	3	0			0			
Moosehead Lager SKU : 0613497	TBS	8	8	29-Sep-2016	29-Sep-2016	6			

NOTIFY

GMS user access

- GMS allows for **three (3) types** of users to access product catalogue and view/place orders:
    - Corporate level: multi store and banner access
    - Banner level: multi store access
    - Store level: single store access
- Corporate and banner level users can have access to **view invoices** in GMS, if requested

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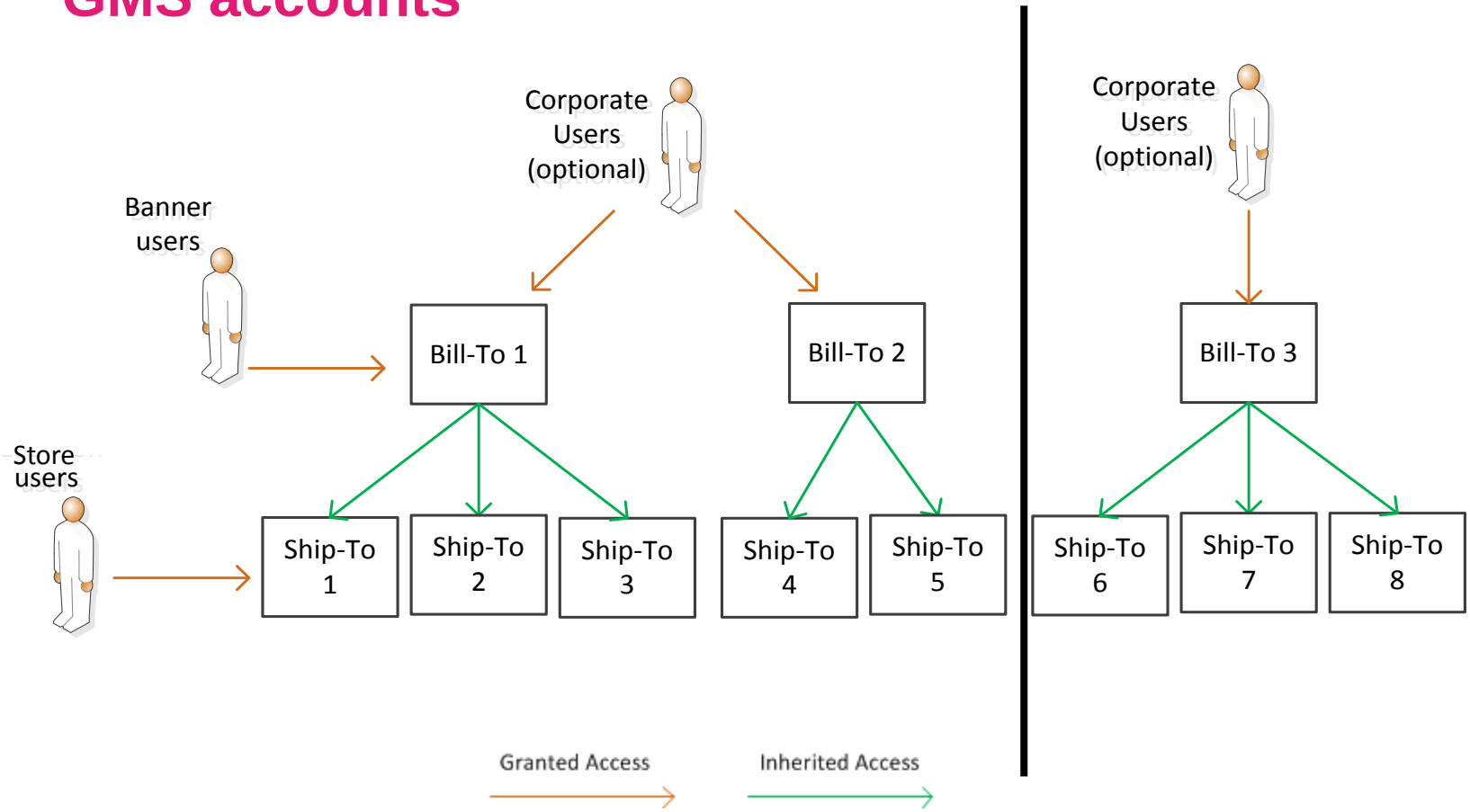
GMS accounts



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GMS set up

- **Existing grocery customers** will be contacted to **update** current user information

- **New grocery customers** and **new stores** to existing customers require **user set up** in GMS prior to ordering
  - Details at end of presentation

EDI capabilities

- **Initial orders** are placed **manually** (except for those grocers currently transmitting orders electronically)
- GMS has **EDI capabilities** to accept orders from store operators electronically
- Grocery Operations IT can **organize working sessions** with you to scope EDI requirements for implementation in 2017

4 – Orders, fulfillment, delivery, receiving and invoicing

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ORDERING

Ordering & fulfillment process

RECEIVING

SHIPPING

Grocery Operations

LCBO

ORDERING

Store operator sends order to LCBO

LCBO acknowledges receipt and sends to supplying sources

LCBO SHIPPING	1 day
ONTARIO PRODUCER SHIPPING	1 day

Ordering & fulfillment process

RECEIVING

Supplying sources confirm inventory availability to LCBO

LCBO SHIPPING	2 days
ONTARIO PRODUCER SHIPPING	2 days

SHIPPING

Grocery Operations

LCBO

ORDERING

Store operator sends order to LCBO

LCBO acknowledges receipt and sends to supplying sources

LCBO SHIPPING

ONTARIO PRODUCER SHIPPING

1 day

1 day

Supplying sources confirm inventory availability to LCBO

2 days

2 days

SHIPPING

Order is picked and readied

Delivery date confirmed

2-3 days

4-6 days

Supplying source provides ASN to LCBO

Transit to store or DC

1 day

3-5 days

RECEIVING

Ordering & fulfillment process

Grocery Operations

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ORDERING

LCBO pays supplying source

Store operator sends order to LCBO

LCBO acknowledges receipt and sends to supplying sources

LCBO SHIPPING

ONTARIO PRODUCER SHIPPING

1 day

1 day

Store operator pays LCBO

Supplying sources confirm inventory availability to LCBO

2 days

2 days

RECEIVING

LCBO issues invoice to store operator

Ordering & fulfillment process

Order is picked and readied

SHIPPING

Delivery received by store operator

Transit to store or DC

Supplying source provides ASN to LCBO

Delivery date confirmed

1 day

3-5 days

2-3 days

4-6 days

Grocery Operations

LCBO

ORDERING

LCBO SHIPPING

ONTARIO PRODUCER SHIPPING

LCBO pays supplying sources

Store operator sends order with LCBO

1 day

1 day

LCBO acknowledges receipt of order and sends to supplying sources

Store operator pays LCBO

2 days

2 days

RECEIVING

LCBO issues invoice to store operator

Ordering & fulfillment process

Supplying sources confirm inventory with LCBO

SHIPPING

Delivery received by store operator

Order is picked and readied

Transit to store or DC

Delivery date confirmed

1 day

3-5 days

Supplying sources provides ASN to LCBO

2-3 days

4-6 days

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Time required from placing to receiving order:

LCBO and TBS: up to 7 days

Ontario Manufacturers: up to 14 days

General delivery guidelines

- Products will not be **delivered**
  - in quantities **greater** than the purchase order,
  - be **backordered**,
  - be **substituted** by other products to top-up an order or replace unavailable product

- Supplying sources **cannot attempt a second delivery** for products that were originally unavailable

General delivery guidelines

- A **packing slip and Bill of Lading (BOL**) must accompany each shipment
- No refusal of **order errors** (refer to Claims & Returns process)
- No refusals for **time of day delivery**; no appointment times for LCBO deliveries to individual store locations

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Receiving

- Receipts due by **noon every Tuesday** for orders received during the previous week (Sunday to Saturday).
- Include zero receipts
- Two **options** available to store operators to record receipts:
  - Online directly in GMS, or
  - Submit excel spreadsheet

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Receiving Option 1: Online directly in GMS

My Orders

Order History

Filter By
None Purchase Order Number Date Range

Purchase Order	Order Date	Order Details	Status	Total Price	
LRROC5test	August 19, 2016	Details	Order shipped View Status	$16,239.12	Re-Order
LRROC4test	August 19, 2016	Details	Order Received View Status	$4,942.96	Re-Order
LRROC3test	August 19, 2016	Details	Order Received View Status	$8,334.24	Re-Order
LRROC6Ates	August 19, 2016	Details	Order shipped View Status	$11,508.68	Re-Order

LRROC6Ates	Supplying Source	Orders	Available	Preliminary Delivery Date	Estimated Delivery Date	Shipped Qty	Received Date	Received	Deemed Receipt
Boxer Ice+ SKU : 0184143	LCBO	23	23	21-Aug-2016	23-Aug-2016	0			
Bavaria Holland Beer 6 Pk-C (Mid Cone) SKU : 0676429	LCBO	34	34	21-Aug-2016	23-Aug-2016	0			
Budweiser 710ml SKU : 0679449	TBS	54	54	21-Aug-2016	20-Aug-2016	0			
Brewmaster Craft Pack Lake Of Bays 4x473ml SKU : 0448126	LAKE OF BAYS BREWING	23	23	21-Aug-2016	20-Aug-2016	0			
Wanderoot Cider SKU : 0456608	LCBO	54	54	21-Aug-2016	23-Aug-2016	0			
Hopping Mad Cider Radler SKU : 0453282	LCBO	30	30	21-Aug-2016	23-Aug-2016	0			

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Receiving Option 2: Submit excel spreadsheet

Grocery Operations LCBO

WEEKLY RECEIVED SHIPMENT REPORT

Store Operator Name: _____

LCBO Customer Number: _____

Delivery receipts for the week ending (Saturday): _____

Email completed reports to **wholesaleservice@lcbo.com** by 12:00pm Tuesday.
Please save file in the format WeeklyDeliveryReceipts-name-WeekEndingDate.xlsx

Delivery Receipt Details

Store No.	PO Number	Received Date	SKU	Cases Received	Reason Code

Instructions

Store No.: The LCBO-generated store number where the product was delivered/received.
PO Number: The customer's purchase order number.
Received Date: The date the products were received.
SKU: The LCBO product SKU number received.
Cases Received: The number of cases of the item received.
Reason Code: The reason for any shortages/discrepancies, i.e. breakage.

Deemed Receipts

- Deemed receipt will take effect:
  - If receipts are not submitted by noon Tuesday deadline and Estimated Delivery Date entered by supplying source(s) falls within the previous week
  - Based on shipment quantities entered into GMS by supplying source(s)

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Reconciliations

- Grocery Operations will complete a weekly reconciliation of customer receipts against supplier shipments
- LCBO may request copies of proof of deliveries (PODs) from store operators
- Invoice adjustments will be issued where necessary

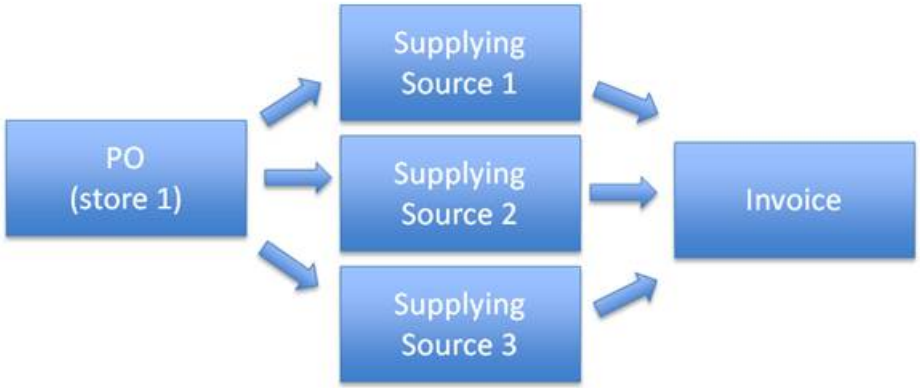
Invoicing

- Completed weekly based on weekly receipts
- Two invoice options available to store operators:
  - One invoice per Purchase Order, or
  - One invoice per Split PO/delivery
- Confirm your choice of invoicing method before ordering commences, otherwise you will be defaulted to Option 1

Invoicing Option 1: One invoice per PO

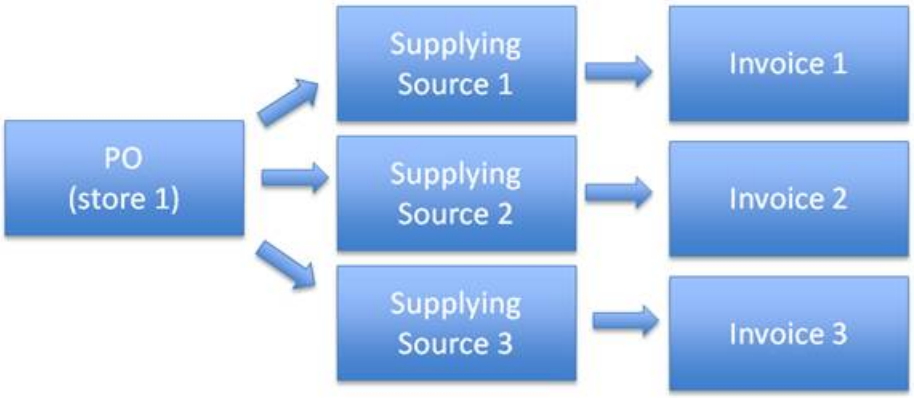
- One invoice will be generated per store, per PO; invoice will contain products from multiple supplying sources/deliveries.

- If deliveries span across multiple weeks, you will receive multiple invoices relating to the same PO.



Invoicing Option 2: One invoice per Split PO

- One invoice will be generated per store, per PO, per supplying source/delivery.
- This is the most granular level which will result in the largest number of invoices as it is tied to each shipment.



Promotional sales

- Customer will be credited back for items sold during a promotional period
    - LTO
    - Super sale
    - Wine deal of the week

Returns & Claims

- Process in place to account for returns and claims including, but not limited to:
  - short shipments
  - damaged product
  - recalled product

- Refer to Section 7 of Policies & Procedures Manual for Authorized Store Operators for details and timelines

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5 – Mandatory weekly reports

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Receipt Report

- Receipts due by noon every Tuesday for orders received during the previous week (Sunday to Saturday).
- Two options available to store operators to record receipts:
  - Online directly in GMS, or
  - Submit excel spreadsheet

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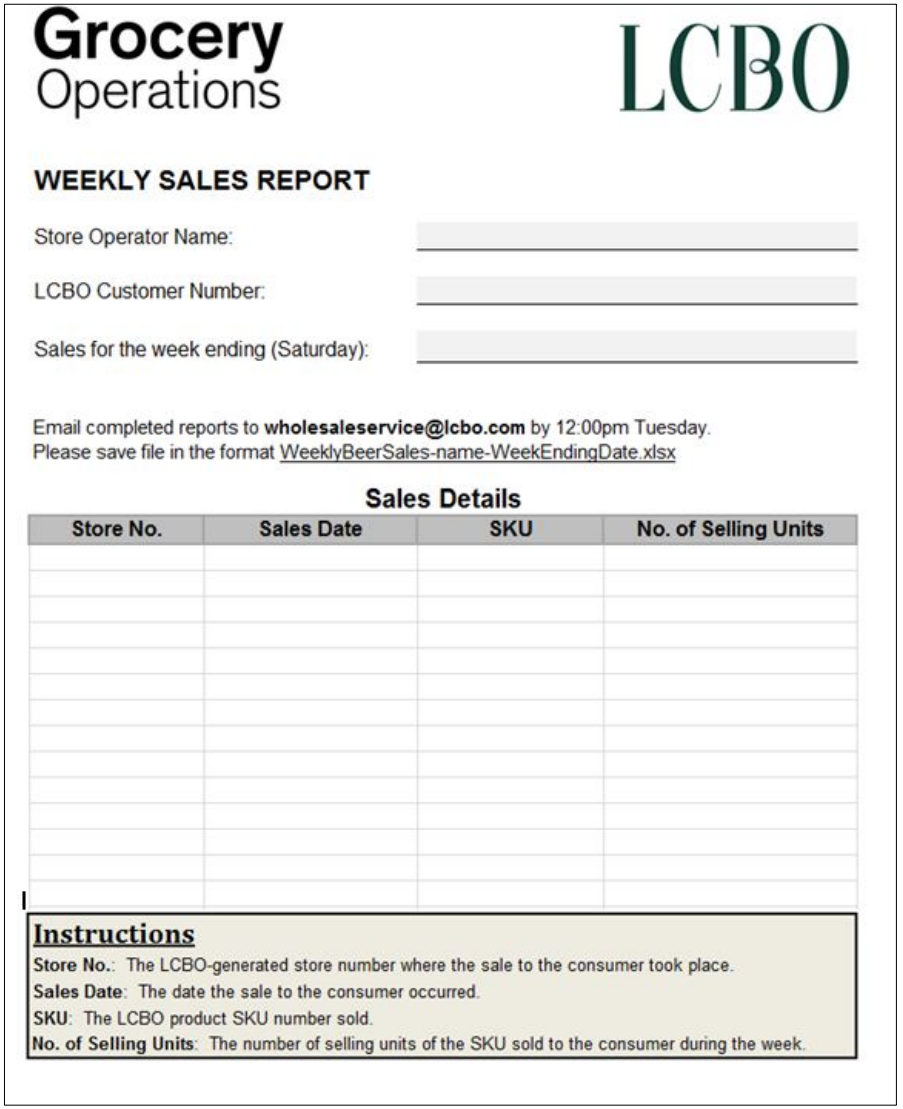
Sales Report

- Due by noon every Tuesday for all sales from previous week (Sunday to Saturday)
- LCBO SKU **or** UPC accepted as of Nov 1



Grocery Operations

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WEEKLY SALES REPORT

Store Operator Name: _____

LCBO Customer Number: _____

Sales for the week ending (Saturday): _____

Email completed reports to **wholesaleservice@lcbo.com** by 12:00pm Tuesday.
Please save file in the format WeeklyBeerSales-name-WeekEndingDate.xlsx

Sales Details

Store No.	Sales Date	SKU	No. of Selling Units

Instructions

Store No.: The LCBO-generated store number where the sale to the consumer took place.
Sales Date: The date the sale to the consumer occurred.
SKU: The LCBO product SKU number sold.
No. of Selling Units: The number of selling units of the SKU sold to the consumer during the week.

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Demand Forecast & On Hand Inventory Report

- Due by noon every Friday for all LCBO supplied products for upcoming six (6) months and on hand inventory as on Saturday

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Instructions

Name: Store Operator name
Store No.: LCBO generated store operator number (5xxx)
Week Ending: Date of the week ending Saturday MM/DD/YYYY
SKU: LCBO product SKU number
Demand Forecast : in cases

WEEKLY DEMAND FORECAST REPORT: LCBO SUPPLIED BEVERAGE ALCOHOL

For LCBO supplied beverage alcohol, store operator is to complete demand forecast in cases by week for upcoming six (6) months.

Email completed report to ***wholesaleorders@lcbo.com*** *by 12:00pm every Friday.*
Please save file in the format DemandForecastInventoryReport-name-WeekEndingDate.xlsx

Demand Forecast Report

Name	Store #	Week Ending (Saturday)	LCBO SKU #	Demand Forecast (Cases)

6 – Resources & next steps

Grocery
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RESOURCES: Contact Information

Director	Chris Dini chris.dini@lcbo.com	416-365-5714
Operations	Leanne Rhee leanne.rhee@lcbo.com	416-365-5889
	Gustavo Neri gustavo.neri@lcbo.com	416-864-7664
Finance	Jamie Fazekas jamie.fazekas@lcbo.com	416-365-5912
Customer Service	wholesaleservice.@lcbo.com	416-365-5842

Grocery Operations

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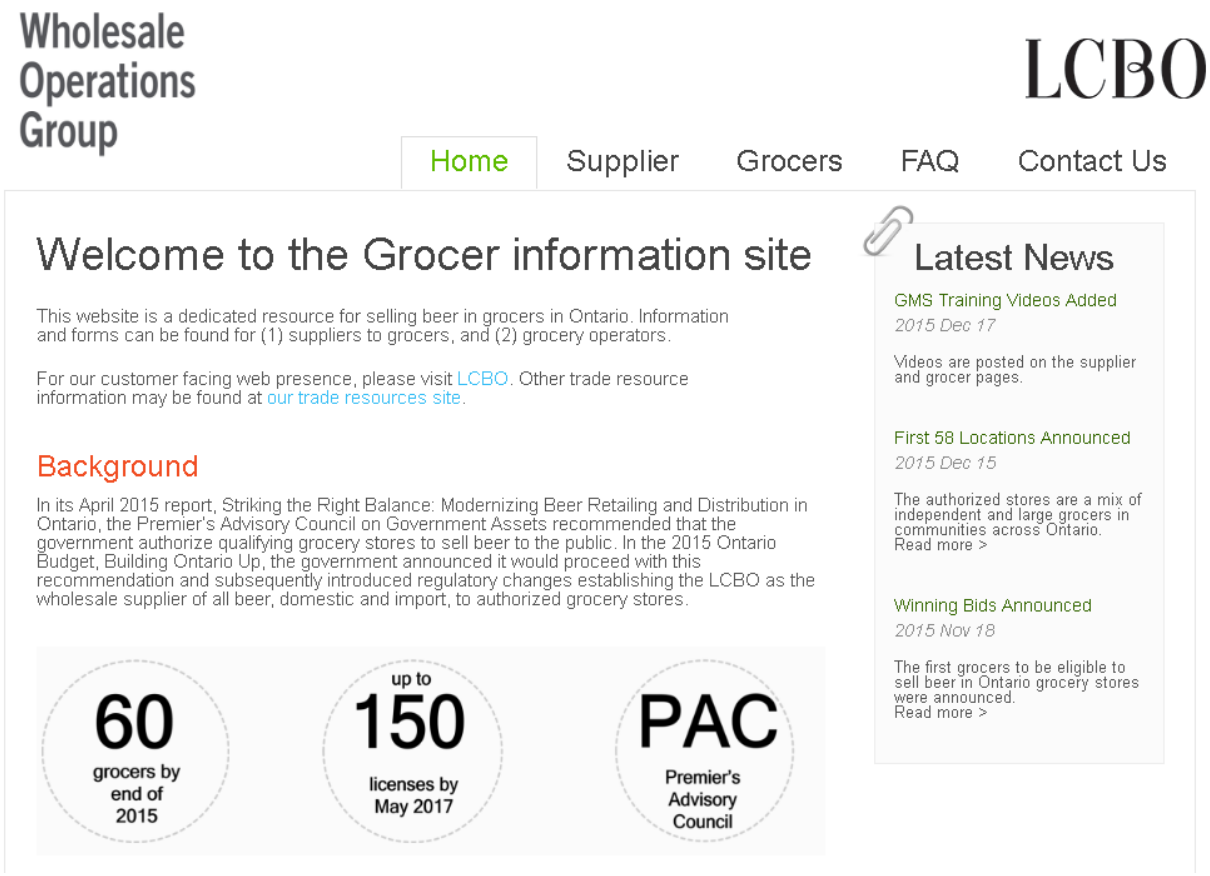
Grocery Operations website: www.lcbowholesaleoperations.com



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Click through to grocers/store operator section of the site:

1. The **primary** source of **communication** to store operators
2. Contains **forms, documents and presentations** for store operators
3. Access to **Grocery Management System (GMS)** to view product catalogue and place orders
4. Communication regarding **pricing, pricing promotions** and **product catalogue updates**

Grocery Operations

LCBO

LCBO

Grocery Operations

Policies & Procedures Manual for Authorized Store Operators

Version 1.3 September 2016

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Grocery Operations

LCBO

NEXT STEPS

1 - Wholesale customer set up

Grocer(s) receives **Wine Authorization(s)** from **AGCO**

↓

Contact LCBO Grocery Operations

↓

Finalize **Wholesale Supply Agreement (WSA)** with **LCBO** and provide LCBO with:

- letter of credit (as required by the WSA)
- proof of insurance (to be provided within 10 days of effective date of the WSA)

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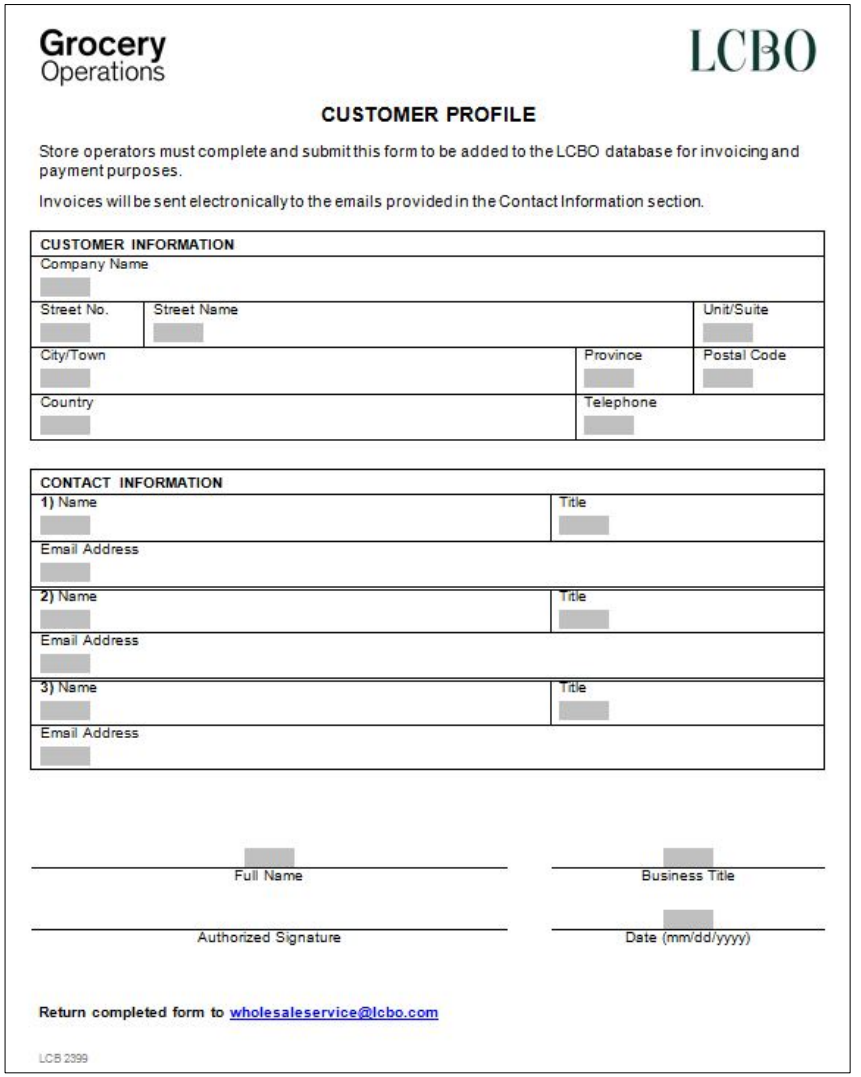
2 – Complete Customer Profile registration form

DUE:
OCT. 7TH, 2016



Grocery Operations — LCBO

CUSTOMER PROFILE

Store operators must complete and submit this form to be added to the LCBO database for invoicing and payment purposes.

Invoices will be sent electronically to the emails provided in the Contact Information section.

CUSTOMER INFORMATION			
Company Name			
Street No.	Street Name		Unit/Suite
City/Town		Province	Postal Code
Country		Telephone	

CONTACT INFORMATION	
1) Name	Title
Email Address	
2) Name	Title
Email Address	
3) Name	Title
Email Address	

Full Name — Business Title

Authorized Signature — Date (mm/dd/yyyy)

Return completed form to wholesaleservice@lcbo.com

LCB 2399

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3 – Submit Grocery Management System (GMS) IT Access form

Grocery Operations LCBO

GROCERY MANAGEMENT SYSTEM (GMS) IT ACCESS FORM

For Authorized Store Operators

Store operators may request a maximum of three (3) users per location. The Grocery Management System (GMS) provides for three types of users:

Corporate Level User: This level enables the user to manage all stores and all banners at the corporate level and view and download the product catalogue. The user has multi store access to create and view purchase order transactions, receive order notifications, enter receipt details and view and download invoices.

Banner Level User: This level enables the user to manage all stores under the banner's level and view and download the product catalogue. The user has multi store access to create and view purchase order transactions, receive order notifications, enter receipt details and view and download invoices.

Store Level User: This level enables the user to manage a single store and view and download the product catalogue. The user has single store access to create and view purchase order transactions, receive order notifications and enter receipt details.

ALL FIELDS MUST BE TYPED. THE FORM WILL NOT BE PROCESSED IF HAND-WRITTEN

USER ACCESS:

Check one of the following: Corporate level ☐ Banner level ☐ Store level ☐

CORPORATE LEVEL INFORMATION: Required for access to levels.	
Corporate Name	
Contact Name	Telephone Number

BANNER LEVEL INFORMATION: Required for access to banner level, otherwise leave blank.	
Banner Name	
Contact Name	Telephone Number

STORE LEVEL INFORMATION: Required for access to single store, otherwise leave blank.	
Store Name	Store Operator Number
Contact Name	Telephone Number
Address	

LCB 2392 Page 1 of 2

Following completion of steps 1-3:

- An LCBO Store # will be assigned to each authorized location
- LCBO will collect delivery **location and receiving requirements**
- GMS **usernames and passwords** will be emailed

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Important Notes:

- Grocery Operations **IT freeze** from October 12th – October 28th, 2016 for any changes not related to wine launch
- **Delivery plans** for each store will be communicated by grocery operations before Oct. 18th
- **Communication Package** to be sent 1st week of October highlighting upcoming changes to process and systems
- **Beer Price increases** effective Tuesday November 1, 2016 details to follow and posted on grocery website.

7 – Q&A with LCBO team

Grocery Operations

LCBO

Panel Members

Director, Grocery Operations	Chris Dini
Manager, Grocery Operations	Leanne Rhee
Finance Supervisor, Grocery Operations	Jamie Fazekas
IT – VP Business Systems Solution and Relationships Management	Bipasha Chiu
Director, London Warehouse	Jim MacPherson