

BLADE ADVISORY

Commercial Strategy for Beverage Alcohol & CPG

Commercial diligence and value creation from an operator who has built acquisition cases and operated inside PE ownership.

Blade Advisory can unearth opportunities and risks based on assessment of underlying data by SKU and account.

1. Commercial Red-Flag Review

5 business days · fixed fee · pre-LOI or confirmatory

What it tests

- Depletions vs. shipments and distributor inventory
- Distributor health, terms and change-of-control risk
- Retailer and account concentration (Costco, Kroger, Total Wine, etc.)
- Price, promo and mix dependence
- Credibility of the growth plan

You get

- 6–8 page memo with red / amber / green ratings
- Management question list for your next session
- 60-minute readout with the deal team

2. Post-Close Commercial Sprint

3–4 weeks · fixed fee · for portfolio companies

What it tests

- Joint business plans with top retail accounts
- Distributor scorecards, priorities and terms
- Commercial operating cadence: forecast, KPIs, reviews
- Where the first 100 days of growth should come from

You get

- 100-day commercial plan the management team owns
- Distributor and key-account scorecards
- Board-ready summary of risks and upside

Why me

- **Operator.** SVP, Sales Strategy & Enablement, The Duckhorn Portfolio. Led JBPs with Kroger, Costco, Total Wine & More and Safeway/Albertsons.
- **Deal side.** At Treasury Wine Estates, built business cases for \$1.3B in acquisitions and negotiated over \$300M in distribution contracts.
- **Growth.** Brand launches including Cali Red and Matua Lighter; rebuilt a stage-gate process that cut time to market by about a third.
- **Breadth.** Constellation Brands; Accenture Consumer Goods strategy (MillerCoors, AB InBev); Chicago Booth MBA. 18+ years across wine, spirits and beer.

How it works

Fixed fee quoted up front, so there are no surprise hours. Standard NDA. I work only from data you or the target provide and never use prior employers' confidential information. Fast start: usually within a week of the call.

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