



Internship Presentation

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Finance - Sales Ops

- Rising Senior at Whitman College (Walla Walla, WA)
- Economics and Environmental Studies Major
- Minors in Finance and Mathematics
- Originally from Marin County
- Alpine Ski Team, Club Tennis, Whitman Investment Company



1. **Salesforce Projects**
 - a. Contact, Account, & Lead Data Health
 - b. Competitor Tracking and Analysis
 - c. Growing Contact Database
2. **MicroStrategy Visualizations**
 - a. Leadership Dashboards for G3e
 - b. Wine / Non-Wine Data Analysis
3. **Enterprise Risk Management (ERM)**
4. **Personal Takeaways**



MICROSTRATEGY



Salesforce Data Health

- Updating Salesforce data enables effective grouping of accounts and contacts, improving segmentation, targeting, and strategic planning.

Outcome

- Enabled more tailored and specialized marketing strategies, increasing engagement and conversion rates.
- Ensures accurate segmentation for campaign targeting

Salesforce Projects

The screenshot displays two Salesforce interface components. On the left, the 'Leads Lead Updating View' dropdown menu is open, showing a search bar with 'select an Option' and a list of commodity categories including Almonds, Bakery, Beer, Beverage Distributor, Beverage Mixers, Bottled Juices, Bottled Water, Canned Goods, Canned Water, Carbonated Beverages, CBD / THC Drinks, and Chocolate / Candy. On the right, the 'Contacts Functional Role Contacts' dropdown menu is open, showing a search bar with '--None--' and a list of functional roles including Billing Contact (Accounting/Finance), Bottling Operations, Creative/Marketing, G3 Internal, Grower Relations / Viticulture, Logistics/Supply Chain, Owner/GM/Executive, Processor/Cellar Operations, Procurement, Sales, and Winemaker/Brewer/Distiller. At the bottom, a navigation bar includes filters for Google Analytics Medium, Lead Source, Primary Division, Primary Product Family, and Commodity.

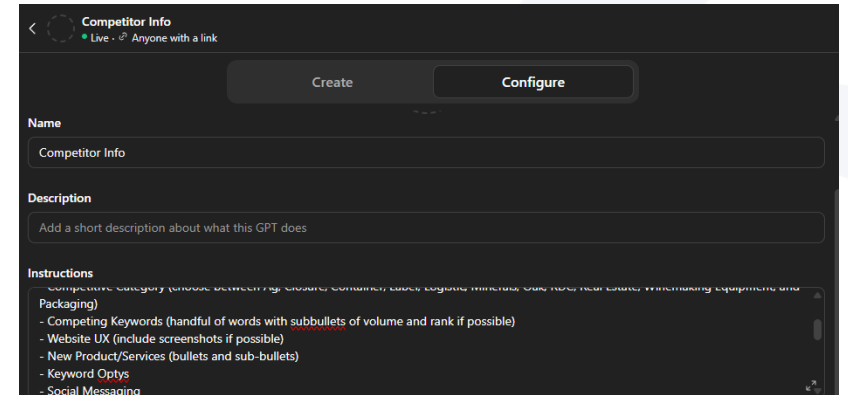
Phase I Competitor Analysis Marketing Intel

Approach

- Built a custom GPT tool to capture and update competitor data
- Potentially can be directly integrated into Salesforce
- Updates key information about G3 competitors

Impact

- Updated 127 competitor accounts in Salesforce
- Improved targeting and strategy with fresher data
- Helps us spot market trends, identify new opportunities, and anticipate competitor moves



Competitor Information	
Key Messaging	<ul style="list-style-type: none"> • Recognized Quality, Consistent, Sustainable • Tagline: "Complete Closure solutions" - • "Introducing the world first Micro Natural Cork"
Competitive Category	Closure
Competing Keywords	<ul style="list-style-type: none"> • Synthetic Cork Manufacturers <ul style="list-style-type: none"> ◦ <u>Volume</u>: 30 ◦ <u>Rank</u>: 70 (77) • Wine Screw Cap Suppliers <ul style="list-style-type: none"> ◦ <u>Volume</u>: 30 ◦ <u>Rank</u>: 99 (4)
Website UX	<ul style="list-style-type: none"> • Product info • Trendsetters Page • Customer Stories (Next Page) • Contact form – Free Samples Request Form • FAQ • Download Page <ul style="list-style-type: none"> ◦ Includes Flyers, PDFs, Brochures - • Sustainability Report – Flip Book
New Product/Services	<ul style="list-style-type: none"> • Ohlinger (natural): Subr F7/ Subr M5 / Selektion • Syntek (coextruded): Excellia / Eco / Colors (color options) • Nomacorc (plant-based): Reserva / Select Green / Classic Green / Smart Green / Zest Premium / Ohlinger (natural) • Vintop
Keyword Optys	No untapped words given

Demandbase: Growing Contacts and Marketing Leads



Demandbase: A B2B database that works to find and match companies and provide detailed info on each business and its employees.



Expanding Contacts on Existing Accounts:

- Utilized Demandbase to enrich customer accounts by adding relevant contacts, enhancing the depth and reach of account-based marketing efforts.
- Improved account engagement and communication by expanding the contact network within existing customer accounts.
- Updated 572 Accounts with new contacts



Growing Contact Database for Marketing:

- Met with marketing campaign leads to identify target markets and key areas of potential growth
- Leveraged Demandbase and company research to identify and add new contacts and accounts for Marketing leads in Salesforce

Which companies do you care about?

Add companies by typing or copy/pasting company names in the searchbox or upload a list of companies.

Q ZYLS IKA DAIRY
Zymex Industries Inc
(blank)
Grand Total

Matching in Progress...

0%

Cancel

Download sample .xlsx, .xls or .csv file

Max file size: 6MB

Matching Complete



5812 companies matched successfully



We couldn't find 1090 companies

Review

MicroStrategy Visualizations:

- Gives sales reps and company leaders a clearer, data-driven view of performance
- Alternative to manual reports or data
- Easier to spot trends, strengths, or areas of improvement

Label Sales Rep Visualization:

- Overview of Label Sales Rep Performance
- Ability to look at any Sales Rep performance
- Similar visualizations for Sales Reps in Core Closure and Cans





Key Accounts:
Top 10 largest
customers by
volume

Strategic
Accounts:
> 50K cases/year

Emerging
Account:
25K–50K
cases/year

Independent
Winery:
5K–25K
cases/year

Micro Winery:
< 5K cases/year

Comparing G3e Wine and Non-Wine business

- Helps company leaders look at broader picture and make informed decisions about direction of company

Wine								
Period	Sales	Profit	Volume	Growth	Period	Sales	Profit	
Q1	1000	200	10000	5%	Q2	1100	220	5%
Q3	1200	240	12000	10%	Q4	1300	260	10%
YTD	3500	700	35000	8%	YTD	3700	740	8%

Non-Wine								
Period	Sales	Profit	Volume	Growth	Period	Sales	Profit	
Q1	800	160	8000	3%	Q2	850	170	3%
Q3	900	180	9000	6%	Q4	950	190	6%
YTD	2650	530	26500	4%	YTD	2750	550	4%

Goal/Project Outcome:

- Update the 2022 ERM evaluation to include all current business activities and environments.
- Identify mitigation gaps and recommend action plans to reduce risk to acceptable levels.

Scope:

- Refresh the 2022 ERM using the same scoring criteria to screen and prioritize risk.
- Meet with key leaders identifying risks, mitigation strategies, and changes

Key Changes:

- Smartsheet was implemented in 2024, changing from Excel, allowing for more consistent risk ratings and a cleaner format
- Clearer communication between groups



KEY		
RISK SEVERITY	RISK LIKELIHOOD	RISK MITIGATION
Insignificant (OK to proceed)	Rare (Risk is unlikely to occur)	Very Low: Seek Support
Acceptable (OK to proceed)	(Risk is unlikely to occur) Improbable	Low: Seek Support
Tolerable (Take mitigation efforts)	(Risk will likely occur) Possible	Medium: Take Mitigation Efforts
Undesirable (Seek Support)	(Risk will occur) Probable	High: OK to Proceed
Intolerable (Put event on hold)	Almost Certain (Could result in disaster)	Exceed Best Practices: OK to Proceed

Enterprise Risk Management: Process



Leaders Kyle Derby & Bryce Mason

Key Stakeholders

Tom Cook, Kevin Luttenegger, & G3 Board

Working Team

Business Leaders

Logistics: Brad Busam, John Edwards, Jerry Knight, Darren McDonough, Nicole Ostertag

Manufacturing: Mike Stanfield, Mark Peters

Real Estate: Mike Ash

Ag/Minerals: Jeff Redoutey, Bruce Prybylinski

Collo-Pack: Mike Stanfield

Finance & Tax: Lisa Fiveash, Ben DeWitt

IT: Dave Brady

EH&S: Vern Grewal

HR: Laura Bream, Jeanna Barbaste-Findlen

Legal: Tim Byrd

Sales: Mihailo Panovich

Subject Matter Experts

Across All Disciplines

Benefits



Enhanced Risk Awareness



Risk Mitigation Strategies



Improved Decision-Making



Relevance to Current Environment



Tracks progress on previous risk mitigation and goals

Challenges:

- **MicroStrategy Limitations:** Intuitive and easy to use, but occasionally difficult to make specific metric or formatting adjustments
- **Data Issues:** Encountered problems with imported AO data in MicroStrategy, which affected dashboard accuracy.
- **Project Coordination:** On the ERM project, it was sometimes difficult to get timely feedback or responses, which slowed momentum and required persistent follow-up.

Internship Takeaways:

- Improved Data Story Telling
- Adaptability
- Communication & Coordination
- Proficiency in new platforms and software
- Trust but Verify

Q & A

✓ Challenge Accepted.