



How to Improve the Business Model of Olá

Strategies to Mitigate the Limitations of the Visibility Model

Unilever – Jerónimo Martins



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1. Context of the Business Project

1.1 Introduction to the Client

Unilever – Jerónimo Martins is the Portuguese local subsidiary of the giant consumer goods multinational company group Unilever. The proposed brand to be assessed was Olá, the ice cream brand of Unilever in Portugal. This brand is divided in both in-home and out-of-home ice creams, being that the focus of the business project was on the impulse business, in out-of-home. In the Portuguese market for more than 40 can be seen for its impressive numbers, registering 95% brand awareness in the country and more than 91% market share of the impulse packaged ice cream business.

1.2 Market Overview

The impulse ice cream market accounts for 55% of the whole ice cream market in Portugal.¹ This market is comprised by two different categories: the fresh (or non-packaged) and the packaged ice creams. This last one is highly concentrated and is composed by three brands only: Olá, Nestlé and Kalise. Olá detains the major share of the market, with 77% of the whole impulse business (table 1) and 91%, of the packaged ice creams section. However, one cannot only consider these direct competitors (figure 1). Hence, it is important to distinguish also indirect competitors (figure 2), which are all the products that can compete with Olá in “share of stomach”. These competitors take a part in the decision process of choosing an ice cream, which is based on the fulfillment of one of three main needs - refreshment, indulgence and nutrition -, thus facing competitors such as Coca-Cola (refreshment), a KitKat (indulgence), or a toast (nutrition). This also relates to the consumption location and the time of the year. It is important to understand the impulse ice cream business is highly seasonal, being that most of the turnover is all done during the summer season. Furthermore, the most important trends in the market are the hype around the premium ice creams, and the advent of higher levels of health consciousness.¹

1.3 Olá’s Current Business Model

In order to better serve the final consumer, Olá currently follows a segmentation model in the HORECA channel, which distinguishes the points of sale (POS), by their sales performance - C1 (high), C2 (average) and C3 (low). Through this segmentation model, Olá then deploys its strategy on assortment and visibility.

¹ Source: Euromonitor International, (2014), “Ice Cream in Portugal”

Hence, Olá grants a total assortment price board to the C1 and C2 POS customers, while for C3 customers it gives a reduced price board with half of the assortment. Moreover, Olá segments the offer not only in terms of needs to target - indulgence, refreshment and nutrition – as also in a pricing perspective, by delivering 50% of the SKU's at 1€ or less. Likewise, Olá also focuses highly on innovation, by launching a selective number of new products every year, increasing the novelty to the consumer. Furthermore, another feature that is at the heart of the business is the visibility model. The visibility strategy is focused mainly in the investment on POS material, such as parasols, tables & chairs, napkin-holders, bins and flags. This material is then allocated according to the sales of the different POS's (C3, C2 and C1). This strategy permits Olá to award its POS customers, while enlarging its brand communication by means of the use of its large POS distribution strategy.

1.4 Business Project Challenge

The business project proposal of Unilever – Jerónimo Martins was rather challenging. The company proposed us to elaborate on the topic “*How to improve the business model of Olá*”. In order to so, we had to assess the Olá brand business model on two main bases: making a more efficient assortment and optimizing the visibility model.

1.5 Summary of Conclusions

To begin with, we identified from the research that the segmentation model was not targeting the POS's in the most efficient way, by focusing solely on sales. From a study on sales and stock-outs, we concluded that there were establishments with high levels of sales who did not have the right assortment to their target offer. Hence, we proposed a new segmentation model, which would not only focus on the sales level, but also on assortment. In order to execute the assortment plan, a new strategy would be implemented, in which POS's would receive a more adequate price board to their target consumer, in order to increase the efficiency of the assortment allocation.

Then, we assessed the visibility model of Olá, concluding that there was not a standardized method to allocate the POS material. Again, we understood sales were not enough as a rule to allocate the investment. Therefore, we created a tool – the Visibility Diamond -, that would assess the POS also in terms of potential and the way the investment was being deployed. This tool would provide an easy mechanism for Unilever to decide on its visibility investment, as also, would give it the possibility of deploying a plan of action to optimize the visibility in each POS.

2. How to improve the Visibility Model of Olá

2.1 Original Approach to the Visibility Model

When we first approached the topic on *how to make the visibility model of Olá more efficient*, we started thinking on ways to change the model in order to make it more impactful. However, the client suggested following another path, one that would guarantee that the model currently established would not be modified, but rather optimized in terms of investment savings. Hence, the visibility model was from then on assessed throughout the business project in the perspective of creating ways to better allocate the POS material investment. To do so, we went through a detailed research to measure the performance of each POS material.

To begin with, the material invested on store was first analyzed on the basis of their impact on attracting and stimulating people to purchase Olá ice creams. To analyze such topic, we ran a qualitative and subsequent quantitative research, which provided us results in terms of POS materials' awareness (table 2) and purchase intention (table 3) effects. Through this study, it was possible to derive a ranking of the POS material visibility effectiveness (table 4), which put together with the costs of the material investment, served as basis for the induction of the return on investment rank (table 5). Our research permitted us to draw the prototype of a tool that could help optimizing the visibility model of Olá – the *Visibility Diamond*. This tool enabled Olá to assess the performance of a POS, by examining crucial success variables, as well as to draw plans of action for each POS, in order to optimize the investment allocated.

This way, we created a way to standardize the measurement of a POS potential on visibility, making it a more efficient investment allocation. However, the visibility model still comprises some limitations regarding the POS customer incentives and the final consumer stimuli, causing the visibility strategy to underperform. On the next few pages, the main weaknesses of this model will be scrutinized and conclusions will be drawn in order to mitigate them.

2.2 Limitations of Olá's Visibility Model

2.2.1 The Limitations of the Visibility Model – POS Customers

Olá's business model has one of the densest distribution channels in the country, which ends up being one of the main competitive advantages of the brand. One can walk outside of home and instantaneously run into an Olá price board; the same if he goes for a walk, or is in the beach, if he makes a quick stop in the highway, or even in

any other cafe in the middle of nowhere. This is what makes Olá unique, its instantaneous availability. In order to do this, Olá must ensure to partner up with the greatest number possible of cafes, bars or restaurants in the country. This makes Olá highly dependable of the HORECA channel to successfully deploy its strategy. Moreover, as aforementioned, this “*being everywhere*” feature is also connected with the visibility strategy, since Olá uses each POS as a vehicle of brand communication, through the POS material. However, this model has some threats and limitations.

From our research we identified that competition for visibility is very high. While Olá has 91% market share in its business, it still has indirect competitors that also compete with it in terms of POS visibility. As you can see in table 6, on the appendix, brands such as Super Bock, Sagres or Coca-Cola are present in the same POS’s as Olá in 15% - 29% of the times. This whole “brand noise” decreases the impact of visibility of Olá inside the POS. In addition to this, there is another concern that undermines Olá’s business compared with these other brands. From our research on the POS, we were able to identify that Olá is a traffic generator brand for the establishment owner, with really shrink margins. This creates a huge problem for the business, since POS owners will not make an effort to sell more ice creams, and will rather try to sell other products with higher margins. This ultimately results in lower margins than the potential sales of the POS and fewer visibility in strategic POS’s, in favor of brands that grant higher margins.

2.2.2 The Limitations of the Visibility Model – Consumers

Likewise, there are also limitations of the visibility model to have in mind, concerning the final consumer. According to Unilever, POS materials have four different roles, depending on the distance they are from the point of purchase (figure 3). Hence, they can show availability, create impact for the brand, stimulate desirability and direct the attention. This follows the same line of the literature on POS communication, which states that the main goals of it are to: attract attention, remind, inform, persuade and create image. (Pelsmacker et al, 2001)

On our research on visibility impact, we concluded that most of the POS materials were successful on delivering positive awareness results (table 2). This means that the POS material is successfully grabbing the attention of the consumer and showing availability. However, the same could not be said about their impact on stimulating

desire to acquire the product. We can observe this from the weak results of the purchase intention indicators (table 3), with trigger values always below 25%.

2.3 Recommendations to Improve the Visibility Model

2.3.1 Incentivize POS Customers to Push Olá Products

In order to solve the issue of the POS customers' low involvement towards Olá, it is crucial to find mechanisms to incentivize POS's to push forward Olá products to their costumers. The best solution for such, it is to make use of sales promotions, which have as main goal to trigger immediate sales (Rossiter, 1997). In addition to this, they are the best solution for impulse businesses. In this case, we are studying sales promotions from the view of the manufacturer – Unilever. Hence, it can target three different audiences. Promotions can be used in the sales force, in the retailer (POS) or directly to the consumer. Because the main problem resides on the retailer's incentives, I will only focus on sales force and trade promotions.

Incentivizing the POS to upscale the segmentation model

With the new segmentation model, we have now 6 different segments (figure 4). However, even though it is easy to identify the segments with higher interest to Olá, the fact is that there are no incentives for a POS to reach a higher level in the chain. Hence, benefits must be created to motivate POS's to upscale its assortment and sales. Firstly, regarding the assortment, an *elaborate* POS has higher risks than a *specialized*, which has a smaller SKU offer. Thus, an *elaborate* can benefit of a *buy back allowance* policy on innovation SKU's. What this means is that Olá will buy back 10% of the leftovers of new product launches, one year and half after the purchase. This way, Olá can incentivize POS's with higher offer on investing more on innovation SKU's, taking away some of the risk innovations represent to the POS.

Then, another policy should be made in order to incentivize POS's to move from C3 to C2 or C2 to C1 level. In order to do so, an *off-invoice allowance* policy must be put into practice. Thus, 3 different levels of benefits must be created. Hence, C2's and C'1 customers will be granted a discount of 2% and 4%, respectively.

Additionally, together with this trade promotion program, there would be another for the sales force running together. In order to ensure high success rates, this program would incentivize the sales force, by granting monetary prizes to those who could migrate more than 10% of the POS's of their area of responsibility to a higher sales level. This way, the new segmentation strategy would be perfectly tuned.

Trade Promotion as a *Visibility Diamond* action plan

As aforementioned, one of the tools that the *Visibility Diamond* grants to Unilever, is the possibility of building-on an action plan for each POS, given their results in terms of sales, potential, visibility execution and investment on visibility. The action plan can be used in the feature *POS Performance Overview* (figure 6). This action plan starts by assessing if the visibility is well executed, and in case it is not, it means that Unilever can already increase the visibility of that place by recommending it how to better allocate the material given. Then, it can also provide information regarding if there is still or not space for improvement. This means that if there is not, there is no interest in investing in the POS, if there is improvement, one must then focus on the three columns after, which say the amount of investment needed, the gain from investment and finally if the ROI will be positive or not. Basically, this action plan helps Unilever to understand if it can increase sales of a POS, by influencing the visibility of that same POS. However, there are other ways to accomplish this.

The idea is that another option is included on the action plan, considering the idea of influencing POS's with basis on sales promotions. Hence, in case the variable *POS Potential* is lower than *Visibility Investment* and *Visibility Execution*, or in case there is no budget or space for more investment, Olá could opt to grant an *off-invoice allowance*. This *off-invoice allowance* would be executed by offering of an extra box of ice cream for each 7 bought. These boxes would have to be linked to its target add-on, following the new segmentation model. This way, the sales representative could push for more product purchases, in order to make *Actual Sales* increase and meet *POS Potential*. With the incorporation of this trade promotion alternative in the *Visibility Diamond* action plan, Unilever would have more variables to act on in order to accomplish its ultimate goal of driving up sales.

POS Wallet incremented in the *Visibility Diamond*

Finally, the last recommendation to increase purchase intention on retailers is also connected to the *Visibility Diamond* tool. The idea is to add a new feature to the tool, which could further standardize the giving of POS material, while at the same time involving the POS in this choice. In order to do so, every time a POS is audited, the sum of the points of the four variables assessed will give a result out of 100. This result will equal the number of points the POS receives, that can be further on invested in POS material. This new feature would be called the *POS Wallet*.

In order to execute it, a table should be created with the “cost of points” of every POS material to the POS, based on the *Return on Investment (ROI) Rank*, which illustrates the visibility impact versus the costs of the material. Since Unilever prefers to deliver POS material with higher high levels of visibility impact, the costs to acquire a material would decrease for the POS with higher effectiveness levels. On the other way around, it is pretty straightforward that Olá prefers to spend the least possible on a POS, thus the higher the cost of a POS material, the higher the amount of points needed to acquire a that material will be. Hence, the points are allocated through the calculation of the absolute cost of investment together with the relative ROI rank. A simulation of the table can be seen in figure 6, in the appendix. From this example, we can see that the POS assessed has 204 points to invest and has already used 110 of its points acquired in 4 napkin holders and 2 small parasols.

This way, the POS can actively participate in the choice of material, knowing exactly how much he can receive, depending on its performance.

2.3.2 Increase the Stimuli on Consumers through the POS Material

In order to achieve higher results of ice cream purchase persuasion, a strategy focused on the consumer must also be implemented. From the assessment of the limitations, we could conclude already that the POS material should have a higher stimuli impact. To do so, it is important to implement a POS communication that can influence consumers’ behavior, by trigger the need for an Olá ice cream, when inside the POS.

Product as King

The visibility model is highly centered on the heart brand itself, and it has produced high levels of image creation, registering 95% brand awareness in the Portuguese territory. However, little focus is given to the product itself. From table 3, we can see that the Price Board is the POS material with more power to stimulate purchase. Also, it is the only POS material that shows not only the brand Olá, but also the product itself. Actually, Unilever just started a new campaign of billboard animations to communicate specific SKU’s. This is a good strategy, but it should be implemented in the POS itself too. Given this, in order to arise more desire in the consumer, Olá should start to promote specific SKU’s inside the POS. The idea is that Olá creates POS material that really shows some of its ice creams. These materials should be bold and creative executions, so that people feel curiosity and desire to have an Olá ice cream. Two prototypes of this new strategy were created, as you can see in figures 7 and 8, in the appendix. The first one, it is an execution of a “Perna de Pau” and of a

“Cornetto de Morango” in a napkin-holder, which is one of the materials with higher ROI. Then, in figure 8, we can see a Magnum stick as a menu of the POS display. The execution plans to create the desire on the people of having an Olá ice cream, from the moment they enter in the POS to have a meal. Likewise, other executions like these could be made, in order to generate desirability in the consumer. To note that the SKU’s used in the communications should be aligned with the specific target the POS is serving, following the new segmentation model’s recommendations.

Operation “Show the Ice Creams”

When we talk about POS communication, we cannot only focus on the display by its one, since there are many other variables to have in mind. The more important ones are the store image, packaging, store organization, product presentation and store atmosphere (Pelsmacker, 2013). Some of these variables are difficult for Olá to make the POS change, but there is still margin in topics as packaging and store presentation. From our qualitative research, some data was derived on the importance for the costumers to see the product in the freezer. Moreover, according to the literature, packaging can influence consumer behavior for long. Hence, since Olá has a type of freezer that is much more visual and can easily show the ice creams to the consumer, the suggestion would be to, from now on, invest only in this “*uncovered*” freezers instead of the usual “*covered*” ones (figure 9). This way, not only the ice creams would have more relevance in the store presentation, as also, the consumers could be triggered to eat an ice cream, by seeing its colourful and stimulating packaging.

Olá Lounge

Store environment is one of the most powerful tools to bring consumers to a store. Store characteristics, such as music and colours, can influence emotions of pleasure, which will subsequently impact the consumer’s behavior, by spending more time on the store and increasing its willingness to buy (Mehrabian & Russel, 1974). Even though store environment is really difficult to influence, Olá should focus on specific POS’s with enough visibility potential to build an *Olá Lounge*. Likewise, according to the literature, music is a powerful in-store marketing tool (Pelsmacker, 2013) as well. Hence, this Olá sponsored area would have a smart and relaxed Olá outlook (figure 10), complemented by an on-going set of original songs, which according to the marketing specialist Jean-Charles Chebat are the most effective ones to evoke good feelings, thus increasing the time spent and the willingness to purchase. Hence, this strategy could ultimately create an environment that stimulates ice cream sales.

3. REFLECTION ON LEARNING

3.1 Previous Knowledge Learned from the Masters Program

The Business Project on “*How to improve the business model of Olá*” was a great opportunity to put into practice, in a real company situation, several marketing topics developed throughout the Master studies.

Firstly, we began by assessing Olá’s business model in the perspective of its distribution channels. Here, we started by concluding that its business model was clearly based on a mass distribution strategy, bringing the great advantage of availability and convenience. In addition to this, we also saw through category management studies that Olá was for the POS a *traffic generator* brand. It brings costumers to the POS and represents high sales volume, however, the margins of profit are too small. This permitted us to know that Olá was not a priority for the POS. Furthermore, in order to analyze the current assortment and visibility model, we had to make use of integrated marketing communications and consumer behavior tools. One of them was the tail diagram, which permitted us to understand how was the concentration of sales of the different SKU’s in the total assortment. Moreover, we built a market hierarchy to understand the process by which the consumer would choose to purchase an Olá ice cream. In addition to this, and to complement this last analysis, we studied the different consumer needs - refreshment, indulgence and nutrition -, in order to understand how should we make a further segmentation that could serve a better offer to each specific target consumer of a given POS. Besides this, we also had to study the importance and goals of POS materials, which are part of POP communication, so to understand how to analyze the visibility model.

Likewise, we also had to cover marketing research topics, in order to reach important insights from the customers and consumers of Olá and build on subsequent recommendations. To do so, we made interviews, based on the structure of qualitative and quantitative research methods.

3.2 New Knowledge Acquired

In this business project, I was also able to learn new subjects or increase the knowledge in some others already covered. To begin with, I learned the role of innovation from a fast moving consumer goods company perspective. This was particularly interesting, because all the innovation strategy topics I had learned previously were predominantly in other industries, such as consumer electronics.

Moreover, it was also interesting to work thoroughly on a trade-marketing viewpoint. The truth is that in the “real world” companies need strong trade marketing strategies, since even in B2B businesses there are always distributors or key account clients, who ask for a different dealing strategy than the one deployed in B2C marketing strategies. Finally, it was also interesting for me to go deeper in the POP communication theory, because that is a part of the IMC strategy that I feel is not much exhaustively covered, even though it is a big slice of the advertising investment of brands.

3.3 Personal Experience

Throughout this business project, and with all the challenges that it comprised, I could witness my own strengths and weaknesses.

From this experience, I was able to reinforce my belief that I have a creative mind, delivering innovative ideas to solve critical challenges and issues that were proposed in the project. Likewise, from my strategic thinking, I was able to derive frameworks and maintain a 360° approach to the problem, working side-by-side with my teammates so that the overall strategy designed for the project was coherent.

However, I was also able to notice some negative points in my performance, such as some lack of organization and planning, working better under pressure; as well as lack of leading skills. In order to mitigate these issues in my teamwork skills, I believe I must try to take more leading roles in future situations. If I do so, I think I will not only increase my leadership, as also increase my organization skills, since it is part of the role to plan and organize projects, with a team to lead.

3.4 Benefit of Hindsight

Looking back on the business project process I think it was quite a valid and positive experience. One of the main points contributing for this was the way the team was able to perform all together. To begin with, every team member had a special skill or different field of expertise, which when combined together, worked on really well. In addition to this, there was also a lot of collective sacrifice, with all the team members backing up on one another always when necessary and helping continuously.

Anyways, if I had to say something that we could improve, that would be to have started planning more ahead from day one. I would say that if such had happened, maybe it would had been possible to better understand what were the main limitations of the assignment since the beginning, instead of being confronted with unnecessary challenges upper in the project.

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Appendix

Company Shares of Impulse Ice Cream: % retail value rsp	2009	2010	2011	2012	2013
Unilever Jerónimo Martins	72,21	73,91	75,12	75,54	77,16
Mars Portugal, Inc	8,09	7,65	7,46	7,16	6,95
Nestlé Portugal SA	5,03	2,95	2,54	2,27	1,19
Others	14,67	15,5	14,88	15,02	14,7
Total	100	100	100	100	100

Table 1. Company shares of Impulse Ice Cream % retail value.

Source: Euromonitor International, (2014), “Ice Cream in Portugal”, p.10

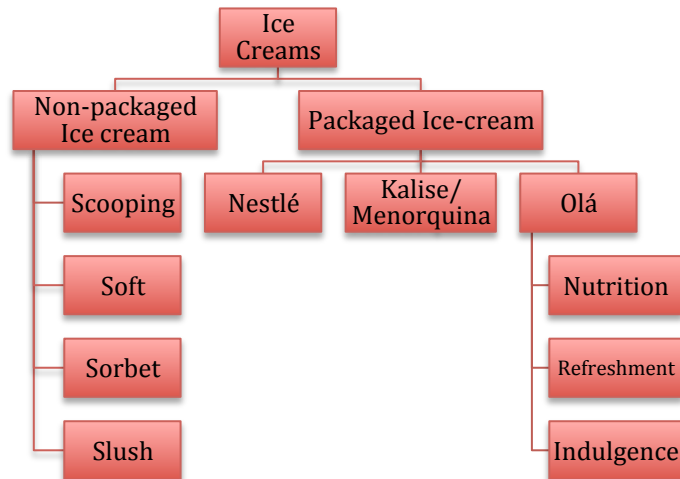


Figure 1. Direct Competition

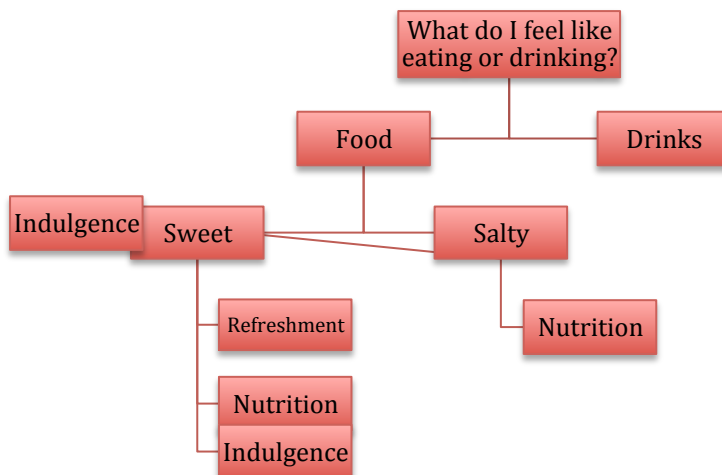


Figure 2. Indirect Competition

Item	Total POS	Times noticed	Relative
Flag	4	2	50%
Parasol (small)	49	26	53%
Placard	14	5	36%
Chairs + tables	29	15	52%
Napkin Holder	32	8	25%
Bin	66	1	2%
Price board	100	83	83%
Freezer	100	9	9%

Table 2. Quantitative research results: POS material awareness

Reason	Total POS	# Responses	Relative
Saw someone eating	100	3	3%
I remembered myself	100	32	32%
Friends	100	20	20%
Children	100	8	8%
Flag	4	1	25%
Parasol (small)	49	7	14%
Placard	14	2	14%
Chairs & tables	29	1	3%
Napkin holder	32	0	0%
Bin	66	0	0%
Price board	100	25	25%
Freezer	100	1	1%

Table 3. Quantitative research results: Purchase intention reasons

Distance	Material	Awareness Rank (Research)	Trigger to buy (Research)	Visibility Rank
High	Flag	4	1	4
High	Parasol big	2	2	2
Medium	Parasol small	2	2	2
Medium	Chairs & Tables	3	3	3
Medium/short	Napkin holder	6	5	6
Medium/short	Bin	8	5	7
Short	Price board	1	1	1
Short	Freezer	7	4	5

Table 4. Calculation of the visibility rank.

Distance	Material	Investment	Investment Rank	Visibility Rank	ROI Rank
High	Flag	€ 272.00	7	4	5
High	Parasol big	€ 165.00	6	2	3
Medium	Parasol small	€ 8.00	4	2	2
Medium	Chairs & Tables	€ 75.00	5	3	3
Medium/short	Napkin holder	€ 3.50	2	6	3
Medium/short	Bin	€ 6.00	3	7	4
Short	Price board	€ 1.50	1	1	1
Short	Freezer	*	*	5	*

Table 5. Calculation of the ROI rank

	Super Bock	Sagres	Cola	Lipton	Nestlé	Delta
C1	3	0	0	2	0	0
Average C1	30%	0%	0%	20%	0%	0%
C2	9	7	8	4	1	8
Average C2	26%	21%	24%	12%	3%	24%
C3	3	2	0	0	0	1
Average C3	38%	25%	0%	0%	0%	13%
Grand Total	15	9	8	6	1	9
Average Total	29%	17%	15%	12%	2%	17%

Table 6. Visibility competitors' performance

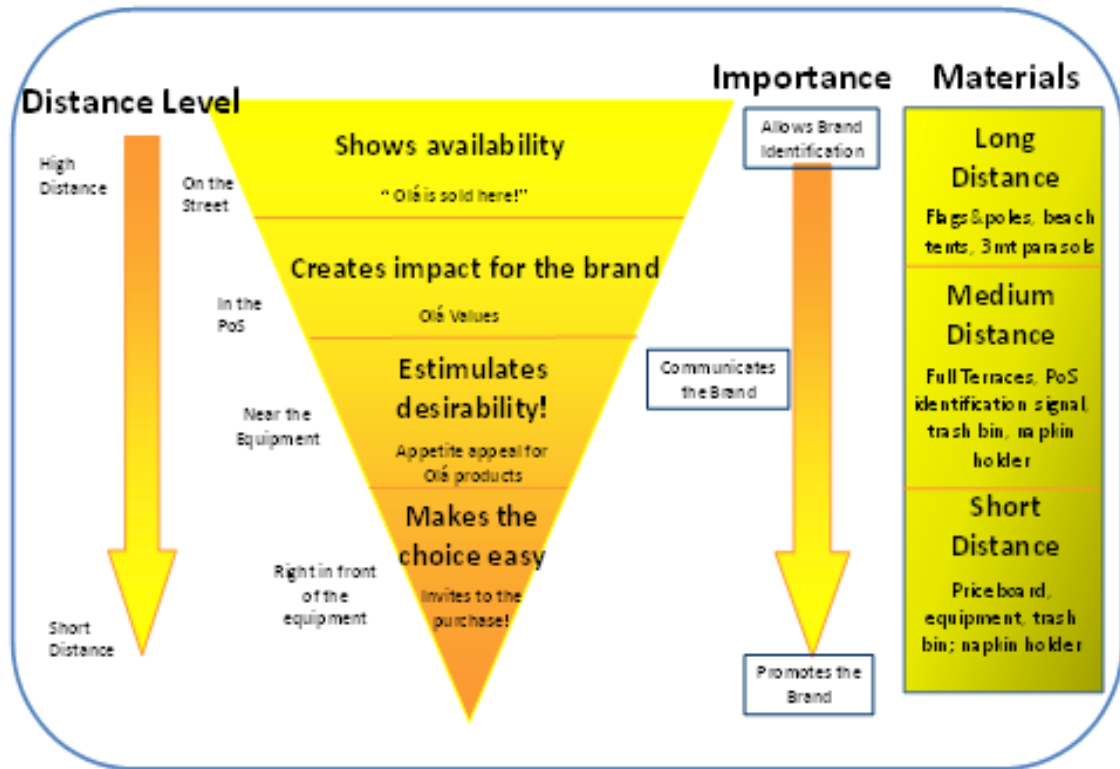


Figure 3. POS material role

Source: Unilever

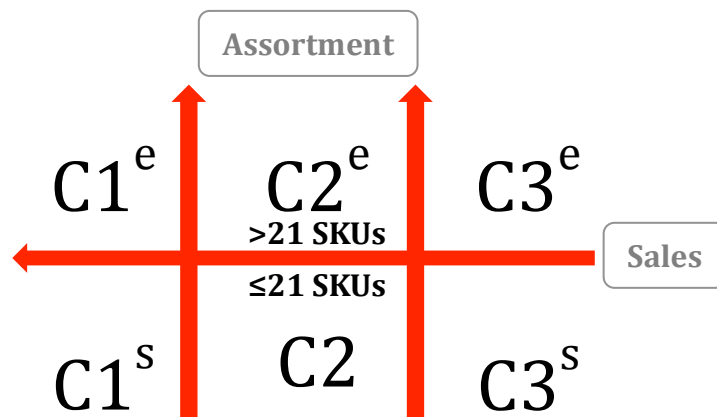


Figure 4. New Segmentation Model

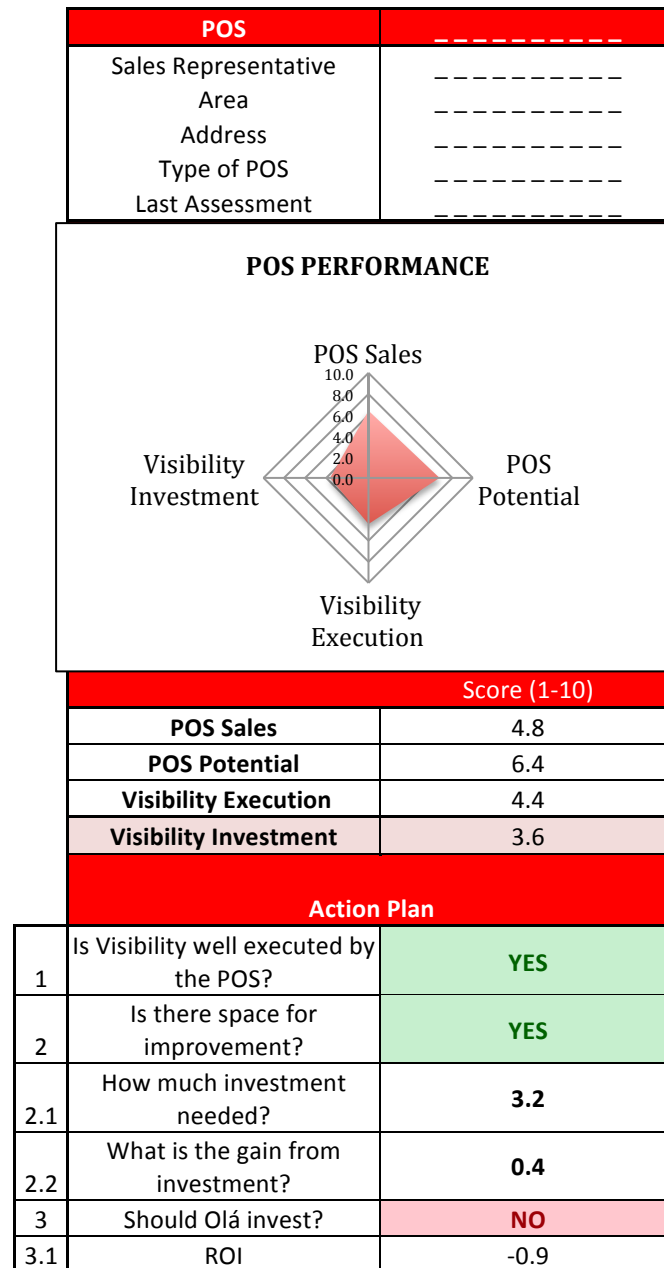


Figure 5. Visibility Diamond - POS Performance Overview

POS Wallet		Material Acquired
Napkin Holder	20	4
Small Parasol	25	2
Bin	50	0
Tables & Chairs	200	0
Big Parasol	500	0
Points Balance	204	
Points Used	110	

Figure 6. POS Wallet – Point-trading System



Figure 7. Stimuli POS material approach – Napkin Holders



Figure 8. Stimuli POS material approach – Menu Displays



Figure 9. “Uncovered” freezers change



Figure 10. Olá Lounge