Pre-work

Reading and understanding the case before the programme

1. What the pre-work is

The pre-work of AI for Business: Data-Driven Decisions consists of reading and understanding the material of the Maré Alta case before the first day, so that the three mornings can be spent on the decision and not on learning the story.

The case is the thread that runs through the programme. It takes place in a fictional brewer and distributor whose chief financial officer has to recommend to the board how next year's commercial investment should be allocated, with three executives defending three different uses of the same budget. On the first morning the class starts from the situation as the case document describes it, which is why the reading comes first.

Nothing has to be solved, calculated or prepared in writing. The pre-work is complete when you can explain to a colleague, without the document in hand, what the company is living through, what each executive proposes and why the three positions cannot all be accepted.

2. What to read

Material	What it is	How to read it
Case document	The company, the last three fiscal years, the positions of the three executives, the role of the working group and the constraints. Three pages.	In full, with attention. It is the central reading.
Data dictionary	The five tables of the extract that the working group receives, column by column.	Once, to know what information exists about each point of sale, each sale and each investment. There is no need to memorise it.

Both are available on this site and as PDF files on the materials page. The data files themselves do not need to be opened before the programme, since they are explored in class with the professors.

3. A reading guide to the case document

The case document has five sections, and each of them answers a different need of someone who will have to take a position. The notes below indicate what to retain from each one.

The company

Retain what Maré Alta sells and to whom. The distinction between the on-trade (bars and restaurants) and the off-trade (mini-markets, supermarkets and convenience stores) returns throughout the case, as do the fiscal year that runs from October to September and the fact that part of the outlets came from a distributor acquired in 2023 and is still managed in another system.

Three years in five numbers

Read the table until you can say in one sentence what happened to volume, to margin and to commercial investment between FY24 and FY26. Then identify the two commercial decisions of FY26 and the loss of customers at the end of the year, because each of the three proposals grows out of one of these facts.

What each executive brought to the table

For each of the three executives, separate what is being proposed, how much it costs and which number is offered in its support. It is worth noting which of the three positions convinces you most on a first reading and what in it convinces you, since the first morning starts from that impression.

Your role

The participants act as the working group that advises the chief financial officer. The section states what the group delivers at the end of each of the three mornings and makes clear that nobody builds a model or writes a query.

Constraints and what is known about the data

Retain the size of the envelope, the target that the board expects and the decisions that cannot wait. The last paragraphs describe where the data came from and what the data team said about it, which matters for judging how far each number can be trusted.

4. Terms as the case uses them

The vocabulary of the case is that of the beverage business. A few terms have a precise meaning in the data, which the table records to avoid different readings in the room.

Term	Meaning in the case
Fiscal year	October to September. FY26 runs from October 2025 to September 2026.
Extract	The data on 1,150 points of sale over 36 months to which every figure of the case refers.
Invoice discount	Reduction granted on the invoice, which separates gross revenue from net revenue.
Trade spend	Investment made at the point of sale and booked apart from the invoice: coolers, activations, merchandising materials and listing fees.
Commercial investment	Invoice discounts plus trade spend, the R$ 22 million envelope under discussion.
Gross margin	Net revenue minus cost of goods sold, as a percentage of net revenue. It does not include trade spend.
Tier	Potential of the outlet (A, B or C) as classified by the sales team in 2023.
Cooler Programme	Programme launched in October 2025 that installs and maintains a branded cooler in the outlet and funds a monthly activation.
Churn	An outlet that was buying in June 2026 and placed no order in the following ninety days.
Churn model	Model of the analytics team that gives each outlet a score between 0 and 1 for the risk of churn.

5. What to bring to the first morning

The first session opens with the positions of the participants on the case as they read it. It helps to arrive with three notes, which nobody collects and which serve only as a starting point for the discussion.

The first note records which of the three executives you would support today and the reason. The second lists what you would want to know before committing the budget to any of the proposals. The third lists what in the case document you did not understand or would like to see explained, about the company, the numbers or the data.