

## **PRE-VISIT PLANNING**

### **Marketing and Promotion Guide**

- Know start and finish dates of promotion
- Identify product of your brand(s) that is part of promotion
- Determine how much inventory is required to support promotion
- Check what listings you have at store you are visiting
- Review & understand overall Theme of promotion & how to connect purpose of visit

### **Product Performance**

- Prepare to review store-specific performance results

### **Time with the Team**

- Identify who you will be meeting with at the store:
  - Store Manager
  - Product Consultant
  - Ambassador
- Define purpose of the interaction while at store:
  - Product knowledge/education
  - Selling skills
  - In-store presentation
  - Inventory needs/decisions
  - Employee informational tasting
- Schedule time with the identified team member to ensure availability and maximize time in store/interactions with team

### **Tools & Resources**

- Sell Sheets completed
- Know the store/market you are visiting – Customer trends & insights

## **IN-STORE VISIT**

### **Introductions**

- Sign in by completing Visitor Sign-In Log
- Introduce yourself to Store Manager/Designate

### **Merchandising**

- Product(s) on shelf full in-stock position
- Product displayed in correct area
- Adequate inventory based on forecasted sales specific to store
- Review options for seasonal/discretionary space

## Store Visit Guide

### **Paid Programs**

- Product(s) on display full in-stock position
- Displayed in correct area
- Adequate inventory to support promotion
- Proper signage and promotional materials

### **Upcoming Promotions/Opportunities**

- Discuss with Store Manager/Designate upcoming promotions, including events, media coverage (e.g., write-up in newspaper or awards/accolades), local events/upcoming attractions
- Ensure ready for increased demand
- Discuss pending issues with stock availability - i.e., back orders, shipping issues, production supply, etc.
- Present new listing(s)

### **Trade-Led Educational Employee Tastings**

- Schedule with Store Manager/Designate during non-peak operational times
- Confirm you have all required items/ingredients for tasting, including product chilled as appropriate
- Focus on innovation or products store does not have listed
- Review occasion-based upselling, cross-selling and incremental sales opportunities for your product(s), i.e., Holiday top sellers, LTO, Bonus Offers, and promotional items
- Sell Sheet completed and available to support product and tasting, ensure all information is covered during tasting
- Do not to leave samples that employees can taste later, however leave product information for employees not in store at time of tasting
- Re-start again as of June 6<sup>th</sup>, 2022.

## **POST VISIT ACTIONS**

### **Performance**

- Review sales performance to determine if sales increased
- Identify the reason/contributing factors, i.e., Product Knowledge, Education, Selling Strategies
- Establish an exit strategy for excess product
- Review potential actions for under-performing SKUs

### **Follow up**

- Schedule time to reconnect with the Store Manager as required
- Connect with District Manager in the event there are specific market needs/exceptions