



12 Month Planning Guidelines

Review and Goal Setting

Before starting, I recommend a bit of review and goal setting. It is critical to have open discussions with your team and examine what comes out of these talks without judgement. Only then can you start working to build the systems necessary for better results. Here are a few questions to start the discussion:

- What about our promotional planning process is working or not working?
- Where are we failing? Where are the pain points in the process?
- What has changed since last year? What trends are emerging?
- What do we want to accomplish this year with our promotions?
- What tools do we need to measure success? (reports, analytics, etc)
- How can we improve our communication and retention of information?
- Are we transparent enough? How do we make the information more accessible?

Suggested Action Plan

May

- Develop spend rate and price point targets
- Create base off invoice and MCB structure

June / July

- Develop key distributor promotion plans
- Create national/ top regional account promotional plans with broker rep input (Whole Foods, Kroger, Albertsons/Safeway, HEB, Publix, Sprouts, INFRA, NCG)

August / September

- Build regional chain promo plans (Mollie Stones, Fresh Thyme, Natural Grocers)
- Build regional distributor plans
- Create plans for top independent stores and retailer group promotions
- Review all of the above make sure nothing is missed

This order is driven primarily on the natural order of what comes first. It is hard to develop a retailer plan without first coming up with a structure for the distributor that serves it. The large retailers are working farther out and therefore their promotions are due sooner. Talk to your brokers and build a list of your deadlines so you can prioritize.



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A few more things to consider

- **Keep things simple** – remember that you have to communicate your plan to multiple broker teams. The simpler it is, the better chance you have to get it executed properly.
 - Line up your promotion months for the distributors across the country
 - Line drives are preferable in most cases for brands with only a few items
 - Standardize your base case stack deals and spend levels
 - Create communication decks that tell the story
- **Understand what drives sales** – one size doesn't fit all. Retailers have different priorities and the promotional plans should reflect these preferences. Creating variations of your base plan to accommodate different types of retailers (ad driven, deal driven, EDLP focused) can help you be more successful. And while these plans vary, you can create a standard set of strategies that can be adapted to different retailers across the country.
- **Understand your promotional vehicles** – it is critical that you really know how each of the promotional types (OI, MCB, Billback, Scan, etc) work both at the retailer level and via your distributor. To get the most from your promotion dollars, you need to know they are calculated and reflected to the retailer. If you are trying to hit particular price points, work through the numbers and make sure you are going to get there.
- **Ask questions** – utilize your broker teams, reach out for distributor reps and buyers and talk to the retailers. These are all great resources for you in designing the best promotional program possible for each retailer. For the most part, they will be happy you engaged them in your process. The best plans are developed through an iterative process with lots of input from the stakeholders.
- **Follow up** - Double check at key deadlines so you don't miss anything and get your broker teams to send pictures to verify execution. This feedback loop can help you adjust as you go through the year



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