

Case Study Success Story Niche Templates

Customer Problem Category
Mfr: Continuity work must be effective to keep sales up
Mfr: Difference between what mfr thinks is in stores and what is really in stores
Mfr: Effective reporting needed on merchandising work
Mfr: Foreign mfr problems
Mfr: Low margins make merchandising work impractical
Mfr: Need to spend merchandising dollars in most effective way possible
Mfr: Needs critical information from retail floor: Pricing, Competition, Coupons, Promotions
Mfr: Needs knowledge of local retailer, local conditions
Mfr: New items
Mfr: Out of Stocks
Mfr: Promotions executed effectively
Mfr: Rapid response required to special circumstances
Mfr: Retailer's people can't or won't get merchandising done
Mfr: Secondary displays are critical
Mfr: Short, seasonal selling periods
Mfr: Some categories benefit from effort to train retailer's people
Mfr: Some categories benefit from highly skilled merchandising reps
Mfr: Some products benefit from special events
Mfr: Some tasks require "burly men with tool belts and no teeth"
Mfr: Vendor managed inventory
Mfr: When is 100% completion needed?
Mfrs: Understaffed, overworked
Retailer: Effective use of "fair share" funds

Template #: 4

Key Message: Increase Same Store Sales

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Continuity work must be
effective to keep sales up**

**Key Problem Solved: Weak Continuity Work By Previous
Merchandiser Was Missing Sales**

**Headline: *Same Store Sales Increased by 78% For Same Cost as
Was Being Spent on a Weak Merchandising
Organization***

***Additional \$125,000 Spent on Merchandising Results
in \$1.5 million in Additional Gross Profit***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 9

Key Message: Rep Accountable for Status of Every SKU In Store

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Continuity work must be effective to keep sales up

Key Problem Solved: Merchandising Work Only Partially Done

Headline: *Handheld System Forces Rep to Account for Activity on Every SKU In the Store*

Prorated Cost of System is Under \$100,000 Per Year, Results in \$2 Million of Additional Sales from Just One SKU

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 38

**Key Message: Percent In-Stock Increases From 52% to 85%
After Just One Call by Merchandising Rep**

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Continuity work must be
effective to keep sales up**

**Key Problem Solved: Product in the store, but not on the shelf
correctly**

**Headline: *Percent In-Stock Increases From 52% to 85% After
Just One Call by Merchandising Rep***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

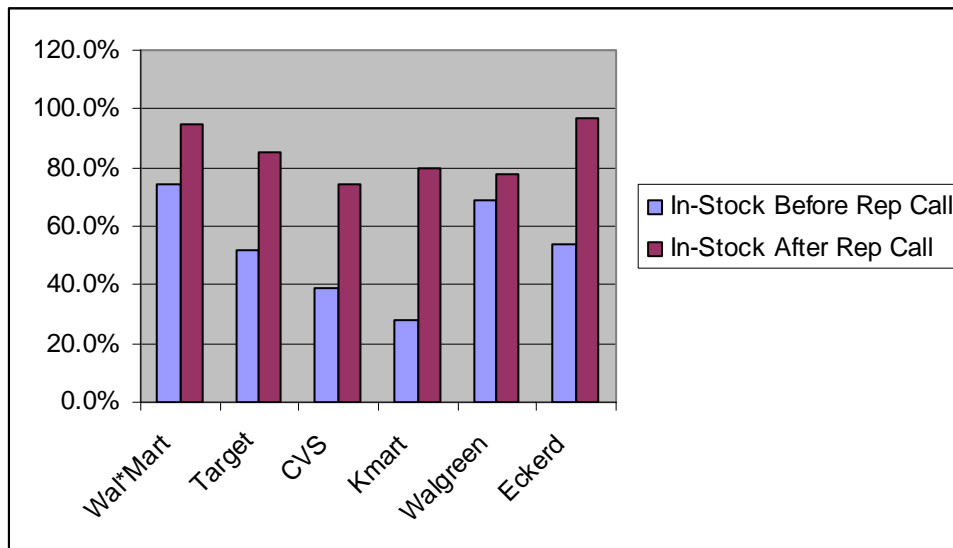
Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)



Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 28

Key Message: Inventory Only Projects

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Difference between what mfr
thinks is in stores and what is
really in stores**

**Key Problem Solved: Occasionally need a minimal cost
inventory**

**Headline: *We Can Do Rapid, Inexpensive Inventory-Only
Projects***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 12

Key Message: Near-Instant, Custom Status Report on Merchandising Work Prevents Waste, Capitalizes on Opportunity

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Effective reporting needed on merchandising work

Key Problem Solved: Slow, inaccurate reporting from merchandising work often results in wasted dollars

Manufacturer is understaffed, cannot waste time on confusing, ineffective reporting

Headline: *Near-Instant Reporting of Status on Merchandising Work Results in a Course-Correction Half Way Through Project*

Instead of Wasting \$75,000 by Continuing with the Project, We Changed the Project Objective and Accomplished a Sales Lift of Over \$1.5 Million

Our Reporting System Saves Buyer 250 Hours Per Year in Reduced Analysis and Validation Time

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 14

Key Message: Proof of Performance Ensures That Money Spent on Retail is Getting Desired Result

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Effective reporting needed on merchandising work

Key Problem Solved: Merchandiser's claims of 98% completion are often false or unreliable.

Too much time and hassle to verify.

Headline: *Digital Photos Show that Merchandising Work is Done as Promised*

Buyer saves 500 hours a year and \$100,000 in Audit Costs Because She Has Immediate Access to Digital Pictures of Work Done

GPS and Card Scanning System Guarantee that Our Reps are In Stores as We Promise

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 43

Key Message: Foreign Manufacturer Uses Big Training and Advocacy Push to Grow Market Share During Holiday Season

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Foreign mfr problems

Key Problem Solved: Foreign brands often have weak sales in the U.S., even when superior value

Headline: 252% ROI On Training and Advocacy Effort

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 20

Key Message: Incremental Work, Very Inexpensive

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Low margins make
merchandising work impractical**

**Key Problem Solved: Some work is not practical unless
piggybacked with other work**

**Headline: *Special Program Constructed to Accomplish
Additional Tasks In-Store that Could Not be Done
Otherwise***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

(when already in store, when fixed costs are covered for month)

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

BE VERY CAREFUL

Template #: 18

Key Message: Analysis Produces Best Results for Merchandising Dollars Spent

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Need to spend merchandising dollars in most effective way possible

Key Problem Solved: Merchandising work is often done in all stores equally, regardless of sales potential

Manufacturers often do not have the time, tools or skills to do the analysis required to get the best results from every merchandising dollar spent

Headline: Store Volume Analysis Results in 40% More Sales for Same Merchandising Dollars

Pre- and Post-Promotion Analysis Allows \$100,000 in Merchandising Work to Produce \$1.5 Million More In Sales than Similar Projects Without Analysis

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Projects from Hard Data

Manufacturers often do projects at all stores, based on something other than hard data

Help manufacturer get better, measured results by making sure effective analysis is done before dispatching reps, then analyzed after project completed

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 25

Key Message: Take Over From Other Merchandiser, Better Results

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Need to spend merchandising dollars in most effective way possible

Key Problem Solved: Unsatisfactory performance by previous merchandising organization

Headline: *Same Store Sales Increase 20% After We Took Over Merchandising Work*

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 26

Key Message: Dedicated Team Produces Better Results than Syndicated Model

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Need to spend merchandising dollars in most effective way possible

Key Problem Solved: Syndicated merchandising work is inconsistent, manufacturer is not really sure what they get for their money

Particularly helpful when facing chronic out of stock problems

Dedicated team can cost 40% less than manufacturer's in-house merchandising force

Headline: *By Spending an Additional \$2 Million on a Dedicated Team instead of Syndicated Merchandising, Manufacturer Reaps \$37 Million of Additional Sales*

Dedicated Team Brings Out of Stock Rate From 40% Down to 3%

Dedicated Team Increases Display Activity by 50%

Dedicated Team Increases Manufacturer's Sales by 10%

Dedicated Team Increases Manufacturer's Sales by 13% With Clip-Strip Program

Dedicated Team Gets New Item Into 1500 Mass Merchant Stores in One Day

“Give Us A Test. You Will Never Know What This Model Can Do Unless You Try It”

Dedicated Team Gets New Item Into 75,000 Convenience Stores in 90 Days

Dedicated Team Solves Out-of-Stock Problem Caused by Limited Shelf Space in High Turn Category. Scan Data Aided in the Effective Assignment of Reps. Result was 5% Annual Sales Increase for Manufacturer, With Contribution Margin from the Increase Well Exceeding the Cost of the Dedicated Team

Dedicated Team Payback Exceeds Client Hurdle Rate for Justifying the Effort by 52%

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

E.g. 2 calls per week at 2100 stores

E.g. Extra effort to get store manager to order enough stock, especially for weekends, including promise to return and merchandise the new stock immediately

E.g. Found creative way around store policies on clip-strips

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 41

Key Message: ROI Analysis of Continuity Coverage Results in Several Activities Dropped, Some Activities Increased, Out of Stocks Down Considerably and \$3 Returned for Every \$1 Spent

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Need to spend merchandising dollars in most effective way possible

Key Problem Solved: Out of habit, we often continue doing activities that have little to no impact on improving sales

We often do not measure the ROI of merchandising efforts

Headline:

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 46

**Key Message: Clear Value Received for Merchandising Dollars
Spent With Broker / Syndicated Model**

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Need to spend
merchandising dollars in most
effective way possible**

**Key Problem Solved: Manufacturer Does Not Have Clear
Reporting on Exactly What Services Are
Received for Merchandising \$ Paid to
Brokers / Syndicated Model**

**Headline: *Our Reports Show Every Touch, Every Look, Every
Action We Take on Your Behalf***

***Clear Accountability Yields \$6 Million In Sales Over
Similar Stores Using Broker / Syndicated Model***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 11

Key Message: Knowing Most Critical Things that are Happening on Retailer's Floor: Pricing, Competition, Coupons, Promotions

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Needs critical information from retail floor: Pricing, Competition, Coupons, Promotions

Key Problem Solved: Manufacturer Often Does Not Have Good Information from Retail Floor on Pricing, Competition, Coupons, Promotions

Headline: *Effective Survey Costs \$60,000, Results in \$500,000 of Additional Gross Profit*

Survey Provides Solid Information from the Retail Floor on Pricing, Competition, Coupons, Promotions

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Effective survey questions

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 1

Key Message: Local Market Knowledge Spurs Sales

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Needs knowledge of local
retailer, local conditions**

**Key Problem Solved: Buyer needs local market knowledge to
capture all possible sales**

**Headline: *Knowing Local Market Preferences Results In
Cosmetics Sales 350% Higher Than Store Average***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

- Store / display area clean and presentable
- Maintain Planogram integrity
- Tags accurate, neat and clean
- Out of stocks corrected
- New Item Cut In
- Stock Rotated

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTION: This area requires substantive impact and results. “We know the local market” is not enough. (e.g. working cosmetics at Target. e.g. Hispanic fashion in Chicago.)

Template #: 5

Key Message: New Item Speed to Shelf

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

Customer Problem Category: Mfr: New items

**Key Problem Solved: Retailer, Other Merchandising
Organization Not Getting New Product On
the Shelf Fast Enough**

**Significant Sales Lost During the Period It
Takes Most Retailers to Get New Products
on The Shelves**

**Headline: \$300,000 of Additional Merchandising Work Results in
New Product Sales of 300% of Forecast**

***\$300,000 Spent at New Product Introduction Saves a
\$3 Million New Product Investment, Results in
Established New Brand***

***Merchandising Firm Gets New Item On 80% of
Shelves In 3 Weeks, Compared to 60% On-Shelf in 10
Weeks When Done By Retailer***

***New Item Produces \$6 Million in Sales in First 3
Weeks In Stores We Merchandise. Comparable
Stores Merchandised by Retailer Produced \$4 Million
in Sales After 10 Weeks***

***Best Possible With Standard Syndicated Effort is 80%
On the Shelf in 4 to 6 Weeks (Usually Requires
Multiple Trips)***

***Extra Effort Puts New Item On-the-Shelf at 90%
Complete In 10 Days***

Knowing The Retailer, Working Around the New Item Introduction Constraints

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

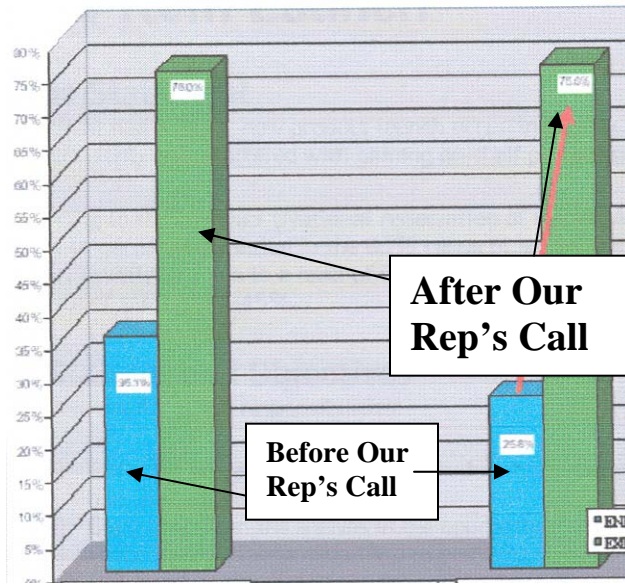
Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

NEW ITEM ON THE SHELF – BEFORE & AFTER



Average Product

Produce We Serviced

Pictures:

Summary – Lessons Learned

Additional Details, Notes: NARMS Study is basis of headlines, need to verify

CAUTIONS:

Template #: 19

Key Message: Effective Test Marketing Effort Increases New Product Success from 1-out-of-5 to 2.2-out-of-5

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: New items

Key Problem Solved: Test Marketing needs extensive, excruciating surveys to collect enough data to increase odds of success

Headline: *Survey with 22 Effective Questions Results in Successful Test Market of New Product*

Previous Test Market Efforts Failed Due to Ambiguous Questions

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 3

Key Message: Reduce Out of Stocks

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

Customer Problem Category: Mfr: Out of Stocks

Key Problem Solved: Reduce Out of Stocks

Critical During Peak Selling Periods

Risk of Losing Shelf Space

**Headline: \$250,000 Invested In Merchandising Effort to Reduce
Out of Stocks Results in \$55 Million of Additional
Sales**

***Merchandiser Uses Technology to Help Manufacturer
Work Collaboratively With Retailer and Reduce Out of
Stocks***

***Our Primary Focus is Rapidly Solving Out of Stocks.
This Includes Scan-Data and Surveys to Find Out of
Stocks, Getting the Stock Out of the Back Room and
Ordering New Stock On-the-Spot***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

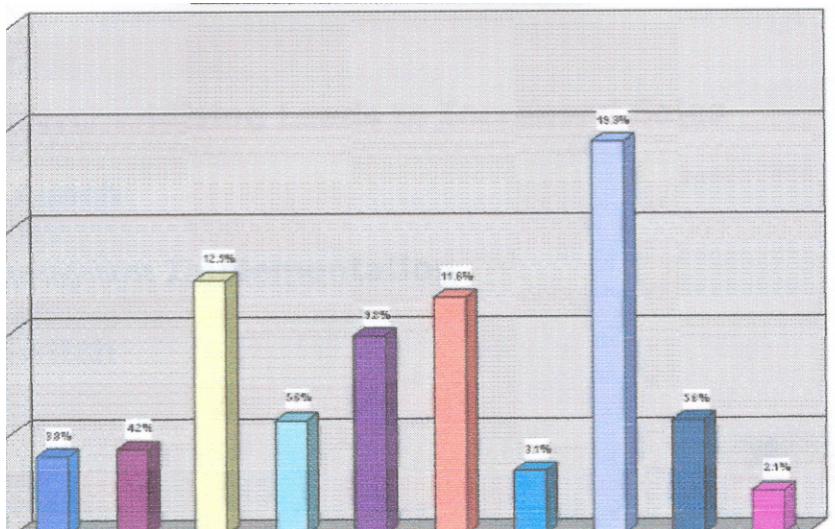
Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

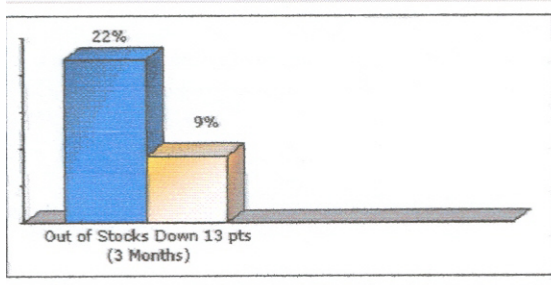
Quotes from Retailer:

Graphics:

BEFORE: OUT OF STOCKS BY PRODUCT



AFTER: OUT OF STOCKS DOWN SIGNIFICANTLY



Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 6

Key Message: System Can Automatically Dispatch a Rep When an Out of Stock is Detected (through Zero Scan monitoring)

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Out of Stocks

Key Problem Solved: Lost Sales Due to Out of Stocks, High Labor Cost of Resolving Out of Stocks

Headline: *Automatic Dispatch on No-Scan Items Increases In-Stock from 78% to 96% In Four Months*

Sales Increase by \$320,000 for Same Period – In One Product Line

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 8

Key Message: Out of Stocks and Over Stocks Reduced Because Rep Orders Inventory While On-Site

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Out of Stocks

Key Problem Solved: Out of Stocks, Over Stocks, Time Lag for Retailer to Order

Headline: *Out of Stocks Reduced from 23% to 2.5% by Allowing Reps to Order On-the-Spot Through Handheld*

Increased Sales Results in \$1.4 Million Additional Gross Profit for Retailer, \$1.8 Million Additional Gross Profit for Manufacturer

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 45

Key Message: Audit and Correct Service

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

Customer Problem Category: Mfr: Out of Stocks

**Key Problem Solved: Alarming Number of "No-Scans" out of
500 SKUs that the manufacturer provided
to the retailer**

**Broker could not target activity to specific
no-scan items because of large volume of
work with other SKUs**

**Headline: *Audit and Correct Service Identifies Root Causes of
No-Scans, Sells Store Managers on Ordering Missing
Product and Reduces No Scans by 80%***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 7

**Key Message: 100% of POP Materials In Place for Promotion Yields
Big Sales Increase**

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Promotions executed
effectively**

**Key Problem Solved: POP Materials Not In Place, Promotion Not
Getting Full Sales Lift, High Labor Cost to
Get 100% of POP Materials In Place**

Includes Primary and Secondary Displays

**Headline: 100% of POP Materials In Place for Promotion Yields \$8
Million In Additional Sales Over Stores that Only Have
90% of POP Materials In Place**

***Reps Order Missing POP Materials On the Spot,
Resulting in 99% POP In Place in 2 Weeks***

***Promotion Yields 135% of Expected Sales Lift
Because All POP Materials In Place Within 2 Weeks***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reps order on the spot through handheld

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

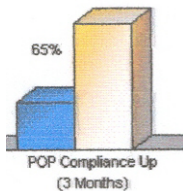
Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:



Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 15

Key Message: Close Coordination on Promotions and New Items Produced More Effective Merchandising Work

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Promotions executed effectively

Key Problem Solved: Promotions and New Item efforts often do not produce best possible sales because broker or whoever drives promotions and new items are not effectively coordinating with merchandising organization

Headline: Close Coordination Between Broker and Merchandiser Results in \$2.5 Million in Initial Sales for New Item

Close Coordination Between Manufacturer's Sales Department and Merchandiser Results in \$2.5 Million in Initial Sales for New Item

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 40

Key Message: Proactive Effort By Merchandiser Gets New Item In Stores Without Expediting, Last Minute Costs and Hassles

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Promotions executed effectively

Key Problem Solved: Broker, Merchandiser and Retailer Often Do Not Get Information On New Item Launches and Promotions Until Late In the Game

Headline: Proactive Effort By Merchandiser Gets New Item In Stores Without Expediting, Last Minute Costs and Hassles

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 16

Key Message: Rapid Response to Urgent Need

Key Advantage: Already in the Stores 2-3 Times Per Week

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Rapid response required to special circumstances

Key Problem Solved: Understaffed manufacturers often must respond to urgent situations with very little lead time

Headline: *Urgent Restickering Project Accomplished in 7 Days from Initial Call*

2500 Store Calls Made in 48 Hours to Meet Urgent Need Because We Were Already Calling on the Stores

98% of 3,500 Stores Reset in Only 4 Weeks

New Item to Shelves In Three Weeks to Meet Manufacturer's Advertising Schedule

Key Point of Difference for Manufacturer is Speed in Getting New Product on Shelf – We Got it on Shelves in 3,000 Stores in Three Weeks

Rapid New Item Introduction Depends on Being in the Store Weekly

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Clear Expectations
(e.g. "70% completion is the best you can get under this deadline")

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 37

Key Message: Effective New Item Cut In Allows New Item to Become #1 in the Category in 30 Days

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Rapid response required to special circumstances

Key Problem Solved: Unique Opportunity for Hot Product Requires Special Effort

Headline: *Effective New Item Cut In Allows New Item to Become #1 in the Category in 30 Days*

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 42

Key Message: Ability to Rapidly Recruit and Train the Right
Reps Allows Effective Response to Urgent
Manufacturer Need

Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker

Customer Problem Category: Mfr: Rapid response required to
special circumstances

Key Problem Solved: Circumstances arise where new reps and
new skills are needed urgently

Headline: Ability to Rapidly Recruit and Train the Right Reps
Allows Effective Response to Urgent Manufacturer
Need

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 10

Key Message: We do work the Retailer Can't or Won't Do

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Retailer's people can't or
won't get merchandising done**

**Key Problem Solved: Retailer's People Lack Skills or Time to Do
The Work**

**Headline: By Setting Up Complex Electronics Displays
Correctly, We Increased Average Store Sales by 230%
Over Stores Where Retailer Personnel Did the Setup**

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Quality of Completed Tasks.

Better Access to Supporting Materials, Help, Training

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 31

**Key Message: Effective Planogram Compliance During Resets
Results in Higher Sales**

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Retailer's people can't or
won't get merchandising done**

**Key Problem Solved: Retailer's personnel will always be multi-
tasking and customer service will always
take priority over the reset**

**Headline: *Spending \$185,000 on Highly-Capable Merchandising
Reps Raises Planogram Set Compliance from 84% to
98%***

***Study Shows a New Planogram Produces Sales Lift of
7.8% and Profit Increase of 8.1% on Average***

***Resets Done By Our People Resulted in \$7 Million in
Additional Sales and \$170,000 in Additional Profits
verses Stores Where Others Did the Resets***

***Work Completed in One Fifth the Time It Would Have
Taken the Retailer***

***By Completing Reset in Five Weeks Instead of 20
Weeks, \$7 Million in Additional Sales and \$170,000 in
Additional Profits Were Captured***

***Certain Retailers Require Planogram Resets Within
Very Strict Time Windows Throughout the Year***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

- Plan the reset to minimize store disruption
- Sign in
- Pack and remove damaged or dropped product
- Adjust shelves and fixtures as needed
- Place new product according to planogram
- Replace reorder labels
- Leave suggested order (or process if allowed)
- Clean up and dispose of trash
- Get signature on satisfactory work completion
- Report work completion

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

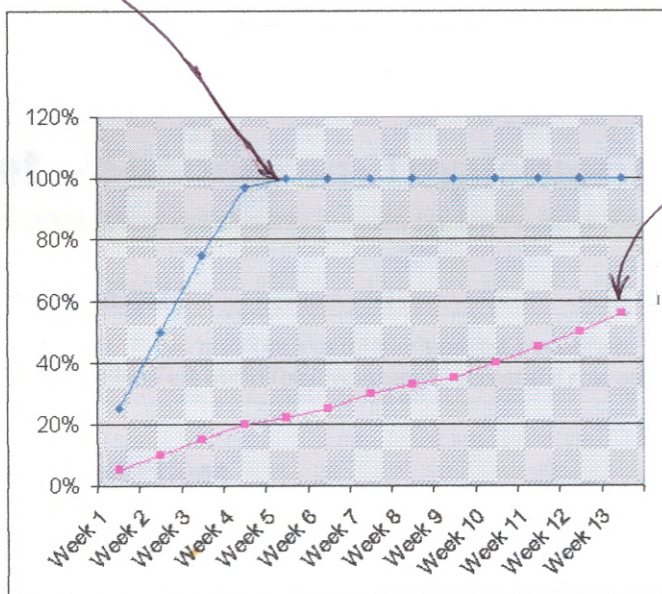
Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

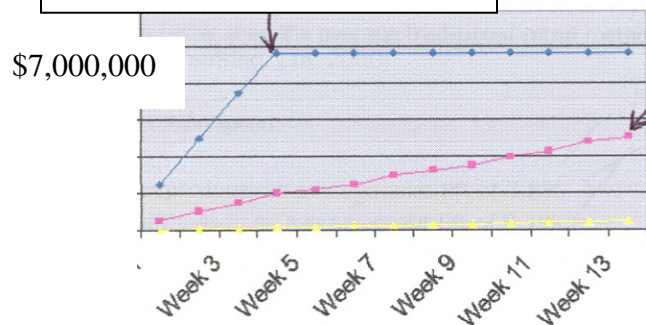
Graphics:

Our Time to Complete Reset



Retailer's Average Time to Complete Reset

Sales Captured by Stores We Reset



Sales Captured by Stores Reset By Retailer

Pictures:

Summary – Lessons Learned

Additional Details, Notes: STUDY BY WILLIAM BISHOP CONSULTING, Ltd., 2000
NEEDS TO BE CONFIRMED

CAUTIONS:

Template #: 23

**Key Message: Selling Store Manager on Secondary Displays,
Expanded Facings**

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Secondary displays are
critical**

**Key Problem Solved: Certain lines (e.g. batteries) are made or
broken on secondary displays**

**Certain lines can be helped enormously by
expanding facings**

**Headline: *Secondary Displays Produce \$14 Million in Additional
Sales for Battery Manufacturer***

***Additional Facings Result in \$2.8 Million in Additional
Gross Profit for Manufacturer***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Floorstands
Sidewings
Gravity Feed Displays

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

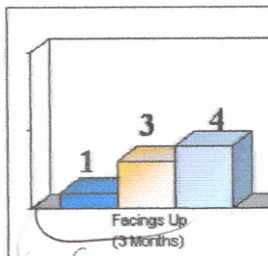
Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:



Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 44

Key Message: Audits Provide Solution to Unique In-Store Information Problem

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Secondary displays are critical

Key Problem Solved: Manufacturer Had 4 Separate Display Locations in Drug Store Chain

If missing, the correct display had to be ordered for each store

Headline: *Audits Provide Solution to Unique In-Store Information Problem*

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 39

Key Message: Big, Seasonal Selling Periods Benefit from Special Efforts

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Short, seasonal selling periods

Key Problem Solved: Short, Intense Seasonal Selling Periods Require Close Coordination, No Mistakes

Headline: 99.1% Execution on Setting Up 2,800 Seasonal Displays

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 29

Key Message: Sales Training

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Some categories benefit
from effort to train retailer's
people**

**Key Problem Solved: Lack of product knowledge by retail
personnel**

**Headline: \$150,000 Spent on Sales Training Produces \$1.8
Million In Additional Sales**

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 35

Key Message: Products that Have High Levels of Consumer Confusion and Demand, Plus High Margins and Competition, Are Right for High End Merchandising Services

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Some categories benefit from effort to train retailer's people

Key Problem Solved: Manufacturer Needs Strong Merchandising, Training for Product to Stand Out from Competitors

Headline: *Consumer Electronics Product Jumps to #1 Market Share in Stores With Our Merchandising and Training*

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 24

Key Message: Focus on One Category in One Retailer Produces Better Results

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: Some categories benefit from highly skilled merchandising reps

Key Problem Solved: Certain categories require greater expertise, higher caliber rep, benefit from focus on a single retailer's program

Headline: *We are the Best On the Planet at Merchandising Cosmetics In Target*

Brands We Service Consistently Outsell Other Brands by 3 to 1

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 47

Key Message: Higher caliber reps produce better resets, better sales

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Some categories benefit
from highly skilled
merchandising reps**

**Key Problem Solved: Low cost reps can't read and follow
planograms**

Headline: Higher caliber reps produce better resets, better sales

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 30

Key Message: Demo Days, Special Event Marketing

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Some products benefit from
special events**

**Key Problem Solved: Certain products at certain retailers can
benefit greatly from special events, demo
days**

**Headline: \$200,000 Spent on Special Event Results in \$850,000
in Additional Gross Profit**

100% Sales Lift In MP3 Player in 12 Weeks

186% ROI on Effort

***Sales Increase 20% in Stores Covered by the Demo
Days, Training and Advocacy Effort***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Grand Openings

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 27

Key Message: We Specialize in Heavy Work, Requiring Extra Skills

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Mfr: Some tasks require "burly
men with tool belts and no teeth"**

**Key Problem Solved: Need for heavy labor, tools, basic
carpentry, assembly skills**

Headline: *We Have Burly Men with Tool Belts!*

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 36

Key Message: Increasing Profits on Vendor Managed Inventory

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

Customer Problem Category: Mfr: Vendor managed inventory

**Key Problem Solved: Retailer Shifts Cost to Manufacturer on
Vendor Managed Inventory, Becoming
Harder to Make a Profit**

**Headline: *We Take Over Vendor Managed Inventory Program,
Turn \$2 Million Annual Loss Into \$5 Million Annual
Profit***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 33

Key Message: 100% Completion Rate Critical for Some Situations

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: When is 100% completion needed?

Key Problem Solved: Certain Promotions / New Items are Worth the Cost to Drive to 100% Completion

Headline: 100% Completion Rate Costs Only an Additional \$30,000.

Results in \$1.8 Million of Additional Sales Over Sales Achieved in Stores with a 90% Completion Rate

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

System automatically takes action if work is not done to 100%

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 34

Key Message: 90% Completion Rate Makes Sense In Some Situations

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfr: When is 100% completion needed?

Key Problem Solved: Cost and Effort of 95% to 99% Completion is Not Justified in All Cases

Headline: 90% Completion Rate Costs \$80,000 Less Than 100% Completion Rate

Additional Sales in Stores with 100% Completion Rate Do Not Justify Spending the \$80,000

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 2

Key Message: Reducing Buyer's Time to Oversee Merchandising Work

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfrs: Understaffed, overworked

Key Problem Solved: Buyers have too much to do, too little time, things fall through the cracks

Headline: *System Allows Buyers to Order Merchandising Services Directly from their Desktop*

Buyer is Able to Order, Monitor and Complete Merchandising Work in 25% of the Time It Used to Take

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

- Merchandising work request system available on buyer's desktop

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 17

Key Message: Doing Our Work Right – the First Time, Being Easy to Work With Helps Manufacturer Deal With Being Understaffed and Overwhelmed

Audience: Manufacturer's Buyer / Product Manager / Merchandising Services Decision Maker

Customer Problem Category: Mfrs: Understaffed, overworked

Key Problem Solved: Manufacturers have too few people, too much work to do

Headline: *Buyer Reduces Her Workload by 400 Hours per Year Because We Do Our Merchandising Work Right the First Time*

Problems and Disagreements Prevented By a Clear Agreement on WHO, Does WHAT, by WHEN on Every Assignment

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 32

Key Message: Outsource a Complete Promotion Activity

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

Customer Problem Category: Mfrs: Understaffed, overworked

**Key Problem Solved: Manufacturer's people do not have
enough time to oversee all programs**

**Headline: *Campbells Outsources Entire Promotion Program To
Merchandising Organization***

***Frees up 2,000 Hours of Manufacturer Time Per Year,
Sales for All Stores Up 28% Over Last Year***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 13

Key Message: Cost Containment, Stay Under Budget

Audience: Retailer's Buyer / Merchandising Services Decision Maker

Customer Problem Category: Retailer: Effective use of "fair share" funds

Key Problem Solved: Need to Get Resets Done within Money Received from Manufacturer "Fair Share Allocations."

Headline: *Reset Work Done to 98% Completion Within Homestore / Fair Share Allocation Budget*

100% of Stores Reset Within 4 Weeks, Under Budget by 11%

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 21

Key Message: Improve Results from Manufacturer's Fairshare Funds (Homestore)

Audience: Retailer's Buyer / Merchandising Services Decision Maker

Customer Problem Category: Retailer: Effective use of "fair share" funds

Key Problem Solved: Homestore work is often executed very poorly because retailer's people do not have time or skills to oversee and because marginal to poor reps are provided

Headline: *Spending \$200,000 to Have Us Oversee Homestore Work Results in \$2.2 Million of Extra Gross Profit for Retailer (verses stores where we did not oversee the Homestore work)*

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: 22

**Key Message: Help Retailer Make a Profit On Fairshare
(Homestore) Work**

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

**Customer Problem Category: Retailer: Effective use of "fair
share" funds**

**Key Problem Solved: Retailer's margins are so tight, they need
help anywhere they can get it**

**Headline: *Homestore Program Contributes \$230,000 to Retailers
Bottom Line***

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE / AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Template #: Master

Key Message:

**Audience: Manufacturer's Buyer / Product Manager /
Merchandising Services Decision Maker**

Key Problem Solved:

Headline:

Problem Details:

Manufacturer:

Retailer:

Products:

Urgent Need:

Number of Stores:

Planning & Prep Time Before Start of Work:

Length of Execution Period:

Call Length:

% Execution Goal:

% Execution Achieved:

Solution Detail / Work Steps:

Reporting: What Information was Reported?

Reporting: How Quickly was Information Reported?

Exceptional Circumstances:

Heroic Efforts:

**Results: (Striving for \$ Results in Increased Sales or Gross Profit, BEFORE /
AFTER, Clear, Compelling Improvements above the Cost of Merchandising Effort)**

Quotes from Manufacturer:

Quotes from Retailer:

Graphics:

Pictures:

Summary – Lessons Learned

Additional Details, Notes:

CAUTIONS:

Case Study Template Notes:

- 1. A pattern is emerging. The stronger success stories are based on solving very specific problems for manufacturers**
- 2. Communicate in terms of manufacturer goals and problems whenever possible**
- 3. Market Share: Probably need stronger references to increasing market share**