Brilliant Basics – Checklist & Toolkit

Getting ready for the meeting

Be the most knowledgeable in the room about your category & others.	Yes	No	NA
Data, insights, and observations gathered?			
Insights and data available to maximise?			
Gap analysis & benchmarking conducted, detailing key opportunities?			
Market analysis presented visually?			

Have a specific Account Trade Plan.	Yes	No	NA
Targeted store launch proposals explored?			
Product exclusivity made available?			
Targeted event support in scope?			
Promotional launch RRP and point of sale requested?			

What's just for *me* while bringing more customers to *them*.	Yes	No	NA
Bespoke promotional activity?			
In-store sampling?			
Targeted social media support?			

Have customer-centric NPD plans.	Yes	No	NA
Store format growth plans?			
Targeting health/treats/other?			
Convenience smaller cases/families larger packs?			
Emotional connection?			
Functional connection?			
Trade up customer up?			

Align plans with account values and priorities (sustainability, packaging, etc.).	Yes	No	NA
All packaging compliant with customer values?			
Health (HFSS) targets adhered to?			
All government legislation (DRS, minimum alcohol, etc.) accounted for?			

Having realistic ambitions and a plan to grow together.	Yes	No	NA
Scalability targets achievable?			
Presented the NPD pipeline?			
Private label options considered?			
Technical accreditation aligned?			
Best-in-class availability assured. # of stores agreed?			

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NAM Necessities

Cross functional contact plan with accounts (keeping 200 daily emails out of buyer inboxes).	Yes	No	NA
Organisational chart in place?			
Relationship scorecard marked?			
Meeting and minutes captured and followed up on?			

Sales reporting using all tools, weekly availability monitors, measures, etc.	Yes	No	NA
Daily, weekly, and periodic performance reporting?			
Quarterly business updates?			
Promotional autopsy; volume pre/during/post?			
New customers identified and retained?			

Scorecard interpretation & importantly analysis with actionable next steps.	Yes	No	NA
Arriving with solutions?			
Actionable next steps outlined?			
Range recommendations welcomed?			
Case / Product / Life amendments required?			

Availability and capability with a focus on account customer delivery.	Yes	No	NA
Focused account team?			
Appropriate resources in hand to interrogate?			

Understanding of who the accounts customers are (i.e. five families in Tesco etc).	Yes	No	NA
Do I know who buys my product?			
Do I have a targeted plan for reaching customers?			
Are we reaching customers (ROI)?			

Right-First-Time Admin Excellence

Event and promotion (trade plans) on time, every time.	Yes	No	NA
Shared critical path detailing key steps and ownership?			
Period activity and account planner with key dates?			
Promotional calendar and buy in with drop-dead dates?			

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NPD and range review plans & adherence.	Yes	No	NA
Range review dates noted?			
Range review level of activity (1-star to 5-star, etc.)?			
Spec sheets for all products?			

In-store activation (sampling) plans.	Yes	No	NA
Key dates?			
Store availability?			
Power/refrigeration?			
Store colleague details?			
Additional stock ordered via supply chain?			
H&S certification and insurance?			
Third-party partnering?			

Joint business planning:

Justifying CPI (cost price increase), breaking this down for the buyer.	Yes	No	NA
Fixed and variable costs aligned by product?			
Relevant to the period?			
Timely?			

Targeting national listings and corresponding requirements.	Yes	No	NA
Brand communication in a new market(s)?			
Targeted above-the-line spend?			
Capacity and availability required?			
Logistic solutions in place?			

Own label opportunities & plans.	Yes	No	NA
Technical accreditation?			
Capacity agreed to?			
Team focused and available?			
Technical team available?			

ORD/LTA request planning.	Yes	No	NA
Marketing funding & their effect on margin?			
Growth terms & effectively managing these?			