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# CHECKLIST FOR RETAIL REPRESENTATIVES

[This checklist is compiled to complement/ supplement the typical tasks a representative would perform as part of a normal visit.]

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## 1 ENTRY

**Check your attitude & create your personal energy (before you enter).**

### Be Confident

- 📖 If you physically act confidently, you will experience confidence.
- 📖 If you know your product you can be confident.
- 📖 People prefer to buy from people who seem confident.

### Be Courteous

- 📖 You have no right to be in their store - it is a privilege.
- 📖 There is no substitute for simple manners.
- 📖 'Please' and 'thank you' are some of the most powerful selling tools in business.
- 📖 The key to all of this is that it must be sincere. Don't fake it – find another job if you have to.

### Be Credible

- 📖 Review sales history.
- 📖 Review outstanding requests/issues – and the current status.
- 📖 Refresh names and key events from prior conversations – crucial for the small talk
- 📖 THINK about your objective.

**Preparation is vital – EVEN if you think you already know everything you need to know. If you are not ready then you are going to waste your time in the store.**

## 2 ENGAGEMENT

**Likability is the CRITICAL success factor in establishing and maintain a relationship – more than your deals and the products.**

### Make a personal connection

- 📖 Smile & walk upright with confidence
- 📖 Look like you **want** to be there: **BE** genuinely happy to see the retailer
- 📖 Look around and spot some changes if you can: New stock? New locations? New displays?

### Be likable (examples)

- 📖 “This really looks good”, or even the new hair do can also be complemented (Compliment)
- 📖 “Interesting display, a few retailers I have been to adopt this strategy...” (Social Proof)
- 📖 “Very effective placement of posters...” (Authority)



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Don't try to out-sell your competitor, out-teach them, and you will have a more sustainable business built on better relationships.

### 3 EVALUATION

**Don't focus on YOUR product and YOUR sales only, but start by finding out what works (or not) for the retailer and let your recommendations respond to that. Then apply to your product..**

The next stage of the selling process is when you attempt to solve the customer's problem. You do this NOT by selling more stuff, but taking an integrated approach to the entire retail mix and understanding and demonstrating how your product fits into that picture.

#### Product

- 🔗 Focus on your core/hero product or sub-category – not everything at once.
- 🔗 ASK about the good/bad sellers – even if you know the answer from the sales report. It is important to figure out what they think it is and if there are discrepancies they must be educated about those.

#### Price

- 🔗 Review for price point proliferation and different prices for same products.
- 🔗 Never discount unless a product falls below the benchmark stockturn rate. You should know your margins, your turns etc. – and SHARE it with the retailer.
- 🔗 Instead of negotiating price, consider the other 20 different types of reductions you can agree to. [<http://goo.gl/DtCHmT>]

#### Promotion

- 🔗 Doing the same old will get the same old results – be brave, be different.
- 🔗 If it works, don't change because you are tired of it.
- 🔗 Help the retailer engage with their community – and the sales will follow.
- 🔗 Be generous with your trade marketing support when the retailer is passionate about success.

#### Presentation

- 🔗 Don't start with a compliance check with YOUR planogram.
- 🔗 Evaluate the adjacencies and the location – solve the big issues first before you argue about how many facing a particular product should have.
- 🔗 Even the dirtiest, poorest, most ignorant customer does not love a dirty store – clean your display if you have to, and even around it.

#### Place

- 🔗 Make sure your planogram is BALANCED – and that it also promotes the products that the retailer will make the most money from. (Don't focus exclusively on your brand.)
- 🔗 When you have achieved this, TELL the retailer why you are doing certain things. (They are not experts in every product they sell – unless they only sell one product.)

## 4 EXECUTION

If you want the retailer to invest their time with you, you must give them a return on investment, and you do this by adding value.

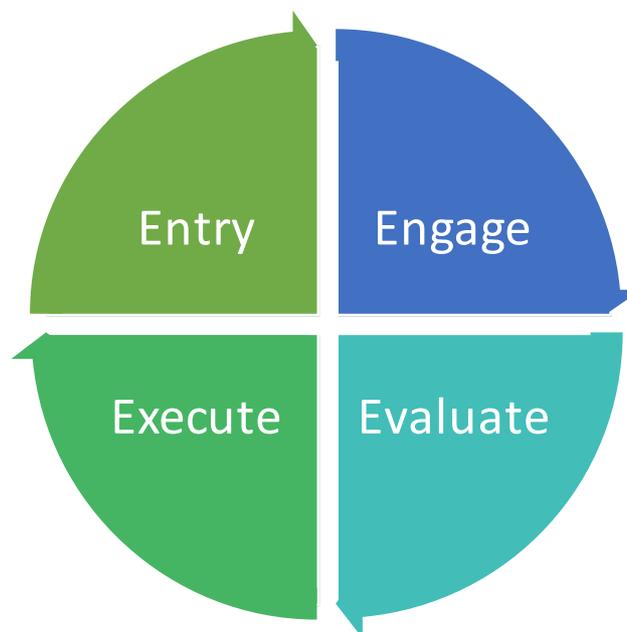
- 1. Make it easy and quick to place orders
- 2. Help/ encourage the retailer to use their systems to make decisions based on data. Educate them on the difference it can make in their bottom line.
- 3. Provide advice/ feedback about the market the competition and other relevant developments.
- 4. Give a hand to move something or hang something or clean something as required – even if your 'job' is not to merchandise.

### Plant the seed for the next visit

- 1. Tell them what you are going to do for them between this visit and the next. (And make sure you do it.)
- 2. Make sure you END the discussion on a positive note, for that makes it easier to start on a positive note next time.

### Review

- 1. Update your logs/diaries/CRM immediately
- 2. Schedule actions for your To Do list
- 3. Do something TODAY to respond to an issue or deliver on a promise. It creates a lasting impression and buys goodwill for the future when things go wrong.



## The Retail\$mart Process