

MERCHANDISEFOOD.COM'S COMPLIMENTARY:

Specialty Food Retailer

Merchandising & Marketing Self-Assessment

So what is “food merchandising?” It’s how your company presents or displays products, services, and messages in such a way to generate interest and entice customers to make a purchase. Merchandising visually presents your physical tangible products through display, signage, web storefronts, and imagery. Yet even observed intangible factors and secondary perceptions are important to your success. Discriminating buyers also consider how you tackle communication, service, operations, cleanliness, management, and quality. We can all see poor service, rotten foods, and dysfunctional teams. These factors dissuade us from buying.



Many fresh food retailers have very few well-executed efforts to share their unique story and products in a visually and sensory compelling manner on all fronts. Others start well-intended merchandising projects, standards, or ideas but lack the capacity, follow-through, experience, or funds to gain momentum. Successful retailers must actively monitor their image as it relates to their **BRAND, MARKETING, & MERCHANDISING**.

Food customers are now more than ever well-educated, discriminating, “foodies” leveraging the power of the Internet to gain culinary and dietary insights. Unfortunately, many buyers are often more educated than you on particular products on your shelves. Customers request dietary, allergen, carbon footprint, calories, ingredients. Your guests desire an understanding of where their food came from, when it was made, who made it, and how it was it prepared. Maslow’s Hierarchy of needs defines food as a fundamental human requirement. As we sell food we fill a fundamentally important physical and emotional need for our guests. We build an emotional bond between us and them. If well executed we build personal relationships, trust, and loyalty. Many retailers such as [Wegmans](#), [Whole Foods](#), or [Dean & DeLuca](#), have developed brands customers can trust for quality foods, service, and memorable shopping experiences. These retail leaders core convey a mission focused relevant messages about value, quality, health, or luxury to their customers. It is here that a trust is established. From this basis, high-impact displays, quality fresh foods, world-class service, and customer education are simply an outpouring of the brand’s underlying mission. These companies communicate in a manner opposite the norm:

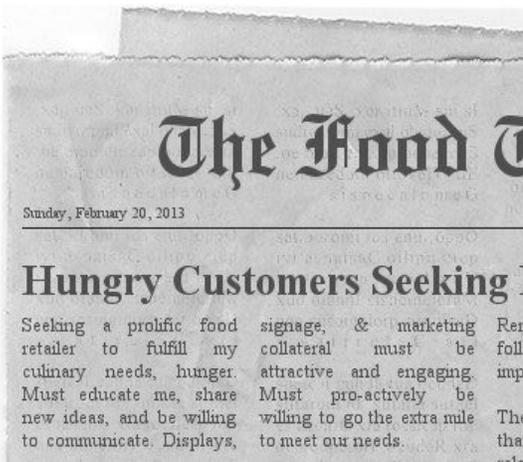
VIDEO INSIGHT: [The Golden Circle Concept by Simon Sinek](#)

When your missions are evident in what you do and communicate you have the beginnings of a brand. The information you make available to the industry can take many forms and mediums. With rapid pace the internet,

technology, digital video, printed collateral, and social media are providing new platforms and options to connect with customers at all levels to engage loyal customers.

“I am a merchant and I have, therefore, my own philosophy about merchandising. That is: To do something that no one else is doing, and to be able to offer the customer a choice she doesn’t have at the moment.”

Robert Wegman from his famous “I am A Merchant Speech”



Building a clear well positioned brand is the foundation to successful outgoing marketing & merchandising efforts. The most successful growers gain momentum by building a compelling industry reputation that generates word of mouth advertising. Once a brand concept has been carefully defined to embody your unique culture, products, family, history, and reputation, a well positioned plan must consider how to communicate this message to relevant industry stakeholders.

This **Merchandising & Marketing Self-Assessment** is best suited for those engaged in revamping current marketing and display efforts with an open mind. For many, a simple review of physical displays, or mediocre marketing collateral might prompt concerns. Others, even including very successful retailers, may observe challenges such as declining sales, weakened customer service & sales effectiveness limiting profitability. For many a third party with “fresh eyes” is helpful.

Marketing: Companies communicate their look, feel and mission through printed, online, and social media marketing. There are many hurdles to creating unique pieces that stand out among the millions of signs, direct mail, and brochures we see each year. Luckily many agencies, designers, and marketing solution companies such as MerchandiseFood.com are able to deliver creative ideas some with even highly measurable results. With the advances of digital printing making unique full color pieces with short runs and customization are affordable and within reach of even small companies.

Merchandising & Display: Once a brand is established retailers can then begin merchandising to the unique look, style, and technique that communicates their message. While some themes might require classic natural colored wooden baskets others may benefit from modern square black fixtures and containers. Merchandising is a creative outlet to convey who you are. High-Impact Compelling Displays can be a sensory and visual experience for guests to engage in during their shopping experience. Visitors can learn more about the practical components of merchandising that effect, point of sale displays, culinary action/sizzle, props and containers on www.merchandisefood.com 's Food Merchandising 101 Pages. One of the greatest opportunities for retailers lies in even very small techniques that improve the visibility of their offerings.



LEARNING PAGES

Check out these links to understand the components of merchandising.

[Food Merchandising 101](#)

[Props & Decor](#)

[Fixtures & Furniture](#)

[Marketing Collateral](#)

Beyond Marketing: Operations: Delivering on the promises your reputation, slogan, logo, or marketing collateral infers is challenging. Many organizations are limited by operational efficiencies, quality concerns, and weak personnel. Retailer XYZ may be quickly diluting their brand message through poor displays, customer service, & delivery of products and services placing their image and reputation in serious jeopardy. To align a powerful brand message with reality retailers must realistically consider whether operations, staff education, experience, and service, equipment, resources, business partnerships, and vendors are positioned to “back-up” the brand promise.

To genuinely benefit from this questionnaire, **don't cheat!** Please answer all questions with as much detail as possible. This assessment will provide you with an objective perspective of your current state and build a vision of where your operations need to be. I guarantee that you will find this exercise valuable.

Business Information

Name:

E-mail:

Address:

Web Site:

Phone Number:

Business Name:

Tagline:

City:

Postal Code:

1. Visual Merchandising

Merchandising Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Review the following rating 1 (Lowest) - 5 (Highest) on each section.	1	2	3	4	5
My store's visual food merchandising is superior to my competitors					
My management employees are well-trained merchandisers and proactively make good merchandising / business decisions.					
My customer service / merchandiser level employees are well-trained and make good merchandising/business decisions.					
Our in-store displays are innovative and unique.					
I regularly make investments in fixtures, techniques, props, and tools to improve our visual displays.					
I maintain a written merchandising calendar to include opportunities for holidays, sporting events, seasonal, etc. opportunities.					
My food merchandising is always appropriate for the season at hand. (I.e. We are merchandising peaches at their "peak of perfection.")					
Our view of merchandising is holistic including display, service, signage, and surrounding ideas to drive sales.					
We use a methodical process to conceptualize, sketch, and plan a display before rolling out in-store.					
We include input and opportunities from various departments in our store to integrate logical complimentary products and cross selling opportunities.					
We do not have centralized corporate supported merchandising approach. (All merchandising is developed in-store to meet the needs of our local natural market.)					
We fully understand the impact of merchandising on SHRINK (product loss/waste)					
High-Impact Food Displays					
I or my team regularly builds new creative original displays with successful implementation.					
We find creative props & containers to attract attention from our guests. (i.e. merchandising in a canoe, antiques, furniture, etc.)					
We successfully roll-out new displays on-time, on-budget.					
My fixtures are contemporary and are free from disrepair, scratches, dents, etc.					

Our displays “Tell A Story” or communicate an idea to help educate customers or solve their problems.					
Our displays successfully cross-sell unique complimentary products.					
My store has a continual new look, and does not become stale by leaving displays up too long.					
We feature unique signature items in our key displays.					
We are aware of and subscribe to industry specific newsletters, emails, and print magazines to inspire merchandising ideas.					

Digital Displays / Signage

We utilize digital displays or screens in our food displays or menus

We have re-engineered our digital menus to drive orders to high gross profit items we most desire to sell.

Our digital slides feature high-quality professional food photography

Our overhead & department signage is consistent

Our way-finding signage is at or above industry standard and accurate.

We have a streamlined process and technology to easily create and automate layout of high quality signage for food product offerings

We have specialized sign stock with perforations created to save labor

We laminate our food signs to prevent moisture damage and allow for easy cleaning.

We have access to an in-store signage department or a vendor to make creative one-of-a-kind custom signs for unique displays.

Setting Technique & Strategy

We seriously consider each angle, product view, proper fixture is appropriate to build a successful display.

We have standardized written processes and methods for setting food displays.

We have a trained, written, process for proper rotation on displays.

Our team is trained with an understanding of our merchandising priorities, standards, style, and methods to my satisfaction.

My team is capable of making good merchandising decisions without being told.

My team has the proper equipment each day to save time and labor while merchandising (U-carts, Safety Cutters)

My team is trained on methods to merchandise efficiently.
(Moving product directly near display and methods to minimize movement and increase filling speeds)

2. Brand Identity & Marketing

Brand Identity Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Review the following rating 1 (Lowest) - 5 (Highest) on each section.	1	2	3	4	5
My retail food store(s) or farm has maintained a well-known brand identity within my market.					
I clearly understand my target market opportunity?					
My employees understand what services, products, & promises make our farm/operation unique.					
My customers & prospects understand what services, products, & promises make our farm/operation unique.					
Logo					
My company logo clearly communicates my brand, history, commitment, story, or core proficiencies?					
My product logos clearly communicate my brand, history, commitment, story, or core proficiencies?					
My current marketing collateral contains current images of my brand.					
We use branded promotional specialties to communicate our brand at tradeshow, etc.					
Our staff uses branded apparel, vests, hats, shirts, etc. to communicate our brand in the industry.					
Our printer is capable of meeting our exact color match consistently on our logo for printed materials.					
A professional creative team or graphic designer has reviewed the size, shape, color, and message of my visual identity (logo) to ensure effectiveness.					
My logo identity has been updated within the last 5 years.					
Slogan / Tagline					
Our slogan/tagline effectively communicates our passion, history, promise, or products, effectively.					
Our slogan / tagline shares a promise that we can meet every					

single day with our service, operations, and staff.					
Our marketing and collateral pieces share this message effectively.					
Service Standards					
I am happy with the current level of customer service our company provides to our customers.					
My employees understand our unique brand and key product stories and proactively engage customers to share it.					
Our employees present a positive attitude and smile to greet our guests.					
Our customer service staff has regular development opportunities and assigned readings to gain industry insight.					
My employees have access to leading industry news & idea generating publications (i.e. Produce Merchandiser Magazine)					
Our service department is knowledgeable & well-trained to be positioned to solve our customer's needs and problems.					
Our service is consistent.					
Our service meets or exceeds promises we make with our brand, marketing collateral, and sales force.					
My staff is periodically trained, empowered, and motivated to meet our customers needs continually better.					
Sales / Customer Service Team					
I am confident in our sales force to meet our sales plans.					
I have a well written sales plan or daily retail projections our team is well in tune with.					
My Sales / Customer Service Team is superior to my competitors.					
My sales team is highly motivated and expected engage customers and seeks selling opportunities.					
My sales team is challenged to engage customers.					
My team is coached and trained on Customer Service, "Selling", and Educational topics relating to our food product offerings.					
I have current open positions in my sales team and have difficulty filling them.					
I am able to retain quality customer service professionals.					
We rarely lose business to our competition.					
My sales / customer service team benefits from a competitive compensation package aimed at business results.					
Retail Environment					
Our store(s) and offices communicate professionalism, cleanliness, and innovation.					
Our environments are fluid with a consistent theme/signage/look & feel throughout					
I am satisfied with and proud of our retail environment.					
My retail design was developed by a professional firm					

Our stores have an effective layout based upon industry studies, trends, and common knowledge.					
Our customers are able to successfully navigate through our stores because of our intuitive layout, signage, and guest service.					
Our stores are well lit presenting our products in the best possible light for each category.					
Our store lighting has been upgraded in the last 5 years and is energy efficient.					
Our stores take advantage of advances in “Scent Technologies”					
Our retail store environments take advantage of the leading industry technologies to drive sales.					
Merchandising & Marketing Partners					
My distributors & or wholesaler relationships are ideal partners aligned with our mission, and share a similar focus on quality, service, and pride in their work.					
My key food suppliers are willing to support us with on-site ideas, implementation, and materials to drive our message and products.					
I am taking full advantage of the support services and tools my vendors supply.					
My pre-prepared foods packaging equipment suppliers meet or exceed our expectations.					
My fresh produce packaging supplies vendors meet or exceed our expectations.					
My marketing services providers (printing, web, social media, etc.) meet or exceed my expectations.					
I retain professional staff or outside consultants to guide my key marketing & merchandising efforts.					
Additional Comments:					

3. Store Operations, Strategy, & Customer Service

Despite excellent merchandising, many operational hurdles, inefficiencies, and quality issues limit new business opportunities, client retention, and brand promise fulfillment. Consider if any of the following areas are limiting your ability to meet your client and prospect expectations jeopardizing retail store & farm sustainability & profitability.

Operations, Etc.	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Review the following rating 1 (Lowest) - 5 (Highest) on each section.	1	2	3	4	5
We have extensive retail insight concerning our products, and understand in-store challenges to sell more of our products.					
Our current packaging solutions display our product effectively and maximizing shelf-life.					
Our business operations, sales, enterprise, client management software and hardware meet all our needs and are scalable to meet our future growth.					
Our business is engaged and well-supported to meet our new product development goals and roll them out effectively.					
Our organization has a strategic written plan to guide decisions, day to day operations, and sales team goals.					
We have a well designed succession plan in place to guide our family / management into the future.					
Our quality assurance plan meets or exceeds our competitors. Quality issues are not limiting our sales or profitability.					
Our team is well trained at buying / procurement.					
Our team receives regular continuing education on relevant industry topics.					
Our organization has effective board governance.					

Reflection: If you've answered 4-5 for a majority of these questions consider your company doing well compared to your peers. Focus on points of differentiation and innovative projects to keep your team ahead of the competition. **If you've answered 3** for a majority of questions, begin asking yourself and team serious questions about your commitment to excellence. Begin by building a strategic plan and remain committed to follow through on projects. **For those answering 1-2** on most questions, consider your business under positioned for sustainability in today's competitive environment. Seek assistance today to begin reviewing your operations and capabilities. Start with solving internal and operational issues before attempting to build your brand. Growing a bad reputation is counter-productive.

We hope this exercise has been useful as you prioritize your energy, efforts, and new projects. Many farms recognize the value of expertise and leveraging time, money, and efficiencies towards their business goals. We would like to help make your goals a reality. As an effort of good faith we extend the following:

FREE 30 MINUTE ASSESSMENT REVIEWS: If you are unhappy with your assessment begin implementing new ideas with your team or schedule a call to review how Jonathan Raduns can help.

Simply follow the instructions below:

Preferably, **please save this document as a PDF** (use your company or last name as the file name). E-mail to **Jonathan@merchandisefood.com**

PLEASE COMPLETE THE FOLLOWING: The following information will aid our call and understanding of your unique business. We look forward to speaking with you.

Briefly, tell me a little about yourself:

What would you like to accomplish with us?

In what timeframe does this need to happen?

How did you hear about MerchandiseFood.com

Are you conveying your message successfully?

What is the primary message you wish to convey to prospects or clients?

What is the second most important message you hope to convey to your audience/clients?

What are your goals for your online presence?

Please describe your target market:

e.g., what is their size, reputation, location, what's important to them, what are their needs...etc.

How is your company unique?

Ask three clients why they work with your company. Please note answers below.

Our Promise:

We appreciate your honesty. This information is to remain confidential and will be used for the purpose of reviewing powerful opportunities to gain additional profitability, brand awareness, or efficiencies in your business.

We respond to our inquiries quickly. Please submit your assessment with 3 specific potential times to schedule a follow-up call within one week from today. During this short call we will review your current situation and request our input on your primary concerns.

We will respond with very specific manners in which we can help grow your business.

If you have any questions please contact me directly:

Sincerely,

Jonathan Raduns

856-344-5680

jonathan@merchandisefood.com