IMS STRATEGIC MANAGEMENT CHECKLIST

Results Count ... everything else is conversation!
**The Opportunity**

- How big is the retail market for your category of products?
- How big is the retail opportunity for your organization?
- Which channels represent the largest revenue opportunity?
- Which channels represent the largest growth opportunity?
- What is your bundling opportunity with your retail accounts?

**The Competition**

- Who are your key competitors in the retail marketplace?
- Which competitor(s) do you benchmark against?
- What are your competitors’ retail plans?
- Will your competitors’ plans affect your sales?
- What will the competitive market for your products look like in 2 yrs.?

**The Customer**

- Who are the top 5 retailers in your business, by market?
- How important are you to your retail customers?
- What retailers can build consumer awareness for your products?
- Do you have executive level relationships with the retailer?
- What are your key retail customers’ long term plans?

**The Product**

- What “consumer sets” do your retailers serve?
- What are your retailers’ consumer product requirements?
- Do your products & brands have merchandisable differentiation?
- Are your products competitive on feature/function with competitors?
- Do your products occupy critical niches and retailer “sweet spots”?
- Are product launches & supply matched to retailer cycles?

**The Criteria**

- What do your retail customers measure you on?
- What do you measure your retail accounts on?
- What does it take to be a key vendor with your accounts?
- What is your product seasonality by retail account?
- What criteria are retail buyers judged by in each account?

**The Investment**

- What do you need to invest for retail success?
- Are you driving your forecasts with joint marketing programs?
- Have you determined the market investment by channel?
- What are the normal product return rates by channel?
- What is your current investment, by channel, by account?

**The Resources**

- What information will make you proactive instead of reactive?
- Which retail account programs are working, and why?
- Will store detailing improve your sales?
- What coverage model will optimize your revenue results?
- What lead times are required, by channel, by account?

**The Payback**

- What is your profitability, by channel, by account?
- What are the typical margins for your products in each channel?
- Are you using P&L measurements for each channel and account?
- Have you determined your ROI for each type of promotional activity?
- Have you analyzed markdown dollar investment by channel, by account?