



Session 2: Preparing for Your Pitch Meeting

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Session Outline

- Product Expert
- Sales Expert
- Owning Distribution
- Preparing Your Pitch
- Calculating Promotions
- Next Steps



Product Expert

- Know your product
- Understands where belongs in store or season
- Sell sheet
- Why consumers purchase your product
- What values is it based on



Know Your Product

- Department/category
- Seasonal items
- Stands behind with demo
- Sell Sheet
- Who is buying your product?
- Size, Units, Cases
- Recall procedure
- Shelf life – buy back plan
- Handling requirements

Sell Sheet

What is a sell sheet?

- How should it look?
- Difference between a sell sheet and an order sheet



Sell Sheet



Every apple is grown on our family farm in the organic farm capital of Canada, Cawston, British Columbia.

For generations, our family has grown food to build healthier families and communities. Here is one more addition to our fruit family!

A healthy snack from our farm to you

At Blossom River Organics, we believe that you and your family deserve a snack option that is healthy, nutritious, and truly delicious! When our family started growing organic fruits, we quickly realized that we needed to find a way to make healthier snacks for all families, not just ours. We love these naturally sweet and crispy organic apple chips and know that you and your family will too!

We pick our own fresh organic apples, dehydrate them, and put them in this bag for you to enjoy anywhere.

Organically Grown
Non-GMO
Vegan
Gluten Free
Fat Free
No Artificial Flavours
No Preservatives
No Sugar Added

Nutrition Facts	
Valeur nutritive	
Per 70 g	
pour 70 g	
Calories 176	% Daily Value*
Fat / Lipides 0.0 g	0 %
Saturated / saturées 0 g	0 %
Trans / trans 0 g	0 %
Carbohydrate / Glucides 48.2 g	15 %
Fibre / Fibre 6.2 g	25 %
Sugars / Sucres 40.3 g	
Protein / Protéines 0.7 g	
Cholesterol / Cholestérol 0 mg	0 %
Sodium / Sodium 0 mg	0 %
Potassium / Potassium 0 mg	0 %
Iron / Fer 0 mg	0 %

*% Daily Value is based on a diet of organic apples. 100% of needs is a lot.
*% Valeur nutritive est basée sur un régime alimentaire composé de pommes biologiques. 100% de besoins est beaucoup.

ORGANIC APPLE CHIPS ORIGINAL 70g

Case Pack	24
Unit UPC	6-27987 23431-2
Case UPC	6-27987 23435-0
Unit Dimensions	7" W x 9" H
Case Dimensions	22.25" L x 15.25" W x 10.5" H
Case Weight	5.77 lbs
Pallet TI/Hi	40 Cases 5/8
Shelf Life	12 mos

Kootenay River Organics Ltd.
2916 Erickson Road, Creston BC V0B1G1
info@krorganics.ca
@blossomriverorganics

Information for retailer to understand product:

- Nutritional facts
- Case specs
- Unit size
- Source of origin
- Company mission statement
- Useful when communication is limited

An aerial photograph of a winding river, likely the Yellowstone River, flowing through a valley. The river is surrounded by a mix of green and brown vegetation, with patches of snow visible in some areas. In the background, a range of mountains with snow-capped peaks is visible under a clear blue sky. A road or railway line runs along the left side of the river.

Sales Expert

- Knows their category
- Understands margin
- Order sheet
- Seeks sales data & feedback
- Easy partnership
- Promo schedule

Category Margin

- Build 35% into MSRP
- Is your product driving the category up: in margins, units, or consumers?
- Don't give it all away, negotiate shared margins





Sales Data

- Asks for shared knowledge to leverage more sales
- Adds valuable product knowledge to pitch to other retailers
- Proves what the consumers are buying/when

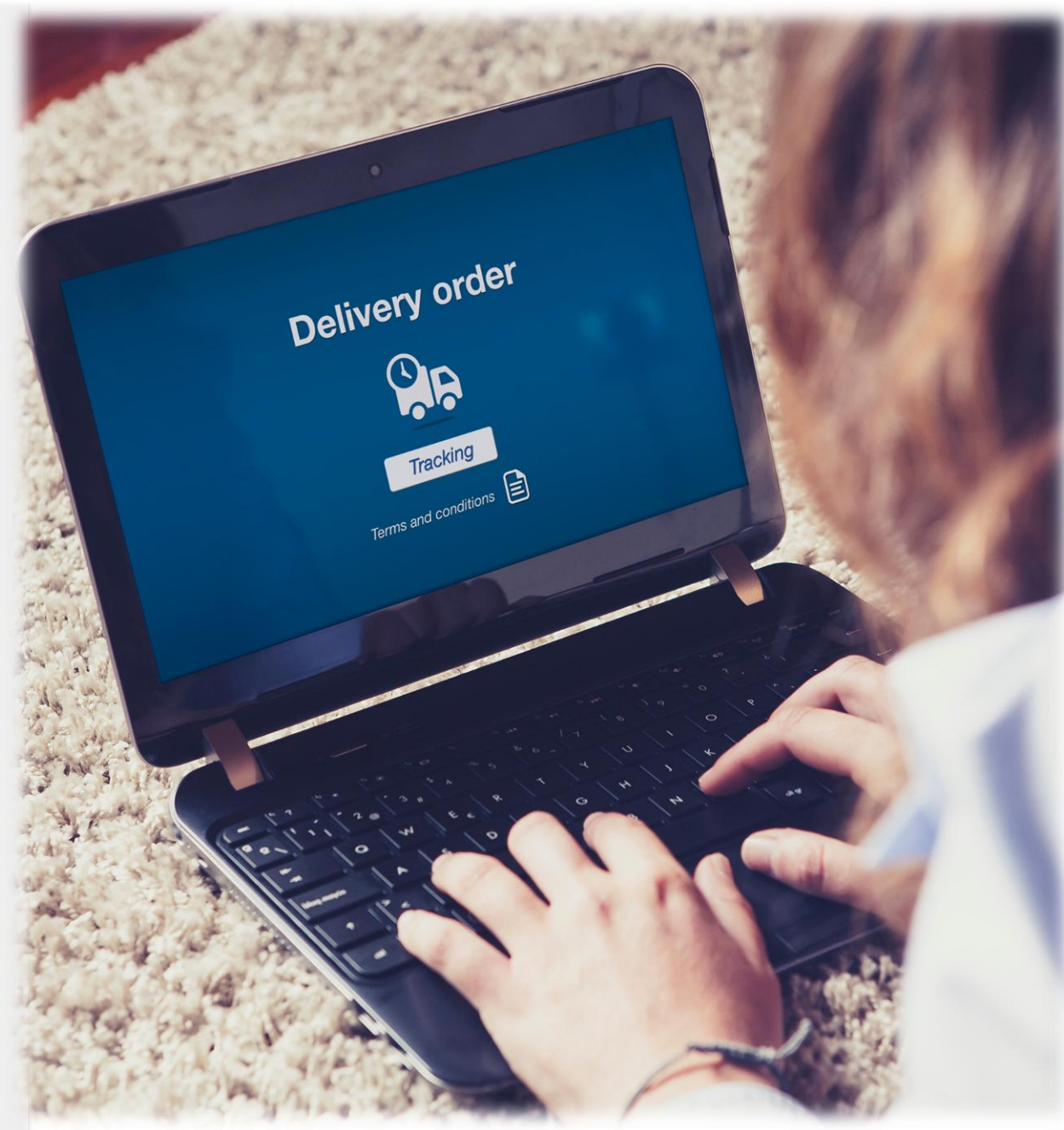
Know Your Category

- Sales: dollars, units, profitability
- Category: basket builder, incremental sales
- Market research
- Include an order sheet



Order Terms

What should these be?



Order Terms

- Lead times
- Payment deadlines
- Deposits
- Cut off times
- Set expectations
- Be accountable



Order Sheet

Retailer info:

- Cost, suggested retail, margin %
- Units per case
- Minimum order
- Return process
- Sales rep and owner contact info

PURCHASE ORDER

Company Name] CONFIDENTIAL

Gray cells will be calculated for you. You do not need to enter anything in them.

Planned number of owners	2
Required protection from personal liability	Low
Net income for business	\$250,000
Owner's share of income	\$125,000
Salary received from business	\$20,000
Owner's other income subject to self-employment tax	\$20,000
Owner's marginal tax rate	28%
State income tax rate on individual income	5.00%
State income tax rate on business income	8.00%

	Sole Proprietorship	Partnership	Corporation
Number of planned owners	No	Yes	
Form 1065		Low	
Option available?			
If no, reason option not available			
Election to be treated as corporation? (Yes/No)			
Business tax return required			
Business tax rate on business income			

	N/A	N/A	N/A
	\$20,000.00	\$125,000.00	\$1.00
			\$125,000.00
			N/A

Order Sheet Example

PRODUCT	Order	PACK	BRAND	SEASON	Sell to Retailer (+35%)	Consumer Buys (+35%)
ORGANIC EARLY RED		10/1.5#	BLOSSOM RIVER	JUN-JUL	1.82	2.45
ORGANIC LAPIN RED		10/1.5#	BLOSSOM RIVER	JUL	1.82	2.45
ORGANIC LATE RED		10/1.5#	BLOSSOM RIVER	JUL	1.82	2.45
ORGANIC APPLE						
ORGANIC AMBROSIA		12/3# or Trays	BLOSSOM RIVER	SEP-DEC	1.82	2.45
ORGANIC FUJI		12/3# or Trays	BLOSSOM RIVER	SEP-DEC	1.82	2.45
ORGANIC HONEYCRISP		12/3# or Trays	BLOSSOM RIVER	SEP-DEC	1.82	2.45
ORGANIC PINK LADY		12/3# or Trays	BLOSSOM RIVER	OCT-DEC	1.82	2.45
ORGANIC GALA		12/3#	JUST A MERE	SEP-DEC	1.82	2.45
ORGANIC JONAGOLD		12/3#	JUST A MERE	SEP-DEC	1.82	2.45
ORGANIC CRIPPS PINK		12/3#	JUST A MERE	OCT-DEC	1.82	2.45
ORGANIC BOTTLED JUICE & DRIED PRODUCT						
1 GALLON APPLE W/UPC		4/3.84L	JUST A MERE	ALL YEAR	1.82	2.45
½ GALLON APPLE W/UPC		6/1.89L	JUST A MERE	ALL YEAR	1.82	2.45
946ML CHERRY JUICE W/UPC		12/946ML	BLOSSOM RIVER	ALL YEAR	1.82	2.45
DRIED APPLE CHIPS W/UPC		24/70g	BLOSSOM RIVER	ALL YEAR	1.82	2.45
DRIED CHERRIES W/UPC		24/125g	BLOSSOM RIVER	ALL YEAR	1.82	2.45
Send Orders to Danny info@krorganics or call 250 123 Payment due 45 days upon receipt late payments are subject to a 10% late payment charge						



Promotional Schedule

What is it?

What promotions can you think of?

When should you promote?

Promotional schedule

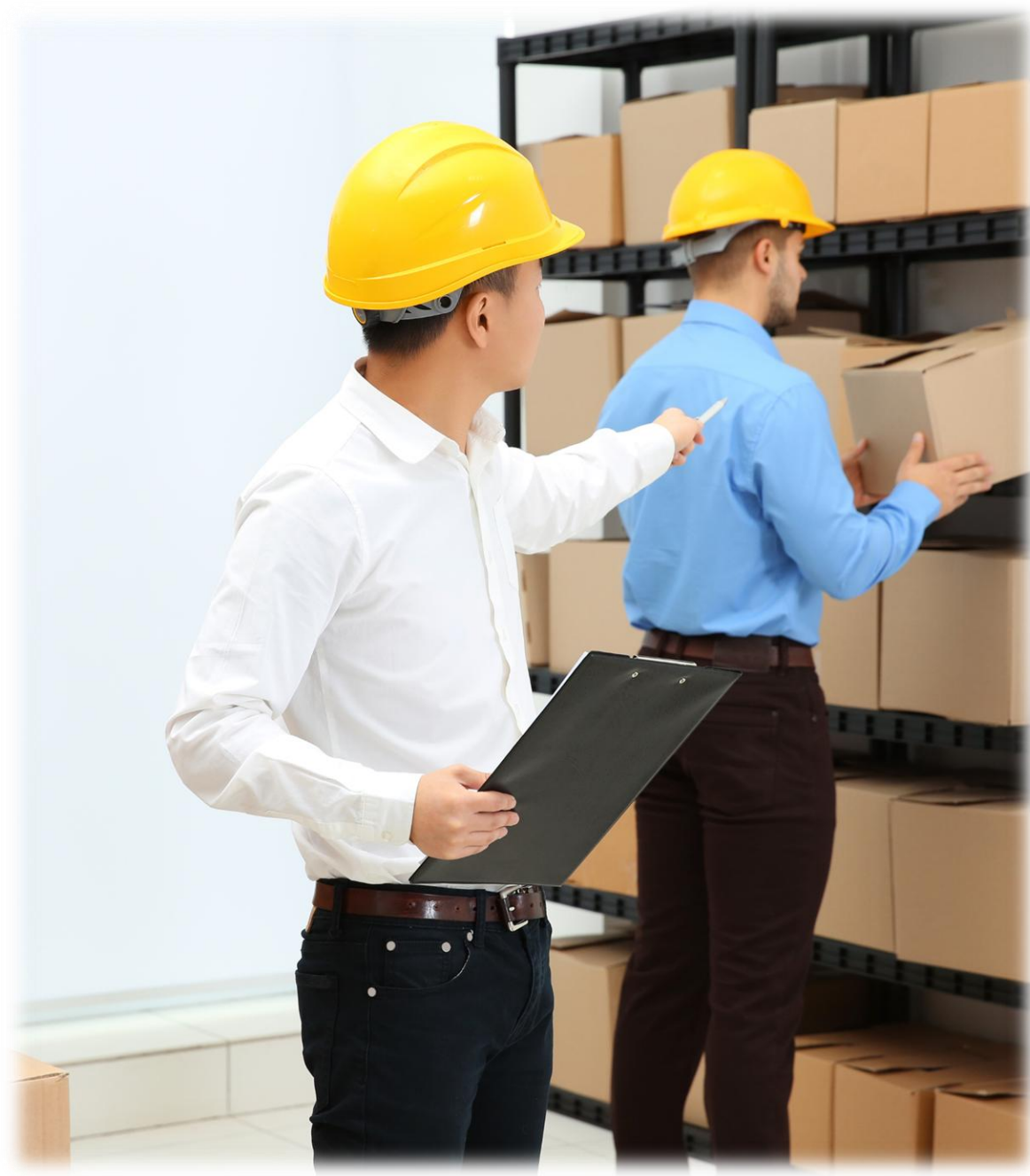
- Drives sales
- Schedules plan/maintenance
- Aligns with holidays/current events
- Planned during “slow times” to boost sales



Owning Distribution

- Risk management
- Order management
- Reinforce commitment to selling
- Leverage rapport
- In stock positions





Risk Management

- Shortages
- Liability insurance
- Traceability and recalls
- In-store returns
- Damaged products (in-store and in transit)
- Late payment plan
- No reorder

Order Management

- Fulfill terms of agreement
- Order methods: email, phone, in-person
- Minimum order
- Invoicing
- Payment schedule
- Clear lead times



Product/Order Maintenance

- Make contact with sales manager or your direct store contact
- Face, rotate, dust, observe presentation
- Ask for sales history, reorder, feedback and act on
- Look for comparable products; location, presentation, labels
- Observe merchandising areas, departments, “opportunities”
- Visit retail often





Reinforce Commitment to Selling

- Follow up and nurture relationships
- Seek feedback and actions
- Communicate with retail ahead of events/seasons
- Offer support and promotions

Leverage Rapport

- Create lasting partnerships
- Speak the language retailers understand
- Sell more of your product
- Gain insights into sales history and similar lines
- Learn more about the industry for better planning





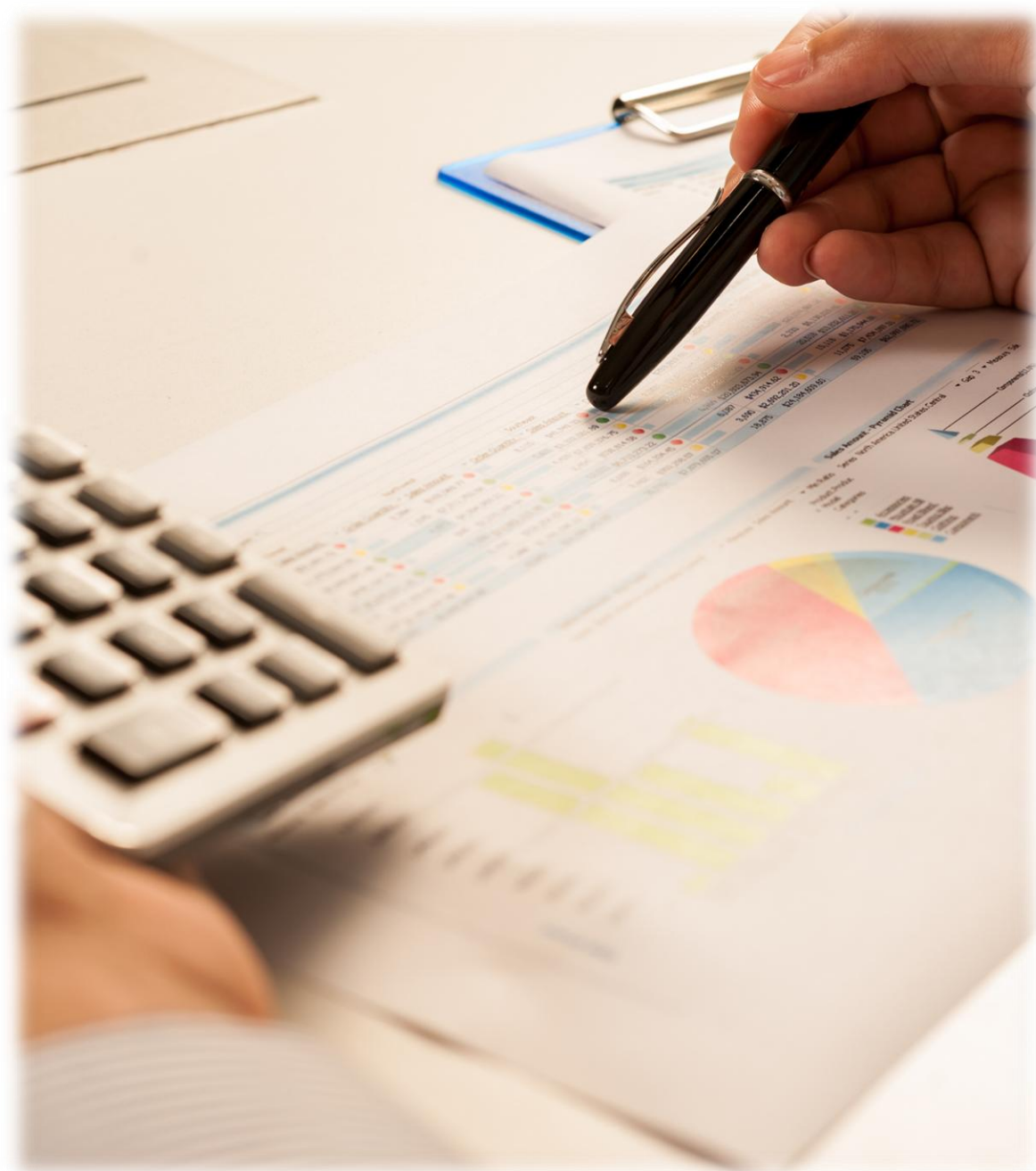
Preparing Your Pitch

- Know your Mission, Vision, Values (MVV)
- Highlight performance
- Identify wholesale partners
- Start with a quick elevator pitch

Mission Vision Value

- Share your why – your story, your values
- Difference between farmers markets, in-person retail, and distribution
- Highlight how your product is different from competitors





Performance Highlights

- List current retailers and performance
- Include Units, Sales, Cases, Margins
- Understand you're now selling to a retailer, not directly to the consumer
- Identify your product category
- What else is sold in a basket with your product?

Identify Wholesale Partners

- Gather sales info and market competition
- Understand you're now selling to a retailer, not directly to the consumer
- Include positive comments from sales channels
- MARGINS! What margins does your partner require?



Start with an Elevator Pitch

12 Seconds	30 Seconds	3 Minutes
<ul style="list-style-type: none">- One simple sentence about what your company does- Benefits and features that set you apart	<ul style="list-style-type: none">- A few sentences about your company and product- Benefits, features, qualifications- Company goals or objectives	<ul style="list-style-type: none">- Full summary of company and product- Mission statement- Goals/objectives- Example of a successful outcome



Calculating Promotions

Understanding Vendor Incentive Buying

Utilizing a benchmark of 10,000 units sold to set our
Price for Profit baseline

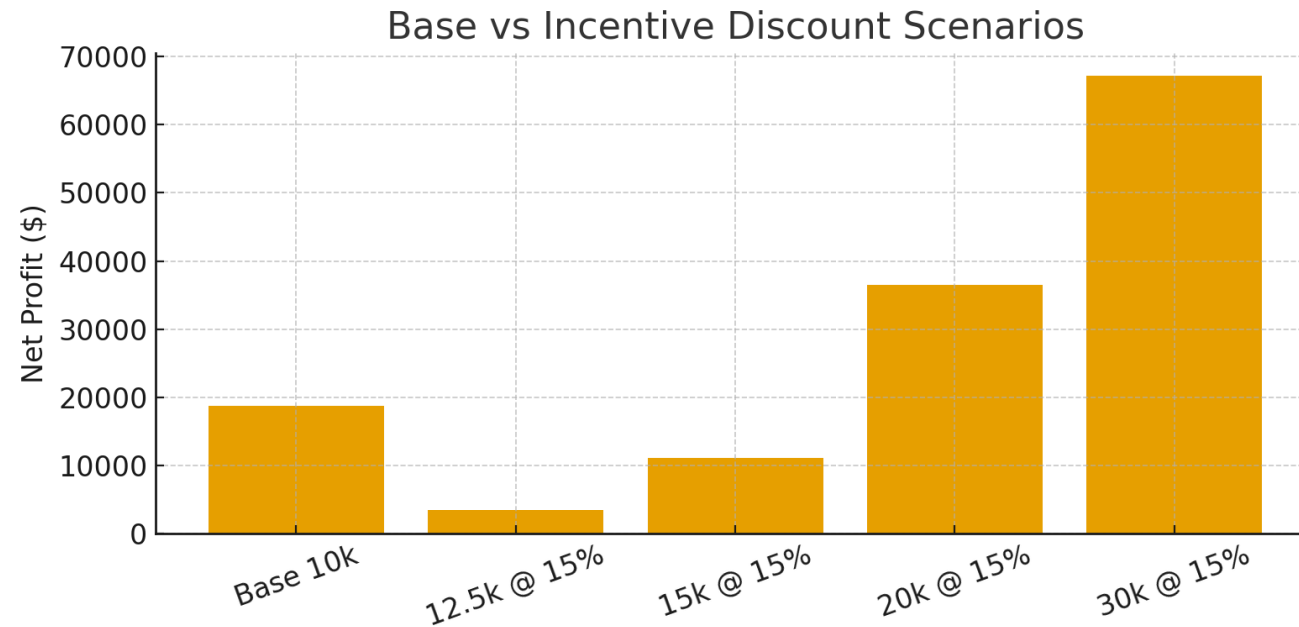
Base Case: Price for Profit

- Selling price per unit: \$15.38
- COGS per unit: \$10 → Gross margin \$5.38 (35%)
- Operating expenses: \$3.50 per unit
- Net profit per unit: \$1.88 (12%)
- At 10,000 units → \$18,800 Net Profit

Scenario Setup: Incentive Discount (15%)

- Offer 15% discount on case purchases
- Discounted price: \$13.07/unit
- Costs remain the same (\$10/unit COGS, \$35k OPEX)
- Margins shrink – must sell more units to maintain or grow profit

Base vs. Incentive Discount Scenarios



Key Takeaway on Vendor Incentive Buying

- Incentives boost sales volume but erodes margin
- Profit only improves at very high volumes
- Protecting margin is key to sustainable growth



Homework

- Create a promotional schedule (using seasons and holidays)sheet or create
- Create a wholesale agreement terms; including minimum order, payment schedule, lead times, VBI discounts, etc
- Identify ideal buyer for your “tradeshow” and research what vendors they look for



Next Steps

- Working Group: Preparing for your Pitch meeting
- Session 3: Make the Sale
- Working Group: Making the Sale with Pitch
- Basin Food & Buyer Expo (Nov 6-8)

Questions?



Thank You

