Winning Shelf Stories For Growth-Stage Brands:

CPG PITCH PLAYBOOK
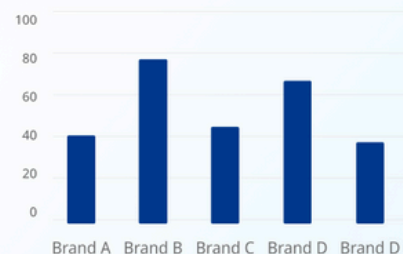
Display Compliance

- Correct
- Incorrect
- No Display

Sales Performance

Total Sales YTD
$1,981.23

+8 cases, 12%
Compared to last year

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

October

SUN MON TUE WED THU SAT
1 2 3 5

Shopper Preferred Brand

100
80
60
40
20
0

Brand A Brand B Brand C Brand D Brand D

Executive Summary:
Why This Playbook

Retail buyers don't buy vision. They buy results, growth, and confidence you can deliver in-store.

To win and keep shelf space, your pitch must blend **story** + **proof**: a clear narrative, backed by data, that shows you'll grow the category and execute reliably.

This playbook is built for brands navigating seasonal resets, competitive categories, and retail buyer expectations, giving you a practical framework:

1   Craft a story that lands with buyers.

2   Time it to their decision cycles.

3   Prove you can execute at scale.

4   Show shoppers respond.

5   Turn it all into a case the buyer can't ignore.

Retail Win Formula

STORY

FIT

EXECUTION + INSIGHT
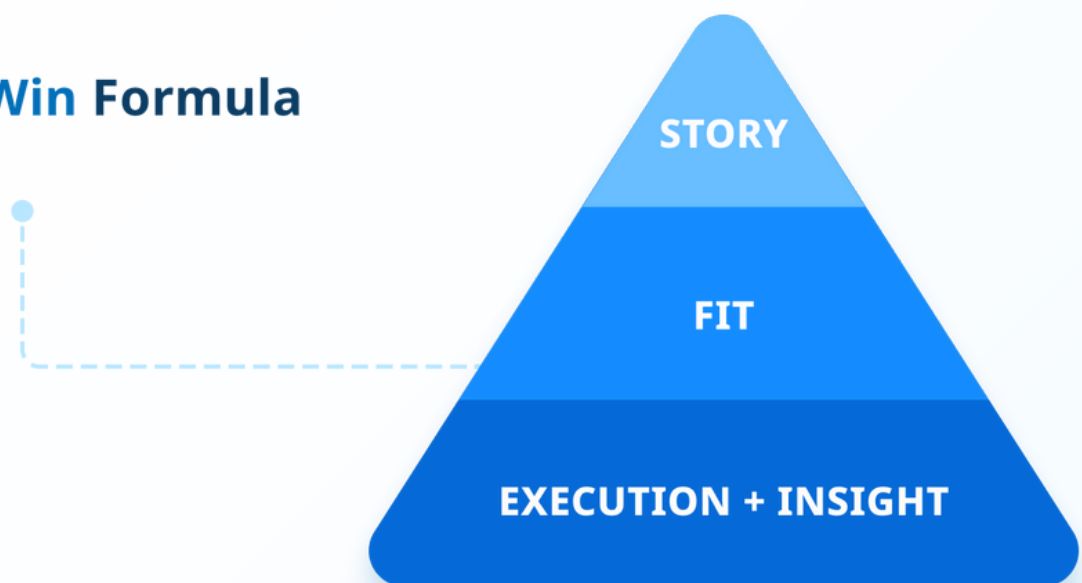
Phase 1:
Start With the Story

Most brands pitch like marketers: "We're disruptive! We're growing fast!" But retail buyers don't care. They're measured on growth and execution, not ambition.

Retailers aren't just picking products, they're picking partners. And data beats adjectives, and buyers only care about one thing: **can you grow the category and execute reliably?**

Structure Your Pitch Like a Retail Case Study:

1   **What we launched:** SKUs, packaging, positioning.

2   **How it performed:** Sell-through, compliance, shopper response.

3   **What's next:** Why expansion is the right move.

Proof Pillars

Performance
Use data that supports sell-through, like $/store/week repeat rate, or proof of velocity.

Fit
Show how you align with usage occasion strategy, pack price targets, or category growth.

Capability
Provide evidence that you can execute with compliance rates, rep reach, or third-party audit data.

Best Practice Snapshot

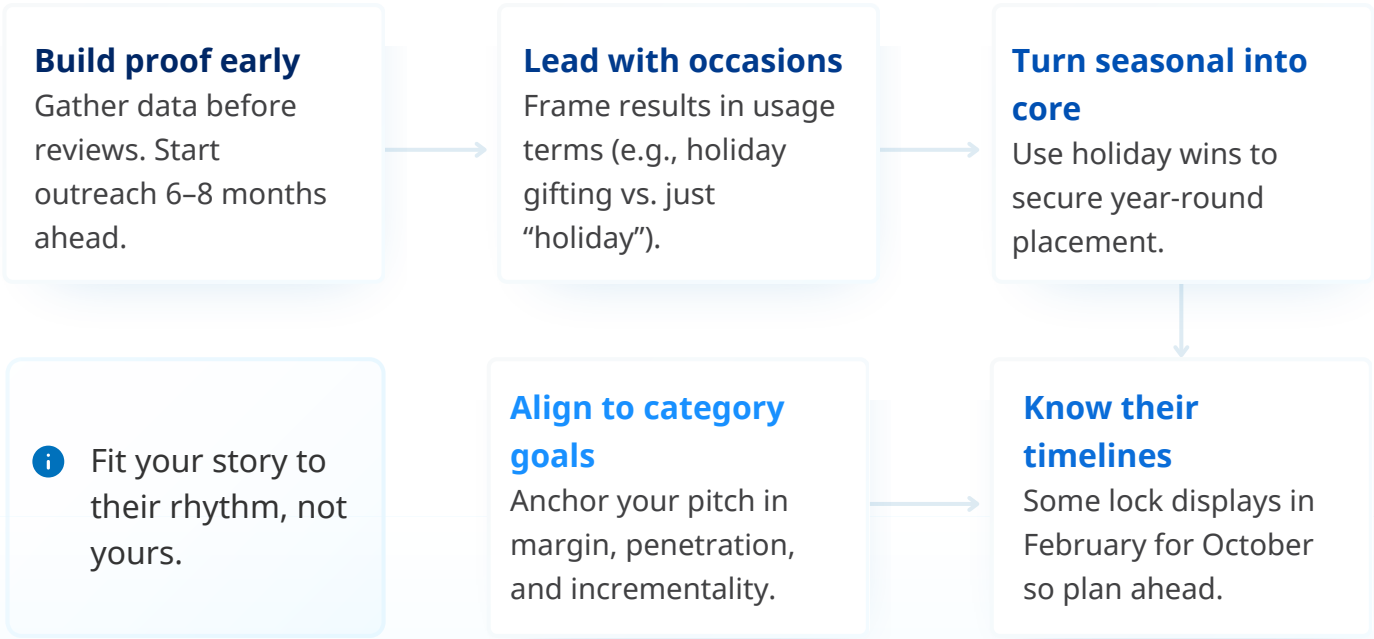| **Opportunity framing**	**Performance highlights**	**Execution proof**	**Shopper engagement**	**Action Plan**
(category lift, shopper behavior)	(banner, region, or channel)	(photos, compliance data)	(feedback, recall, conversion)	(clear, visual, with a "why now")

Phase 2:
Match Your Story to Their Strategy

Buyers don't think in quarters. They think in seasons, category shifts, and goals. If your pitch misses their window, you miss the shelf, no matter how strong your brand.

What Retailers Are Planning, And When:

	Buyer Focus	Common Categories Affected	Example Retailers
Q1	Summer + Halloween finalization	Beverages, Candy, Seasonal Displays	UNFI, AWG
Q2	Fall resets, BTS, wellness	Snacks, Supplements, Functional Drinks	Walmart, Meijer
Q3	Holiday execution, V-day tests	Gifting, Health & Beauty	Target, Albertsons
Q4	Post-mortem + Annual Reset	Core sets, shelf segmentation	All majors

Best Practice Snapshot

Build proof early
Gather data before reviews. Start outreach 6–8 months ahead.

Lead with occasions
Frame results in usage terms (e.g., holiday gifting vs. just "holiday").

Turn seasonal into core
Use holiday wins to secure year-round placement.

ⓘ Fit your story to their rhythm, not yours.

Align to category goals
Anchor your pitch in margin, penetration, and incrementality.

Know their timelines
Some lock displays in February for October so plan ahead.

Phase 2:
Match Your Story to Their Strategy

Three Things to Remember

01. Retail Reviews Set the Rules

Retail category reviews determine shelf resets and are locked months in advance. For example:

- Halloween and Christmas sets may finalize in February or March.

- **UNFI / AWG** buyers finalize holiday plans execution before Easter hits shelves.

- Accounts like **Target** and **Walmart** run post-holiday reviews to shape next year.


2025

Jan	Feb	Mar ✓	Apr
May	Jun	Jul	Aug
Sep	Oct	Nov	Dec
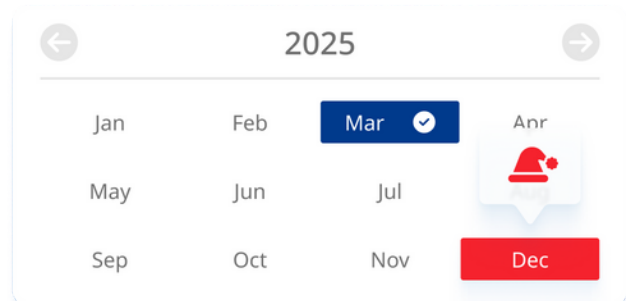
ℹ️ If you miss these windows, your brand may have to wait another cycle.

02. Incrementality Is the Filter

Buyers want additive growth, not just innovation.

- Example 1:
  A beverage brand won Albertsons by bringing in wellness-focused shoppers.

- Example 2:
  Another emphasized trade ups by shifting focus from $7 to $15 multi-packs.

● Incremental impact ● Shopper Base
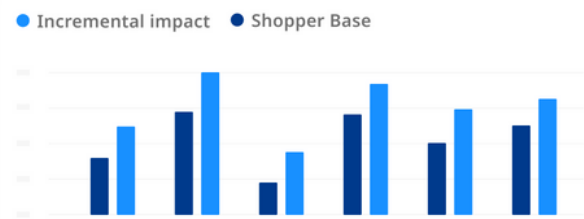
ℹ️ These examples succeed because they speak the retailer's language: margin, shopper base, and total category growth.

03. Usage Occasion Drive Priorities

Top-performing brands in seasonal and set reviews anchor their pitch in usage occasion.

- Candy brands talk "casual gifting" vs. "serious gifting" at Valentine's.

- Beverage brands pitch hydration for "post-workout" rather than just "sports drink."

- ✓ Post-workout
- ✓ On-the-go hydration
- ✓ Office refreshment
- ✓ Social moments

ℹ️ Flex your pitch to the retailer's occasion logic.

Phase 3:
Prove You Can Execute at Scale

Great products fail if execution lags. Retailers need proof you'll deliver once on shelf: *compliance rates, photo documentation, and store-level accountability allow you to gain trust (and space).*

Why It Matters

- Studies across CPG categories show non-compliance rates can hit 30–40% within the first week of a reset or display rollout.

- Missed tags, empty displays, or unstocked endcaps don't just hurt your brand, they reflect on the buyer's judgment.

- Retailers remember who followed through and who didn't.

Display Compliance

● Correct   ● Incorrect   ● No Display

What To Show Buyers

Shelf presence
Proof that planograms were met.

OOS & tag errors
Tracked and resolved.

Display setup
Signage, promo materials in place.

Compliance rates
By chain, banner, or region.

Phase 3:
Prove You Can Execute at Scale

How To Prove It

Start audits 5–7 days post set date (after deliveries + merchandising).
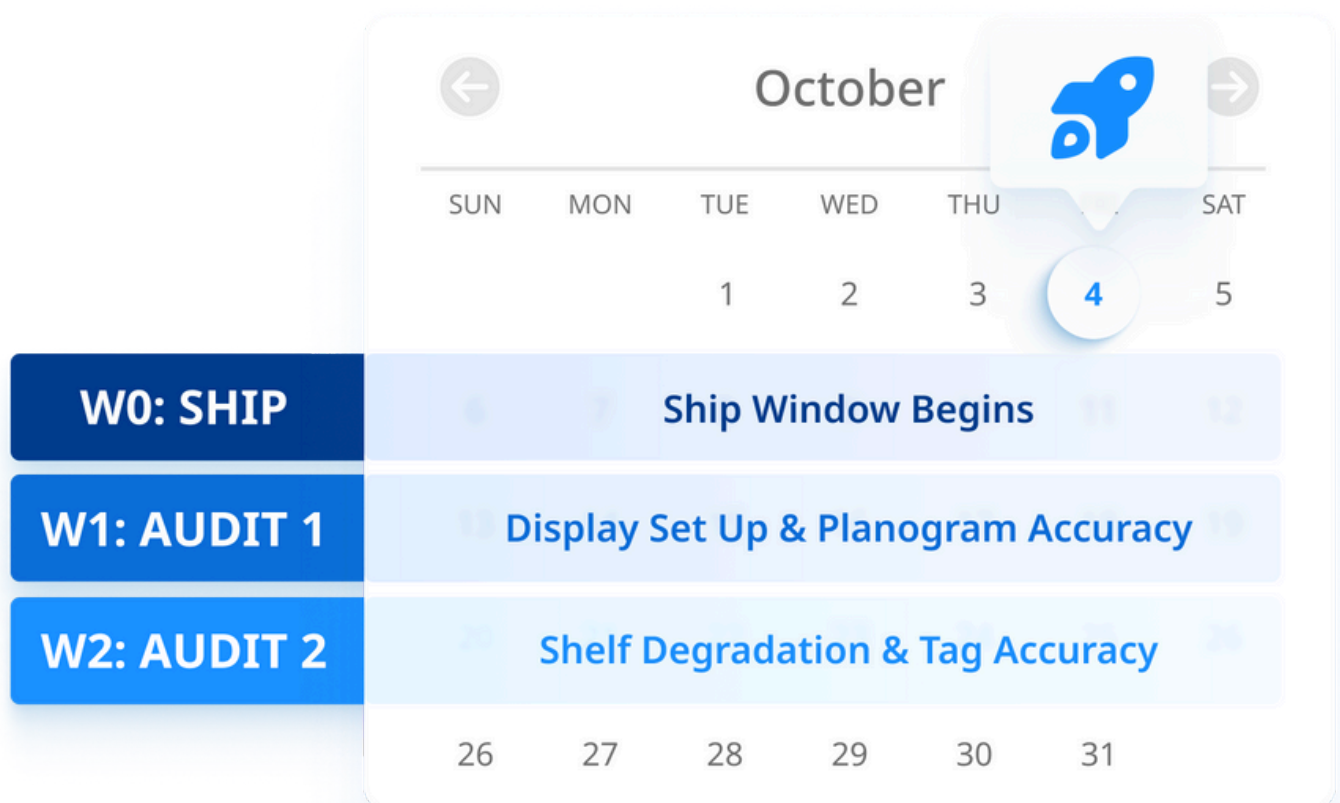
→

Continue for 2+ weeks to capture degradation or stockouts.

→

Supplement field teams with crowdsourcing + timestamped photos for scale and credibility.

ⓘ **Tip:** Start with **20–30%** door coverage. Hit key geographies, banners, or high-priority stores. Expand later.

October

SUN	MON	TUE	WED	THU	SAT
		1	2	3	4	5

W0: SHIP — Ship Window Begins

W1: AUDIT 1 — Display Set Up & Planogram Accuracy

W2: AUDIT 2 — Shelf Degradation & Tag Accuracy

| 26 | 27 | 28 | 29 | 30 | 31 |

Phase 4:
Layer in Shopper Impact

Execution earns space. Shopper insight earns growth.

Buyers want confidence that your presence at shelf drives movement. Layering shopper insights on top of shelf execution transforms a decent pitch into a strategic win: without shopper it, you're guessing. With it, you prove your shelf presence converts.

What To Measure

Visibility
What percentage of shoppers noticed the item or display?

This helps validate placement and size.

Recall
Do they remember the brand, product name, or key benefit?

A measure of messaging clarity.

Conversion Influence
Did the shelf presence prompt trial, trade-up, or switch?

This is where value comes into focus.

How To Capture It

Digital Surveys
Use digital intercepts (e.g. QR codes on signage) or mobile prompts at checkout: easy to deploy, non-intrusive, and scalable.

Field Insights
Have reps capture verbal insights or voting cards (e.g. "*What made you pick this over another brand today?*")

Crowdsourced Feedback
Tap into shoppers for scalable sentiment data, paired with audits to show geographic and demographic depth.

Phase 4:
Layer in Shopper Impact

A growth-stage beverage brand ran crowdsourced surveys during a regional rollout. Across 150 stores:

65%
of shoppers noticed the off-shelf display

43%
said it drove their purchase

31%
understood the benefit at a glance

These results secured expanded distribution during set review and convinced internal leadership to reinvest in display spend.

CONVERSION DRIVER

SHOPPER RESPONSE

SHELF EXECUTION

WHY IT WORKS

Shopper impact is the *"why now"* of your pitch.

It moves you from *"brand trying to grow"* to *"brand that converts"*. Retailers are increasingly under pressure to deliver on fast-moving trends, but they don't want to gamble.

By bringing the data, you remove the risk.

Phase 5:
Build the Case to Win More Space

Now It's Time To Connect The Dots

So far you have

A **timely story** aligned to the retailer's vision.

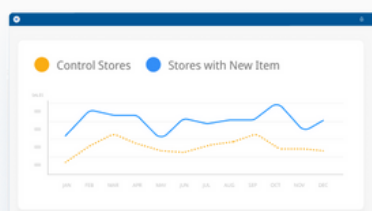Proof that you can execute in the real world.

Evidence that shoppers care and convert.
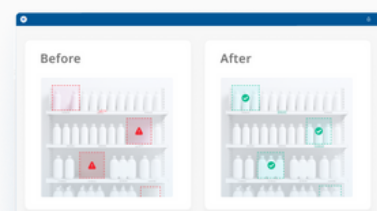
Now bring it to life with

Category impact
Lift vs. control stores or regions.

Visual shelf conditions
Before and after resets.

Shopper overlays
"*Why I bought*" or "*How I noticed it*" polls.

Performance delta
$/store/week in compliant vs. non-compliant stores.

Store	4 Weeks Sales	Avg Compliance
#45563	338	● 45 %
#66789	386	● 76 %
#44564	431	● 98 %
#55567	426	● 92 %

Competitive benchmarking
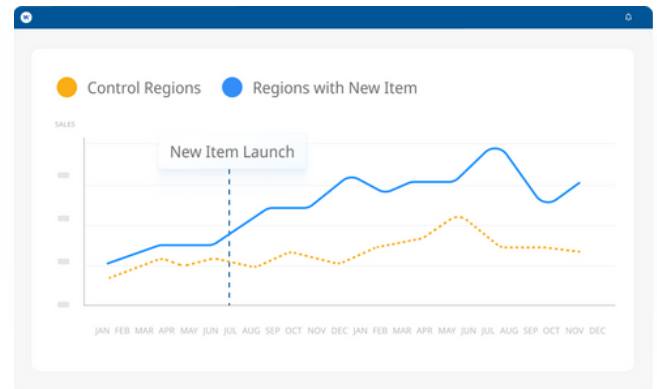Sales or execution gaps vs. peers.
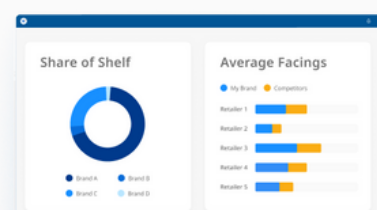
Phase 5:
Build the Case to Win More Space

Tips from the Field

To earn more space, show what your product did, but also *what it made possible.* That might be trade-up to premium SKUs, new household penetration, repeat rate gains, or replacing underperforming competitors.

Prove it with data buyers care about:

Use region-specific wins to justify test expansion.

Compare like-for-like display types/promotions for true lift proof.

Translate insights into retailer KPIs—margin, velocity, shrink, turns.

Power Move

Build a **Shelf Story Dashboard** tailored to each account, showing execution, engagement, and outcomes in one place.

When buyers can click through you results like a living case study, you stop being a vendor and become a growth partner.
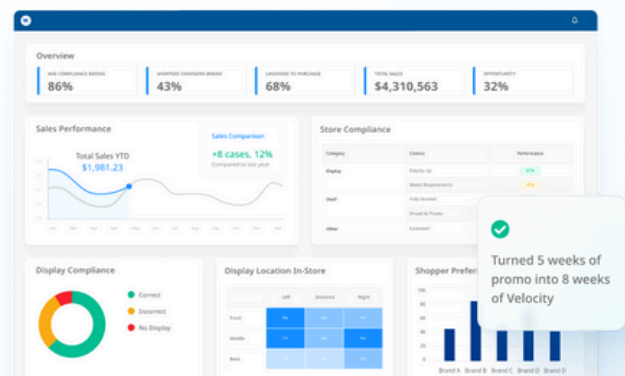
Conclusion

Retail buyers aren't just scanning for great products: they're betting on great partners. In crowded categories with limited space, the brands that win are the ones who show up with proof, not promises.

This playbook gave you a repeatable framework to turn your wins into winning pitches:

- Tell a clear, timely story rooted in category growth

- Match it to seasonal decision cycles and retailer priorities

- Prove you can execute across stores, banners, and regions

- Layer in shopper insight to show real demand at the shelf

- Package it all into a living case study buyers can't ignore

Ready to turn your shelf story into a retail win?

Talk to our team about how Wiser can help you bring it to life with real-time execution data, shopper insights, and proof you can scale.
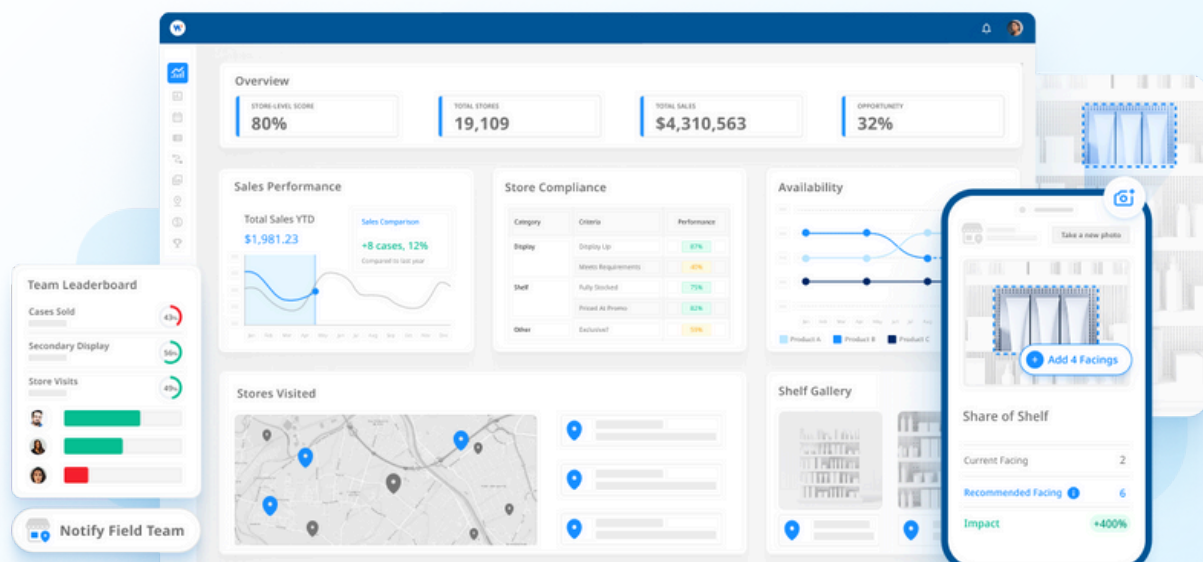
About Wiser Solutions

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