



GPS

Distributor Planning Process

An integrated, comprehensive approach combining the skills of organizations committed to supporting independent distributors excel and exceed organizational goals.

This 5 phase process includes:

1. Introductory Meeting with Company Leadership

- a. Vision / Goals
- b. Note: With some companies this becomes an expanded element of the strategy to help develop a company's vision and mission statement

2. 360° Review

- a. Employee / Key Management Interviews and/or Survey
 - i. Designed to elicit associate view of the company, management, direction, culture and perceived opportunities.
 - ii. Skills testing (optional. We've used Profile XT, Wonderlic, Myers Briggs)
 - iii. Interview key and aspirational personnel
- b. Skills / Leadership testing of all management
- c. Quantitative sales, supplier and operational metrics
- d. Supplier Perspective regarding company, marketplace and competitors
- e. Solicit Customer Input
 - i. Conduct customer satisfaction survey
 - ii. Conduct customer interviews

Note: With some clients we have conducted a Management Retreat where the above information is presented to the "management team" and then the team breaks into groups for idea generation on specific topics

3. Quantitative Analysis

- a. Determine market size, share and competitive environment (May involve workshop)
- b. Customer volume analysis, product mix analysis, customer segment analysis, GP / invoice analysis, supplier analysis
- c. Marketing Audit

4. Strategic Recommendation

- a. Vision / Mission
- b. Growth Objectives over X years
- c. Elements to Profitable Growth (not all may apply)
 - a. Cultural and Communications Initiatives
 - b. Business Metrics
 - c. Operational Needs
 - d. Sales / Marketing
 - e. Markets Serve (Geographic, Customer Segment, Product Offering)
 - f. Paths to Growth
 - g. Locations
 - h. Salespeople
 - i. eCommerce
 - j. Acquisition
 - k. Services
 - l. Organization Structure Recommendations (if applicable)
- m. Provide overview of job responsibilities & performance metrics

5. Implementing the Plan ... recommendations for moving forward