

---

**THE SMALL BRAND'S TO-DO LIST FOR**  
***PLAYING BIG***  
**IN SHOPPER MARKETING**



# THE SMALL BRAND'S TO-DO LIST

## FOR PLAYING BIG IN SHOPPER MARKETING

When you're a small brand, shopper marketing success can seem reserved for the big volume, multi-brand portfolio manufacturers. But that's not the case. Small brands can start to open up new opportunities with retailers and amplify shopper marketing success by following these six key steps.

### 1. MAKE SHOPPER MARKETING STRATEGY PART OF YOUR BRAND ENGAGEMENT PLAN

Treat shopper marketing as part of your total marketing plan. Just like social media, influencer marketing and any other potential touchpoint you may include, shopper marketing should be evaluated for its role, cost, and contribution to your overall media mix. A shopper marketing program can be an overpriced expense compared to other marketing options. Other times, it's a great bargain. For these programs to earn their budget in the mix, they have to be good.

#### QUICK TIPS

- ✓ You can reduce bias and executional complexity (not to mention retailer headaches) by limiting the media and agency partners at the table.
- ✓ Set messaging musts for your shopper marketing programs so they contribute to brand building. Don't compromise when tempted with an option that's all about giving the shopper a discount.

### 2. FRAME SMALL BRANDS AS BETTER SUPPORT FOR RETAILER OBJECTIVES

Small brands are driving the most growth for retailers. Over the last five years, while revenues have fallen by a combined 15% for the 10 biggest publicly-traded packaged food and beverage companies, an estimated \$15 billion has shifted to companies with less than \$1 billion in annual revenue (IRI 2017). When you're working to earn collaborative marketing opportunities, this is a formidable argument. Which brands are more likely to bring new shoppers to the category? Which brands can turn a shopper on to a more profitable premium item? Know your power as a small brand and use it.

#### QUICK TIPS

- ✓ Funnel shopper marketing investment to a few key accounts instead of spreading across many in order to fund a scaled-up effort.
- ✓ When a small brand demonstrates the ambition of a big brand to customers, it's easier for customers to see the brand's growth potential.

### 3. MAKE SALES LEADERS YOUR ALLIES

A sales leader who knows their key account and might get incremental marketing support is an amazing ally. As the most connected to a retailer's ways, a sales leader can be the first to learn about a new marketing program their customer is testing, or how their customer plans to prioritize certain shopper segments. Include key sales leaders in your annual marketing planning process and you'll quickly see how their intel can help a program go from a hope to a funded idea.

#### QUICK TIPS

- ✓ Alignment with your sales teams' trade calendars is a must.
- ✓ Run weekly or monthly status meetings to maintain momentum and plan for customer communications.
- ✓ Share marketing plans and successful programs supporting different customers across sales teams to create healthy competition.

### 4. KEEP IT SIMPLE & REAL

Once you have a seat at the table, don't rush to brainstorm with your customer. If you want to get approved, bring a carefully thought-out plan so that the burden on your customer is minimized. Most importantly, bring a plan that is built in the reality of your customer's marketing tools and standards. Recommendations with song-and-dance sampling events and through-the-roof merchandising displays are not only unrealistic, they are notes to your customer not to be open to future initiatives.

#### QUICK TIPS

- ✓ Don't think of success as plan approval on the spot. Success is using these discussions with your customer as a starting point to get to something better.
- ✓ Earn the right to execute outside of the playbook. Once you've proven you can successfully execute a shopper marketing plan, consider bringing an idea that pushes beyond your customer's normal protocols.



## 5. HAVE A PLAN TO GO IT ALONE

The best shopper marketing programs are almost always done in collaboration between brand and retailer, as retailers have created amazing loyalty and communication ties with their shoppers. For brands these are ideal media channels right where it matters most. But if a great plan can't be executed because the necessary collaboration isn't possible, it's not dead. Don't waste time, energy and resources trying to kickstart unlikely collaboration. Instead, know that handfuls of third-party media entities are highly adept at targeting shoppers. A back-up plan using these methods can be a B+ to what would have been an A+ if only collaboration were possible. Go with the B+.

### QUICK TIPS

- ✓ Share the investment that could be spent in your customer's owned, preferred channels. Collaboration is more likely when it's on the table.
- ✓ Don't wait too long to pull back from a collaboration that isn't happening, or you might miss the window to repurpose available marketing budget.

## 6. USE DIGITAL TOOLS TO LEVEL THE PLAYING FIELD

From search, social, video and mobile to digital offer platforms, digital media providers offer opportunities beyond retailers' owned media channels that are ideal for targeting hand-raising shoppers in specific geographies. The ability to right-size these digital activations to work within the budget framework, and do it all independent of retailer approvals, provides an ideal fallback. It allows small brands to maintain control of their marketing. Don't succumb to participation in a bad retailer program for lack of options.

### QUICK TIPS

- ✓ Put new technologies to the test and share the learnings so that your customer will view you as a resource for emerging marketing tools.
- ✓ Make sure you are sharing how many visits your campaign drove to their store, redemptions attributed to the campaign or confirmed purchases.
- ✓ Reveal new opportunities and solve for knowledge gaps by pairing digital media planning experts with shopper marketing planners.

## ABOUT THE AUTHOR



### **GREG SMITH**

DIRECTOR OF RETAIL MARKETING, PARTNERS + NAPIER

Greg Smith is a seasoned shopper marketing leader and the head of Partners + Napier's retail marketing division. He specializes in CPG marketing, consumer promotion and path-to-purchase marketing, and works across traditional and non-traditional retail scenarios to drive traffic, engagement, choice, affinity and loyalty. Greg has led Effie Award-winning retail marketing campaigns and shopper marketing and promotional efforts for notable clients including Saputo Dairy Foods USA, Keurig Green Mountain, Nestlé, Heinz, Clorox, Constellation Brands, Schuman Cheese, Georgia-Pacific and Kellogg's.

# FRIENDSHIP DAIRIES

## MIX-IN MATCHMAKER CASE STUDY

### PROGRAM OVERVIEW

Friendship Dairies is a premium cottage cheese brand with regional distribution in the Northeast and Florida. In spite of the cottage cheese category's 40-year, 50% decline, Friendship Dairies' sales were posting double-digit growth, outpacing the competition, gaining share and driving previously unseen upticks in category growth with each of its key retailers — except at ShopRite, an incredibly important retail partner. At the same time, ShopRite was losing share of grocery-buying trips and shopper dollars to value channels and premium, health-oriented retailers like Whole Foods and Trader Joe's.

Friendship Dairies set out to create a program that would change shoppers' minds about cottage cheese, deliver greater spending by ShopRite's coveted healthy food shopper segment, and reverse brand share decline. In collaboration with agency of record Partners + Napier and ShopRite, Friendship Dairies developed and led a multi-partner, cross-category shopper marketing program called the Mix-In Matchmaker.



▶ CASE STUDY VIDEO

### PROGRAM RESULTS

- ✓ Delivered 93% new brand purchasers for Friendship Dairies
- ✓ After program end, 60% of purchasers had repeated purchase
- ✓ Increased total trip spending by 12% among healthy food shopper segment
- ✓ Cottage cheese category at ShopRite grew 7% vs. YAG, and Friendship Dairies outpaced the category with 8.3% growth over that time period
- ✓ Awarded a Silver Effie Award at the 2017 Shopper Marketing Effie Awards