



MOVISTA

Ultimate Guide To Flawless Retail Execution



Flawless retail execution means finding simpler ways to make work more efficient, verifiable and repeatable. However, if a project is done on time, but you've burned through your payroll budget, you're in trouble. Even worse? If you stay under budget, but your projects are all late, you're sunk.

Using this guide, you'll learn the secrets to mastery-level retail execution.

That means your retail execution teams and merchandisers will have the support of a system that ensures efficient workforce management, cost control and cross-project, cross-location consistency.





Step 1: **Plan**



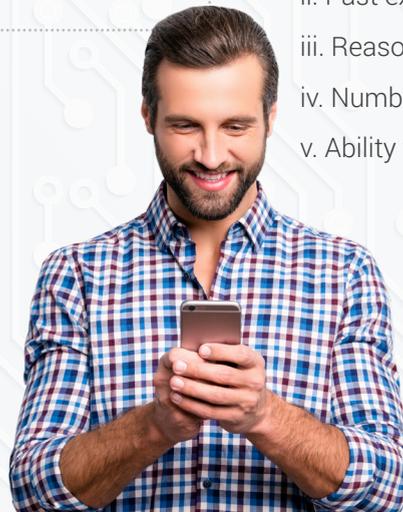
Countless hours of management time and staff payroll go to waste due to ineffective strategies for implementing training and execution. Control costs and get teams ready for flawless and fast execution through some essential planning steps.

1. Document staff skill sets

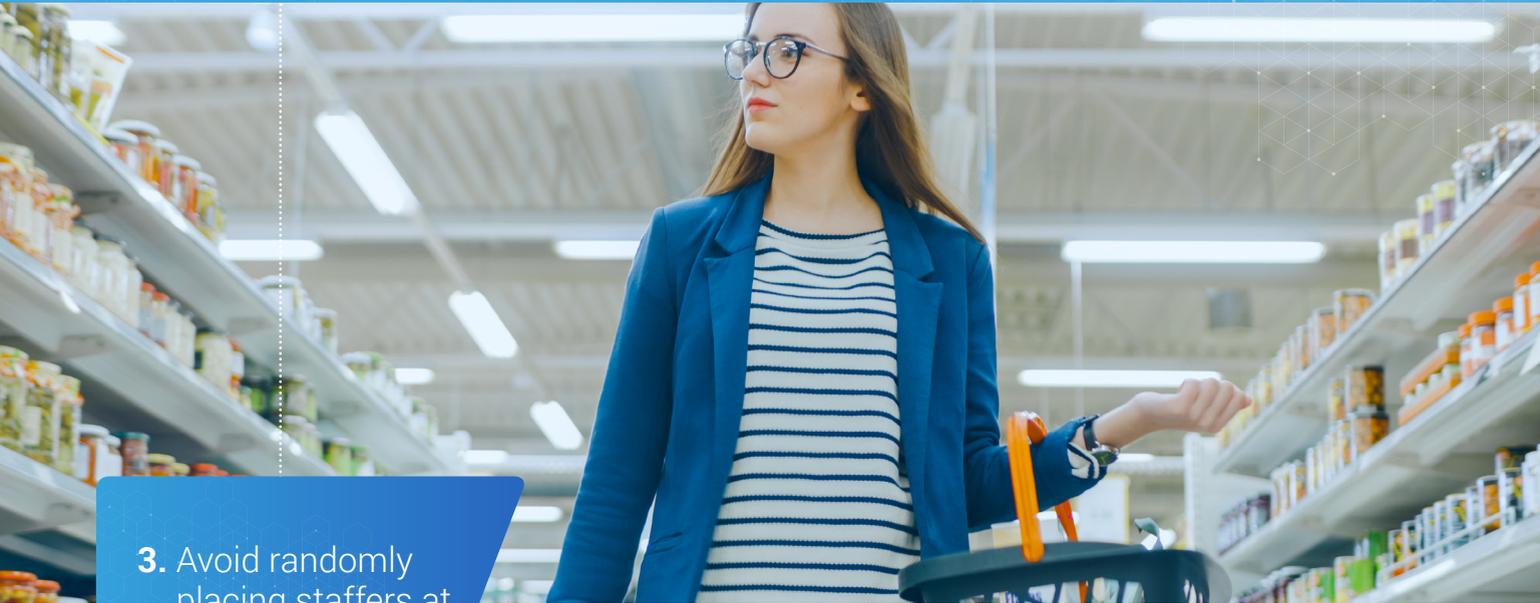
a. Example: Wine Demo skill requirements

- i. Over 21
- ii. Past experience on Wine Demos
- iii. Reasonable distance from location
- iv. Number of hours worked this week
- v. Ability to stand for prolonged periods

2. Plan employee schedules based on skillsets and location



“Control costs and get teams ready...”



3. Avoid randomly placing staffers at stores

- a. This builds relationships at your stores – essential in the space wars!
- b. Regular staffers will know what motivates each store’s management and how to persuade them to feature items or improve shelf space – different stores have different strategies to motivate more spending.
- c. Unfamiliar staffers won’t know store layout, stockroom layout and location-specific nuances that speed up execution and create a positive experience for all.
- d. Partner with brands and retailers – and vice versa – if you’re a retailer, share schedules with your merchandisers. This will keep store activities and merchandiser work in sync and reduce conflicting activities. Impacting traffic affects everyone.

“Partner with brands and retailers – and vice versa...”

4. Coordinate with management and a regular, reliable staffer

on location to prevent the various organizations present at one location from over-representing their own agenda. When teams from different organizations have the same goal, everyone – retailers, merchandisers and stores – wins big.

5. Create and distribute templates to aid field workers as they complete work.

This includes planograms, training videos and highly structured forms with multiple choice answers to create structured data for future use and analysis. Regarding reusable forms and templates, try them for audits, new product rollouts and recalls – and build from there.

“When teams from different organizations have the same goal, everyone wins big.”





Step 2: **Execute**

Keeping up with a highly mobile workforce isn't just a challenge for merchandisers. Retailers and product companies all have to work intimately with field staff to ensure work is completed accurately and on time. The following "trouble spots" in execution can be solved in some surprisingly simple ways.

Issue:

Wrong Setup, Wrong Product

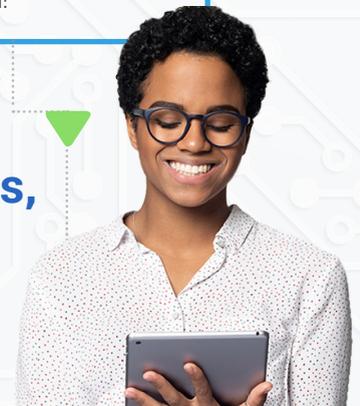
Field teams are paid to do the work, but when it's done, they've used an outdated planogram and put the wrong products in place – not to mention outdated displays or signage.

Solution:

Centralization and Support Material Versions

House all planograms, instructions, videos and training materials in a secure, central database. Use this database to then distribute plans to the teams and staff you determined will work each location. Also, implement an internal version tracking method so that if someone loses their instructions, they can obtain the correct replacements. No more lost work. No more wasted payroll!

“House all planograms, instructions, videos and training materials in a secure, central database.”



Issue:**Day Late, Dollars Short**

Scheduling can be a never-ending headache. It's far worse when conflicts and issues don't get caught – plans get thrown into disarray. Complicating this issue, staffers on-route get delayed, take unusual routes or end up going to the wrong store.

Solution:

This solution is similar in concept to asset centralization.

Just like training materials, staff assignments and routes should be centralized. That way, routes for staff can be planned, timing can be addressed, and the mobile team transforms from clown car mayhem to a fleet working to a beat.

Also, make use of geo-fencing or geo-tagged data which pinpoints exactly where your employees are located to ensure they are working in the correct store or location. Combine with real-time login and progress reporting for maximum insight in time-sensitive work.

For more information on creating highly useful, repeatable templates for better field execution and easily managed, structured data, check out our **[Quick Retail Execution Checklist](#)**.

[Download the Checklist](#)



 Step 3: **Verify**

The final – and critical – element of flawless retail execution is consistent and verified work. Movista was born from the need to know – without travel – that the right work was being completed well and on time. Here are the core principles that can help you make that a reality.

1.

Distribute checklists for completion with regular review by team leaders or managers

2.

Require photo verification for all completed projects

Share all verification and progress upward and downward through teams

3.

Verify execution using GPS verification

4.

Collect signatures for completed work to create accountability

5.

Create checklist questionnaires for both completion and non-completion

- o Non-completion questions provide insight into the roadblocks to completion
- o Structure questions with multiple-choice answers to make data analysis easy and digestible at a glance

6.

Require reporting for non-completed work to help avoid repeat issues and solve any specific store problems

“Share all progress through teams.”


 Step 4: **Optimize**

Now that you've used structured data to distribute plans – but also to verify their execution and any issues – you've got the perfect opportunity to optimize. Effective use of these steps contributes to reduced reimbursement and payroll costs and increased availability for field reps to get work done.

Assess route and reimbursement effectiveness and adjust:**1.**

- a. Did mapped routes work as well as hoped?
- b. Should a different route be considered?
- c. Might a different scheduling pattern work to account for traffic?
- d. Could certain payroll and reimbursement processes be automated?

Review store and team data on execution and adjust:**2.**

- a. Did staffers execute on time?
- b. What issues were documented during the process?
- c. What extra space or loss of space occurred?
- d. Were team members effective, or do they require more training or tools?
- e. Can more of this data be reported in real time?

“Verify execution and any issues.”



3.**Track and prepare for future ordering needs:**

- a. Which products are selling?
- b. Where are inventory levels?
- c. What products are already on order?
- d. Which location will they go to?

Review overall sales data by store:

- e. Which promotions did best?
- f. Which products need to be reconsidered?

4.**“Review overall sales data by store.”**

Need Help?

Movista provides a unified, cloud-based field execution and workforce management platform optimized for retailers, manufacturers and third-party service providers. With Movista’s mobile-first platform, all players across the retail ecosystem are empowered to scale and deliver superior retail execution to improve the in-store experience, grow sales, and increase productivity and ROI of distributed workforces. Using Movista, you’ll have the real-time, centralized tools and visibility you need to bring all of these elements together and consistently deliver flawless retail execution.

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