Retail Site Evaluation Form

The Retail Site Evaluation Form is a tool to aid in collecting information from your retail vendors when making regular sales calls for the purposes of re-stocking, continuing product promotion, and education of the retailer. This form will help you collect valuable information on the placement and presentation of your product and collect feedback from the retailer as to common questions, sales objections, and other customer communications.

A.	Name of spot checker	
B.	Date and time of visit	
C.	Retail store location	
D.	Retail store name	
E.	Position of person at store (i.e., owner, daughter of owner, etc.)	
F.	Visit number to this site	

Instructions:

1. Identify retail store location and introduce yourself to the shop vendor.
2. Explain that the purpose of your visit is to observe the placement of your product in the various retail shops that carry it.
3. Explain that you would like to take a few photos and ask a few questions to learn more about how product sales are going.
4. <u>Before the vendor changes anything about the positioning of the product, take a photograph of how and where it is displayed in the retail shop.</u>
5. During your visit to the shop, observe placement of the product and promotional materials and respond to the questions below.

1.	Is the product easily visible?	Yes	No
2.	Where in the shop is the product located? (check one)	☐ Front of shop ☐ Middle of shop ☐ Back of shop ☐ Other_____	
3.	How many of the products are visible?		
4.	Did you have to ask the vendor to see the product?	Yes	No
5.	Is a sample of your assembled product on display?	Yes	No
6.	Where in the shop is the assembled sample of the product located? (check one)	☐ Front of shop ☐ Middle of shop	

Back of shop ☐	
Other☐_____	
Yes	No
Yes	No

7. Is the product displayed according to your original instructions to the vendor?

8. Is the assembled product on display clean?

Yes	No
☐ Poster	
☐ Sign	
☐ Banner	
☐ Other_____	

9. Is there a point-of-sale (POS) sign on or near the product? (Only if you have provided POS materials.)

10. What other promotional materials can be seen from the shop?

Product Name	Price

11. What other competing products are visible in the shop?

More	Equal	Less
Yes		No

12. In comparison to competing products was your product more, less, or equally visible?

13. If your product was not visible and you had to ask to see it, was the vendor able to show you the product?

14. If not, why? (note reason)

15. What price is the vendor charging for your product?

Questions to ask the Vendor:

16. Which competing product is the most popular?

17. How many of this competing product did you sell last month (on average)?

18. Approximately how many people come into your shop per day?

19. How do you sell my product?
(What do you tell customers?)

20. How does my product compare with the other competing products sold in this store?

21. Why do people purchase my product compared to other products?

22. Why do people NOT purchase my product compared to other products?

23. Do you have any recommendations on how to increase sales of my product?

Other notes about the site visit:

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