



The CPG Guidebook for Q4 Success

EXPERT ADVICE, SHOPPER
INSIGHTS, AND USEFUL TOOLS
TO HELP YOU WIN Q4

A Q4 With So Many Qs

Regardless of the year, Q4 is a high-stakes event for companies across the retail and packaged goods industries. If you're a CPG professional, you're accustomed to pressing questions, daunting challenges, and rich opportunities in the final months of every year.

But, wow, have we ever seen a Q4 quite like 2021 is shaping up to be? Have we ever seen a Q4 with so many uncertainties and contingencies?

- ✓ COVID-19 and its particularly pernicious Delta variant
- ✓ Widespread labor shortages
- ✓ Rising inflation
- ✓ Discombobulated supply chains
- ✓ Turbulent shopping patterns

These aren't isolated variables either; they're correlated and connected, able of igniting a chain reaction.

Consider COVID, for instance. Here's how one VP of sales, interviewed for this guidebook, described the potentialities surrounding the virus this year:

“COVID-19 surges drive ongoing consumer behavioral shifts and buying patterns. Any major surges in demand like we saw in March of 2020, combined with the state of the global supply chain, could be catastrophic for some retailers and/or brands [in Q4].”

— VP OF SALES (CPG)

Such ambiguity is enough to make any brand wring its hands, and not just top-of-mind, seasonal categories like toys, candy, and baking goods. After all, Q4 often serves as a proverbial “rising tide” that raises all—or at least many—categories, er, ships. From peanut butter to tissue paper.

But here's the stark reality: Tides (and ships) can move down as well as up. So, will factors like COVID, labor, and inflation—and their interplay—work to buoy or sink brands and retailers in 2021? That's the question, and the answer remains agonizingly unclear.

The good news is, while uncomfortable, uncertainty like that in front of us always yields advantages to the prepared and resolute. Including prepared and resolute brands.

Which is why we at Field Agent created “The CPG Guidebook for Q4 Success,” a resource to help you, a CPG professional, enter Q4 2021 better prepared and more confident.

The pages to come contain an assortment of best practices, insights, and tools—all to help your brand “do more in Q4.”

On the pages to come, you’ll discover...

- ✓ Principles and practices used by CPG veterans to impact Q4 sales
- ✓ Insights about the attitudes and intentions of Q4 shoppers
- ✓ Information and links to useful tools for improving Q4 performance

This year, more than ever, fortune will favor the prepared.

Preparation starts on the next page.



Q4 BEST PRACTICES

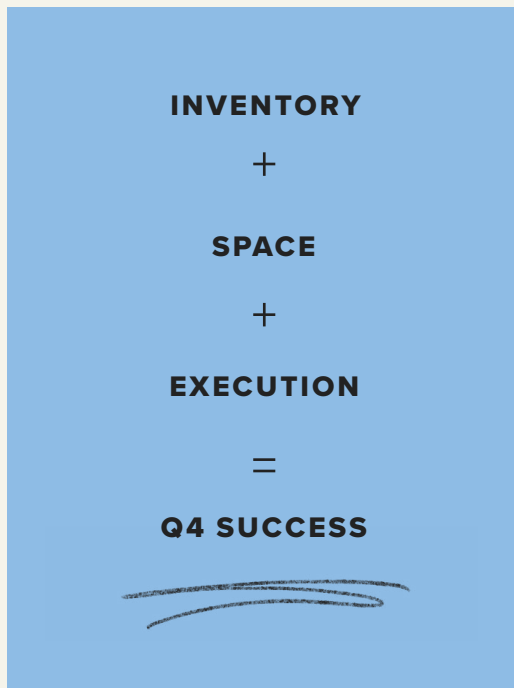
Plato learned from Socrates.
Skywalker learned from Kenobi.
How fortunate to be able to learn
from someone who has already walked
your path. Especially if you're a CPG
professional facing a topsy-turvy Q4.
So, to help you navigate Q4 this year,
we interviewed seven CPG veterans—
inside and outside Field Agent—who
have already earned their Q4 stripes.
Now we share some of their advice
with you.



The Q4 Success Formula

Just how does a brand win Q4?

Maybe there's nothing flashy about the formula below, but, for CPG companies, it's a dependable, time-honored recipe for Q4 success...



Inventory, because you can't sell what isn't there.

In Q4 particularly, the ability to “get it in, get it out” counts for so much. But as any brand will tell you, it's not as easy as it sounds. A SKU's journey from manufacturer to (in some cases) wholesaler to backroom to store floor can hit costly snags, especially in a climate of supply chain uncertainty like Q4 2021.

Naturally, different categories have different inventory goals and dynamics at the end of the year. For example, seasonal categories like toys and gift-sets usually get to feeling really jolly if they sell-through their inventory. An out-of-stock may even be declared a “win,” as long as it's not too early.

However, evergreen categories, even those that witness a Q4 bump

(potato chips, paper towels), manage replenishment as to never see empty shelves or displays.

Space, because it's so scarce in stores, and never more so than during important Q4 shopping events.

Throughout the year, brands vie for shelf and display space. We're talking highly valuable, highly competitive real estate here. But in Q4, when retailers pack stores with popular gifts, gift sets, seasonal items, and the like, there's even less of this coveted space to go around.

Execution, because operational realities don't always conform to plans, expectations, and agreements.

“No plan survives first contact with the enemy.” Or, in CPG, no plan survives Q4 retail. Unfortunately, what happens on sales floors, on-shelf, at pickup curbs, and in backrooms doesn't always go according to plan. Wrong prices, out-of-stocks, missing displays, and other operational problems are all-too-common in Q4.

Taken together, then, the brand with a firm grasp on inventory, space, and execution is a brand well-positioned for a strong Q4.

Only, don't be intimidated. This isn't an all-or-nothing game.

As the joke goes, you don't have to outrun the bear, only the guy next to you. When it comes to inventory + space + execution, perfection isn't possible. But a brand doesn't have to be perfect; it just has to be better than its competition.

In interviews with seven longtime CPG professionals—with, collectively, hundreds of Q4s to their names—we asked, “What can a brand do to impact its Q4 sales?” Most of their responses touched on one or more elements of the Q4 success formula, whether inventory, space, or execution.

Notably, their suggestions also fell neatly into two categories: actions CPG professionals can take before Q4, and actions they can take during Q4.

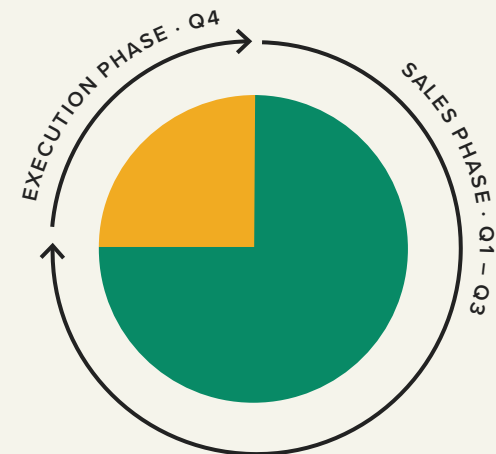
As you can see in the illustration on the right, winning Q4 is a matter of winning two distinct phases: the sales phase and the execution phase. In this way, Q4 success is a year-round endeavor. But it's an endeavor that relies heavily on making the right moves each and every Q4.

Understand, winning the sales phase often entails collecting data, evidence, and insights during Q4 to support sales in the upcoming year. Actions taken

during the execution phase, however, can impact Q4 sales the same year.

Consequently, whether its Q4 sales this year or next year, everything hinges on making the most of the Q4 currently in front of you.

And, on the following pages, that's how we present the advice from our panel of CPG experts. We first present best practices for impacting sales next Q4 (i.e., sales phase support), then we share best practices for impacting sales this Q4 (i.e., execution).



Practices *This Year* to Impact Sales *Next Year*

1 Win the Space Wars

“Space. The final frontier.” Actually, pretty much the only frontier inside stores.

In brick-and-mortar retail, the name of the game is proximity—being proximal to as many purchase-minded shoppers as possible. Capture more space inside stores—on-shelf, on displays, at entranceways—and you’re going to see more sales.

Period.

This isn’t exactly a secret, however. CPG companies know the essentiality of space to Q4 success, and they compete vigorously for it. And as space becomes scarcer, like around the holidays, the fight for it only intensifies.

“The biggest challenge is space,” said one CPG vet interviewed for this guidebook. “Every manufacturer is clamoring for more of it. If you can figure out how to

get more space, you’re going to win Q4.” Big, national brands, with their money, reputation, and sales record, are usually better equipped to wage this all-important fight for space.

But whether you’re a big, multinational brand or a smaller, regional brand, you can win more Q4 space next year with a simple yet formidable one-two punch:

1. Move your product off the shelf and out the door this year.

Invest your promotional spend wisely in 2021, adding fuel to your Q4 sales. As another CPG professional said, “[In Q4, use] a combination of marketing and advertising to boost awareness and in-store activity to entice shoppers...”

2. Capture data and photos showing demand for your SKUs outstripped supply.

Now that you’ve generated demand for your goods, be ready to capture data and photos to convince retail buyers you’re worthy of even more space, displays, etc. next year. Maybe, for instance, you can collect photo proof of widespread out-of-stocks.

With innovation in marketing and auditing services, it’s getting easier to land this one-two punch. For instance, as you’ll see in the product guide at the end of this guidebook, you can now enlist shoppers to buy products from specific stores, where you can be waiting in the wings to capture data and photos to demonstrate the higher pull.



2 Hit the Sales Floor Early

Einstein would be proud, wouldn't he? From talking about space to talking about time.

In retail, as in physics, time and space are linked. To enhance Q4 sales, your SKUs not only need to be where shoppers are, they need to be *when* shoppers are.

Just as being in more places within a store will improve sales, being there longer will have a similar effect. It's a matter of extending the selling period for a Q4 event—from football gameday to New Year's Eve—by getting your

brand on-shelf or on-display as early in the season as possible.

“Christmas comes the same time every year,” said another one of our CPG advisors. “The only way to extend the selling period is to get it on display earlier.”

As he further explained, the earlier inventory hits the floor, the sooner the retailer will sell through it and need to replenish stock. So, if you generate impulse sales early in the season, the retailer will need to restock closer to the holiday. FTW.

Or, alternatively, they'll run out of stock, and, during the sales phase, you can make a strong case to the buyer for a head start next year.

Here, too, the one-two punch of promotion + data collection will be to your advantage. It's all about showing your buyer they could have sold more units had your brand been on the floor earlier.

3 Just One More Case (Maybe Two)

There's a lot of talk these days about how seemingly small gains make a big difference over time. Just look at the success of "Atomic Habits" by James Clear, who encourages folks to get better by just 1% every day. Small, steady gains can eventually produce major victories.

What's the corollary to Q4 retail?

As put by one of the CPG professionals interviewed for this guidebook: "Push in a couple of extra cases." This, he said, is especially true for smaller manufacturers. Imagine the impact of selling one or two additional cases of product to **every store, every Q4**. Over time, we're talking about a potentially profound impact for your brand.

And while a principle like "just one more case (maybe two)" can yield positive sales results, it also offers CPG professionals a simple, realistic goal to aim at. Unlike aggressive financial goals, which can be intimidating, selling

one or two extra cases per store feels feasible at the gut-level. Small steps to big improvement.

But now we're starting to see a theme, because here, too, selling a couple of extra cases means **making a data-driven argument** for those extra cases to the retail buyer.

You're already well on your way to selling those extra cases next year if, this Q4, you arm your sales team with data and photos proving demand for your brand outpaced supply in certain stores.

“

Imagine the impact of selling one or two additional cases of product to every store, every Q4.

”



4 Record and Analyze “Game Film”

Football coaches know the importance of recording games. It’s a way to dissect their own team’s performance and to study their competitors’ strategies and players.

Coaches know success on the field starts in the film room. They know the importance of studying the past to influence the future.

CPG companies would do well to follow their example, particularly in Q4, the Super Bowl of retail competition.

This year, retailers and brands—including your rivals—will be laying it all on the line in stores and online as they compete for Q4 dollars.

The question is, will you “set up a camera” to record it, or will you let the opportunity to capture intelligence about your competitors and retail partners go by?

It’s hard to think a year ahead about Q4 performance, but if you take steps to capture information, photos, and/or videos of categories, planograms, prices,

and displays this year, you can analyze all of it this “offseason” and, like a good coach, draw up a better game plan next year.

Take a deliberate, opportunistic approach to documenting and analyzing Q4 this year, and put your brand in a stronger position to win Q4 for years to come.

5 Help the Retailer Win

Your brand isn't the only company trying to win Q4. Your retail partners are also desperately striving to grow Q4 sales and outperform competitors.

For this guidebook, we interviewed a CPG professional with years of firsthand experience selling specifically to Kroger. "Kroger is placing, perhaps more than any other year, a significant value on the holiday season [in 2021]," he said. "They are working with vendors to develop wholistic marketing plans—in-store, digital, shopper—as well as hot promotional pricing to drive households and trips [and gain] market share."

In this instance, a brand could help Kroger win by creating and executing a savvy promotional plan, one that buoys both supplier and retailer.

Let's bring it down to the individual level. As described in "The Buyer Meeting Success Kit" by Field Agent, brands win by helping their retail buyers win. After all, your buyer is responsible for a "store

within the store"—the category—and they need to grow category sales as badly as you need to grow brand sales. In both instances, whether we're talking retailers in general or retail buyers individually, you win by helping them win. It's symbiotic.

What are some practical applications of this principle?

First, work hand-in-hand with retailers, via promotional plans, data-sharing, and other vehicles, to make their Q4—not just your Q4—the best ever.

Second, during the sales phase, root your proposals in mutually beneficial terms and realities. Consider how the first three practices—win the space wars; hit the sales floor early; just one more case (maybe two)—can be conceptualized and articulated in ways that help both parties win.

Third, we talked a lot about collecting data already. As you learn about

your category and shopper, consider sharing your gleanings with your buyer. They're usually eager to learn from your knowledge, particularly if it's objective and data-driven.

Still one more reason to gather intelligence throughout Q4: to keep up retailer and buyer relations.

Buyer meeting?
No sweat.

The Buyer Meeting Success Kit

HOW TO LAND (AND KEEP) YOUR PRODUCT ON STORE SHELVES

- ✓ ADVICE FROM INDUSTRY INSIDERS
- ✓ BUYER MEETING CHECKLIST
- ✓ PRODUCT GUIDE FOR SUCCESS

FIELD AGENT

DOWNLOAD THE BUYER MEETING SUCCESS KIT ↓



6 Have an “After” Strategy

What comes after the rush of shoppers? It’s easy to overlook, but there are opportunities after the Q4 frenzy to consolidate your gains and position your brand for a strong new year.

Consider two concrete examples:

First, during the sales phase leading up to Q4, develop and negotiate an “exit strategy” with your buyer.

This is especially true if you’re selling gift boxes or specialty items—think, tins of caramel popcorn adorned with Rudolph’s shiny red nose—that don’t have a permanent place on store shelves. For such wares, the buyer will naturally be concerned about not selling through all the inventory. Rudolph doesn’t belong on store shelves in January; neither will the retailer attempt to sell one-year-old popcorn next year—yuck. So what can the retailer do with leftover inventory? Nothing.

In short, the buyer will want to know how you—the brand—will protect the retailer’s margins. At first sight, this is bad news. You’d much rather sell several crates without being on the hook to offer a discount for unsold goods, or—humiliatingly—being forced to pick up unsold goods from stores (two common exit strategy concessions).

But look for the silver lining here. An exit strategy is one more item to negotiate and, more importantly, leverage. For instance, if the buyer seems hesitant to accept your quoted price, consider offering more generous exit terms, particularly if you’re confident in the ability of your items to sell.

Second, don’t overlook or capitulate January.

We know, we know, compared to Q4, stores in January look like retail deserts. Is that a tumbleweed I see?

“Don’t accept that January is less important,” said one CPG advisor to this guidebook. “It’s a great time to get ahead and set a good pace for the new year.”

He admitted this is somewhat difficult, as brands and retailers alike are always hyper-focused on Q4. But during the sales phase, when negotiating with buyers, don’t neglect the first week in January. Consider a “win-win,” post-holiday deal to propose to your buyer.

Moreover, in January, a lot of merchandising is happening inside stores, including some planogram resets. The first few weeks of the year are, consequently, a crucial time to get your bearings on the new retail environment and get ahead of the competition.

Practices *This Year* to Impact Sales *This Year*

1 Micromanage the Supply Chain

We all know we shouldn't micromanage people. How many best-selling business books have made this point?

But, according to a couple of CPG vets interviewed for this guidebook, we may need more micromanagement leading up to and during Q4 this year.

Micromanagement of supply chains, that is.

"Hyper focus on your supply chain," said one CPG professional, "and micromanage inventory, orders, and forecasts at every step in the supply chain."

Challenges create opportunities. Disruptions create advantages.

This year, with labor shortages, container shortages, and forecasting uncertainties, the supply chain has plenty of challenges and disruptions to go around.

"The global supply chain is so tangled and disrupted that those who are paying the closest attention and driving the highest urgency are the ones that will outperform," the CPG interviewee said.

Brands that micromanage the supply chain this year could be in-stock when their competitors are out-of-stock.

Talk about impacting Q4 sales.

“

The global supply chain is so tangled and disrupted that those who are paying the closest attention and driving the highest urgency are the ones that will outperform.



2 Shift Your Online Ad Spend

It may be an omnichannel world, but there simply isn't enough inventory right now to go around.

Shoppers are currently witnessing high levels of out-of-stocks online, and many retailers are prioritizing stock on shelves over stock at curbsides. Limited inventory, after all, necessitates hard choices.

But staying in-stock in the .com space is a serious matter for brands. Online retailers—Amazon, in particular—can hand out steep penalties to suppliers that don't stay in-stock.

Which brings us to a point about online ad spend.

As one of our CPG interviewees advised, don't simply set and forget your online ad spending, particularly during an unpredictable Q4 like the one ahead. If you're running low on inventory at, for instance, Amazon.com, then shift your ad spend to Walmart.com or another online retailer with plenty of stock.

“Don't waste ad dollars when you may run out of stock on a particular platform,” he said. “You are paying the [online retailer] to punish you when you run out of stock!

The name of the game in Q4 is inventory and savvy ad spending.”

Especially during times of high demand and supply-chain upheaval, carefully manage the dynamic between online stock levels, OOS penalties, and ad spend. They're linked—and a holistic approach to managing them will keep down costs and improve sales.

And here's a bonus tip: Keep an eye on your competitors' online stock levels. If they're OOS or running low, invest your ad spend there...and reap the rewards. This, according to our CPG contact, is what “smart manufacturers” do.

3 Replenish to the Finish

In Q4, it's probably too late to influence replenishment for the current year. The sales phase has come and gone; now we're in the execution phase.

But there is one part of the replenishment journey you, as a CPG professional, can impact even late in the season: "the last 100 feet," as it's sometimes called.

In the busyness of Q4, inventory can sometimes linger in the backroom rather than make its way efficiently to store shelves, endcaps, and displays. In other words, your products were delivered OTIF to the store, but they're not where shoppers can see and buy them. Shame.

"The last 100 feet is so crucial," said one of our CPG interviewees. "You can have the best program in the world, but it doesn't matter if inventory isn't right."

What can brands do about the last 100 feet? They can assign employees, hire merchandisers, or purchase crowdsourcing services to get product out of the backroom and onto the floor.

Which leads to another principle mentioned by our panel of CPG professionals...





4 Provide Your Own Labor

One CPG veteran summed it up nicely: “Labor is a real problem this year,” he said. “Stores can’t get folks to work. So, you may have to provide your own labor.” Labor for what? Well, for instance...

- Moving product from the backroom to the sales floor
- Cleaning up SKUs on shelves and displays
- Ensuring pricing and display compliance

This Q4, there’s potential for a “perfect storm” in B&M retail. What if high demand, high traffic, and labor shortages all collide? We’re talking about a scenario with potential for lots of oversight.

Out-of-stocks. Unkempt aisles and shelves. Inaccurate prices. Missing promotions, signage, and displays.

In this environment, harried store managers will, in many cases, welcome labor provided by CPG partners with open arms. With benefits to both brand and retailer.

While big brands often have the benefit of professional merchandisers, smaller brands might consider crowdsourcing services like those cited in the product guide at the end of this guidebook.

5 Get Serious About Compliance

Q4 is not the time to hide your eyes from the reality of what's happening in stores. During the sales phase, your team negotiated a program with the retail buyer, including, perhaps, specific pricing and promotional considerations.

But, especially during a wild and woolly Q4, operational realities don't always match programs as they appear on paper. The most common (and costly) offenders are perhaps prices, displays, and POS materials (analog and digital). In the chaos of Q4 retail, it's not uncommon to see, for instance...

- Incorrect prices on SKUs
- Missing or incorrect shelf tags
- Missing displays
- Displays stocked with the wrong product

Yet these were negotiated—in some cases, purchased—by your brand. You have them coming.

Taking quick action against mistakes made by retail partners, which may be isolated to one store or spread across many (if not all), can prevent a catastrophic loss of sales.

But you can't spot compliance issues if you don't look for them, and you can't fix compliance issues if you can't prove them to the retailer.

So, this Q4, be deliberate. Look for, find, and, working with your retail partner, fix operational problems—before they get out of hand.

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Taking quick action against mistakes made by retail partners can prevent a catastrophic loss of sales.

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Q4 INSIGHTS

Ultimately, it all comes down to the shoppers and spenders themselves. COVID, inflation, and the like are less important to Q4 retail than how shoppers respond to them. So how are shoppers feeling about Q4 2021 and key shopping events like gameday, Halloween, Thanksgiving, and Christmas? What are their intentions? We conducted two surveys to find out.

Q4 2021. For *better* or *worse*?

It was supposed to be a foregone conclusion that consumer demand and sentiment would come roaring back in time for Q4 2021.

But here we are...asking questions like, “Compared to Q4 2020, are shoppers feeling better or worse about shopping and spending in Q4 2021?”

That’s the question we posed to 1,100 U.S. adults*, all Field Agent app-users.

As you can see, virtually half (53%) of respondents said they’re feeling “better” about shopping and spending in Q4 2021 compared to last year. However, 19% indicated they’re feeling only “a little better,” while 17% said they’re feeling “much better.”

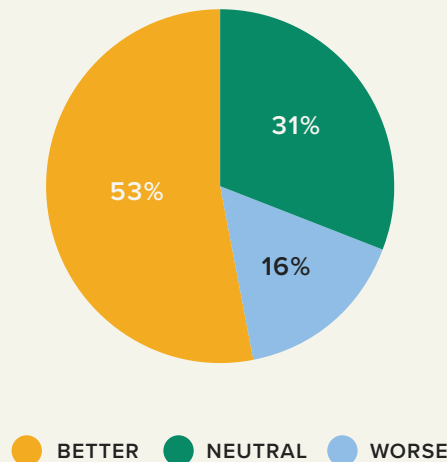
Good news altogether.

Yet it’s important to understand the reasons for such optimism, and to gauge whether this sentiment is liable

to change with circumstances.

Indeed, “less perceived risk of contracting COVID-19” was cited as the top reason for feeling better about Q4 2021 shopping/spending. Which begs the question: Could the Delta variant

Compared to last year, are you feeling better or worse about shopping/spending in Q4 2021?



eventually undermine this positive outlook?

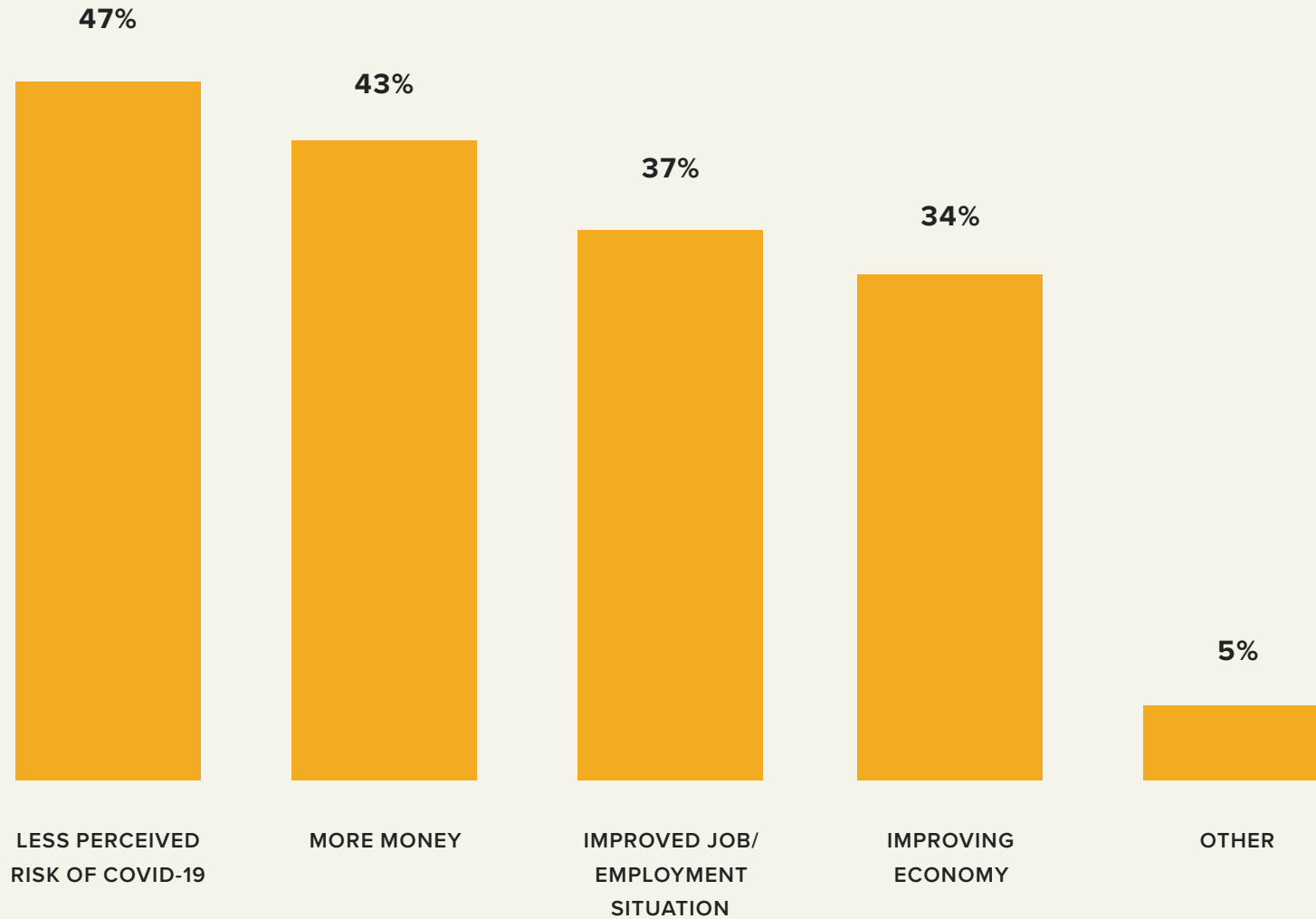
Among respondents who said they’re feeling worse about shopping/spending this year, fully 70% pointed at rising inflation for their pessimism.

But how does this translate to actual Q4 shopping events like gameday, Halloween, Thanksgiving, and Christmas?

Consider the insights to come...

*All survey respondents were U.S. adults at least 18 years of age and Field Agent app-users. The survey was executed exclusively through the Field Agent platform, August 20, 2021. Demos for the sample of 1,100: Gender - Female (74%), Male (26%), Age - 18-34 (36%), 35-44 (38%), 45-54 (18%), 55+ (9%); Household Income - < \$35K (15%), \$35-49K (16%), \$50-74K (21%), \$75-99K (18%), \$100K+ (22%), prefer not to say (8%). To make the sample more representative of the gen pop, Field Agent weighted the data by race, as follows: Race - Caucasian (63%), Latino/Hispanic (17%), African American (14%), Other (6%).

Why are you feeling *better* about shopping/spending in Q4 2021?

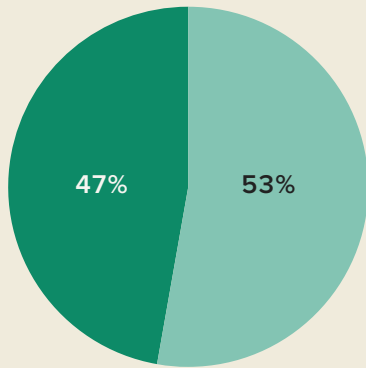


N = 567 RESPONDENTS WHO SAID THEY'RE FEELING "BETTER" ABOUT Q4 2021 COMPARED TO Q4 2020

INSIGHTS

Gameday Retail

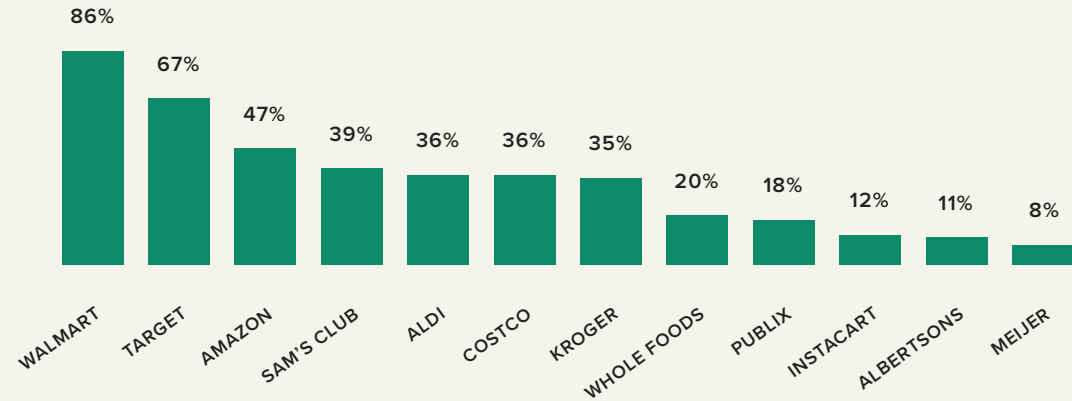
This year, will your household purchase merchandise/groceries to enhance your football viewing?



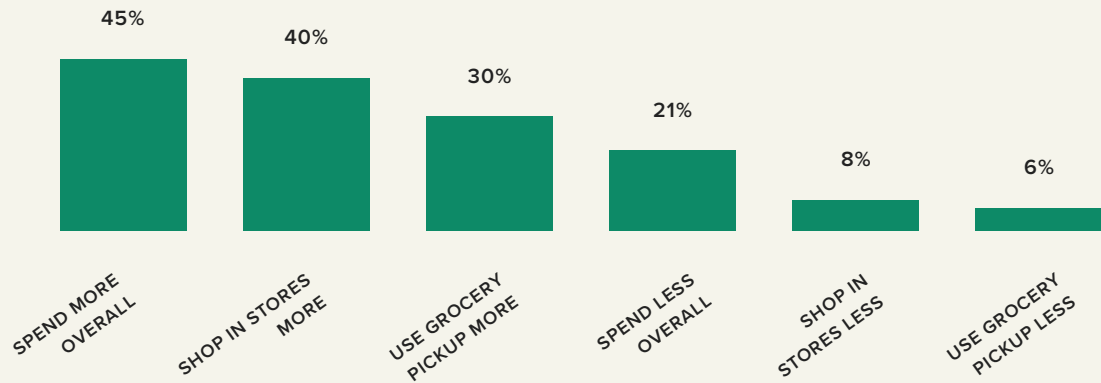
● YES ● NO

N = 1100

This year, from which retailer(s) will you purchase gameday merchandise/groceries?



In what ways, if any, do you expect your shopping and consumption of merchandise/groceries during football season to differ from last year?



N = 519 RESPONDENTS WHO WILL MAKE GAMEDAY PURCHASES IN 2021

33%

Hosted or attended a
football-viewing party
or tailgate last year
(2020) with people
outside their household

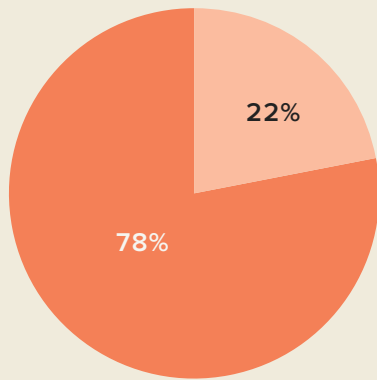
56%

Will host or attend a
football-viewing party
or tailgate this year
(2021) with people
outside their household

INSIGHTS

Halloween Retail

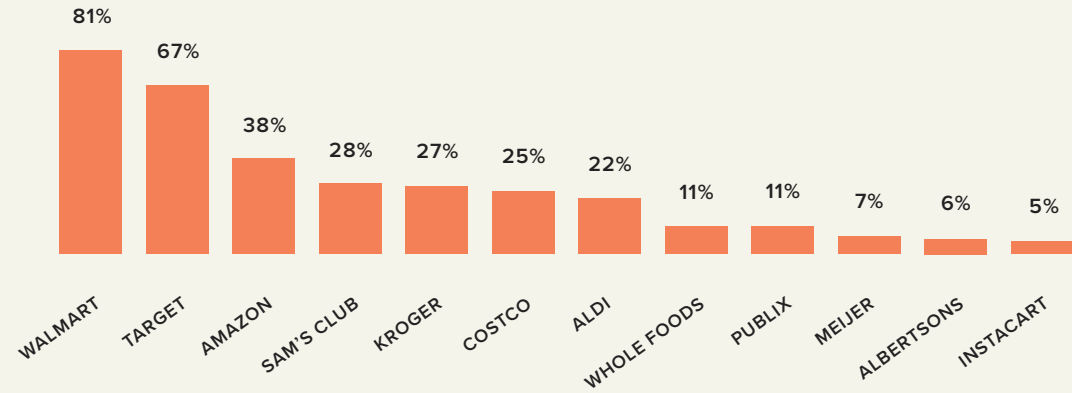
This year, will your household purchase merchandise/groceries/candy for Halloween?



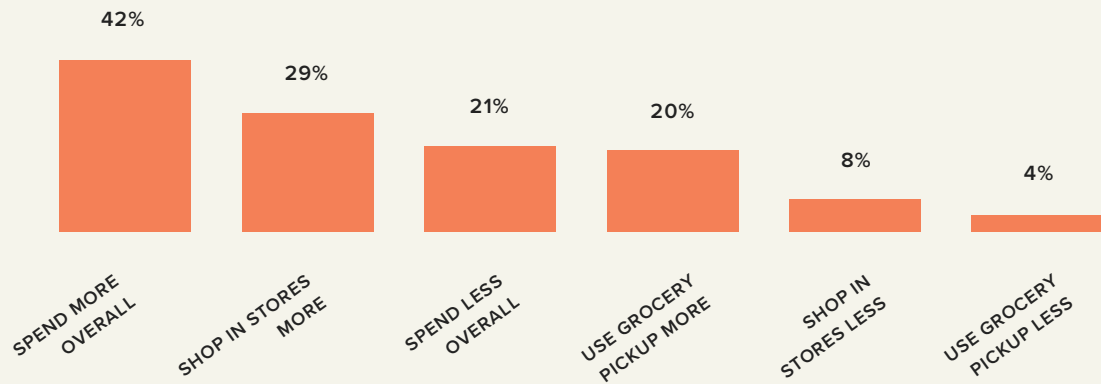
● YES ● NO

N = 1100

This year, from which retailer(s) will you purchase Halloween merchandise/groceries/candy?



In what ways, if any, do you expect your shopping and consumption of merchandise/groceries/candy for Halloween 2021 to differ from last year?



N = 857 RESPONDENTS WHO WILL MAKE HALLOWEEN PURCHASES IN 2021

49%

Passed out Halloween
treats last year (2020)

66%

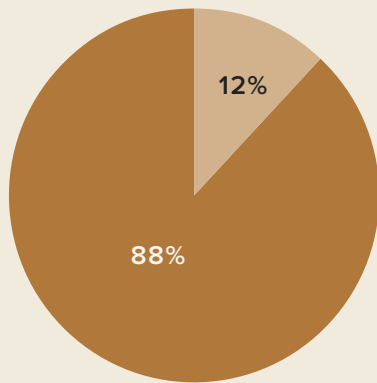
Will pass out Halloween
treats this year (2021)

N = 1,143 HOUSEHOLDS THAT OBSERVE HALLOWEEN

INSIGHTS

Thanksgiving Retail

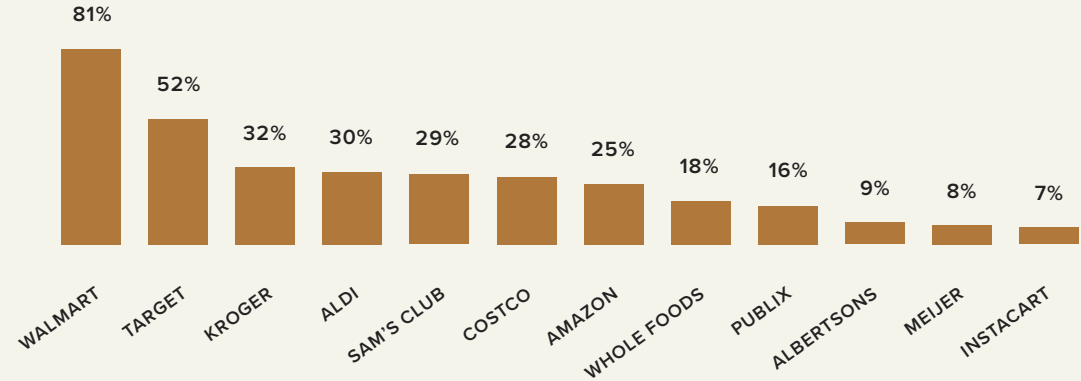
This year, will your household purchase merchandise/groceries for Thanksgiving?



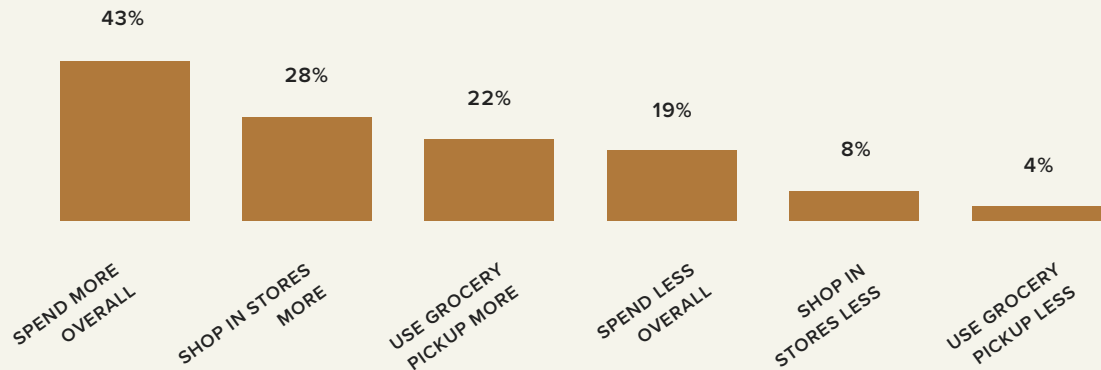
● YES ● NO

N = 1100

This year, from which retailer(s) will you purchase Thanksgiving merchandise/groceries?



In what ways, if any, do you expect your shopping and consumption of merchandise/groceries for Thanksgiving 2021 to differ from last year?



N = 941 RESPONDENTS WHO WILL MAKE THANKSGIVING PURCHASES IN 2021

51%

Hosted or attended a
Thanksgiving meal last
year (2020) with people
outside the household

72%

Will host/attend a
Thanksgiving meal this
year (2021) with people
outside the household

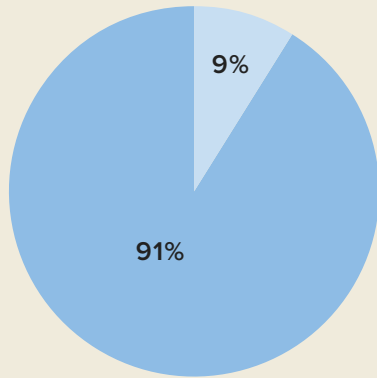
N = 1,231 HOUSEHOLDS THAT OBSERVE THANKSGIVING

FIELD AGENT™

INSIGHTS

Christmas Retail

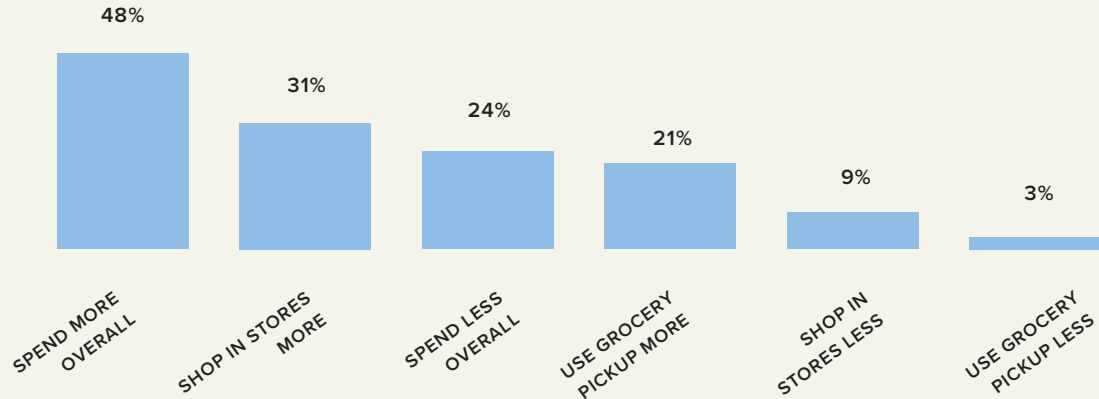
This year, will your household purchase merchandise/groceries/gifts for Christmas?



● YES ● NO

N = 1100

In what ways, if any, do you expect your shopping and consumption of merchandise/groceries/gifts for Christmas 2021 to differ from last year?



N = 983 RESPONDENTS WHO WILL MAKE CHRISTMAS PURCHASES IN 2021

28%

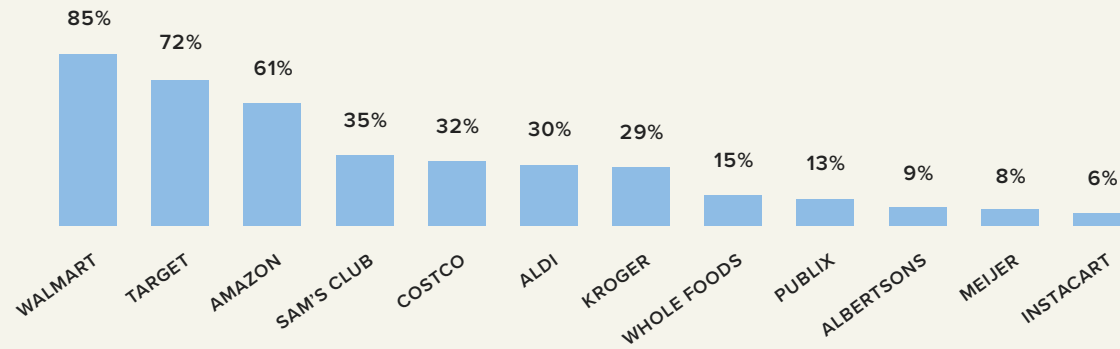
Expect to spend *more* on Christmas gifts this year compared to last year

24%

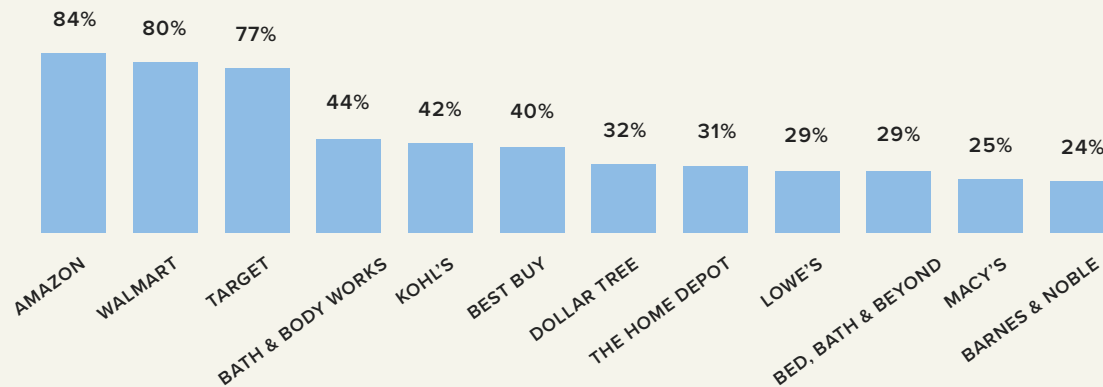
Expect to spend *less* on Christmas gifts this year compared to last year

N = 1,249 HOUSEHOLDS THAT OBSERVE CHRISTMAS AT LEAST IN PART BY GIVING GIFTS

This year, from which retailer(s) will you purchase Christmas merchandise/groceries – *not gifts*?



This year, from which retailer(s) will you purchase Christmas *gifts*?



N = 983 RESPONDENTS WHO WILL MAKE CHRISTMAS PURCHASES IN 2021

Shoppers Sound-Off About Q4

Now here's an interesting question: If given the chance, what advice would shoppers give companies about Q4 retail?

Well, Field Agent gave them that chance. We asked 1,100 shoppers, "Besides [lower prices and more sales], what can brands and/or retailers do in the final months of 2021 to earn more of your business for Q4 [holidays and events]?"

Below are the top responses, along with a representative quote...

Keep shelves well-stocked

"Have merchandise stocked early on. With so much unpredictability we are worried that if we wait too long, the stores will be wiped clean."

Get your online house in order

"Offer good sales online. Due to COVID again this year I plan to buy more online."

Protect your customers

"Ensure the safety of customers by implementing more measures to prevent the spread of COVID-19."

Get festive with ads and signage

"I love seeing new and fresh seasonal ads! It really gets me into the holiday spirit and makes me want to purchase more things for that specific holiday!"

Optimize that curb

"Be easily accessible. I shop using curbside pickup as much as possible."

Let them try before they buy

"Provide smaller samples (free or trial sizes) so one can try a product before investing too much money into it."

Unbox free shipping

"Make everything available online with low or free shipping cost. Being able to order from home makes all the difference whether I will buy something or not."

Think coupons and rebates

"I've found most of my current faves through coupons and rebate offers."

Enlist real shoppers for ads/reviews

"I seem to be more interested to buy products that have been reviewed by normal, everyday people and not actors in commercials."

Q4 TOOLS

It sounds like something dad would say, but the right tools make all the difference. CPG professionals sometimes don't realize the breadth and depth of tools available to help them win Q4 sales. And even when they do, they may not know where to start. Not a problem this year. You can start with this Q4 Product Guide.



The Q4 Product Guide

Ever seen someone pounding a nail with the heel of a shoe? If so, you probably had a thought like, “How much easier this would be with the right tool.”

Q4, too, is easier with the right tools.

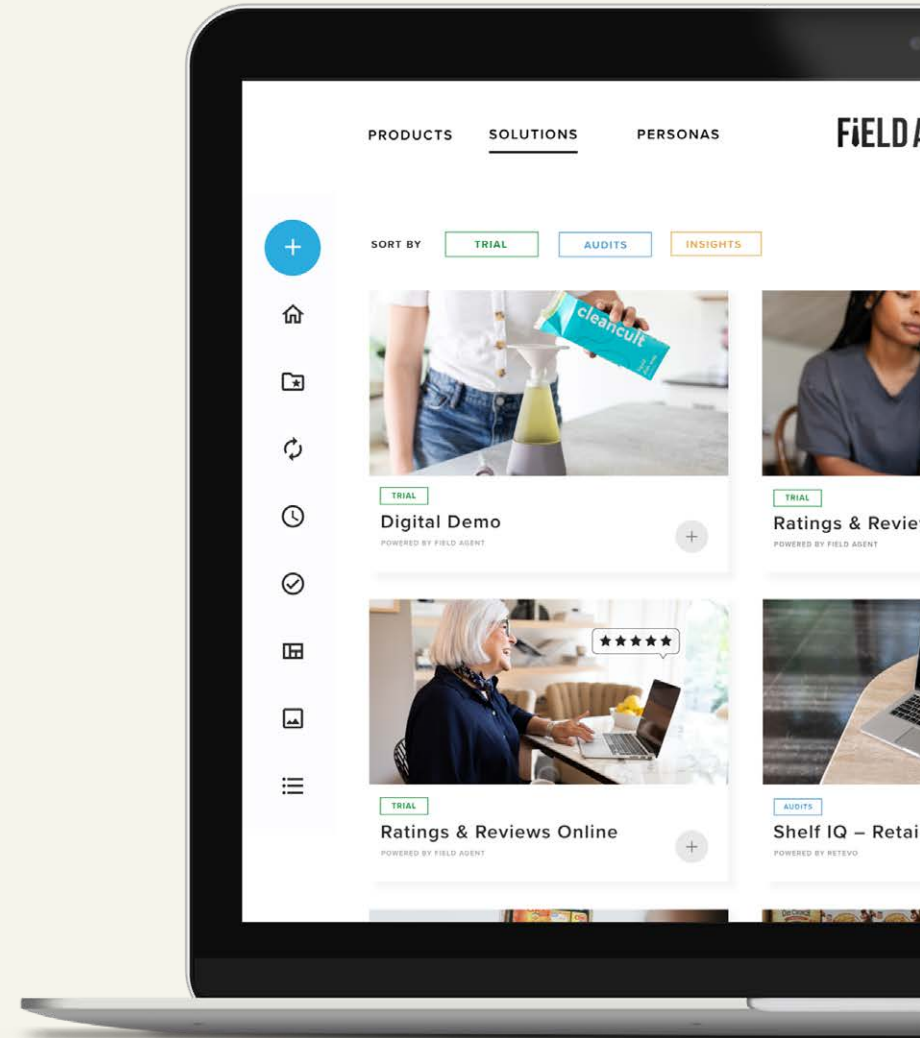
The Field Agent platform, created by CPG professionals for CPG professionals, is designed to give brands the tools they need for Q4 success—all in one convenient location.

Our marketplace contains a host of auditing, marketing, insights, and merchandising tools to help CPG companies win during Q4 and throughout the year.

On the coming pages, we offer a **Q4 Product Guide** to help you quickly locate, learn about, and execute the right tools to wage a successful **Q4** campaign.

Here’s to *your* Q4 success.

[LEARN MORE ABOUT THE FIELD AGENT PLATFORM →](#)



In Q4, I need to...	Explanation	Field Agent Product Recommendations
Check that displays and signage are on the floor and properly executed	Space is everything in Q4, which is why displays and signage are so important. But understaffed retail partners, in the thick of the Q4 frenzy, may not execute your displays or signs properly (or at all). It's wise to protect your investment by checking up on them.	<ul style="list-style-type: none"> ✓ Display Compliance ✓ Signage Audit ✓ Digital Display Ad Compliance ✓ Seasonal Display Execution <small>COMING SOON</small>
Ensure prices on my SKUs are accurate	Shelf tags and displays don't always reflect the right price, a potentially costly error that may be confined to a few stores or widespread over many stores. Ensuring the price is right can be a Q4 gamechanger.	<ul style="list-style-type: none"> ✓ Price Check
Locate out-of-stocks and/or low-stocks for my products	An out-of-stock is a tragedy in Q4—lost sales, frustrated shoppers, perturbed retailers. Particularly in an environment of supply chain uncertainty, it's a good idea to be proactive about looking for, identifying, and fixing OOSs.	<ul style="list-style-type: none"> ✓ On-Shelf Availability
Generate ratings and reviews to drive sales	You're hoping to make a splash online this Q4. Unfortunately, your product pages contain few to no reviews. Take the initiative on generating reviews, especially when a lot is at stake.	<ul style="list-style-type: none"> ✓ Ratings & Reviews <small>IN-STORE PURCHASE</small> ✓ Ratings & Reviews <small>ONLINE PURCHASE</small>

In Q4, I need to...	Explanation	Field Agent Product Recommendations
Generate immediate sales in specific stores or markets	For many reasons, brands sometimes “seed” sales in specific markets, at specific stores, or on specific sites/apps. In such cases, brands can enlist shoppers to purchase their products—where it matters most.	<ul style="list-style-type: none"> ✓ Buy & Try ✓ Digital Demo ✓ Ratings & Reviews <small>IN-STORE PURCHASE</small> ✓ Ratings & Reviews <small>ONLINE PURCHASE</small>
Check up on a single item to ensure proper in-store execution	Maybe a lot is riding on one of your SKUs this Q4. It’s a good idea, then, to check up on it, including its on-shelf availability, price tags, shelf positioning, etc.	<ul style="list-style-type: none"> ✓ Item Checkup
Restock shelves with inventory from the backroom	Are your SKUs out-of-stock, but inventory is available in the backroom? The last 100 feet can be a doozy during Q4. “Provide your own labor” during important selling events, and make sure your product gets from the backroom to the floor.	<ul style="list-style-type: none"> ✓ Shelf Management <small>COMING SOON</small>
Tidy up the inventory on shelves or displays	Shelves and displays can get messy and disorganized in Q4. A little light merchandising—product rotation, shelf-tag maintenance, inventory assessment—can go a long ways.	<ul style="list-style-type: none"> ✓ Lite Merchandising – Product Care Visit

In Q4, I need to...	Explanation	Field Agent Product Recommendations
Understand Q4 categories, planograms, prices, and competitors	Use this Q4 to win next Q4. Now is the time to document categories, planograms, and programs, to lay a solid foundation for future Q4 success.	<ul style="list-style-type: none"> ✓ Category Overview Photos ✓ Planogram Visibility ✓ Price Check
Find on-shelf merchandising opportunities and problems	Don't leave opportunities and cost-savings on the shelf this Q4. Commission an analysis of your on-shelf products, then identify ways to improve your Q4 performance.	<ul style="list-style-type: none"> ✓ Shelf IQ – Retail Smarter
Understand the attitudes and behaviors of Q4 shoppers	Shopping looks different in Q4. Stores are busier; merchandising and promotions look different; shoppers are driven by different priorities and attitudes. Now's the time to understand the Q4 shopper.	<ul style="list-style-type: none"> ✓ Shoalong
Evaluate planograms and categories after the holidays	The post-Q4 is important, too. Lots of merchandising, including planogram resets, happen right after the holidays. It's a smart idea to get your bearings on the new retail environment immediately following Q4.	<ul style="list-style-type: none"> ✓ Category Overview Photos ✓ Planogram Resets

New Products for Q4

COMING SOON TO THE FIELD AGENT MARKETPLACE



Seasonal Display Execution

This new product will determine whether your seasonal displays are properly executed in stores. If they aren't, we'll fix them for you!



Seasonal Category Photos

What are your competitors up to this Q4? Are they lining stores with seasonal displays, signage, and/or other POS materials? This product can show you.



Seasonal Display Photos

Displays drive sales. So, what's going on in your category? This product will capture all displays and signage for a particular category...so you can stay in the know.

DO MORE IN Q4

The right tools make all the difference, whether you're a plumber working on a leaky faucet or a CPG brand striving to win Q4.

The Field Agent retail-solutions platform features a full suite of tools to help your brand make the most of crucial shopping seasons—putting stores, shoppers, and even sales all within arm's reach. Throughout Q4, you're just a few clicks, a few minutes, and a few dollars from the tools you need to win at retail.

Click below to sign-up for the Field Agent platform or to request a free demo.

[VISIT THE MARKETPLACE →](#)

[SCHEDULE A FREE DEMO →](#)

