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# Grocery Store Assessment

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This tool allows a storeowner to self assess successful business practices.

Grocery Store Assessment

Directions: The grid below is organized in columns and rows. The first column includes target categories that can determine business success. The columns to the right create a row for each category that offers a spectrum of developmental insights.

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| --- | --- | --- | --- | --- |
| CATEGORY | Developing | Organizing | Advancing | Excelling |
| Product supply | Offers product undesired by consumer and often wasted, lack of consideration given to market audience | Listens to consumer demand when selecting some product, randomly surveys customer needs | Listens to consumer demand when selecting most merchandise, surveys customer needs periodically and consistently | Maintains a supply of product that consumers demand, Takes ongoing inventory of customer needs, Special order product by demand, Utilizes world-wide market through web presence |
| Pricing | Prices derived from unrecognized source creating unreasonable prices | Merchandise offered at a price where a profit margin allows minimal growth | Product offered at a price where a profit margin allows for some growth | Offers product at reasonable prices while maintaining a profit margin that allows for growth |
| Promotion and Advertising | Customers traffic store without seeing everything available, little communication with community, no web site, no social meetings, no niche market | Store layout has been identified as need and some changes have been made to expose product to customer’s radar, occasional or inconsistent communication occurs with community, social meeting times have been identified as need and events are being coordinated, a niche market exists | Layout of store controls most traffic yet a some product remains hidden from customer’s radar, communication with community is consistent but infrequent, web presence has been identified as need and some development has begun, a niche market exists and is often promoted, social events are coordinated | Layout of store controls traffic to heighten awareness of product availability and increases chances for upsale, engages community frequently through advertising or other form of communication, fresh web presence, offers opportunities for social meeting times, promotes a niche product |
| Merchandising | No signage throughout store, inconsistent or no theme, drab or tacky coloring, dim lighting, unappealing or no end caps | Some signage to indicate locations or sections, consistent colors, improving lights, offering end cap selections, matching complimentary products | Consistent signage but outdated appearance, consistent colors, identifying a theme, well organized and maintained end caps, matching complementary products | Consistent and eye appealing signage throughout the store, signs indicating sections, consistent colors and theme, eye catching end caps, matching complementary products, presents to customer an opportunity to add to their list |
| Food Safety and Sanitation | Product may sit for extended period of time before stocked, lack of awareness and use of sanitary procedures, coolers lack temp control, shelves unkempt | Product sits after unloading until time available, awareness of sanitary procedures but rarely followed, recognize importance of consistent temperature control in coolers, understand value of facing product on shelves | Receiving procedures often followed, awareness of sanitary procedures and often followed, implements documentation system for temperature control in coolers, shelves often well stocked/ well faced | Receiving procedures posted and followed, sanitary work methods posted and followed, temperature in cooler maintained at appropriate level at all times and documented, well stocked/well faced shelves |
| Inventory Management | Gauges trust with food representative and food distributer, Recognizes value of inventory awareness, Understands rationale for product rotation | Considers suggestions from food representative, creates a system that documents expiration dates and regulates inventory, rotates product by using first in first out philosophy | Follows suggestions from food representative, product awareness systems become common place, begins proactive thinking to create opportunity, looks at ways to diversify to decrease loss | Utilize storage space, take advantage of sales, promote the complimentary products, uses the awareness systems not only to regulate the eb and flow of inventory but to create intentional profit opportunities and promote trends, |
| Variety of Product | Meeting the minimum food order with limited product choice | Analyzing and targeting product areas based on inventory patterns so as to provide product choice | Testing and monitoring customer selections of available variety, cultivating relationships with local suppliers, recognizes opportunity for customers to have access to seasonal items | The greatest available variety to meet customer needs, features seasonal and trendy items |
| Customer Service | Staff lacks concern towards customer need, slow check out procedures, customer bags and carries purchase to car, improper bagging techniques used, customer loyalty is low | Staff acknowledges customer, staff responds to customer needs when available, checkout identified as priority and backup checkers available, bagging and carryout service offered when requested, some bagging techniques are implemented | Staff routinely greets and thanks customers, staff responds to customer needs and is often available, checkout often fluid and quick, bagging and carryout service offered when available, often proper bagging techniques are used | Staff authentically greets and thanks customers, staff proactively assists customers, short lines at check stands, efficient and courteous checkout, bagging and carryout service, always proper bagging techniques, offer services that entice customer loyalty |
| Equipment/Technology | Collecting information about on-site energy assessments, open to recommendations that target cost-effective improvements to maximize their investment, access the security of information systems | Using energy data to set goals for equipment upgrades, Discovering resources and/or managing current resources for energy efficient upgrades, recognizes technology as a human resources solution, explore PCI compliance options to meet assessed needs | Purchasing energy efficient equipment, researching technology matches for efficient and cost effective check-out procedures, install PCI compliance option that provides adequate security with a reasonable purchase plan | Own energy efficient equipment, provides efficient check-out procedures, PCI compliant |
| Long term/ Succession Planning | Sets long term goals for the legacy of the business, identifies strengths and weaknesses of individual(s) in succession | Creates an organizational chart that shows the structure of the organization, profit timelines and assets and provides a framework for stakeholders, recognizes the importance of educating and empowering stakeholders | Provides stakeholders with opportunity to gauge profitability of business and takes inventory of resources that will assist in achieving goals, complete a SWOT analysis | Receives buy-in from stakeholders, Operates under a succession timeline with good communication, succession system provides for transition ease and tax advantages |
| Business Management | Lack of employee accountability, purchases food individually to stock shelves, owner lacks associations to increase business understanding, understands the importance of staying below a 2% industry average loss | Inconsistent employee responsibility and reporting, lack of or inconsistent communication, develops written document of expectations and procedures, aware of associations available to increase business understanding, takes steps to regulate shrinkage | Employees with managerial duties report with open communication, cultivates teamwork attitudes, systems in place to hold all employees accountable to expectations and procedures, trying out different associations to increase business understanding | Keeps thumb on pulse of business to manage purchasing, labor, overhead, insurance needs, Cooperates with other local food business or maintains several stores to decrease wholesale costs, utilizes collective voice of Kansas Grocers Association, maintains a profit margin that allows for growth and expenses |
| Accounting | Behind on books and statements, behind on billing, recognizes value of scheduled data entry and technology, finds hidden costs in banking system | Implements a schedule of data entry and data collection, recognizes what data needs to be collected and documented daily, weekly and monthly, includes banker in conversation | Maintains a consistent system of data entry, system allows for observations of sales within different categories, open dialogue with banker exists | Accountability systems keep data entry schedule consistent and books in shape, goal setting occurs using data, relationship with banker offers incentives |
| Community Connection | Offers little if any opportunities for connection to organizations within the community | Researches chamber or networking organizations, recognizes store as having a role in the social and economic weavings of a community | Participates in chamber or networking organizations, assesses store’s role in the community, prioritizes efforts of civic groups | Creates a space for community interaction, plays an accurate role in the community, educates customers about products, initiates networks and partners with community organizations , supports efforts of civic groups |