



Tools of the Trade: 10 Must Have Documents to Have Ready For Your Distributor

BTN has put together a list of 10 must-have documents to have with you for your next meeting with your distributor.

Every distributor is different and every sales meeting is unique. It doesn't matter if it's your first elevator pitch or a routine sales meeting, before you enter your distributor's board room you should be prepared for anything. Sample contracts, order sheet forms, sales literature cheat sheets - these are all essential documents to have on hand, but what else should you carry with you when you are called in for a meeting?



Here is a List of 10 Most Important Documents

1. Sample Contract



If it's your first meeting, or the all-coveted first follow-up meeting, having a sample contract with you is critical. Most distributor's will have a stock contract available if you don't have one, but having your own shows that you know what it means to do business.

Putting the time into drafting your own contract will also give you the chance to really understand the implications of what your new partnership means. Setting down what you think to be realistic goals for your company (and that of your distributor) will give you a solid understanding of the technicalities of your distributor-supplier contract. Knowing what to look for in terms of fair brand territory agreements and sales initiatives is valuable knowledge.

If this is a routine follow up, be sure to have a photocopy of your distribution contract with you to review your terms and compare notes on the benefits and drawbacks to both you and your distributor of your current contract.

sample beer distribution contract

2. Order Sheet Form, Including Pick Up Location and Vendor Set Up Details



Order Sheet Forms are absolute necessary, these will ensure your distributor can replenish your orders. Include information on your Pick Up Locations and Vendor Set Up details. Make sure to include all of the appropriate details (ask the requirements ahead of time so you are prepared) for each and have a few forms available to leave with your distributor so that he can add them to your file. If you have digital copies of your forms, be sure to send them in a follow up email.

sample order sheet

3. Credit Forms and Other Account Set Up Documents like Personal Guarantee:

These forms are necessary to create an account with your distributor, do credit checks and protect your payments from a non-paying customer. A Personal Guarantee is good to have if payments don't go through; you want to have these docu-



ments in good standing so that you will ultimately be paid for your product. In order to prevent any problems when creating your account with your distributor, have these documents along for your distributor to sign off on.

credit app

4. Sell Sheets



A professionally produced sell sheet should be a one page print out that is simple and effective. Think of it this way: when your distributor thinks of your label's branding, your intention is that your sell sheet pops into his head as easily as the logo of a multinational brand's would. Your brand name should be the main focal point and easily recognizable. A product image should also be highlighted. The colors you use should reflect your marketing and branding. Include basic information about your product, but it should only act as supportive marketing. Don't put a lengthy 10 line paragraph explaining the rich history of your brand, instead use a few bullet points that point out your strengths in the industry.

wine sell sheet example

5. Sales Literature

Your Sales literature should include detailed information about your brand (or brands.) This means including all of the pertinent information about your product. Production process, origin of ingredients, ingredients, tasting notes, packaging information, awards, reviews, legal compliance to state and federal laws, etc; include any useful information that you, your customer, or your Distributor might ever need to reference.

6. A Powerpoint On Key Selling Points - Focus on how their sales team should be able to sell

Have a hard copy of your presentation with you. This way your distributors can follow along and make notes as you are speaking. Your presentation should cover all the easy selling points of your company. Give your brand a story and spotlight the high points. If your winery is rich in history, now is the time to use it. If your new distillery uses state of the art technology then here is where you can highlight your new techniques.



The idea is to promote your brand so that your distributor can see it relating to costumers and bringing in sales. They will refer to this same power point as their blueprint to getting your product into retailers.

7. Support Program Summary

Most distributors ask for the supplier to provide a marketing support program as a necessary condition to carrying the new brand. They are expecting that you provide tastings, in store merchandising and in house marketing to ensure stock depletion and subsequent order refills at the retail level. Have a summary showcasing your tasting teams and any other programs you are willing to offer.

8. Depletion Report

Follow up on your retail depletion reports with your distributor. Together, you can review them and see where they think you have excelled and what areas you need to work on. They will have tips on what you can do to increase your sales, suggest making market shifts or help you take full account of your current position in their portfolio.

9. Overview Cheat Sheets

Bring along an Overview of your Brand. Take all of your current brand information and put together a cheat sheet to give your distributor an easy reference card to refer to. Keep it simple, easy to read and on one sheet. Tell you distributor that if they need to field any questions from customers or retailers that they'll find them in your cheat sheet. Include your Business Card with it so they can call you with any questions.

10. A Thank You Letter

Thank You letters go a long way. If you are just meeting with your distributor for the first time, it is good practice to include a letter thanking the distributor for their time and expressing your gratitude for the opportunity. Regardless of it will be a deal clincher or not, the Thank You letter is a way of showing that above all else you are willing to work hard. Make the letter as professional as possible, while also being human.



Address them by their name and make note of a few ideas you really want to have stick in their head, but don't sound like you are still preaching your product. Sign off with friendly remarks and include the letter at the top of your documents that you leave behind.



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