# NATURAL PRODUCTS FIELD MANUAL

Newly revised, updated, expanded <u>Ninth Edition</u>
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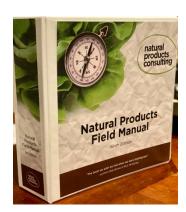
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"If the Natural Products Field Manual doesn't save your firm tens of thousands of dollars, or garner you many more thousands in revenues, then save yourself the trouble and close your business. The problem lies with you, not the authors. This compendium is an invaluable gem."

Gary Hirshberg, Co-founder, Stonyfield Organic

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# Acknowledgements

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Author	Company	Торіс
Dick Albu	Albu Consulting	Guidelines to strategic planning
Lex Alexander	Whole Foods, retired	View from the Food Guy
Anonymous	Anonymous	Anonymous interviews with key retailers on how they select items, the influence of the broker and characteristics of successful companies
Rick Antonelli	Former President, UNFI	How to best work with a distributor sales force
Dan Atwood	Former E.V.P., CMO, President, United Natural Brands, , UNFI	How national distributor deals can drive business
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Bruce Kirk	Former Director of Sales Florida Crystals	Consultative selling
Matt Koch	The Turnlink Sales Manager	Sales Force Automation
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Dan Lohman	Category Management Solutions	Category Management
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Travis Tabor	Former CEO, Advantage Sunbelt	What makes for a great principal
Robbie Thain Nicole Koch	Makai Events	Special events marketing/field marketing
David Thibodeau	Wellvest Capital	"Investment banking" valuation drivers
Phil Tozzi	Phil Tozzi & Associates	Reviewing Your Brokers-the correct approach
John Troy	Wizard's Cauldron	The private label opportunity
Art Volkman	The Volkman Group LLC	Executive Search
Jay Vogt	Peoplesworth	Successful off-site planning/sales meetings
Bill Weiland	CEO, Presence Marketing	The role of the broker; Monthly Newsletter Updates
Lisa White	VP Operations, Alter Eco	The A, B, C's of Co-packing
Andrew Whitman	Managing Director, 2X Consumer Product Growth Partners	Navigating a FinancialTerm Sheet
Kevin A. Williams	Pure Branding, LLC	How to get the most out of your packaging
Scott Van Winkle Jennifer Duval	Cannacord Genuity	"Investment banking" valuation drivers

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#### **Bob Burke**

As a consultant since 1998, Bob Burke provides assistance in bringing natural, organic and specialty products to market across most classes of trade. This includes work in strategic planning, growth strategies, writing sales, marketing and business plans, budgeting, pricing, building distribution, broker selection and management, organizational development, strategic options, financing, branding, trade spending management and assistance around M&A, due diligence and venture strategy groups. He is also the co-author and co-publisher of the *Natural Products Field Manual, Ninth Edition*. Prior to consulting, Bob was with Stonyfield Farm Yogurt for 11 years as Vice President, Sales & Corporate Development and Vice President, Marketing & Sales. He has held marketing positions with Colombo, Inc. and Sperry Top-Sider. He received an MBA from Babson College.

Clients: Have had the privilege of working with and learning from exciting companies such as: Annie's Homegrown, Oregon Chai, Snyder's of Hanover, UNFI, Kraft Foods, Bayer Consumer Care Division, ConAgra, Kellogg's, General Mills, Stacy's Pita Chips, Kettle Cuisine, Small Planet Foods, New Hope Natural Media, Bushes Beans, Equal Exchange, Stirrings, Immaculate Baking, Dr. Bronner's Magic Soaps, Dancing Deer Bakery, The Natural Dentist, Rice Select, EcoFish, PMO Wildwood, S.C. Johnson, Blake's All Natural Foods, Megafood, Mighty Leaf Tea, Lesser Evil Snack Co., Theo Chocolate, The Jane Goodall Institute, Kashi, Project 7, Vermont Butter and Cheese, Yoghund, Bord Bia, American Halal, Orgain, Turtle Island, the W.K. Kellogg Foundation, Bausch + Lomb, Boehringer Ingleheim, Harbar LLC, Rhino Foods, Popcorn Indiana, Stonehouse 27, The ProBar, Hail Merry, Mamma Chia, 479 Popcorn, Heel USA, Nature's Path, Pfizer, Dave's Gourmet, Sopexa USA, Mavea, New Zealand Trade & Enterprise, Bob's Red Mill, New England Natural Bakers, Quantum Health, Jeni's Splendid Ice Creams, Califia Farms, Salem Baking, Taza Chocolate, Integria, Traders Point Creamery, NutPods, Glanbia Ingredients, Valio, Fazer Chocolate, Cali'Flour, Curaleaf CBD, Fora Foods, Mason Dixie Biscuit, Vive Organics, and others.

He currently serves as an outside director for EcoFish, Saffron Road, Halsa Foods, Cali'Flour Foods, Uncle Matt's Organics and King Arthur Flour. He serves on the advisory boards of The Chaat Co., and Soapbox Soaps. He is a former director of Orgain, Stonyfield Farm, Equal Exchange, Stirrings, Wildwood, Nutrabella, Farmwise, MegaFood and the Specialty Food Association. He is on the Selection Committee at Nutrition Capital Network. He serves on the admissions committee of the Specialty Food Association. He also serves on the Editorial Advisory Board of Nutrition Business Journal. He serves as a Beachheads Advisor with New Zealand Trade & Enterprise. He is on the board of the Hirshberg Entrepreneurship Institute, a 501(c)(3) organization. He is also on the board of advisors of the Boy's and Girl's Club of Lawrence, Massachusetts.

Bob was named one of the "Top 25 Business Builders of the Natural Products Industry for the last 25 years" by Natural Foods Merchandiser Magazine. He was also named an inaugural Senior Fellow at Food Sol, within the Lewis Institute at Babson College.

He has been qualified as an expert witness in federal court on the subject of the sales and marketing of natural, organic and specialty products.

Bob has delivered presentations, seminars and moderated panels at leading trade shows and conferences such as Natural Products Expo East & West, The Specialty Food Association's Winter and Summer Fancy Food Shows, OTA's "All Things Organic Trade Show and Conference", Naturally Good Business Summit in Sydney, Natural Good Expo trade show in Sydney, Australia, Nutrition Capital Network, International Keynote speaker at Innovest in Auckland, New Zealand, Natural Products Europe in London, Bord Bia in Dublin, Canadian Consulates in Boston and Chicago, Quebec Delegation in Boston, Kosherfest in New York, The Soyfoods Conference, Agrifood Trade Services in Nova Scotia, Saskatoon and Quebec, the CHFA Expo East in Toronto, BevNet Live, Project NOSH and their Boot Camps in New York and Santa Monica, the Global Access Advisors conference in Melbourne, Australia, the National Health Store Conference in London, and New Zealand Trade & Enterprise educational programs throughout New Zealand. He is also a presenter and panelist at the Hirshberg Entrepreneurial

Institute Boot Camp in Auckland and Boulder. He authored the Specialty Food Association's White Paper on Trade Promotion. Also interviewed on the Product Launch Rebel Podcast and the BevNet's Taste Radio Podcast both found on iTunes.

He also runs full day seminars and networking events on "Becoming a more Effective Sales Manager in the Natural and Specialty Channel", "Financing your Natural and Specialty Products Company" and "Making Your Supply Chain a Business Strength". For complete info, please visit <a href="www.naturalconsulting.com">www.naturalconsulting.com</a>.

Bob lives in Andover, MA with his wife, Kathy and spoiled dog.

### **Rick McKelvey**

Rick brings over thirty years of experience within the natural products industry, most recently serving as outsourced sales and marketing for emerging brands. For over ten years, Rick has steered O'Doughs, Ltd. through the maze of building a rapid growth, yet profitable, business within the gluten free and allergen-friendly space. Rick has expanded the O'Doughs brand from limited Canadian retail distribution to 80% ACV north of the border, and 30% ACV in the U.S., including distribution in 8 of the Top 10 conventional retailers. Within the food service segment, O'Doughs has gained placement in Canada with all major distributors, Air Canada, and continues to build out its' end-user base of restaurants and institutions. In the U.S., Rick secured and launch the 1st national gluten free private label program with the #2 food service distributor. With the recent launch of the "Allfree" brand, Rick is now turning some of his attention to entering the world of convenience, airlines, colleges/universities, travel, corporate...any segment that can benefit from an allergen free snack line. Rick is most proud of his role as mentor and friend to the owner and his family, while making the tough decisions that keep emerging brands (and entrepreneurs) in line.

Prior to his outsource roles, Rick served as president of The Natural Pasta Company, DBA Putney Pasta. Under Rick's direction, Putney Pasta transitioned from self-manufacturing to a co-pack model and expanded from a regional frozen-filled pasta manufacturer to a national footprint with the launch of the first line of all-natural frozen skillet meals.

Prior to Putney Pasta, Rick was Director of Sales for Fairfield Farm Kitchens where he spent five years launching over 40 frozen organic entrees and fresh organic soups. The company emerged as the #1 national brand of organic meat-based entrees and organic fresh soup with annual sales of \$6 million. Fairfield Farm Kitchens was sold to Blue Marble Foods, the branded division of UNFI, Inc.

Rick' early years were spent as Vice President of Sales and Marketing with Lightlife Foods, Inc. He joined the husband and wife-run business as its first Sales Manager at less than \$1 million in sales. Rick's creation and implementation of growth plans resulted in the profitable expansion of sales to \$25 million, and eventual sale to Con Agra Foods. Under Rick's leadership, Lightlife became the number one fresh meatless company (vegetarian hot dogs, luncheon "meats," sausages, etc.), with nationwide distribution through natural product outlets. Rick also successfully navigated the "cross-over" of the brand into the supermarket trade nationally, becoming the top-

selling fresh meatless brand in the U.S. Rick also led the company's efforts in Lightlife's food service, private label, and international business.

Rick has served on the board of Vermont Smoke and Cure, as president of the Soyfoods Association of North America, in the community as board member of his local Y.M.C.A. and has served several executive positions within his church. Rick is also co-founder with Bob of the G.E.N.A. Share Group and holds an MBA from the Isenberg School of Management. He lives in Conway, MA, where he cherishes his family time with his wife of 30 years, Lynn, and his children, Matthew and Meaghan. Rick loves working with, and mentoring, Matthew, the 2<sup>nd</sup> generation McKelvey working in the natural industry.

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#### **About the Enclosed Flash Drive**

The enclosed Flash Drive contains the following:

All directories are Microsoft Excel unless otherwise noted

- 1. Complete natural food store list segmented by "A, B" stores (Top ~2300) Stores are listed in Microsoft Excel format for easy sorting and manipulation
- 2. Directory of Key Natural/Specialty Distributors (Policies, Programs, and New Item Paperwork)
- 3. Directory of Key Natural/Specialty Brokers (Policies, Programs, and New Item Paperwork)
- 4. National Retailer Account Tracker: This Excel spreadsheet of U.S. Conventional and Natural Chain Accounts includes number of stores and distributors servicing. Useful spreadsheet for setting account priorities, tracking progress towards placement and capturing placement gains.
- 5. Top 75 Supermarkets 2020 [Supermarket News, 2020]
- 6. Sample Broker Contract
- 7. Sample Sales and Marketing Budgets
- 8. Sample P&L models
- 9. Basic breakeven calculations
- 10. PR Database
- 11. "One Page Strategic Plan" by Gazelles.com
- 12. 9th Edition Updates