

# Volume 1: The Basics

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## Acknowledgements

In addition to the unflagging support from their loving families, the authors wish to acknowledge the following for their support and incredible insights, experiences and wisdom shared by our over 50 outside contributors

Author	Company	Topic
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 your business
Elizabeth Bertani	Former VP Marketing, New Hope Natural Former Media	Why trade advertising is a great investment
Phil Bicknell	USDA/FAS London	Overview of the U.K. Organic Opportunity
David Butterfield	Former CAP Program Coordinator	The CAP Program: the cooperative marketing Opportunity
Tom Clough	Health Strategy Consulting	Strategic partnerships
Cory Comstock	Former CEO, Oregon Chai	Making the transition from a founder-led, entrepreneurial team to professionally managed organization
Wayne Davey	RML Naturals	Is outsourcing your sales effort right for you?
Steve DelBonis	Matrix Sales & Marketing	Managing trade funds
Katherine DiMatteo	Former Executive Director, OTA	Why you should get involved in a trade organization
Patrick Rea	Nutrition Business Journal	Industry overview
Ginny Flower	Former Marketing Manager, Natural Health Magazine	Building your brand through advertising
Mona Frey	MoonsStone Business Solutions	Regional Sales Management 101 The Basics of Trade Spending
John Giannuzzi Mary Damkot	Sherbrooke Capital	Venture capital: raising financing in the natural products industry
Spencer Hapoienu	Insight Out of Chaos	Utilizing your consumer database

Gary Hirshberg	CEO, Stonyfield Farm	How to build a relationship with your consumer
Guru Dhan Singh Khalsa	Former CEO, SGN Sales and Marketing	The financial realities of building successful natural brands
Bruce Kirk	Former Director of Sales Florida Crystals	Consultative selling
Matt Koch	The Turnlink Sales Manager	Sales Force Automation
Michael Langenborg	Natural Planograms	Category management
Justin Lutes	Former Principal, Exhibit A	Exhibit Design and Construction
Brad Magaro	President, Maximum Marketing	National broker consolidation provides opportunities for regional brokers
Alana Mahdalik Pilcher	Director of Marketing, National Vendor Programs, UNFI	How a distributor views a new product's viability in the marketplace
Peter McGoldrick	Performance Food Marketing	Optimizing the broker-manufacturer relationship
Sue McGovern	McGovern Communications	Public relations
Robert McMath	NewProductWorks	Learning from years of product mis-innovations and packaging mistakes
Mary Mulry	Foodwise	Importance of product quality in building your brand
Paul Nardone	President/ CEO, Immaculate Baking	When you are the CEO and the Sales Manager too!
Bruce Nierenberg	Former President, B.I.N. Sales	How a broker chooses to take on a line
Bonita Oehlke	MA Dept of Food and Agriculture	State & federal resources available to exporters
Tony Olson	President, SPINS	Industry overview, using syndicated data
John Owens	Ridge Rock Associates	The Mass Merchandiser Trade Channel
Scott Presnall	Former, Advantage Sales & Marketing	How consolidation trends affect your business
Alan Purcell	Founder, Natural Food Warehouse	Building your business with the Independent Retailer
Lois Quigley	Tasteful Demonstrations	Successful in-store natural product demos
Jill Raefield Carey Johnston	Former Oregon Chai Marketing Manager	On-site Trade Show Management
Michael Richard	Former, The Hale Group, LTD	The Natural Food Service Opportunity
Walter M. Riglian	Former President, WMR Consulting	Trade Spending Management
Marc Rosenthal	National Director of Natural/Organic DPI, Corporate	Merchandising natural products in mainstream supermarkets
Glenn Rudberg	Co-Founder, Ethos Marketing & Design	The importance of developing a consistent brand image

Matthew Saline Maxine Wolf	Mambo Sprouts Marketing	Optimizing consumer promotional programs
Melodie Schneider	Former CEO, Mitzvah Marketing	How the retail broker rep builds your business
Joe Smillie	Quality Assurance International	Organic Labeling Regulations
Tim Sperry	Former Grocery Director, Whole Foods, North Atlantic	Navigating the Waters of Whole Foods
Paul Stevens	Former Founder/CEO Trios Pasta	The club store opportunity
Bill Stewart	President, National Sustainable Sales	Food Service...Naturally
Travis Tabor	Former CEO, Advantage Sunbelt	What makes for a great principal
Robbie Thain Nicole Koch	Makai Events	Special events marketing/field marketing
Michael Theodor	Michael Theodor Brokerage, Inc.	The Canadian natural products opportunity
David Thibodeau	Partnership Capital Growth Fund III	"Investment banking" valuation drivers
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
Lisa White	VP Operations, Global Organics	The A, B, C's of Co-packing
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Scott Van Winkle Jennifer Duval	Cannacord Adams	"Investment banking" valuation drivers

Cover Design by: Glenn Rudberg and Judy Trepal

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## About the Authors

### **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, branding and trade spending management. He is also the co-author and co-publisher of the *Natural Products Field Manual, Fourth Edition* and *The Sales Manager's Handbook*. 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, United Natural Foods, No Pudge!, 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, Nantucket Offshore/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/BioSan, 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 Ingelheim, Harbar, LLC, Rhino Foods, Stonehouse 27 and others.

He currently serves as an outside director for Stonyfield Farm, EcoFish, Nutrabella, American Halal and TSP Spices. He is a former director of Equal Exchange, Stirrings, LLC, Pulmuone-Wildwood and the NASFT – National Association for the Specialty Food Trade. He also serves on the Editorial Advisory Board of *Nutrition Business Journal*. He is also on the board of directors 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.

Bob 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 NASFT's Winter and Summer Fancy Food Shows, OTA's "All Things Organic Trade Show and Conference", Natural Products Europe in London, Bord Bia in Dublin, Canadian Consulate in Boston, Kosherfest in New York, The Soyfoods Conference, Agrifood Trade Services in Nova Scotia, Saskatoon and Quebec and has been a featured trainer and speaker at Management Venture Institute forums. He is also a presenter and panelist at the Stonyfield Entrepreneurial Institute Boot Camp. He authored the NASFT's White Paper on Trade Promotion.

Bob also runs full day seminars on "Becoming a more Effective Sales Manager in the Natural and Specialty Channel" and "Financing your Natural and Specialty Products Company."

### **Rick McKelvey**

Rick brings over twenty years proven experience within the natural products industry. He currently serves as President of The Natural Pasta Company/ dba Putney Pasta. Prior to Putney, he was Director of Sales for Fairfield Farm Kitchens where he spent five years launching over 40 frozen organic entrees and fresh organic soups. Under Rick's guidance 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 United Natural Foods, Inc. The bulk of Rick's career was 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 emerged as 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 developing Lightlife's food service, private label, and international business.

Rick has served on the board, and as a past President, of the Soyfoods Association of North America, and in the community as board member of the local Y.M.C.A. and Sr. Warden of St. James Episcopal Church. Rick is also co-founder with Bob of the G.E.N.A. Group and holds an MBA from the University of Massachusetts, Amherst. He lives in the small country town of Conway, MA, where he loves to work around his home and spend time with his wife of 20 years, Lynn, and his children, Matthew and Meaghan.

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## About the Enclosed CD-ROM

The enclosed CD contains the following:

All directories are Microsoft Excel unless otherwise noted

1. Complete natural food store list segmented by “A,B” stores (Top 1000 stores nationally)
  - a. Stores are listed in Microsoft Excel format for easy sorting and manipulation
2. Summary of Supermarkets with natural sets – buyer information and main supplier listed
3. Directory of Distributors
4. Directory of Brokers
5. Sample broker contract
6. Sample budgets
7. Sample P&L models
8. Basic breakeven calculations
9. Supermarket News Top 75 Supermarkets 2010
10. Supermarket Profiles-Whose doing what with natural and organic products within supermarkets?
11. Key Distributor Promotional Programs
12. Key Retailer Promotional Programs
13. New Account Forms
14. Key Customer logos
15. PR Database
16. “One Page Strategic Plan” by Gazelles.com
17. 5th Edition Updates