

# DTC to Retail Self-Assessment

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Take our DTC to Retail Self-Assessment to see where your company falls along the DTC Maturity Model and understand your opportunities going forward.

## 01 What is your targeted distribution for retail based on?

- A. Opportunities that you are taking advantage of
- B. Targeting certain accounts based on sales strategy
- C. A formalized process to manage distribution opportunities

## 02 How are you planning to staff the expansion to retail?

- A. Adding responsibilities to existing staff
- B. Modestly planning to add a retail-focused sales role
- C. Planning for organization-wide changes

## 03 How is your product assortment and packaging impacted by retail distribution?

- A. No change, my assortment and packaging are the same as for DTC
- B. Limited changes, at least initially
- C. Customizing product mix and packaging to leverage on-shelf placement

## 04 How is your supply chain impacted by the move to retail?

- A. Initially not making any changes – utilizing current systems and “making do”
- B. Modest changes to account for the move from individual orders to bulk sales
- C. Planning for expansions needed in supply chain to integrate systems and processes

## 05 How are you supporting new retail items on the shelf?

- A. “Wait and see” approach – don’t spend money until you must
- B. Modest initial investment in trade and shopper – spend as little as you can
- C. Aggressive first 90-day investment in trade and shopper with planned annual investments to support the new business

# Results:

When assessing your results, look to see if you scored mostly As, Bs, or Cs to better understand where your organization may be along the DTC Maturity Model. Looking at where you fall on the maturity model will help you to understand considerations for moving forward with the shift from DTC to retail distribution.

## A. DEVELOPING

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If you scored mostly “As,” then you are in the developing stage of the maturity model. At this stage your the organization is reacting to retail distribution opportunities in an ad-hoc capacity with more of a “wait and see” approach. Your organization could benefit from some strategic planning for the retail channel.

## B. MANAGING

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If you scored mostly “Bs,” your organization is in the managing phase of the maturity model, indicated by some thought-out strategy and processes but with limited investments and inefficiencies that are holding your organization back from fully realizing benefits. Some additional work on strategy and tactics will help your organization optimize the retail channel.

## C. OPTIMIZING

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If you scored mostly “Cs,” congratulations, you are at the top end of the maturity model. You are focused on strategic and tactical planning to optimize your retail channel across the entire supply chain.

