

What every beverage brand needs before approaching retailers and distributors.

Before a buyer will take a meeting, they expect a brand to already have its house in order. This checklist covers the must-knows and must-dos that separate a brand that's ready for retail from one that's still getting there.

Item & Product Data



THE BASIC DATA EVERY RETAILER AND DISTRIBUTOR ASKS FOR FIRST

- ☐ UPC & GTIN assignment
- ☐ Case configuration
- ☐ Product specs & dimensions
- ☐ Ingredient & nutritional docs
- ☐ Category attribute mapping

Required Documentation



PAPERWORK AND PORTAL ACCESS BEFORE YOU CAN SUBMIT A SINGLE ITEM

- ☐ New Item Forms (NIFs)
- ☐ Retailer portal setup
- ☐ Distributor documentation
- ☐ Compliance paperwork
- ☐ Materials gap audit

Sales & Retail Materials



WHAT A BUYER ACTUALLY SEES ACROSS THE TABLE

- ☐ Digital assets
- ☐ Sell sheets
- ☐ Brand overview deck
- ☐ Retail pitch deck
- ☐ Positioning & brand voice
- ☐ Competitive category framing

Pricing & Route-to-Market



WHERE, WHEN, AND HOW YOU PLAN TO GO TO MARKET

- ☐ Wholesale & SRP pricing
- ☐ Market prioritization
- ☐ Channel focus
- ☐ Retail tier strategy
- ☐ Distributor selection criteria
- ☐ First-call account list
- ☐ Post-off calendar

Market Intelligence



THE CONTEXT THAT KEEPS YOUR PITCH FROM MISSING THE MARK

- ☐ Buyer expectations by category
- ☐ Competitive landscape
- ☐ Distributor landscape by market
- ☐ Retailer feedback loop



Not sure where to start?
Let's setup a time to talk.
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