

# FIVE critical steps to managing a successful in-store display program

Traditional advertising would kill to be in front of the shopper at point-of-sale, communicating a benefit – or “why-to-buy” - when consumers are standing right in front of the display. Why, then, do we put so little emphasis on understanding how in-store displays work versus traditional advertising?

## **FOR TOO LONG, THE DISPLAY PROCESS HAS BEEN:**

- Reactionary to retailer requirements
- Driven by executional considerations
- Viewed as an add-on to production costs
- Designed with a lack of quantitative data

## **CHANGING RETAIL TRENDS, PARTICULARLY THE EMERGENCE OF THE ‘CONNECTED SHOPPER’, IS DRAMATICALLY ALTERING THE NATURE OF SHOPPING. WE’RE ALREADY SEEING IT; TODAY’S SHOPPER:**

- Makes multi-channel purchases on a regular basis
- Desires more information about the products they are selecting
- Uses mobile regularly in-store
- Is strongly influenced by social media

In this new environment, no brand real estate will be as important as in-store display.

But few companies have a coherent internal process to ensure their displays are working for the brand, the retailer and the shopper.

**WE ARE PURCHASE POINT DESIGN**, a merchandising design and shopper experience company. We believe that displays should be designed from the consumer perspective and with detailed knowledge of the retail landscape. And we are forging a new way to approach display design and deployment with our proprietary technology platform, POPTimizer<sup>®</sup>.

**HERE ARE FIVE THINGS YOU NEED TO KNOW ABOUT EFFECTIVE DISPLAY DESIGN:**

1. **POP is advertising**, and it needs to be evaluated and developed from a consumer perspective and with a strategy
2. **Don't assume** anything about the retail market you're servicing, it is highly variable and constantly changing.
3. **Great design** has the shopper in mind and is shaped by both empirical and quantitative data.
4. **Pre-test** to guide decisions, add a shopper voice and maximize results, then iterate.
5. **Execute** with high quality, speed and a transaction that is free of friction for all players.

Remember, robust display development is a process that must include opinions from shoppers, and not be driven by unproven beliefs.

*Next page: Put PPD's Five Steps to Work in your organization...*

**Start with a strategy.** Know the retail landscape. Use research to guide decisions. Pre-test your design.

**STEP ONE: POP IS ADVERTISING AND IT NEEDS TO BE EVALUATED & DEVELOPED FROM A CONSUMER PERSPECTIVE AND WITH A STRATEGY**

Start by developing a strategy and purpose for display programs that ensures support from stakeholders within the CPG organization and is supported by senior management:

- Sales and management need to understand and embrace the ROI gains possible when POP advertising is done correctly.
- Create a playbook to guide display development and financial decisions; a step-by-step process that supports the strategy. This gets all the stakeholders on the same page. It details the players, approvals you need and in what order, who's making prototypes and artwork and what triggers a "timeout," like when the design doesn't fit the guidelines.
- Adopt tools that brand marketers can use to demonstrate the value displays deliver. This makes a case that can overcome margin hurdles. What if the organization wants to approve a display program, but it's outside your current budget allocation? Upper management needs proof, so shopper engagement research can give you the sales data to support why brands need to compete in-store.
- Helping retailers create a better shopper experience results in a win for both the retailers and the brands.

*Next page: Study the Retail Landscape*

**STEP TWO: DON'T ASSUME ANYTHING ABOUT THE RETAIL MARKET YOU'RE SERVICING;  
IT IS HIGHLY VARIABLE AND CONSTANTLY CHANGING**

Study the retail landscape to fully understand how displays should be designed and implemented for the greatest potential success.

- In a fluid retail landscape, assumptions are often made about ways to solve a problem without actually understanding the challenge. For instance, we recently saw a client who had a great merchandising opportunity. A brief was prepared for the project. But when we made an in-store visit, we saw that the product could be found in three locations, both on hooks and on shelves.
- Understanding the execution of displays, the look and feel of the retail environment and logistics of installs is the starting point. Research can prove what works and what doesn't.
- A quick, nationwide review shows variations in how POP is handled by local markets. This allows local variables that impact compliance to be included in the upfront design exploration. What if you're sending your DIY display into locations where there already exist numerous displays in the same category – some years old?
- Understanding how a shopper might interact with the display once installed can only be accomplished by reviewing the in-store environment. For instance, shelf height, product layout, graphic position and engagement touch points must be in harmony with both the display and the surroundings. We see displays with graphics that are too low or are obscured by other fixtures, headers that are not in shopper sightline, plus interactive add-on's that shoppers never see on the path to purchase.

*Next page: Great Design*

**STEP THREE: GREAT DESIGN HAS THE SHOPPER IN MIND AND IS SHAPED BY BOTH EMPIRICAL AND QUANTITATIVE DATA.**

Utilize as many resources as possible to get ‘into the head’ of the shopper at shelf.

- Begin by understanding the decision. Shoppers approach displays with different sets of needs – immediate gratification; problem solving; emotional connection seeking; affirmation and dollar savings. Some (or all) of these may be in play for the specific shopper decision.
- Plan a ‘path to purchase’ that focuses on the relevant shopper needs. Utilize both internal and external insights into category behavior to understand the role your brand/product plays in the category. And focus on shopper needs that can be effectively communicated at point-of-sale.
- Compile these insights into a creative brief that brings together shopper needs, retail considerations, brand direction and strategic goals. This document can serve as a reference point to ensure design development stays on track.

*Next page: Pre-test*

**STEP FOUR: PRE-TEST TO GUIDE DECISIONS, ADD A SHOPPER VOICE AND MAXIMIZE RESULTS, THEN ITERATE.**

There is no ‘perfect’ display design. There is only the design that maximizes your likelihood of success in-market. Tap into the deep insights POPTimizer(R) provides to pre-test designs with shoppers.

- Gone are the days when pre-testing a display design was a time-consuming, complex, costly affair. POPTimizer is an online test that utilizes the latest technology to ensure design testing is robust, insightful, and painless.
- Create multiple design iterations that seek to affect key shopper needs in different ways –colors, copy, signage, structural form, etc. Test these iterations in the POPTimizer system to understand which combinations are most successful at motivating a purchase.
- Compare POPTimizer results to hundreds of other tested displays to ensure the top designs are beating their overall and category norms.
- Use POPTimizer results to identify the design that has the highest chance of success in market – potentially re-test this design with incremental changes to ensure it is fully optimized.

*Next page: Execute*

**STEP FIVE: EXECUTE WITH SPEED, QUALITY AND A TRANSACTION THAT IS FREE OF FRICTION FOR ALL PLAYERS**

Display design can be improved using in-store re-research and display optimization testing. But remember to stay grounded in the “real world.” That means everything you create must be able to come to life at retail.

- Timing is everything and speed is the name of the game when it comes to getting things done on time. Success also requires having the right people in place with a firm understanding of brands, process and environments.
- Quality takes effort and experience, but it also requires that designs don’t get compromised when it comes to budget constraints. It is essential that correct materials and manufacturing processes all fit within tight lead times.
- Having a process in place that allows for everyone’s input and approval is hard but imperative. Make sure every touch point is aligned and that everyone stays on the same page to achieve “real world” success. Your process must be aligned to meet your goals, otherwise you will always be chasing the innovator.

*The journey to improving ROI for in-store display begins with POPTimizer<sup>®</sup>.*

*[Click](#) or call Kelley Thornton at 312.953.4131 to start the discussion on display optimization best practices today.*