Location & Sales Assessment

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| --- | --- | --- | --- |
|  |  | |  |
| Store Number/Name | Address | | Opening Date |
|  | |  | |
| Store Manager | | District Manager | |

Completing the Location & Sales Assessment is the first step in building your marketing plan. Please complete the “Sales Assessment” Excel Document for data regarding: Sales, Transactions, and Average Ticket/Check.

# Age

How “old” is this location? 🞎 **New** (12 months and under) or 🞎 **Existing** (13-months +)?

# Store Location

What type of neighborhood is the store located within?

* Downtown
* Suburbs
* In A Mall
* Office Park
* Near A University / College
* In A Retail Area
* Off-Highway
* Tourist Area / Seasonal
* Commuter Area
* Remote Location
* Business Building
* Historical/Landmark
* \_\_\_\_\_\_\_\_\_\_\_\_

# Dayparts

When is the neighborhood busy?

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | 7 am - 9 am | 9 am - 11 am | 11 am - 1 pm | 1 pm - 3 pm | 3 pm -  5 pm | 5 pm -  7 pm | 7 pm -  9 pm | 9 pm - midnight | midnight - 7 am |
| Busier | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 |
| Slower | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 |

When your location busy?

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | 7 am - 9 am | 9 am - 11 am | 11 am - 1 pm | 1 pm - 3 pm | 3 pm -  5 pm | 5 pm -  7 pm | 7 pm -  9 pm | 9 pm - midnight | midnight - 7 am |
| Busier | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 |
| Slower | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 | 🞎 |

# Location Visibility

Is your location clearly visible from where potential customer traffic is (from the highway, parking lot, walkway, etc.)? Are their limitations? For example: lack of highly-visible signage, hidden entrance, lack of signage visible from main traffic area?

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# Store Accessibility

Are there any parking, traffic patterns, transit lines, traffic lights, or signs that may affect access to the store?

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# Seasonal Factors

What seasonal factors may affect your location? Consider tourist destinations, university class schedule, summer holidays, seasonal markets, etc.

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# Logistics / Permits

Can sampling activities be done outside of the store? Are there regulations that prohibit this? What is required for you to host live music events?

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# Store Specific Traits

Are there any noteworthy characteristics of your location? These could include:

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| Opportunities - large space, potential music or art venue, space for groups, outdoor seating, within a building of historical significance. | Potential Threats - size limitations, limited seating, restricted access to certain parts of the store, lack of outdoor seating. |

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# Customer Satisfaction

Which best describes how your customers feel?

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| --- | --- | --- | --- |
| * **A** | * **B** | * **C** | * **D** |
| Customers are enthusiastically satisfied. We consistently exceed their expectations. | Our customers seem happy and satisfied. | Our customers are mostly happy, but we have a tough time consistently meeting/exceeding expectations. | Customer satisfaction is hit or miss at my location. |

# Customer Loyalty

Which best describes how loyally and singly your customers visit your company/location?

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| --- | --- | --- | --- |
| * **A** | * **B** | * **C** | * **D** |
| It would be a rare emergency that our customers would visit a competitor for what we offer. | Our customers get what they need 80% of the time from us, however they do go to the competition now and then. | Our customers have many options and choose us when it is convenient and go to the competition just as often. | We may not be the first choice for what our customers need, but they visit us now and then. |

**Notes/Comments:**

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# Location / Sales Strengths, Weaknesses, Opportunities & Threats

Using the information from the research you’ve conducted, list what you see as your strengths, weaknesses, opportunities and threats for your location and sales.

**Strengths & Weaknesses**

Strengths and weaknesses are internal items you have the ability to influence.

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| **Strength:**  These are things you do well. Take advantage of your strengths  What are your biggest location strengths?  What are your biggest sales strengths? | **Weakness:**  These are things you need to improve. Eliminate weaknesses.  What are you biggest location weaknesses?  What are you biggest sales weaknesses? |
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**Opportunities & Threats**

Opportunities and Threats are things external to your organization and are out of your control.

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| **Opportunities:**  Take advantage of opportunities.  What are your biggest location opportunities?  What are your biggest sales opportunities? | **Threats:**  Minimize threats the best you can.  What are your biggest location threats?  What are your biggest sales threats? |
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