



Promote. Motivate. Accelerate.

Sampling Checklist*

<p><input type="checkbox"/> Does Sampling make sense for <i>your brand</i>?</p> <ul style="list-style-type: none"> ✓ Can a reasonable brand/product experience be offered to people willing to try your brand? ✓ Is there a cost/converted person that would equate to a solid return on investment (ROI) for the program? ✓ Many companies have internal methods to calculate potential ROI, examine them in light of your brand objectives and insure data is collected to support the expected analysis 	<p><input type="checkbox"/> Can you access <i>sampling appropriate product</i>?</p> <ul style="list-style-type: none"> ✓ Insure strong product before sampling investment ✓ Product itself is often longest lead time issue – may be possible to use retail product; left over from other programs, etc. ✓ Insure sample can be produced consistent with your company standards for labeling (e.g. ingredient statement, “not for retail sale”, etc.)
<p><input type="checkbox"/> Define <i>your objectives</i></p> <ul style="list-style-type: none"> ✓ Are you seeking to gain new brand trial; introduce a new variant/ formulation/ packaging ; gain share within category; establish brand in new geography; gain retailer cooperation; insure your product is sampled by new lifecycle category entrants; revive an older brand; and many other options where sampling works ✓ Be as concise as possible, using clear metrics if possible to define your desired outcome ✓ Be sure to contemplate your plans for the social / viral impact of your sampling program and seek to leverage the value of samples as a stimulus for people to talk to each other 	<p><input type="checkbox"/> Do you plan to include <i>purchase motivation</i>?</p> <ul style="list-style-type: none"> ✓ Incentive to purchase may add to value perception (if appropriate for brand positioning and/or audience you seek to reach) ✓ If using coupon, plan early and use unique codes to track redemption results - for other forms of incentive also seek to track their use ✓ Consider a sample as a ‘conversation starter’ and consider how to motive not only purchase but opportunities for people to share their feedback with you
<p><input type="checkbox"/> Whom are you trying to <i>reach</i>?</p> <ul style="list-style-type: none"> ✓ Define the ideal people you desire to try your product ✓ You can base this on demography, geography, lifestyles, interests, purchase history, behavioral factors, retail habits, affinity groups and many more. ✓ <i>Balance</i> targeting and reach – the tighter the target the fewer people to be reached at a generally higher cost ✓ Be open to possible targeting and efficiency tradeoffs in the interest of reaching the most people per budget dollar 	<p><input type="checkbox"/> <i>Presentation/packaging</i> is a valuable branding opportunity AND a key cost driver.</p> <ul style="list-style-type: none"> ✓ If using the mail to deliver your sample, it is crucial to discuss best packaging options with vendor experts to ensure sample integrity and adherence to postal regulations while limiting postal expense. ✓ In every sampling situation take full advantage of the sample/package design step to insure a solid branding opportunity is provided.
<p><input type="checkbox"/> Where might you wish to have your <i>high value brand/ product experience</i> take place?</p> <ul style="list-style-type: none"> ✓ Some examples are: In-Home/ In-Store/ At events/ In specific venues e.g. Workout places, Salons, Hotels, Cruise ships, etc. ✓ Frankly, if you can imagine it, the vendor community can help you place your brand there ✓ It is all about a <i>person’s receptivity to the sample experience</i> so think about time and place and their fit with your goals ✓ Realize your best choice can often be a hybrid of multiple venues and sampling approaches to meet your goals 	<p><input type="checkbox"/> <i>TALK TO VENDORS</i> who specialize in sampling</p> <ul style="list-style-type: none"> ✓ Many complexities exist in the world of sampling ✓ Depending on sampling approach chosen, each sampling program will have its own extensive checklist ✓ Let your vendor assist in the process of creating proper timelines to insure program success ✓ You will be well served talking with vendors to guide you through the process of developing a successful sampling program
<p><input type="checkbox"/> Always <i>pre-plan your method of evaluation.</i></p> <ul style="list-style-type: none"> ✓ Link back to your objective - how will you determine success? ✓ Remember the ultimate goal of a sampling program is to <i>convert sample trying into brand buying</i> at a solid ROI – that does not necessarily result from simply the lowest cost per distributed sample ! ✓ All professional vendors will offer you a range of options for monitoring and accessing the results your sampling program ✓ Decide up front the method and means of not only getting results but also of monitoring your sample program over its life span ✓ Assuming you are seeking some form of conversion data insure proper time has elapsed before you field your ‘post’ research 	<p><input type="checkbox"/> Things to prepare for a <i>vendor call</i>:</p> <ul style="list-style-type: none"> ✓ Your objective for the program ✓ Number of samples being considered if known ✓ If comfortable, some notion of the budget parameters helps vendors to offer you the most cost effective solutions ✓ Size, weight and other particulars of the planned sample including shelf life, product stability, expiration issues – all are important for proper time line and handling planning ✓ Geographic or other considerations that constrain where sampling might be desired ✓ Targeting you are seeking ✓ Explore how vendor will insure people are limited to receiving the proper number of samples – usually one ✓ Other media/marketing plans that sampling is a part of or supports so a solid notion of the plans are considered when developing the sampling plan

*This by its very nature is a very high level checklist – written from a *brand owner’s perspective* - each possible method of sampling has its own specific checklist that your vendor partner can assist you with. Note: The author has a bias for in-home sampling but has tried to offer a broad, general outline for sampling across the industry – those who take issue are free to comment and let’s consider this a living document subject to adjustment over time.