

BULLETPROOF

YOUR CPG BRAND

THE 5-MINUTE BROKER ADVANTAGE CHECK™

Turn Boots-on-the-Ground Retail Intelligence
Into Sharper Priorities, Smarter Trade Decisions,
and Better Execution.

GIVE YOUR
BROKER A CLEAR
ASSIGNMENT—
KEEP STRATEGY
WHERE IT
BELONGS:
WITH YOU.

SEE WHAT
REPORTS MISS

FOCUS ON
WHAT MATTERS

STRENGTHEN
PARTNERSHIP
AND TRUST

DRIVE BETTER
TRADE RESULTS
TOGETHER

5-MINUTE BROKER
ADVANTAGE CHECK

- ☒ PRIORITIES
- ☒ SUCCESS
- ☒ RETAILER INSIGHTS
- ☒ KEY ACCOUNTS
- ☒ EXECUTION PLAN
- ☒ MEASURES
- ☒ NEXT CHECK-IN

YOUR BRAND.
OUR PLAN.
BETTER EXECUTION.

A PRACTICAL GUIDE + THE 5-MINUTE BROKER ADVANTAGE CHECK
A ONE-PAGE TOOL YOU CAN USE RIGHT AWAY

BULLETPROOF
YOUR CPG BRAND

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Natural Industry Strategic Advisor | Founder, Retail Solved
Host, *Bulletproof Your CPG Brand*

400+ ARTICLES
Featured in leading
industry publications

KEYNOTE SPEAKER
Conferences, associations,
and industry events

BRANDS TRUSTED ME
To train senior leadership
on broker and trade excellence

THE 5-MINUTE BROKER ADVANTAGE CHECK™

ONE-PAGE TOOL

A SIMPLE CHECK TO ALIGN YOUR BROKER,
FOCUS EXECUTION, AND DRIVE RESULTS.

1 OUR PRIORITIES

The 1-3 things that matter most right now.

1. _____
2. _____
3. _____

2 WHAT SUCCESS LOOKS LIKE

Specific outcomes we are trying to achieve.

- _____
- _____
- _____

3 RETAILER INSIGHTS WE NEED

What we want to learn from you.

- _____
- _____
- _____

4 KEY ACCOUNTS / FOCUS AREAS

Where we are focusing your efforts.

- _____
- _____
- _____

5 EXECUTION PLAN

Must-do actions and timing.

ACTION	WHO	BY WHEN

6 RESOURCES & SUPPORT YOU NEED

Tools, assets, approvals, budget, etc.

- _____
- _____
- _____

7 HOW WE WILL WORK TOGETHER

Communication, meeting rhythm,
feedback, and escalation.

- _____
- _____
- _____

8 HOW WE WILL MEASURE SUCCESS

The KPIs we will track and review.

- _____
- _____
- _____

9 NEXT CHECK-IN

Date of our next review.

Date: _____

Focus: _____

★ YOUR ROLE IS CRITICAL

You are our eyes and ears in the market.
Your insights help us make better decisions,
win at retail, and grow together.



CLEAR PRIORITIES.
STRONGER EXECUTION.
BETTER RESULTS.

BRAND: _____
BROKER / REP: _____
DATE: _____

RETAIL SOLVED®

Better strategy. Better decisions.
Better execution.



GET THE 5-MINUTE
BROKER ADVANTAGE CHECK™
FREE ONE-PAGE TOOL

Use this one-page check to align
priorities, capture insights,
and drive better execution.

Download on the Leak Finder Page

RetailSolved.com/leakfinder



TWO GREAT FREE RESOURCES
ONE CLICK

The Leak Finder shows you where
problems may be hiding.

The 5-Minute Broker Advantage
Check helps you turn field
insights into better results.



THE LEAK FINDER
INSTANTLY IDENTIFIES
WHERE YOU MAY BE LEAKING:

- Cash
- Margin
- Execution
- Visibility
- Decision Quality
- Runway

“ I never set out to become known for broker strategy. The industry kept asking. I kept solving. That's how I earned it.

— Daniel Lohman, CPSA | 400+ Articles | Keynote Speaker | Brands Trust Me to Train Their Teams