Welcome to Repsly U!

WELCOME TO REPSLY U!

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We are excited to talk to you about the power of forms. We are going to walk you through:

- Repsly Overview
- The Power of Forms
- How Do Forms Help?
- Understanding Question Types
- Examples of Good Questions
- The Importance of Good Photos
- Examples of Good Photos
- Understanding Power Data from Forms

Pairing the functionality of the Repsly software with your business goals can yield impressive results. But if you take it one step further with effective forms, your outcome will be extraordinary!

In today's webinar, Lyssa will show you how you can use Forms in Repsly to coordinate your brand objectives and gain valuable information, which will move you toward more successful reporting.

Repsly Overview

Repsly empowers field teams to...

Execute more effective in-store programs.

Get more out of their teams in the field.

Be more agile and ready to respond to change.

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Repsly is the central hub for managing your entire retail execution workflow.

1. Plan and track the work that needs to get done.
2. Manage the team that executes in the field.
3. Review and share results as they happen.

INSIGHTS   WHAT   PLANNING
MERCHANDISING   SALES
HOW   PROMOTIONS   WHO
ACTIONS

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You can think of Repsly as your central hub for managing retail execution. So whether you're executing a merchandising reset, in-store promotion, or sales blitz, Repsly makes it easy to plan and track the work that needs to get done, manage the team that executes it in the field, and review and share results as they happen.

With Repsly, sales, and merchandising, leaders can execute **more effective in-store programs** and **get more out of their resources in the field**, all while becoming **more agile and ready to respond to change**.

The Power of Forms

The **POWER** of Forms

In your business, your goal (or your customer's) is to increase your share of the shelf. You have a great product waiting to be discovered by customers.

- How do you get that done?   **DATA!**
- How do you get that data?   **FORMS!**

Retailers and Brands respond to fact-based reports. Factual, historical evidence speaks for itself.

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## How do Forms Help?

How do **FORMS** Help?

1. **Visit Compliance**: Easy for reps to know exactly what to do during a visit.
2. **Better Time Management**: Keeps the rep focused on goals.
3. **Better Data**: Individually and across the board.
4. **Better Conversations**: Can guide dialogue with staff.
5. **Powerful, Repeatable Stories**: Pictures are worth 1,000 words.

## Understanding Question Types
Quantitative Questions

- Data that can be counted or measured (how much, how often, how many, etc.).

- Easily represented in charts and graphs.

- **Best Use:** You want to measure behavior, not explain it

123 Numeric

Yes/No

Selection

Multiple selection
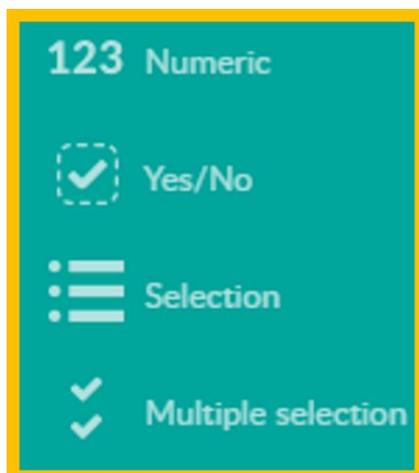
Qualitative Questions

- Data that is descriptive and comes from observations.

- Offers more in-depth insights and often leads to information not previously considered.

- **Best Use:** You want to ask a customer "how" or "why" they choose an action.
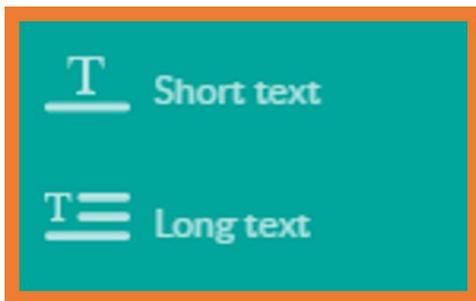

Use Case for Quantitative Questions

If you can aggregate your answers into a list, make it quantitative! It will allow you to easily visualize your data.

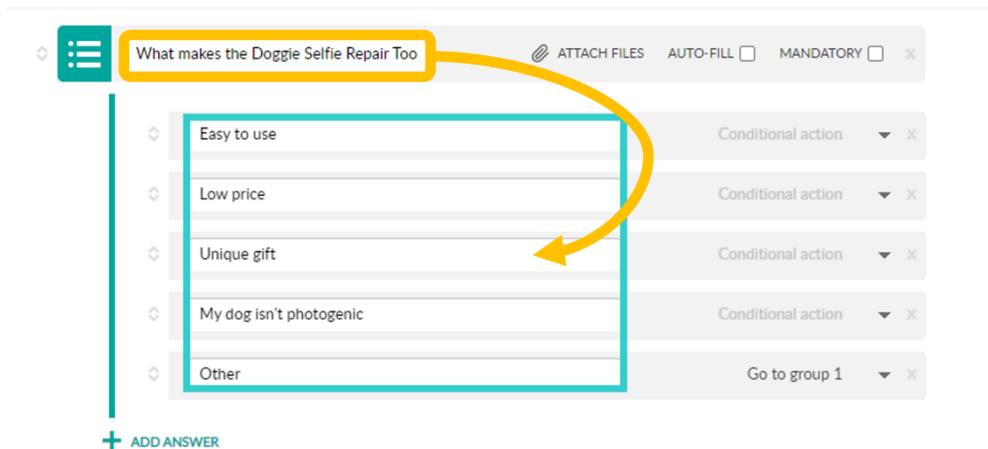Let's set up a great example of a quantitative question:

- What makes the Doggie Selfie Repair Tool the best on the market?

    - ❑ Easy to use

    - ❑ Low price

    - ❑ Unique gift

    - ❑ My dog isn't photogenic

    - ❑ Other (with Conditional Action for Comments)
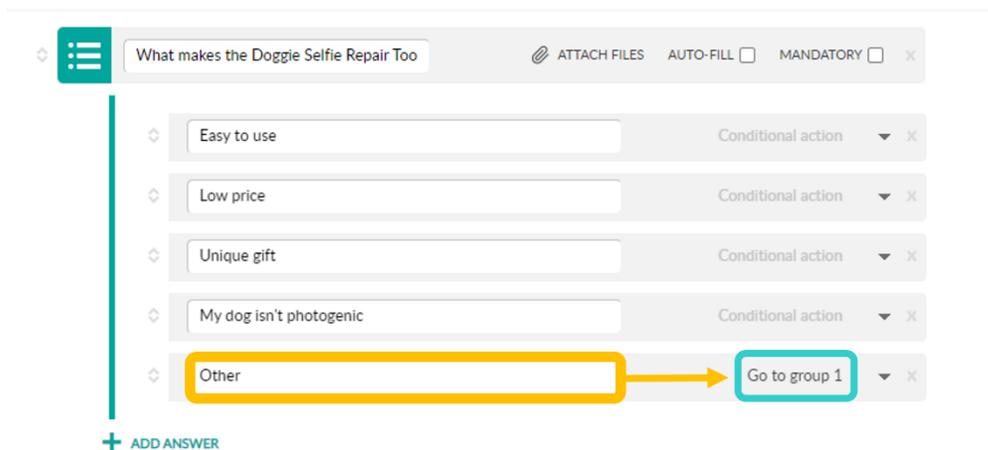
When building the form, do the following:

1. Select the **Question Type** (**Selection**).
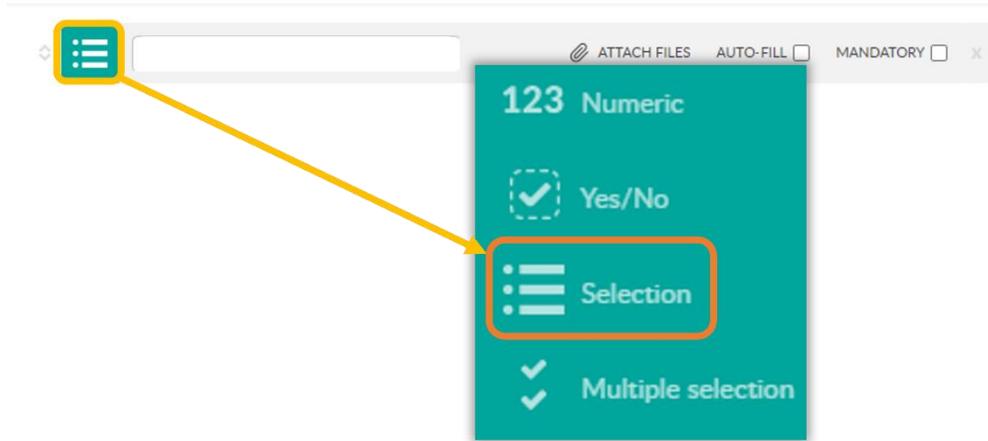
2. Enter the **Question** > enter the **Answers**.

3. If you want the rep to have an answer outside of your selections, enter **Other** > click **Go to Group #.**

4. Select the **Question Type** (**Short Text** or **Long Text**) > enter the **Question**.

| Group 1 | VIEW PARENT QUESTION | ✕ |

T Please explain: 📎 ATTACH FILES   AUTO-FILL ☐   MANDATORY ☐   ✕

T Short text

T≡ Long text

Quantitative Results

What makes the Doggie Selfie Repair Tool the best on the market?

12, 28%

7, 17%

3, 7%

5, 12%

15, 36%

- Easy to Use
- Low price
- Unique gift
- My dog isn't photogenic
- Other
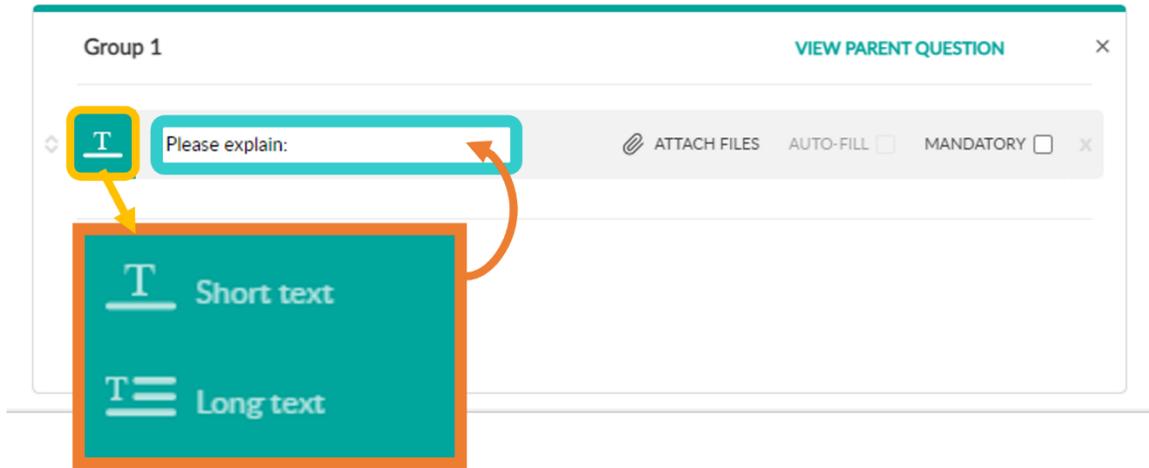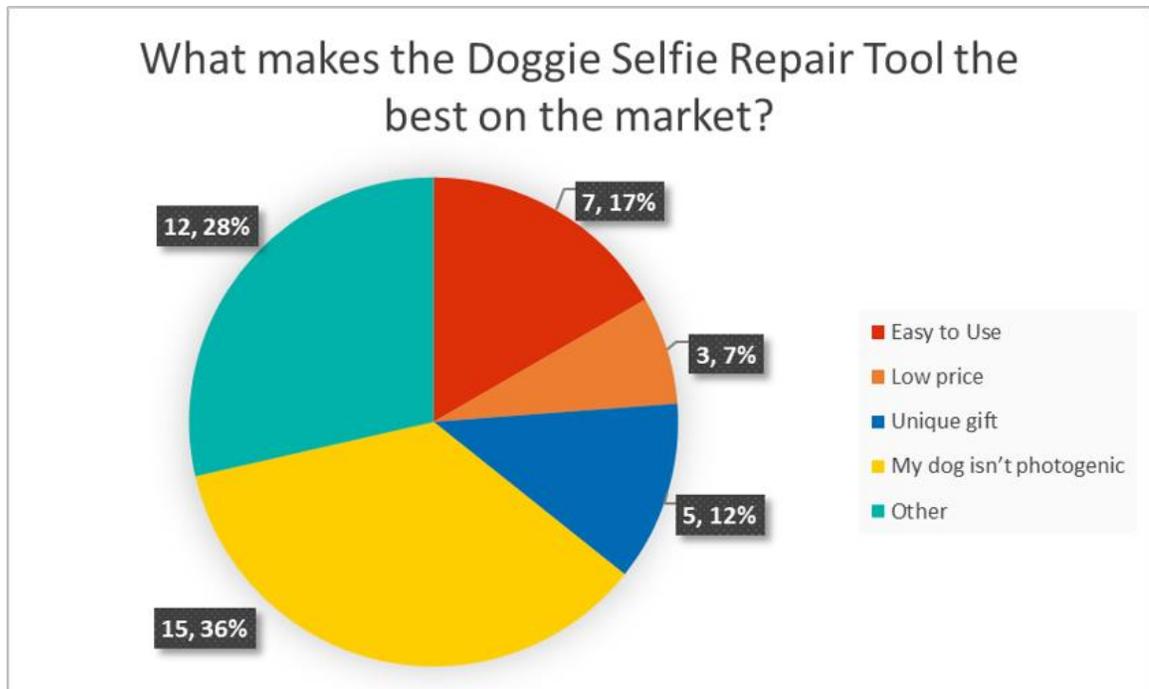
Please explain:

My dog is beautiful. He doesn't need selfie repairs.

Stupid idea. My dog can't take selfies because she has no thumbs.

## Use Case for Qualitative Questions

If you want information directly from the staffs'/customers' mouth, make it qualitative! You will not be able to make charts/graphs from this information, but you will often times find very helpful feedback.

Let's look at the same question, but as a qualitative question:

- What makes the Doggie Selfie Repair Tool the best on the market?

When building the form, do the following:

1. Select the **Question Type** (**Short Text** or **Long Text**) > enter the **Question**.
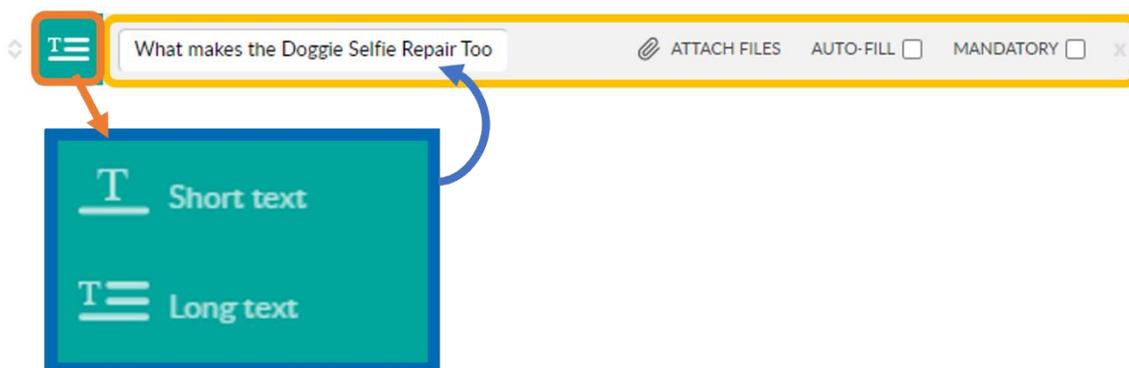
Qualitative Results

| What makes the Doggie Selfie Repair Tool the best on the market? |
| --- |
| I like the tool, but it would be better with a remote. |
| I'm not in the market for this tool. Call me when you have a Hamster Selfie Repair Tool. |
| I would buy this if it had a money-back guarantee. |
| The software seems too complicated for me. |
| I saw this item on Shark Tank and they rejected the idea! I agree with Mark Cuban, this is hot garbage. |

P.S. Don't let bad selfies happen to good dogs!

Examples of Good Questions

With Repsly, you can determine a schedule for display maintenance. This will help Store Managers understand that your brand will be maintained on a regular basis.

## Activity Data (Works for Sales and Merchandising Visits & In-Store Demos)

- Planogram Compliance
  - Are you where you are supposed to be?
  - You can attach a Planogram in **Files** or **Forms**.
    - Attach in **Files**, Back Office User directions: click **File** > click **Upload File**. You can create Folders to hold groups of documents by clicking **Create Folder** > **Name Folder** > click **Create Folder**.
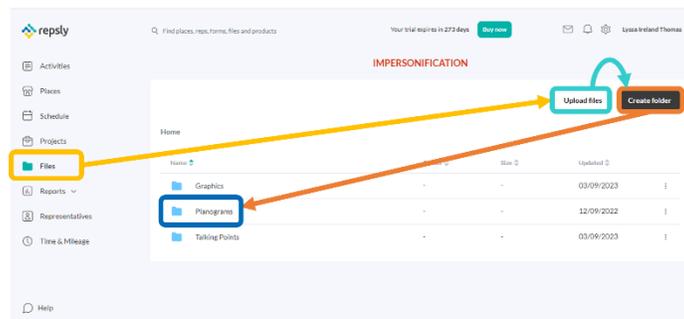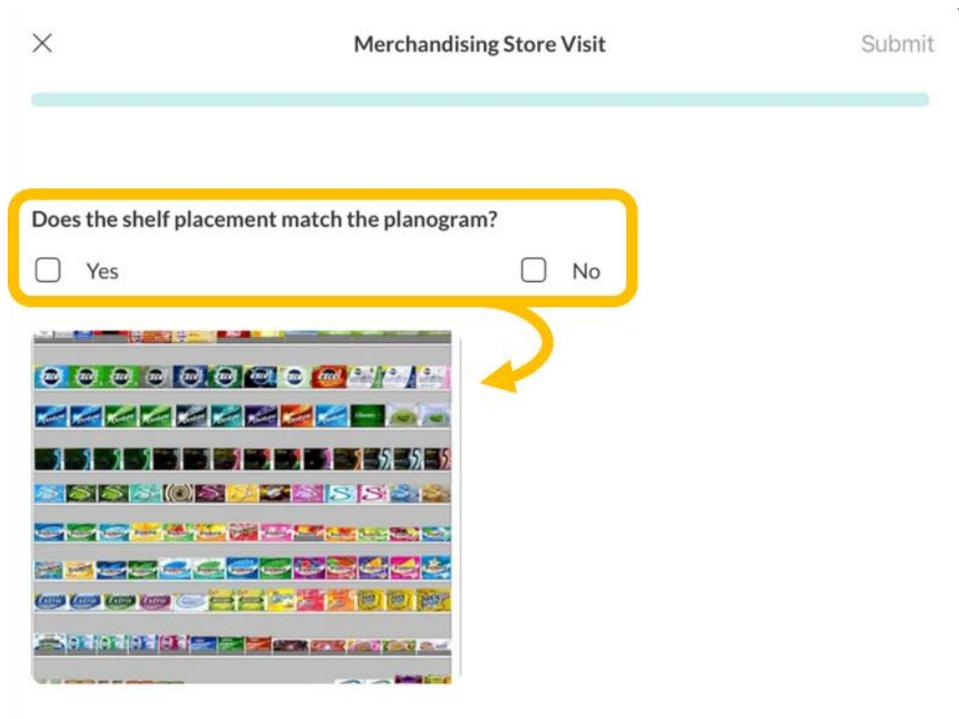

    - Attach in **Files**, Representative directions: click **Menu**, select **Files** > click **Named Folder**.
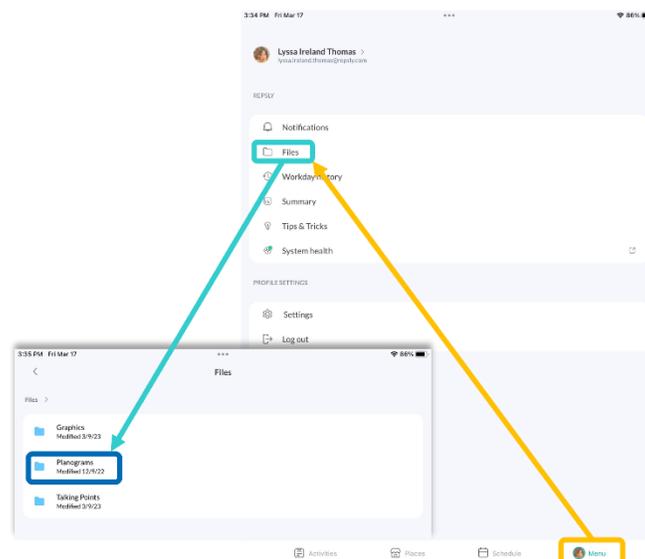
- Attach in **Forms**, Back Office User directions: In the form, click the **Question Type** (Yes/No) > enter your **question** > click **Attach Files** > click the **Folder** (if applicable) > click the **Planogram** > click **Attach**.
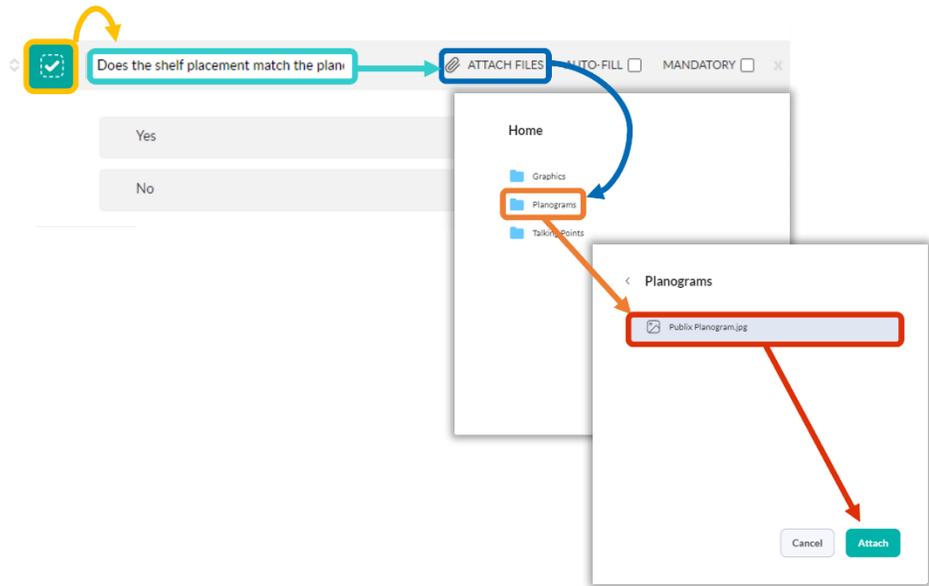
- In **Forms**, Representative view:

- Shelf Compliance
    - Is pricing visible?
    - Is there damaged product on the shelf?
        - It speaks volumes about your brand if the shelf is left unkempt.
        - It also says the same thing about your competitors.
- Display Compliance
    - Are displays set up properly?
    - Is anything broken?

Observational Data (Works for Merchandising Visits & In-Store Demos)

Photos, Structured Data, and Notes allow brands to experience the store visit.

- Product Information:
    - Is the product on the shelf?
    - Where is it located on the shelf (top, middle, bottom, entire shelf)?
    - What are the backstock levels?
    - How many facings do you have?
    - Do you have a secondary placement?
- Staff Reaction:
    - Help the staff understand why you and your product are the best.
    - Get staff to talk to customers about your product.
    - You can attach Conversation Guidelines in Repsly **Files** or **Forms** (steps documented above).
- Competitive Landscape
    - Which competitors are present?
    - What are your competitors doing in the store?
        - Any promotions
        - Type of promotions
        - New SKUs
    - Shelf location of competitors
    - Extra displays for competitors?
    - Competitive pricing

These questions are especially helpful for **In-Store Demos/Activations**.

- Traffic in Store?

- - - Slow (1-25 customers)
    - Moderate (26-50 customers)
    - Busy (51+ customers)
  - Weather Conditions
    - Good Weather (no effect on travel)
    - Moderate Weather (mild effect on travel)
    - Severe Weather (challenging effect on travel)
  - Where is your table set up? (In-Store Activation or Demo)
    - Near store entrance
    - Far from the store entrance
    - Close to the product
    - Far away from the product
    -

## Sales Data (Works for Sales Visits & In-Store Demos)

- Number of Samples Distributed or Number of Conversations
- Number of Conversions from Samples or Conversations
- Consumer Feedback on Products
  - If a sale was made, the **TOP** reason why the customer **PURCHASED** the product
    - Reason 1
    - Reason 2
    - Reason 3
  - If a sale was made, the **TOP** reason why the customer **DID NOT PURCHASE** the product
    - Reason 1
    - Reason 2
   - Reason 3

Examples of Good Photos

We've all heard that a picture is worth a thousand words, so don't miss out on this ability in Repsly. It is the easiest way for the management to see exactly what's in the store.

Some companies prefer to let reps choose the pictures to take, while others specify their needs. Whatever you decide, I HIGHLY recommend you get pictures.

In this example of asking for photos in a Form, I've directed the rep to take specific pictures.
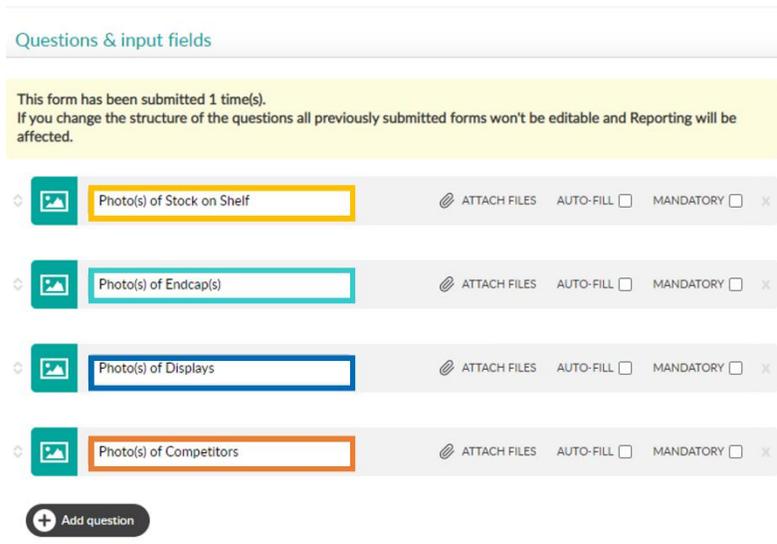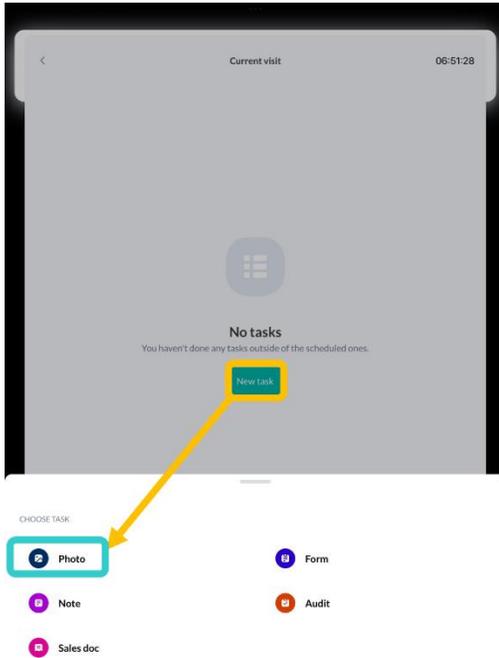

When the rep opens the Form, they will be directed to take specific pictures.
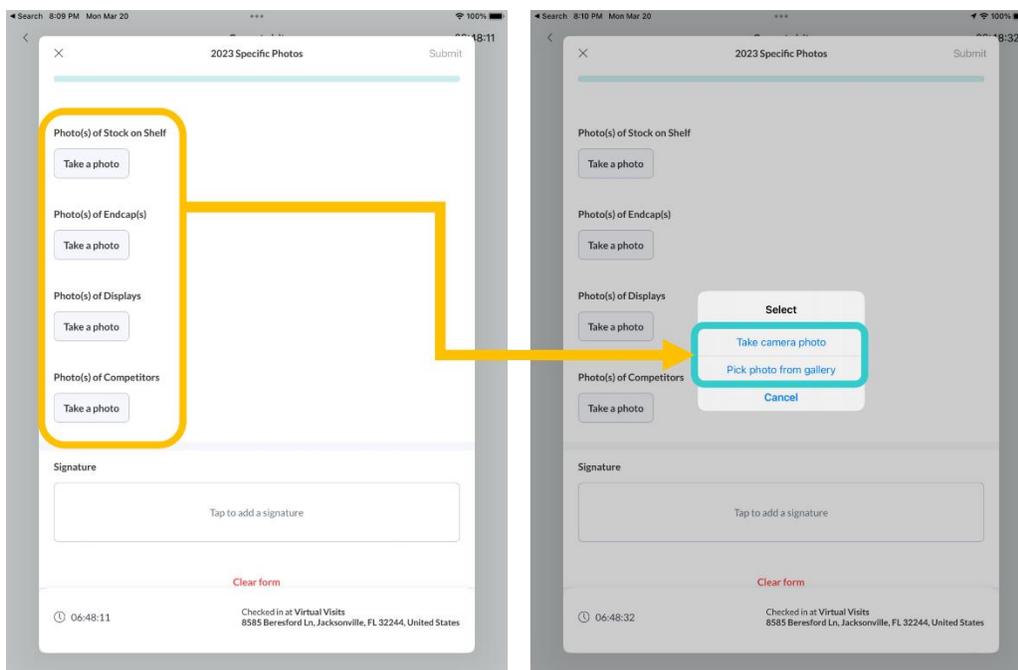
In this example of a **Photos Task**, the rep receives no direction of what pictures to take, but they can take as many photos as they'd like.

1. Click **New Task** > select **Photo**.

2. Click **+ Add Photo** > select either **Take Camera Photo** or **Pick Photo from Gallery**.

Examples of Good Photos

We've found these pictures tell comprehensive stories:

1. Good **wide-angle** photo showing product and competition surrounding it. Another great photo is a close up of the product showing pricing.

2. **End-cap** and/or **secondary placement**.

3. **Product display** (near the registers!).

4. **Holiday display**.

5. **Empty shelves**! It's one story if a storm (or pandemic) is coming. It's an entirely different story if it's a normal day.

Understanding Power Data from the Forms

If you follow the recommendations presented here, you can benefit from the **three** types of data that can drive your sales:

- **Activity Data**

  - Ability to set and see a maintenance schedule.

  - Maintained shelves (available product with visible pricing) and displays make it easier for the customer to buy your product.

- **Observational Data**

  - Building in-store staff communication/reliability can be a case for better placement.

  - Tracking shelf information across chains can justify same placement in all stores of the chain.

  - Understanding the competitive landscape can help leverage your product.

- **Sales Data**

  - Conversations vs. Conversions tell the rep's effectiveness

  - Out-of-Stocks can indicate a lost placement

  - Reasons behind purchases or non-purchases tells the consumer reception to your products