# Last Month of Planning & DSD

**Establishing Opening Date**
**DSD**
**Last Month of Planning**

## Establishing Opening Date

**Opening Date**
- Set by your refrigeration timeline and when your refrigeration gets to temperature
- Once at temp, you need 2-3 weeks to wrap everything up

**Officially Legal to Open**
- Determined by passing your Food Safety Inspection - typically held right before opening as soon as all elements are in place

## DSD

**Wishlist of DSD vendors** you would like to have in your store
- Prioritize and start with the most important to have them set up prior to opening
- Continue onboarding DSD vendors as needed after opening

**Types of DSD Vendors**
- Milk
- Pop
- Beer
- Chips
- Bread
- Fresh Fish
- Fish Bait
- Ice
- Specialty Brands
  - E.g. Tabasco
- Weekly Supplies and laundry (cleaning chemicals, rug and apron laundering, trash bags, scale tags, deli/bakery containers, meat wrapping paper, etc.)
- *Beware of order lead time for each vendor

**NEW Vendor Setup Process**

- Initial Meeting  -  Where you can meet your sales rep, discuss your product set given the amount of space they have, if there are any additional coolers or areas you want them to merchandise, plan your initial order within the budget requirements, and communicate the rest of these needs -
- Vendor provides  -  Product list that includes UPC, item name, case count, case cost, and size
    - Ideally the product list will only include items you will be bringing into your set - not all items they offer. Try to avoid creating a bunch of items you don't need (pays off if you ever try to set up ecommerce).
    - Using this list is how you set these products up in your POS
- Promotions schedule (if applicable)
    - usually give you ~4 weeks at a time
    - If you get a sale price, do they expect you to run the product on sale?
- Autopay setup instructions -
    - this allows you to charge each order when it's delivered then the payment is automatically drafted out of your account later
    - The alternative is to pay by check each time you receive a delivery
- Price tags - do they provide or will you be making your own?
    - If they provide they'll typically let you set your own margin before they can print the tags for you
- Order Day and Process
    - They will likely assign your day(s)
    - They may have you submit your own order or may be planning to have a sales rep come on site to write it for you. If the latter, communicate that you would like to approve all orders before they are submitted.
- Receiving Day and Process
    - They will likely assign your day(s)
    - Mostly make sure your employees are trained in how to receive a DSD order (section below for **Check-In Process for DSD Orders)**
- Backstock space and process
    - Show them how much room for backstock they have and where this is
    - Discuss how much backstock you want to start with
    - Buying Sales Only
        - This means you invest more cash into carrying more backstock on purpose so you can sell the item at a cheaper everyday price.
        - You may choose to do this for select items
- Outdated Product Process
    - Do they give credit and take back expired product?
    - Will they pull outdated items or do you need to in order to get credit?
- Signage - if you want to put it up
- If before Grand Opening
    - Ask if they have any merch they want to donate for giveaways and prizes for your grand opening festivities

**POS Setup**
- Using the list provided by your vendors, make sure all items included in your set are entered in your POS and deployed to your registers
  - Be sure to monitor DSD for new items (e.g. Little Debbie seasonal cakes) and enter new items as needed in the POS so they can scan at your registers (and show in online shopping, if applicable)
- Ask your POS vendor to help you with an upload template for mass creating new items
- Print price tags for items where vendors are not providing them and hang the price tags on the shelf

**Vendor Schedule for Orders, Deliveries, and Payments**
- <mark>Template:</mark> Mod6_2 Vendor Schedule

**Check-In Process for DSD Orders**
- Trained employee of the store
- Receive the invoice of the order the vendor is bringing in
- Start with the top line and verify the item and quantity is physically included in the product stack
- Verify all quantities on the invoice, match what is brought in
- Do the same with credits, if the vendor is taking OUT product, make sure the proper quantities are showing in the credit portion of the invoice
- Flag any new items and get them entered in the POS asap so they'll scan at the register

# Last Month of Planning

**Food Safety Inspection**
- Call to schedule as soon as you know when your refrigeration will be to temp with food in it

**Warehouse Data Feed**
- Setup and current with all batches deployed
- Enter any Produce or Custom UPC's and test they work at the register / scales

**Evaluate Project To Do List**
- Crunch time - can anything be moved to "After Opening" - repeat weekly until open

**Grocery Carts & baskets**
- Can buy used / refurbished, example
    - https://www.cartsandparts.com/used-shopping-carts/
    - https://www.rwrogerscompany.com/refurbished-shopping-carts/


**Employee Training Schedule (store-wide)**
- **See Human Resources Module for more**
    - **Template: Mod5_9 Opening Training Matrix**
- Clock In/Out Systems are ready prior to training
    - Who is QAQC for payroll hours? Person who pulls the report and checks accuracy
- When to start your staff
    - Communicate at hiring
        - the flexibility of the opening date and how that will determine their start date
        - the start date will be communicated as soon as there is a solid opening date
        - gather initial time off requests when you hire them (for the next couple months)
        - provide new hire paperwork and establish you need them to bring it with them when they come their first day.
    - Begin training full time / core employees at least 2-3 weeks ahead of opening (if not sooner) - they can help put freight away to stock the store, help with other last minute tasks, and be trained in between in anything else they need to know
    - Part time employees the week before opening
- Send out schedule for first 2 weeks of being open, along with requesting additional time off requests (if applicable to your process)
    - Send out at least 1 week in advance so you can fix any issues prior to opening day but still close enough where you're certain of your opening date


**Initial Grocery Order**
- Warehouse to help place the order
    - Get setup with an order gun from your warehouse
    - Basically order one case of everything on your shelf
    - Order one side of each aisle at a time for ease of putting it all away
- Use putting it away as general training for new employees
- Work with each DSD vendor to make sure the initial order/deliveries are good to go
- Who will be responsible for
    - submitting grocery credit requests?
        - Beware not all credit requests are due at the same time
    - monitoring meat and produce invoices and updating costs/prices accordingly in the POS?

**Post all Licenses and OSHA Signage**
- Food Safety
- Business
- Beer
- Anything else you've been licensed to operate
- *Be sure to post new certificates upon expiration dates

**Interior Signage**
- Open Sign
- Hours Sign
- Aisle Signs
- Department Signs
- Later on, once approved, hang up SNAP and WIC signage

**Test (all) POS lanes**
- Charge $0.01 and complete a successful payment using all payment methods you're planning to accept including a check to make sure your check processor (e.g. Telecheck) is working
- On Opening Day, who is fixing the items that don't scan aka aren't in the system properly? Things to help there be fewer errors:
  - Make sure all batches are deployed and current from your warehouse
  - Thorough review of produce UPC's to ensure that what is physically on your shelf is also in the POS (the data feed batches may not catch this)

**Scale Tag Items**
- Once Custom UPCs have been setup in POS - tag all items
- Double check the scale tag UPC barcodes scan at the register

**Refrigeration Temperature Monitoring**
- Make sure this system is setup and good to go once refrigeration is at temp
- Learn from your refrigeration contractor what maintenance is expected on your part on a weekly/monthly basis to keep your equipment at its optimal performance

**Cash Registers Ready**
- Cash Drawer Bags
  - Make bank withdrawals for day 1 registers (at least) and petty cash to use as change in case the registers run out
- Receipt paper
- Sacks

### Soft Opening
- Friends and Family
- A couple days before
- Find last minute hiccups with a trusted audience before the wider launch and 1st impression


### Media Coverage of Grand Opening Date
- Start ~1 week in advance of opening
- Radio
- TV
- Newspaper
- Facebook / Instagram Live