

If you sell your product(s) through retailers or other resellers, you must invest in training, sales materials and shelf maintenance (detailing). This spreadsheet is used for budgeting of a merchandising/store detailing program.

Retail Merchandising Budget

Year: 2019

Retail Sales Forecast				Jan	Feb	Mar	Q1 Totals	Apr	May	Jun	Q2 Totals	Jul	Aug	Sep	Q3 Totals	Oct	Nov	Dec	Q4 Totals	2019 Total	
Units/Store	ASP	Total Revenue																			
Product A	2	\$ 59.00	\$ 108,324	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 1,299,888	
Product B	2	\$ 59.00	\$ 108,324	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 1,299,888	
Product C	2	\$ 59.00	\$ 108,324	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 1,299,888	
Product D	2	\$ 59.00	\$ 108,324	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 108,324	\$ 108,324	\$ 108,324	\$ 324,972	\$ 1,299,888	
Product E	1	\$ 59.00	\$ 54,162	\$ 54,162	\$ 54,162	\$ 54,162	\$ 162,486	\$ 54,162	\$ 54,162	\$ 54,162	\$ 162,486	\$ 54,162	\$ 54,162	\$ 54,162	\$ 162,486	\$ 54,162	\$ 54,162	\$ 54,162	\$ 162,486	\$ 649,944	
Product F	1	\$ 59.00	\$ 54,162	\$ 54,162	\$ 54,162	\$ 54,162	\$ 162,486	\$ 54,162	\$ 54,162	\$ 54,162	\$ 162,486	\$ 54,162	\$ 54,162	\$ 54,162	\$ 162,486	\$ 54,162	\$ 54,162	\$ 54,162	\$ 162,486	\$ 649,944	
Total Retail Sales			\$ 541,620	\$ 541,620	\$ 541,620	\$ 541,620	\$ 1,624,860	\$ 541,620	\$ 541,620	\$ 541,620	\$ 1,624,860	\$ 541,620	\$ 541,620	\$ 541,620	\$ 1,624,860	\$ 541,620	\$ 541,620	\$ 541,620	\$ 1,624,860	\$ 6,499,440	
Store Detailing Services				Jan	Feb	Mar	Q1 Totals	Apr	May	Jun	Q2 Totals	Jul	Aug	Sep	Q3 Totals	Oct	Nov	Dec	Q4 Totals	2019 Total	
Stores	\$ / Visit	Total																			
				<i>Based upon 1 visit per store per month</i>																	
Chain A	125	\$ 15.00	\$ 1,875	\$ 1,875	\$ 1,875	\$ 1,875	\$ 5,625	\$ 1,875	\$ 1,875	\$ 1,875	\$ 5,625	\$ 1,875	\$ 1,875	\$ 1,875	\$ 5,625	\$ 1,875	\$ 1,875	\$ 1,875	\$ 5,625	\$ 22,500	
Chain B	275	\$ 13.00	\$ 3,575	\$ 3,575	\$ 3,575	\$ 3,575	\$ 10,725	\$ 3,575	\$ 3,575	\$ 3,575	\$ 10,725	\$ 3,575	\$ 3,575	\$ 3,575	\$ 10,725	\$ 3,575	\$ 3,575	\$ 3,575	\$ 10,725	\$ 42,900	
Chain C	345	\$ 15.00	\$ 5,175	\$ 5,175	\$ 5,175	\$ 5,175	\$ 15,525	\$ 5,175	\$ 5,175	\$ 5,175	\$ 15,525	\$ 5,175	\$ 5,175	\$ 5,175	\$ 15,525	\$ 5,175	\$ 5,175	\$ 5,175	\$ 15,525	\$ 62,100	
Chain D	123	\$ 15.00	\$ 1,845	\$ 1,845	\$ 1,845	\$ 1,845	\$ 5,535	\$ 1,845	\$ 1,845	\$ 1,845	\$ 5,535	\$ 1,845	\$ 1,845	\$ 1,845	\$ 5,535	\$ 1,845	\$ 1,845	\$ 1,845	\$ 5,535	\$ 22,140	
Chain E	50	\$ 15.00	\$ 750	\$ 750	\$ 750	\$ 750	\$ 2,250	\$ 750	\$ 750	\$ 750	\$ 2,250	\$ 750	\$ 750	\$ 750	\$ 2,250	\$ 750	\$ 750	\$ 750	\$ 2,250	\$ 9,000	
Total Service Cost	918		\$ 13,220	\$ 13,220	\$ 13,220	\$ 13,220	\$ 39,660	\$ 13,220	\$ 13,220	\$ 13,220	\$ 39,660	\$ 13,220	\$ 13,220	\$ 13,220	\$ 39,660	\$ 13,220	\$ 13,220	\$ 13,220	\$ 39,660	\$ 158,640	
Collateral Materials				Jan	Feb	Mar	Q1 Totals	Apr	May	Jun	Q2 Totals	Jul	Aug	Sep	Q3 Totals	Oct	Nov	Dec	Q4 Totals	2019 Total	
QTY	Cost Each	Total																			
				<i>3 Month Supply includes all production costs.</i>																	
Copywriting	1	\$ 1,000	\$ 1,000	\$ 250	\$ 250	\$ 250	\$ 750	\$ 250	\$ 250	\$ 250	\$ 750	\$ 250	\$ 250	\$ 250	\$ 750	\$ 250	\$ 250	\$ 250	\$ 750	\$ 2,250	
Coupon Pads	5,000	\$ 2.00	\$ 10,000	\$ 2,500	\$ 2,500	\$ 2,500	\$ 7,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 7,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 7,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 7,500	\$ 22,500	
Design	1	\$ 1,200	\$ 1,200	\$ 300	\$ 300	\$ 300	\$ 900	\$ 300	\$ 300	\$ 300	\$ 900	\$ 300	\$ 300	\$ 300	\$ 900	\$ 300	\$ 300	\$ 300	\$ 900	\$ 2,700	
Flyers	20,000	\$ 0.50	\$ 10,000	\$ 2,500	\$ 2,500	\$ 2,500	\$ 7,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 7,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 7,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 7,500	\$ 22,500	
Headercards	3,000	\$ 1.50	\$ 4,500	\$ 1,125	\$ 1,125	\$ 1,125	\$ 3,375	\$ 1,125	\$ 1,125	\$ 1,125	\$ 3,375	\$ 1,125	\$ 1,125	\$ 1,125	\$ 3,375	\$ 1,125	\$ 1,125	\$ 1,125	\$ 3,375	\$ 10,125	
Point of Purchase (POP) Displays	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Shelf-talkers	3,000	\$ 3.00	\$ 9,000	\$ 2,250	\$ 2,250	\$ 2,250	\$ 6,750	\$ 2,250	\$ 2,250	\$ 2,250	\$ 6,750	\$ 2,250	\$ 2,250	\$ 2,250	\$ 6,750	\$ 2,250	\$ 2,250	\$ 2,250	\$ 6,750	\$ 20,250	
[x]			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Collateral Cost			\$ 62,140	\$ 15,525	\$ 15,525	\$ 15,525	\$ 46,575	\$ 15,525	\$ 15,525	\$ 15,525	\$ 46,575	\$ 15,525	\$ 15,525	\$ 15,525	\$ 46,575	\$ 15,525	\$ 15,525	\$ 15,525	\$ 46,575	\$ 139,710	
Consulting Fees				Jan	Feb	Mar	Q1 Totals	Apr	May	Jun	Q2 Totals	Jul	Aug	Sep	Q3 Totals	Oct	Nov	Dec	Q4 Totals	2019 Total	
Jane Doe's Marketing Services, Inc.		\$ -	\$ -	\$ -	\$ 5,000	\$ 5,000	\$ 10,000	\$ 1,200	\$ 1,200	\$ 1,200	\$ 3,600	\$ 1,200	\$ 1,200	\$ 1,200	\$ 3,600	\$ 1,200	\$ 1,200	\$ 1,200	\$ 3,600	\$ 10,800	
Total Collateral Cost			\$ -	\$ -	\$ 5,000	\$ 5,000	\$ 10,000	\$ 1,200	\$ 1,200	\$ 1,200	\$ 3,600	\$ 1,200	\$ 1,200	\$ 1,200	\$ 3,600	\$ 1,200	\$ 1,200	\$ 1,200	\$ 3,600	\$ 10,800	
Total Merchandising Investment			\$ 75,360	\$ 13,220	\$ 18,220	\$ 27,145	\$ 58,585	\$ 14,420	\$ 14,420	\$ 23,345	\$ 52,185	\$ 14,420	\$ 14,420	\$ 23,345	\$ 52,185	\$ 14,420	\$ 14,420	\$ 23,345	\$ 52,185	\$ 215,140	
Analysis				Jan	Feb	Mar	Q1	Apr	May	Jun	Q2	Jul	Aug	Sep	Q3	Oct	Nov	Dec	Q4	2019	
<i>Merchandising as a % of Total Retail Sales</i>				14%	2%	3%	5%	4%	3%	3%	4%	3%	3%	3%	4%	3%	3%	3%	4%	3%	3%