

**TAYLOR** + Colateral

# Your guide to effective in-store marketing.





## The future of retail is still in-store.

The big noise in retail is e-commerce and the digital tech necessary to feed the beast. With mind-boggling amounts spent on harnessing new technology and innovation, each week sees new announcements about AI, metaverses and robot innovations – all released with great fanfare as the “next big thing” to drive sales online.

However, on average, 80% of retail revenues still come from in-store purchases. So why isn't more help available to drive innovation, cut costs and deliver extra revenues through targeted marketing when consumers walk through the front door?

**Now, it is.**

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**More than 80% of retailers' revenues come from in-store purchases.**

Digital Commerce 360 analysis of U.S. Commerce Department data; February 2022

# Why choose an in-store marketing system?

In-store marketing systems help you achieve a higher return on investment from your marketing campaigns, making them a strategic part of your business.

A good in-store retail marketing system isn't just a tool to improve on spreadsheets and manual processes for your operational staff. It's the powerhouse that drives your in-store marketing, cuts costs and maximizes revenue for your company and your brand partners ... all while giving you granular control of messaging and real-time data analysis of store performance. The information it provides helps you compare sales numbers for each campaign and react to competitors and market conditions on a store-by-store basis.

Then again, it's important to carefully evaluate what you are getting. Free in-store marketing systems often have hidden costs and limit your strategic insights while large systems with extensive functionality often lack the granular detail you need to streamline processes.

“Our in-store marketing system has been fundamental in how we manage the ever-changing marketing landscape in our 600+ stores across the UK and Ireland. The reporting elements have enabled us to double our compliance rate, bringing consistency and clarity of messaging to our customers and shop teams.”

Jamie King  
Head of Retail Marketing at Paddy Power



# What should you look for in your in-store marketing system?

## Consider information output rather than system features

Many providers of in-store marketing systems emphasize features – what the system does and what you can do in it. While these are important, it's better to think about your needs and the advantages you will gain by adopting one. A good system should become an intrinsic, strategic part of your marketing mix.

Consider the challenges are you facing in your business. What problems will the system enable you to solve? What will you do with the time it saves? Will the system provide the information you need to make changes? Most importantly, how will the information it provides empower you to increase revenue?



# Will it generate a return on investment?

Your in-store retail marketing system should pay for itself many times over. There are many benefits to be realized but two rise to the top:

- 1. Save on time, resource, material and labor costs throughout your workflows and supply chain.**
- 2. Reduce and eliminate marketing errors.**

Done right, the system will also help you increase revenues. Marketing is done to drive sales for you and your partners. If your marketing messages are inaccurate, obsolete or absent entirely, you are spending precious dollars with no return.



## So what should you look for in an in-store marketing system?

### A single source of truth.

Retail marketing is collaborative but remote. Marketing teams at the head office collaborate with design agencies, printers, suppliers and stores to plan and execute in-store campaigns.

Your in-store marketing system must give everyone the single source of truth they need. It should serve as a hub of information including fixtures and fittings of stores, printing costs, campaign deadlines, creative work and compliance guides. Users must be empowered to access and update the information relevant to them.

If you find a system that checks most of the boxes but still requires you to use a spreadsheet for one key requirement, ask if the software provider can make that enhancement for you. If not, go somewhere else. Having to supplement your new system with spreadsheets defeats the purpose.

### Guaranteed accuracy in allocations.

When used to manage hundreds of store locations, spreadsheets simply can't maintain details regarding the number of fixtures, fittings and displays in each store. This inevitably leads to overallocations of POS signage to small stores and wasted marketing dollars.

An in-store marketing system should provide store-specific information that is accurate, updated constantly, accessible, searchable and granular. There should be no mistakes and campaigns should be easy to set up for in-store teams. Store allocations should be controllable to the finest detail for each location and for multiple campaigns simultaneously. You need the confidence that your marketing campaigns, visual merchandising, store environments and paid media placements will be right every time, in every store.

## Supplier independence.

Some in-store marketing systems are managed by your supplier. This can be helpful as it outsources some administrative work and takes that off your plate. However, this very much ties you to a specific supplier and limits the information available to you. When you consider the strategic importance of your stores, can you really rely on third parties to manage such a core competence?

In our opinion, your system should own your store data and should survive changes of suppliers. It should work for you, not for your supplier.

## Clean user interface.

If you currently use spreadsheets, selecting an option that just looks like another spreadsheet or reminds you Windows 11 is a missed opportunity. A good user interface is about form and function. It shouldn't just look attractive, but should enable users to easily perform the work they need to complete.

The whole system should be intuitive – for your corporate office, design team and in-store users. There should be training materials and videos included and a regularly updated help desk. It should require minimal support and there should be no extra charges for this.



## Regular updates.

The rate of change for technology isn't slowing down. With updates to security protocols, changing regulations and new emerging technologies, the system you need today is likely to be different to the one you need five years from now or even in three years.

Therefore, it's important that your chosen technology partner is committed to continuous improvement and innovation of the system. Ask them how frequently they deploy updates and for a copy of their most recent release notes. For cloud-based software, releases could be as frequently as two weeks with new features every three months.

Your system should be constantly evolving and improving to help you deliver the most effective marketing possible.

## Compliance tracking.

When you execute in-store campaigns, can you run audits to ensure everything is deployed accurately? An in-store marketing system will allow you to communicate with store teams and to run audits of their store setup. They should have checklists to ensure signage is put up correctly and be able to provide photographs to demonstrate compliance to the corporate office.

No more emails with installation questions, or photos of incorrectly placed signage. Everything should be in the system with a full audit trail of who did what, and when.

Having a complete view of compliance will mean you can align merchandising and marketing efforts across all of your stores to increase sales.



**Everything should be in the system with a full audit trail of who did what, and when.**



## Minimized time and complexity.

One of the biggest advantages of any well-designed software application is time savings. If your software is complicated to use, or requires so many additional steps to your process that it actually slows you down, it should be avoided.

Marketing teams are highly qualified professionals responsible for driving revenue yet they often spend their time managing spreadsheets. Automation can remove headcount from your operations, driving cost savings. It can also free those same people to be deployed on high-value tasks instead of updating spreadsheets, manually verifying installations or correcting mistakes across large numbers of stores.

Your in-store marketing technology should give you the equivalent capacity of an extra staff member. This frees up your team to focus on activities that drive value to your entire organization.

## Easy accessibility.

In today's remote landscape, accessibility is essential. People need to be able to access information wherever they are. This is especially true when corporate office teams are collaborating with teams in stores.

Does the platform have a low level of access complexity? Can it link in to your own active directory or single sign-on? Can you access it through other applications, such as MS Teams? Staff members on the shop floor have too many applications and access passwords. Your in-store marketing system should work with what you already have or replace other software to simplify operations.



## Streamlined approval and creative process.

Getting the creative work right is critical to campaign performance. And having to collaborate in person or via an external platform adds inefficiencies and potential errors into the process.

A good system should have an integrated set of workflows and hierarchies to create and approve artwork, including alterations. Find a platform where design changes can be tracked, approved and delivered to printers and other suppliers in real time, ensuring mistakes can be rectified at little or no cost.

## Cost savings.

Accurate data and visibility when planning, producing, delivering and analyzing your marketing campaigns will drive cost savings in time, materials and logistics. A good system can easily save you 20% or more on your in-store marketing budget – money you can then reinvest to drive more revenue from your customers.



**A good system should have an integrated set of workflows and hierarchies to create and approve artwork.**



## Actionable insights.

One of the ongoing challenges with in-store marketing is the lack of insights available to you. It certainly doesn't compare with online or e-commerce analytics capabilities. However, a good in-store marketing system will give you real-time insights into campaign effectiveness so you can be more agile, react to trends and inform future campaign decisions.

A good system will give you granular detail of campaign performance, including whether campaigns are on time, on budget and compliant. This is how you can manage the quality, cost and delivery performance of campaigns. You should also be able to link with third-party systems including your POS and ERP systems to give you more insights into how your campaigns are impacting product sales.

It's important that this information be delivered to your business in real-time, so you can quickly capitalize on trends and adjust any campaigns that aren't having the desired impact. Being able to give marketing directors, campaign managers and retail operations teams personalized information and escalation paths for issues can be a powerful way to ensure everyone is on the same page.

## Pro tip:

Your system should help you answer the following questions:

- 1. Do campaign-related products see increased sales during the campaign compared to non-campaign periods?**
- 2. Does the number of products in the basket or transaction increase or decrease during a campaign?**
- 3. When campaign-related products are included in sales transactions, does it cannibalize the sales of other products or categories?**



## Paid media.

As mentioned previously, the true value of your in-store marketing system lies in the information it captures for you. If your system is a tool to order paper and ink, it's not delivering true value. Up to 80% of a retailer's transactions happen in store yet point of sale is often treated as an afterthought, not a driver of revenues for retailers and brand partners.

Given proper visibility to in-store displays and links to sales data, you can identify which placements deliver maximum impact on sales. This helps you plan your own campaigns and also negotiate paid media placements with brand partners, while giving them visibility of their ROI with you.

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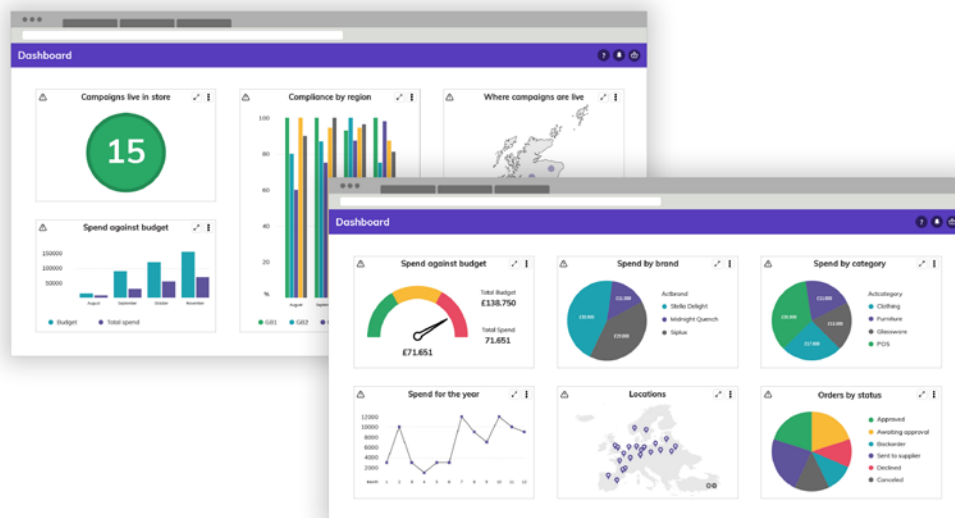
**Given proper visibility to in-store displays and links to sales data, you can identify which placements deliver maximum impact on sales.**



# Choosing your in-store marketing system.

Of course, there are many other considerations when choosing a platform and the partner you will work with. Getting this decision right can be transformational for your business. Making an informed decision will not only save you significant sums of money and reduce errors and administrative time. It will also create a lasting competitive advantage for your business as you better integrate your in-store marketing and omnichannel strategies.

**Want to learn how an in-store marketing system can transform your business?**



[Transform your in-store marketing with Colateral.](#) →



# Thank you for reading.

For more tips to improve your in-store marketing campaigns, check out these resources:

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[How to conduct retail store audits](#) →

[How to align your in-store marketing and merchandising](#) →  
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