

# Protein Pop™ MBA Consulting Project Report

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# Introduction

This document presents a detailed market analysis and strategic plan for Protein Pop's expansion into national retail channels. The analysis encompasses target audience research, sensory benchmarking, market positioning, engagement strategy, and operational readiness for scaling to major retailers including Target and Costco.

The following sections provide data-driven insights and actionable recommendations based on primary research, competitive analysis, and demand forecasting through 2029.

# Project Objectives

**1**

**01**

Target Audience Understanding

Identify demographics, psychographics, and consumption behaviors

**2**

**02**

Market Positioning

Define core value proposition against competitors

**3**

**03**

Engagement Strategy

Build multi-channel plan for awareness and trial

**4**

**04**

Product Innovation

Explore new formulas and formats

**5**

**05**

Sensory Benchmarking

Measure flavor and texture preferences vs peers

**6**

**06**

SMARTLab Testing

Assess packaging and digital UX via eye-tracking

# Market Viability & Product Fit

The concept for Protein Pop has demonstrated strong market appeal based on demographic survey results. Key findings indicate substantial opportunity in the health-conscious consumer segment.

## High Interest

79% of respondents saying they would be "Yes" or "Maybe" interested in trying Protein Pop

## Active Target

76.8% exercising 2 or more times per week (41.9% at 2-4 times, 34.9% at 5-7 times)

## Supplement Users

58.1% already use protein supplements, making them accustomed to buying and integrating these products into their diet

This confirms the product is positioned well for a health-conscious segment that actively seeks protein supplementation solutions.

# Demographic Profile and Opportunity

## Gender Distribution

The sample is predominantly Female (60.5%), indicating that marketing efforts should strongly resonate with women.

## Core Age Range

The primary age demographic is solidified in the 26-35 age range at 55.8%. However, the 50-65 and 65-80 ranges now make up a combined 32.6%, indicating a potential secondary market among older, active adults.

## Protein Awareness Gap

A substantial 23.3% of respondents admitted they "don't know" their daily protein intake. This suggests an opportunity to position Protein Pop as an easy, hassle-free way to hit a protein target without tedious tracking.

This awareness gap represents a significant market opportunity for simplified protein solutions.

# Product Preferences and Flavor Direction

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## Clean/Real Food Preference

While "Real Food" (12.5% of mentions) is the most-cited preference, the next most mentioned preferences were specific "clean label" brands (like Clean Simple Eats and Just Ingredients), suggesting customers prioritize quality and simple ingredients over generic options.

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## Light and Refreshing Flavors

The top requested flavors are Strawberry (22.2%) and Citrus (18.5%). This heavily favors a light, refreshing, non-milky profile that aligns with a "pop" (soda/sparkling drink) format, differentiating it from traditional creamy shakes.

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## Novelty Appeal

The mention of Cherry Cola, Root Beer, and Butterbeer confirms that customers are excited by the novelty and indulgent nature of a protein product disguised as a fun beverage.

# Primary Target Audience: The Active, Health-Conscious Woman

Based on demographic conclusions, the target audience should be sharply defined to maximize marketing ROI.

Component	Profile	Marketing Strategy
Demographics	Female, Ages 26–35	Focus ad visuals and language on women's fitness, wellness, and busy professional/family life
Needs & Habits	High supplement user and regular exerciser who prioritizes clean labels and real food quality	Emphasize ingredients, transparency, and the convenience of a ready-to-drink format that fits a busy schedule
Pain Point	Dislikes the chalkiness or inconvenience of traditional protein supplements	Position Protein Pop as "The Refreshing Protein Upgrade" that doesn't compromise on quality or taste
Product Focus	Launch with Strawberry and Citrus flavors	Satisfy the core demand for light, non-milky options

# Secondary Target Audience: The Protein-Curious and Older Active Adults

Component	Profile	Marketing Strategy
Demographics	Older Active Adults (50+); Any gender/age who "Don't Know" their protein intake	Use simple messaging like "Your Daily Protein Goal, Simplified." Highlight the "Pop" (soda) format to appeal to a broader, less fitness-obsessed audience
Needs & Habits	Needs an easy, non-intimidating way to boost protein without becoming a "gym rat" or tracking macros	Focus on convenience and simplicity rather than technical fitness terminology
Pain Point	Confused by nutrition facts; intimidated by powder tubs or technical fitness products	Emphasize ease of use and straightforward benefits

# Research Limitations and Data Quality Considerations

## Issues with Sample Size and Sampling Bias

The data is not representative of the general population or even the full potential target market.

- **Critically Small Sample Size (43 Responses):** The absolute number of responses is too low to establish statistically significant trends. Any conclusions drawn are fragile and could be easily skewed by a few different answers.
- **Severe Age Bias:** The data is heavily concentrated in specific segments: 55.8% are 26–35 years old, and 32.6% are 50 years or older (18.6% are 50–65, 14.0% are 65–80). This leaves very little data on the 18–25 and 35–50 age groups, meaning you don't know their preferences.
- **High Activity Bias:** The sample is clearly drawn from an already engaged, active audience (76.8% exercise 2 or more times per week). This tells you what fitness enthusiasts want, but provides minimal insight into the preferences of less active consumers who might be drawn to the product's convenience.

## Data Quality and Completeness

Problems persist in how key information was collected or reported, making certain segments difficult to analyze.

- **Persistent "Don't Know" Rate on Key Metric:** A significant portion, 23.3% reported they "don't know" their daily protein intake. For a protein-centric product, this indicates a large segment of the audience lacks the nutritional awareness to be targeted with specific grams-per-day messaging.
- **Ambiguity in Open-Ended Responses:** The free-text questions (e.g., preferred supplement, desired flavors) require manual standardization (e.g., grouping "Whey" and "Protein Powder"). This process introduces a risk of analyst bias and can lose the subtle nuance of the original responses.
- **Missing or Incomplete Demographic Data:** While minor, the Gender question, which is key for marketing, has some responses that are unusable for traditional segmentation (e.g., "Prefer not to say").
- **Lack of Segmentation Variables:** The survey is missing key information typically found in demographic studies, such as income level, location (city/state), or education level. Without these, it's difficult to profile the customer's purchasing power or regional preferences.

# Sensory & Taste Benchmarking: Key Findings

Our sensory benchmarking and willingness-to-pay analysis uncovered three critical findings that mandate an immediate shift toward Operational Quality Control before national expansion.

## 1. Flavor Inconsistency is an Operational Risk

**Finding:** The average Flavor Rating was acceptable at 3.58/5.0, but the texture scored higher at 3.74/5.0. Qualitative feedback noted issues like "weird aftertaste" and "bad then good then bad" flavor profiles.

**Mandate:** This score proves that the product is viable, but inconsistent flavor delivery is the core operational risk. Without a mandatory, unified Quality Control (QC) checklist for the co-packer, the brand risks a national failure due to batch-to-batch variation.

## 2. Price Expectation Mandates Low COGS

**Finding:** The median willingness to pay for the core product is \$3.00. This confirms the pricing sensitivity noted in Section 6 (competitive range of \$2.99 - \$3.49).

**Mandate:** The Cost of Goods Sold (COGS) target must be ruthlessly low to support the competitive price and the high promotional activity required by Target and Costco (up to 30% off).

## 3. Can Selection: The 12oz Aluminum Standard

**Decision:** We recommend the standard 12oz Aluminum Can format because customer preference is too split to justify a high-cost, proprietary design.

**Operational Justification:** This choice is based on operational efficiency. The 12oz aluminum standard is the most cost-effective solution for palletization, utilizes widely available sourcing, and minimizes the risk of product breakage during high-volume fulfillment, which is mandatory for national retailers.

# National Growth Pathways

Data suggests several directions for continued expansion:

→ Staff expansion to meet demand.

→ Investment in packaging and distribution capacity to prevent sellouts.

→ New retail channels:

- Convenience stores
- Gas stations
- Traditional grocery stores
- Health food stores
- Compounding pharmacies

→ Strengthened online availability through inventory management and realistic website messaging.

# Connecting Findings Across Teams

All data gathering to this point found consistent confirmation of the client's existing intuition. Together, the data indicates a strong product poised for growth if operational constraints are addressed.

## Supply Chain & Distribution:

- Consumers wanted to buy Protein Pop online but could not due to sold-out inventory.
- This directly validates the need for a more robust supply chain and additional staffing to support scaled operations.
- The Costco expansion example shows that growth is possible when production capacity is aligned with demand.
- A smoother supply chain enables national distribution sustained over the long term.

## Marketing Spend & Brand Growth:

- Low brand recognition relative to major competitors limits growth potential.
- However, packaging appeal, taste superiority, and trial-to-purchase conversion rate indicate strong ROI potential for sampling and paid visibility.
- Marketing spend should focus on accelerating recognition at the national level.

# Website Recommendations

If products continue to sell out online, consider:

- Removing or modifying "Buy Now" links next to sold out products so they do not imply availability.
- Instead directing users to "Find at Target" from the beginning (on the home page, next to flavors, etc.).
- Promoting only items actually available online - in this case, the variety packs.

# Website Pain Points & Confusion Areas

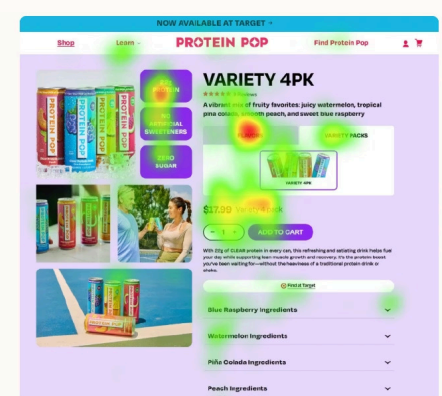
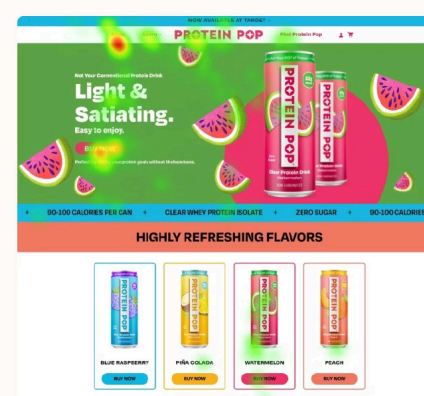
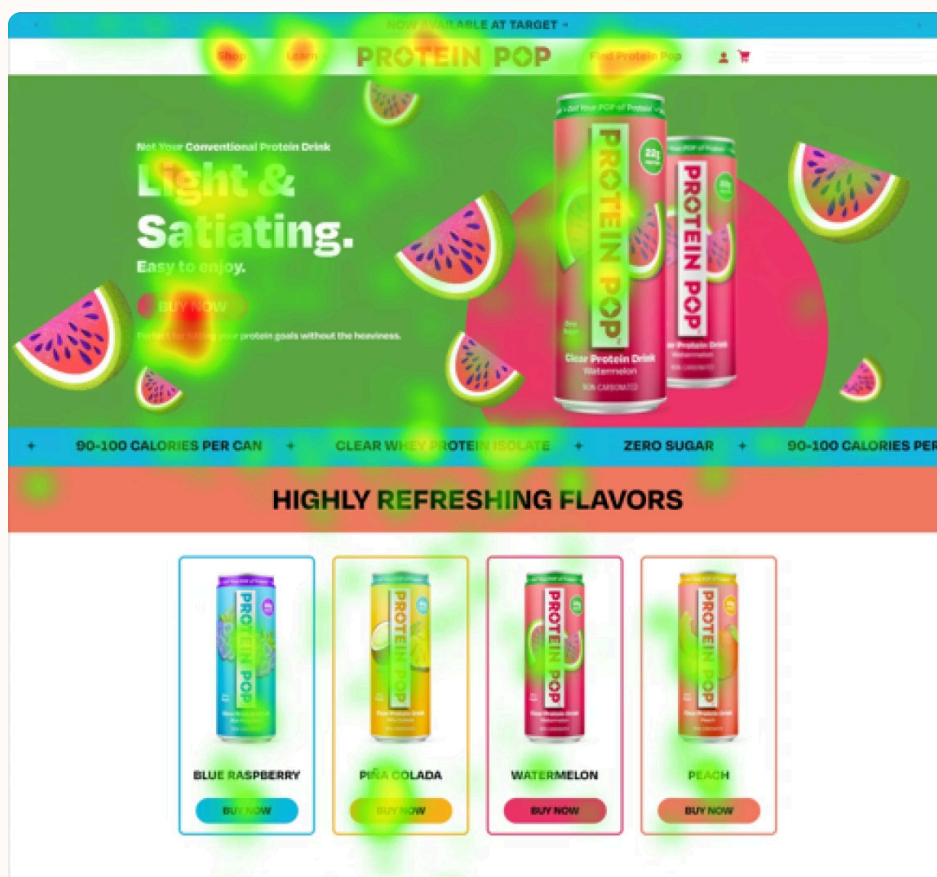
The website is visually appealing but creates several points of friction that disrupt the purchase journey:

## Purchase Path Issues

- Heavy emphasis on watermelon flavor on the homepage created interest but led to disappointment when users discovered it was sold out.
- "Buy Now" links did not lead where users expected. Users were taken to the variety pack page when they were looking for individual flavors.
- Waitlist options for sold-out flavors created confusion regarding availability and fulfillment timing.

## Layout & Usability Issues

Page dimensions limited the visible content area. On desktop, information further down the page was cut off, leading many users to miss clarification sections. Few users scrolled down farther, meaning essential details were not seen.





These issues connect directly to supply chain realities: most products are sold out online. This led to a mismatch between user expectations and actual availability.


# Website Evaluation: Strengths

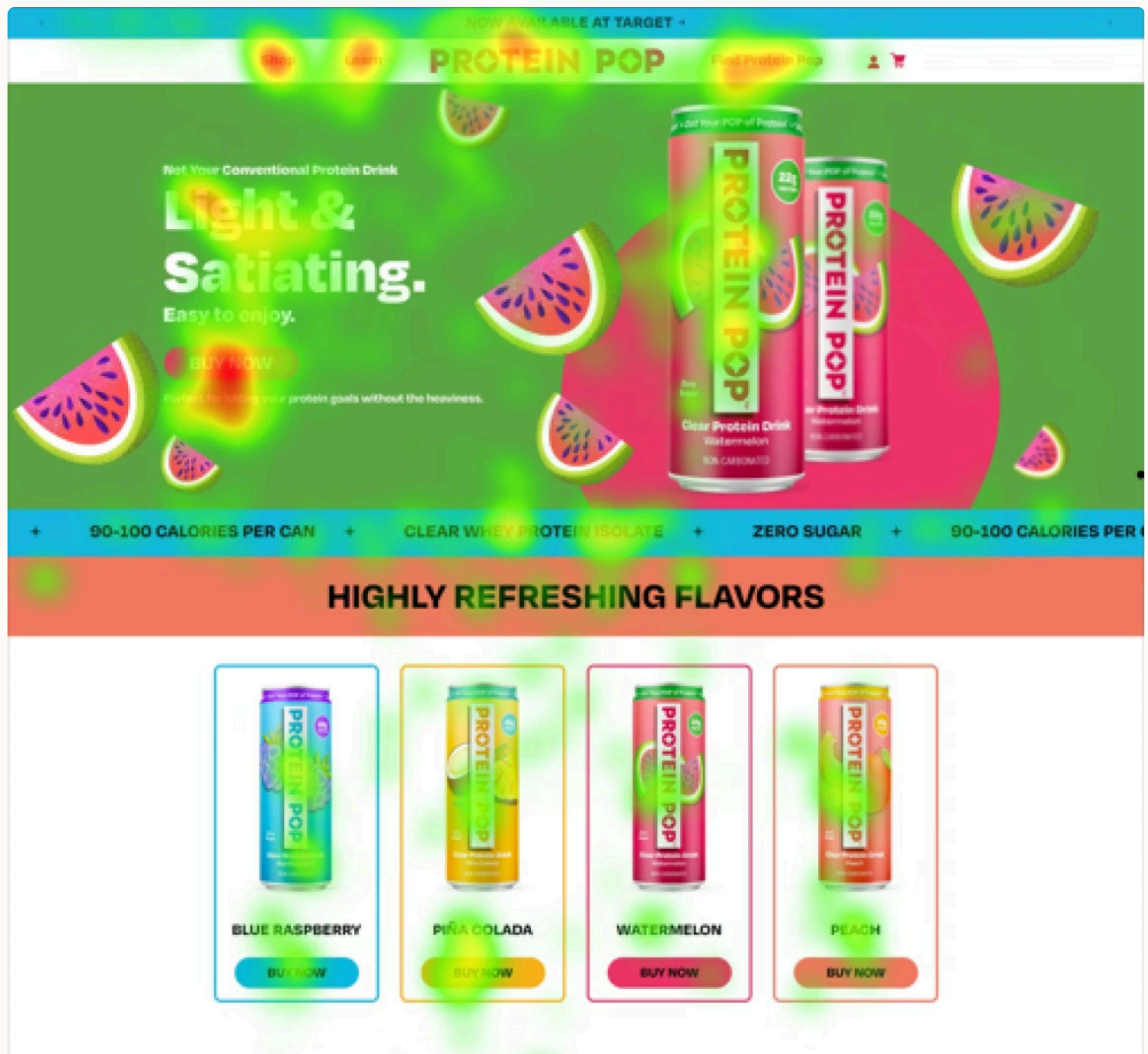
Users responded positively to the visual identity and bold color usage online.

Key Website Pros:

 **Bright colors and bold graphics** helped draw and maintain attention.

 **Graphic-heavy layout** was preferred over text-heavy sections.

 Users described browsing and navigation as **simple** when not attempting a purchase.



# Packaging Limitations & Opportunities

While the packaging performs well visually and functionally, it lacks the built-in trust that competitors like Bucked Up or Clean Simple Eats enjoy as multi-product brands with high recognition.

## Packaging Disadvantages Identified:

### Lower Brand Recognition

Lower brand recognition relative to well-established wellness brands. Multiple participants had tried the Clean Simple Eats or Bucked Up product shown, and several more had heard of them. None had heard of or tried Protein Pop. The audience hasn't built trust with the Protein Pop brand yet.

However, this challenge can be mitigated through strategic marketing:

### Sampling and Giveaways

Sampling and giveaways can accelerate brand recognition, especially since 73% of users (in the taste test above) who tried the product said they would purchase it and preferred it to alternatives.

### Increased Location Presence

Increased location presence in convenience stores, grocery stores, health food stores, and compounding pharmacies, would build recognition through repeated exposure.



# Packaging Performance Rankings

Protein Pop Pina Colada	2.14
Protein Pop Plus Orange Cream	2.86
Clean Simple Eats	3.29
Protein2o	3.71
Bucked Up	4.00
RYSE Country Time	5.00

Note: Lower rank indicates higher preference. Protein Pop products ranked #1 and #2 among all tested packaging options.

# Packaging Evaluation: Key Strengths

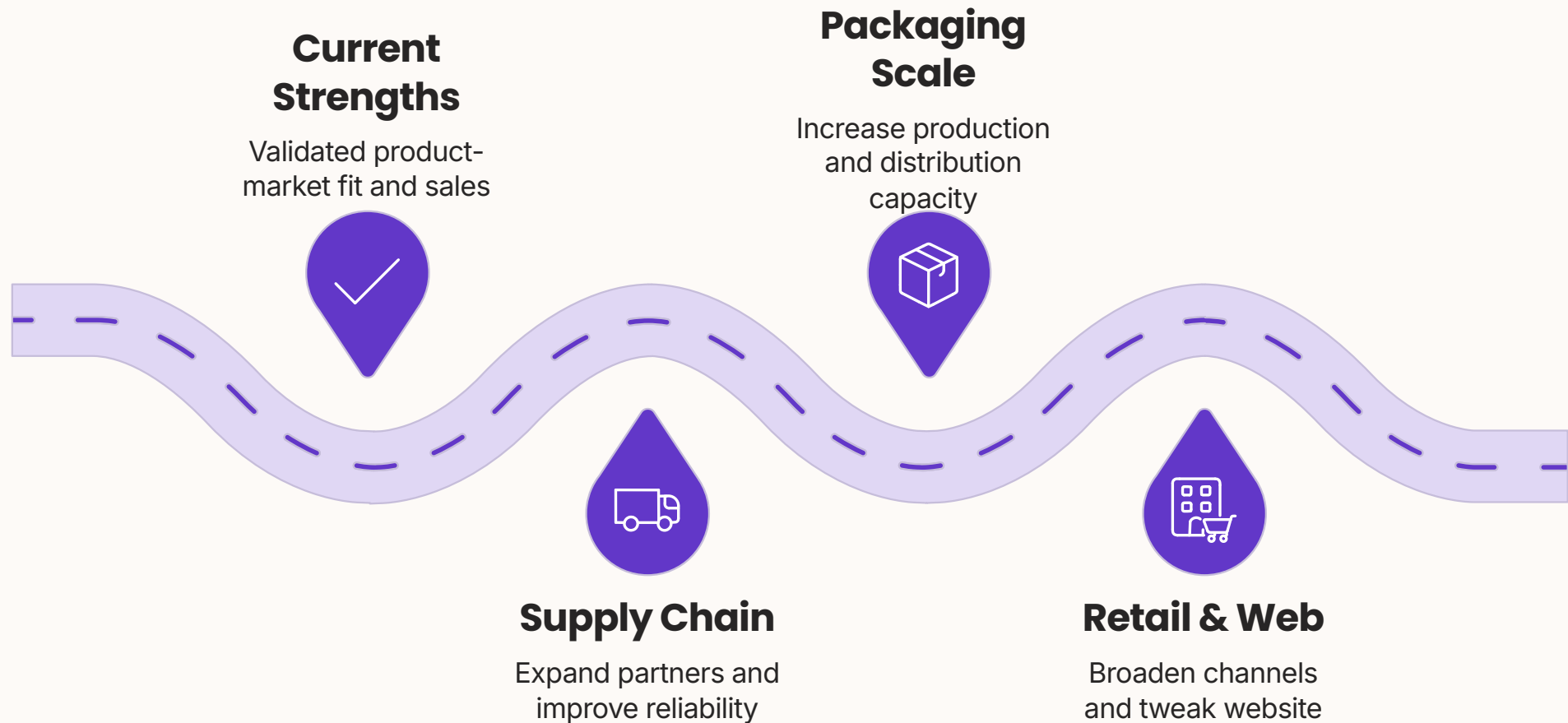
Consumer testing showed consistently strong reactions to the Protein Pop can design. Participants described the packaging positively as bright, clear, and familiar. Most participants picked Protein Pop and Protein Pop Plus as both of their top 2 packaging options.



Top Packaging Advantages Identified:

- Preferred Format:** The can is viewed as more appealing and appropriate for a protein product than a bottle format.
- Color Strategy:** Bright colors with minimal white space attract attention on shelves and stand out among competitors.
- Vertical Logotype:** The vertical orientation of the brand name encourages viewers to scan the entire can, increasing awareness of product features.
- Simple, Clean Layout:** Enhances trust and conveys quality.

# SMARTLab Testing Overview



The data confirms what the client already knows and points to future growth opportunities, including supply chain expansion, packaging and distribution scaling, broader retail channels, and strategic website adjustments.

Across packaging research, website testing, and cross-team audience insights, our findings strongly validated the client's existing assumptions about who their target audience is and what that audience wants. As shown above, Protein Pop is winning on taste against competitors. SMARTLab testing further revealed their advantage in packaging appeal and website aesthetic. The data across all teams aligned: consumers resonate with the current brand personality, the product outperforms competitors in taste trials, and the company's primary audience is accurately understood.

However, while the brand is positioned for growth, friction points in distribution and online purchase pathways create inconsistency between consumer demand and actual purchase opportunities. These findings connect directly with upcoming recommendations on supply chain and staffing, as well as recommendations on marketing spend.

# Market Positioning: Protein Pop's "One Thing"

## Clean Protein with Mainstream Appeal

Protein Pop is the first clear protein drink designed for both refreshment and recovery. Unlike chalky protein shakes or functional sodas with trace nutrients, it delivers meaningful protein (20g–30g) with mass-market flavor, modern branding, and soda-replacement format. Its uniqueness lies in bridging:

- **Protein Functionality:** Like Fairlife Core Power or Clean Simple Eats, but in a clear, ready-to-drink, light-bodied format.
- **Wellness Soda Modernity:** Competes with brands like Olipop and Poppi but with 10x the functional value (protein vs. gut-health fiber).
- **Mass Channel Versatility:** First protein drink poised for everyday consumption in Costco, Target, convenience stores, and gyms.

# SWOT Analysis

## Strengths

- Novel format in a new subcategory (clear protein)
- Available at Target and soon at Costco; DTC optionality
- Appeals to multiple audiences: soda replacers, fitness enthusiasts, wellness consumers
- Better-for-you positioning vs. traditional shakes

## Weaknesses

- Low consumer awareness for clear protein drinks
- Higher production cost due to premium protein isolate
- Taste & mouthfeel may need refinement in early iterations
- Confusion vs. protein water or wellness soda competitors

## Opportunities

- Clear protein category is rapidly emerging; first-mover advantage
- Club channel exclusives allow unit economics & volume
- Cross-channel marketing between gyms, wellness, and retail

## Threats

- Copycat launches by major players (e.g., Premier Protein, Gatorade)
- Aggressive price promotions by functional soda competitors
- Shifts in protein science or consumer skepticism toward sweeteners

# Price Sensitivity & Competitive Landscape

## Price Sensitivity Insights

- **Protein Content:** Consumers are willing to pay \$2.99–\$3.49 for 20g–30g protein if it's transparent, light, and tastes good.
- **Sweeteners:** Products with natural sweeteners (stevia, monk fruit) outperform those with artificial ones (sucralose).
- **Carbonation:** Novel for a protein product, it adds soda-replacement value.
- **Format:** Singles and 4-packs for Target and convenience, 18-packs for Costco maximize margin and repeat purchase.

## Price Scan Data (Utah, 2024)

Brand	Format	Protein (g)	Price	Sweetener	Carbonated
Clean Simple Eats	12 oz RTD	20g	\$3.49	Natural	No
Premier Protein	11 oz RTD	30g	\$2.49	Artificial	No
OWYN	12 oz RTD	20g	\$2.99	Natural	No
Olipop	12 oz can	~2g fiber	\$2.49	Natural	Yes
Protein Pop	12 oz can	20g/30g	\$2.99	Natural	Yes / No

## Market Landscape: Traditional & Emerging Competitors

### Traditional Protein Brands

- Premier Protein
- Fairlife Core Power
- OWYN
- Orgain
- Clean Simple Eats (RTD line)

### Modern Wellness Beverages

- Olipop
- Poppi
- Recess
- Culture Pop

### Emerging Clear Protein Entrants

- Clear Whey Isolate by MyProtein (DTC/gyms)
- Ascent Clear Protein RTD (early retail presence)
- ICONIC Clear Protein (online + specialty)
- Clean Simple Eats Clear Protein (new line)

**Protein Pop's Positioning:** First to combine true protein functionality (>20g/can), light, refreshing, soda-like delivery, mass retail availability, and competitive pricing.

# Adoption Curve & Demand Outlook

## Adoption Timeline



## Market Penetration Projections

Year	Estimated Share of Protein Market
2024	<1%
2026	2–5%
2029	5–10% (~\$400M–\$1B segment)
2033+	15% (similar to plant-based milk)

# Demand Scenarios: Volume, Revenue & Share

Year	Conservative	Base Case	Aggressive
2025	1.7M / \$5M / 20%	3.3M / \$10M / 25%	6.7M / \$20M / 35%
2026	3.3M / \$10M / 20%	8.4M / \$25M / 30%	20.1M / \$60M / 40%
2027	6.0M / \$18M / 20%	16.7M / \$50M / 30%	50.2M / \$150M / 45%
2028	10.0M / \$30M / 20%	26.8M / \$80M / 30%	100.3M / \$300M / 50%
2029	16.7M / \$50M / 20%	40.1M / \$120M / 30%	167.2M / \$500M / 50%

Source: Internal Market Modeling based on Protein Pop Projections (2024)

## Monthly Demand Forecast: 2025–2029 (Base Case)

Month	2025 Units	2026 Units	2027 Units	2028 Units	2029 Units
January	200,000	500,000	1,000,000	1,600,000	2,400,000
February	200,000	500,000	1,000,000	1,600,000	2,400,000
March	250,000	600,000	1,200,000	2,000,000	3,000,000
April	250,000	600,000	1,200,000	2,000,000	3,000,000
May	300,000	700,000	1,500,000	2,200,000	3,200,000
June	300,000	700,000	1,500,000	2,200,000	3,200,000
July	350,000	800,000	1,800,000	3,000,000	4,000,000
August	350,000	800,000	1,800,000	3,000,000	4,000,000
September	300,000	700,000	1,500,000	2,200,000	3,200,000
October	300,000	700,000	1,500,000	2,200,000	3,200,000
November	250,000	600,000	1,200,000	2,000,000	3,000,000
December	250,000	600,000	1,200,000	2,000,000	3,000,000
<b>TOTAL</b>	<b>3.3M</b>	<b>8.4M</b>	<b>16.7M</b>	<b>26.8M</b>	<b>40.1M</b>

# Engagement & Awareness Strategy: \$1M Budget Allocation

Annual Marketing Budget: \$1,000,000

Category	% of Budget	Cost	Key Focus
Social Media & Influencers	35%	\$350,000	40–50 micro-influencers, paid social ads, UGC campaigns
Paid Media (Digital/CTV/Audio)	25%	\$250,000	YouTube, TikTok, Spotify ads, Amazon/TikTok Shop
Retail & Experiential	20%	\$200,000	Target sampling, Pop & Picnic events, Sundance Festival
Partnerships & Sponsorships	10%	\$100,000	Utah Jazz collab, fitness podcasts (Mind Pump, Huberman Lab)
Content Production	6%	\$60,000	Professional shoots, motion graphics, copywriting
Analytics & Contingency	4%	\$40,000	Campaign tracking, optimization reserve
<b>TOTAL</b>	<b>100%</b>	<b>\$1,000,000</b>	

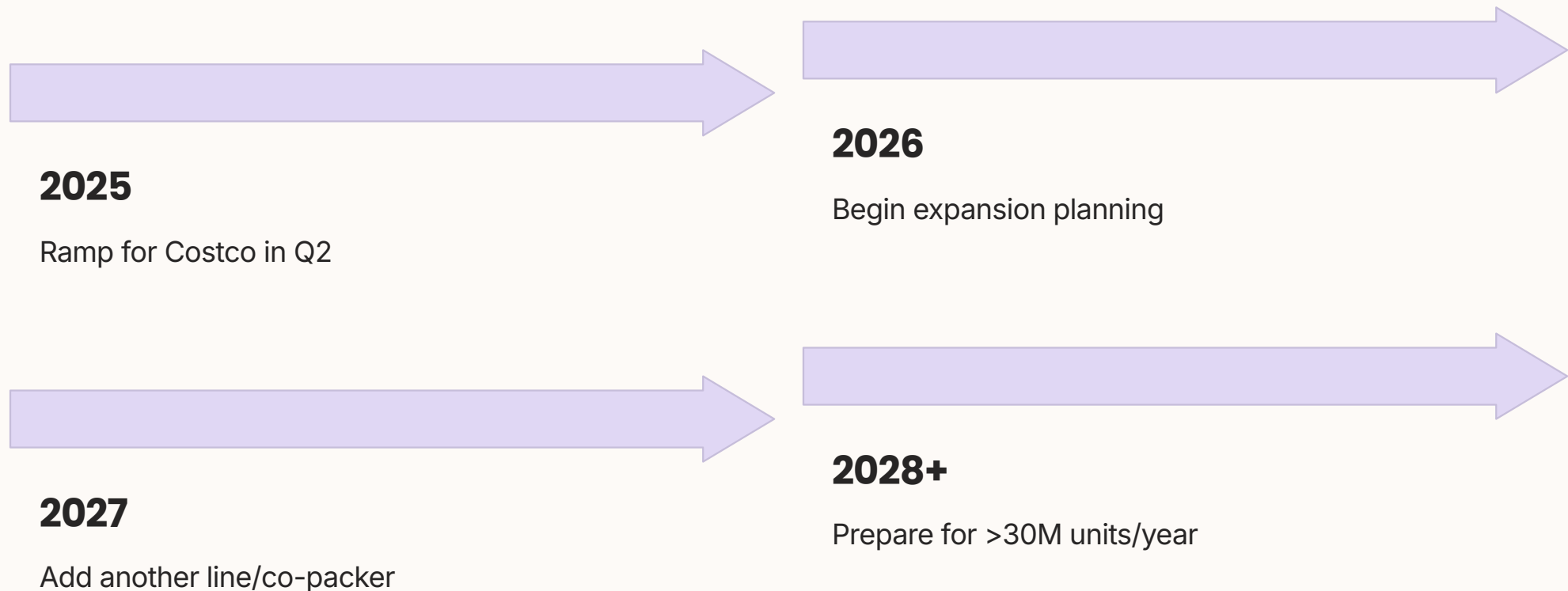
## Strategic Summary

- **Utah Focus (approximately 40%):** Build local buzz through events, influencer ties, and visibility in high-traffic corridors.
- **National Focus (approximately 60%):** Target digital-first audiences via influencers, paid social, and streaming platforms.
- **Goal:** Achieve 10M+ impressions, strong regional loyalty, and Amazon/TikTok Shop lift during Q3–Q4.

# Production Strategy

**Initial Capacity:** Supports up to 3M units/year.

## Scale Milestones



**Aggressive Case:** Requires national co-manufacturing partnerships by 2026.

**Inventory Strategy:** Build 60 days of stock for Costco, 30 days for Target. Adjust DTC based on seasonality.

# Operational Readiness for National Scale

National distribution with retailers this large is less about selling and more about supply chain and manufacturing capacity. Since you use a third party, your focus must be on stress-testing that partnership.

## Supply Chain and Co-Packer Scaling

Focus Area	Requirement for National Scale
Capacity Auditing	Your co-packer must prove they can increase production by 5x to 10x instantly. You need guaranteed access to production lines, not just promises.
Input Sourcing	Secure redundant sourcing for key inputs (protein powder, flavorings, and the cans themselves). Costco and Target demand 98%+ fill rates; running out of aluminum cans or a specific flavor ingredient is not an excuse for late delivery.
Quality Control (QC)	Implement a unified, mandatory QC checklist for your co-packer. This ensures every batch meets standards, minimizing the risk of a national recall which can destroy a brand overnight.
Regional Distribution	You cannot ship from one central facility nationwide. You need to verify your co-packer can utilize or access multiple strategically located warehouses/fulfillment centers to meet the geographical demands of Target's and Costco's distribution centers (DCs).

# Retail Readiness: Target vs. Costco Strategy

Costco and Target are very different buyers with unique requirements. You must tailor your pitch, packaging, and pricing for each one.

## Target (Category: Single-Serve/Mass Market)

Target wants high-turnover, attractive, immediate consumption items.

- **Packaging:** Focus on attractive, colorful 4-packs or 6-packs designed for easy shelf stocking and maximum visibility in the refrigerated or beverage aisle.
- **Pricing Strategy:** You must offer a competitive Unit Price (Price per Can) that fits the mass-market consumer. You'll likely need to offer high promotional discounts (up to 30% off) throughout the year to drive trial.
- **Innovation Hook:** Target is keen on trends. Emphasize features like low sugar, unique flavors, and functional benefits (e.g., electrolytes, added vitamins).

## Costco (Category: Bulk/Value)

Costco is a destination for bulk buying, requiring a completely different stock-keeping unit (SKU).

- **Packaging:** You must create a massive, unique pack size, typically a 12-pack, 15-pack, or 18-pack, often sold in a tray designed for quick forklift placement directly onto the pallet display.
- **Pricing Strategy:** The price must communicate incredible value. Costco's buyers will focus entirely on your Cost of Goods Sold (COGS) to ensure you can deliver a significantly lower Price per Can than Target.
- **Merchandising:** You need a budget allocated for "roadshows" or in-store sampling events to introduce the product directly to Costco members, which is a key strategy for winning their long-term business.

# Innovation and Expansion Plan: Go-Forward Strategy

Expansion isn't just about selling more of the same product; it's about strategically launching new SKUs that protect and grow your market share.

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## Phase 1: Deepening Penetration (Years 1-2)

- **Focus on Core:** Consolidate your core product in Costco and Target. Focus 90% of your energy on execution, ensuring perfect shipments, and driving velocity (how fast the product sells).
- **Limited New SKU:** Introduce one strategic seasonal flavor (e.g., Spiced Cranberry for winter) each year. This drives excitement, occupies shelf space, and reduces the risk associated with a permanent new product launch.
- **Data-Driven Innovation:** Invest in POS (Point-of-Sale) data analysis from both retailers. Find out which regions and demographic groups are buying your product and use that data to tailor your marketing spend.

2

## Phase 2: Market Expansion (Years 3+)

- **Product Line Extension:** Once the core product is stable, launch a genuine product line extension that targets a new consumer, such as a "Low-Caffeine Energy Protein Pop" or a "Plant-Based Protein Pop."
- **New Channel Entry:** Start exploring secondary high-volume channels like large grocery chains (Kroger, Walmart) and convenience stores (C-Stores), utilizing the successful track record from your Target/Costco business to gain leverage.
- **Geographic Focus:** Instead of launching the new SKU everywhere at once, roll it out regionally (e.g., start with the West Coast) to manage demand and supply chain risk more effectively.

## Key Success Metric: Velocity

For national success, the retailers don't care about how much they buy from you; they care about how fast it sells off the shelf (velocity). Your entire plan must center on driving consumer trial and repeat purchases so that when the buyer reviews the data, they see your product as a top performer.

## Essential Hiring Strategy for National Scale

**Core Team:** 4 Employees (Existing)

Your current team of four is likely handling general management, marketing, product development, and finance/bookkeeping. They will become the executive leadership team, but they will not have the time to handle the day-to-day administrative load of national accounts.

## Phase 1: Immediate Hires (The First 2-3 Hires)

These roles must be filled immediately to handle the massive administrative and logistical workload imposed by Target and Costco.

1. **Operations & Supply Chain Manager (MANDATORY):** This person is the core executor. Costco and Target do not tolerate shipping errors, late deliveries, or incorrect labeling. Their vendor guides are hundreds of pages long. Key Responsibilities: Managing the relationship with the co-packer, booking freight, overseeing quality control checklists, ensuring correct pallet configurations, and most importantly, handling the highly technical Electronic Data Interchange (EDI) systems required to process orders and invoices with the big retailers. This person prevents massive chargebacks.
2. **Finance & Accounts Specialist (CRITICAL):** A national launch creates a cash flow crisis. You need someone focused solely on cash management. Key Responsibilities: Managing the Net 60/90 payment cycles (making sure Target pays you on time), chasing down deductions and retailer chargebacks (which can total thousands of dollars per month), managing the line of credit, and accurately tracking profitability by SKU and by retailer.
3. **Broker/Sales Management (Outsourced or In-House):** You cannot hire a full sales team, so you need a strategic manager to direct outsourced sales efforts. Recommendation: Hire a National Food Brokerage Firm. They already have relationships with Target and Costco buyers. Your single hire here should be a Broker Manager or Key Account Manager (K.A.M.) who manages the broker firm, tracks their performance, and owns the overall retail strategy (e.g., promotional calendar, pricing).

## Phase 2: Follow-Up Hires (The Next 1-2 Hires)

Once you are stable in the first year, these roles become necessary to drive growth and reduce reliance on high-cost agencies.

1. **Digital Marketing & E-commerce Lead:** You must drive consumers into Target and Costco. You need someone dedicated to managing digital ads (Google, Instagram), running promotions, and using geo-fencing to target consumers near those stores. They also manage your direct-to-consumer (DTC) site, which is often crucial for testing new products.
2. **Demand Planner / Forecaster:** Inventory management is high-stakes. If you run out of stock (Out-of-Stock or OOS), you lose sales and irritate the retailer. If you order too much, you pay exorbitant fees for warehousing. This person uses retailer POS data to forecast sales and coordinate production runs with the co-packer.

## Team Breakdown Total Count

- Existing Leadership: 4
- Operations Manager: 1
- Finance Specialist: 1
- Key Account/Broker Manager: 1
- Total Minimum FTE: 7 Employees