

PROFITEDGE PLANNING SHEET · OPERATIONS

Before-the-PO Planning Sheet

Every purchase order answers one question: why are we buying this? Put the answer on one page before the cash goes out, and let the page make the decision, not the tier threshold.

Product or program _____ Vendor and rep _____

Order value _____ Decision by _____

1 Why are we buying it?

Circle one. Each calls for a different amount of caution.

Need: customers, sales or service show real demand

Want: the store likes it, unproven here

Push: a vendor deal or deadline

Bet: a deliberate test of something new

2 Four questions

QUESTION	ANSWER
What evidence supports this buy?	
How much cash does it commit, and for how long?	
What customer need does it serve?	
What do we do if it does not move?	

3 The program on one page

The invoice is not the true cost.

ITEM	OUR NUMBERS
Expected sell-through, and by when	
When the cash goes out, and when it should come back	
Freight, and anything added just to reach a minimum	
Rebate or volume bonus: what we must buy to qualify, and is it more than demand?	
Who files the claim, and the deadline	
Co-op: who will use it, and before it expires	
Markdown risk if it sells slowly	

4 If the expansion is coming anyway, plan for it

Before the first shipment lands.

ITEM	OWNER	DONE
Sales staff trained on the product and on who it is for		☐
Service ready: technician training, tools and parts		☐
A real place on the floor, and a plan for showing it to existing customers		☐
An opening quantity matched to the plan, agreed with the rep		☐
Vendor support scheduled and used: training, display, co-op		☐
A date to review how it is selling, and what changes if it is slower than expected		☐

5 If the evidence is thin: a controlled test

Test quantity

Review date

Where on the floor

Who sells it

EXIT PLAN AGREED UP FRONT

- Return
- Mark down
- Transfer
- Stop reordering

6 At the review date

- Buy deeper
- Keep testing
- Exit

Why

Decided by and date

When the line is coming either way, the question is not whether to take it. It is whether the store will be ready to sell it.

WANT A SECOND SET OF EYES?

Start a conversation at profitedgesystems.com about buying plans and vendor programs.