SAMPLING

What Will You Sample? 2

Who Will You Target? 2

Where Will You Sample? 3

When Will You Sample? 4

How Will You Sample? 4

How Will You Measure Success? 6

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When deciding the best way to sample your product, a variety of questions must be answered in order to maximize the effectiveness of your sampling campaign:
1) What Will You Sample?
2) Who Will You Target?
3) Where Will You Sample?
4) When Will You Sample?
5) How Will You Sample?
6) How Will You Measure Success?

What Will You Sample?

This may sound obvious, but you have to make a few decisions related to the sample before you decide to produce and distribute it. Let's assume you're sampling a shampoo for infants/toddlers that is only available at Whole Foods:
- will you sample a full size product, or a trial size? While full size is easier, it is more expensive to produce and ship than a trial size. A full size sample also provides lots of uses to the recipient, so your are effectively taking that consumer out of the market for your product for a longer period of time than a trial size sample.
- if trial size, will the packaging replicate the full size bottle (expensive), or will you produce foil packs (much cheaper, but not as satisfying for the end user, not resealable, using it does not replicate the full size product user experience)
- will you sample the most popular 'flavor', or will you sample the new SKU that you're trying to drive sales for, that is either not as well known, or not as 'likeable' as the other more popular, better known flavor?
- will you distribute a coupon with your sample? If so, will the coupon be adhered to the sample somehow (either glued or polybagged to the sample, for example), or will the coupons be separate?
- will you distribute a brochure, instructions, 'schwag', and/or any other promotional materials along with the sample?
- will you provide a 'call to action' of some sort along with the sample, in order to a) drive sales, or b) drive 'friends' on Facebook for example, or c) drive sweepstakes entries?

Who Will You Target?

Your original question mentioned that 'moms' is your target, so it sounds like you've got this figured out, but it would be good to further drill down on what kind of moms you are trying to reach:

- moms of what age kids?
- are there any ethnic or other demographic considerations when targeting moms? If the product is expensive, for example, you may want to target just upper income moms.

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The 'who' question does not necessarily have to be driven by consumer demographics...maybe 'Wal-Mart shoppers' or 'anyone in college towns' works for your brand.
Regardless, the 'who' definition drives many of the other questions presented below.

Where Will You Sample?

The decision of where to sample should be dictated by a) the demographics of the person you want to reach, and b) the geography where you want to see a lift in sales. So this question really has two components: 1) venue, and 2) geography.
The venue is the location where the sample is being distributed. Venues could include one or more of the following categories:
- at home (i.e. reach consumers at their residence)
- at a retail environment (i.e. reach consumers where they shop, and likely where your product is sold)
- at some other venue that is an OOH (out-of-home), OOS (out-of-store) environment, (i.e. reach consumers where they work, play, exercise, relax, or conduct countless other pastimes, errands, appointments, and/or projects) examples: festivals, daycare centers, train stations, schools, doctor offices, pottery places, zumba classes, etc etc the list is endless)

Once you have selected the venue(s), you will need to decide where (and/or how) to sample within that venue. For example, if you are sampling at home, should the sample arrive in the mail, or be hand-delivered by a representative of your company? If in a retail environment, should sampling occur at the shelf where the product is sold, or in a higher traffic location such as the front door? If you are sampling in some other venue such as a daycare, should the sample be distributed at the front desk, or via parent mailboxes? For more on these decisions, see the How Will You Sample? section later in this article.
The geography is the continent, country, region, state/province, metro area, county, city, zip/postal code, block, or other geography where you want to target your efforts. The geographies you choose will likely be based on the retail footprint of your product, and/or where your product is otherwise available to consumers. It is in your best interest to only sample in geographies where your product can be purchased. Otherwise you are wasting your money and samples!
For the 'kid shampoo at Whole Foods' example, I would suggest the following

* targeting daycare centers, mommy & me classes, and pediatrician offices, because they are visited by virtually 100% moms. The product is relevant to almost everyone that walks in to those venues. Plus you have a built-in 'ambassador' to manage the program

* If you can find a residential list that includes just homes where infants and toddlers are present, samples sent by mail to those homes (only near Whole Foods) would also be very effective (but expensive).

* I would NOT sample at Whole Foods, because, while it is true that the product is sold there, only a small percentage of Whole Foods customers are moms of infants/toddlers. So you would be distributing many samples to an irrelevant demographic (those at Whole Foods who like free samples, but may not have an infant or toddler)

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When Will You Sample?

The timing decision will likely be dictated by your own internal goals and deadlines, but some other key timing factors should be considered:

* Product Availability - If your product is newly on the market, you are generally better off waiting to sample after the product is available in stores. Sampling before you have shelf space at retail creates frustration for consumers; that experience generally does not convert to sales later once the product is actually available.

* Product Seasonality - If your product has a seasonality (such as a cold/cough remedy used most during the winter months, or maybe a product that is sold a lot over the holidays), you are best off sampling just before that key season begins, in these examples the fall timeframe would be the best choice.

* Product Supply Issues - Be sure to plan your sampling well ahead of schedule so that your manufacturing team can get the samples made, and excess product made, to meet the demand the promotion will create.

* Venue Seasonality - if your selected venue type has seasonality in its business or activity, that should also be considered. For example, preschools are generally closed in the summer, so that would not be a good time to sample there.

* Competitor Activity - Sampling is a rational response to aggressive tactics taken up by your competitors. Use sampling to gain market share back.

* General Economy Considerations - While a downturn in the economy will generally depress sales, it is often a great time to grab market share from competitors, as they are likely scaling back

How Will You Sample?

There are 3 aspects of 'how to sample' that I will address here:

* How will you approach your intended target consumer?
(will you 'surprise and delight', or will they seek you out to opt-in)?

* Is this a solo or co-op sampling effort?
(i.e. are other brands involved, or just yours?)

* Who will manage the sampling effort?
(will it be your team, or a third party agency?)

1) How will you approach your intended target -- will you 'surprise and delight' or will they seek you out to opt-in?

This may be the most important section of this article to consider. How you approach your intended target consumer will impact the effectiveness of your sampling effort far more than you might imagine. In my experience the most important attribute driving effectiveness of a sampling program is the element of surprise.

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A sample distributed at a grocery store is generally not surprising...sampling happens in grocery stores all the time. But giving a sample to a parent via a daycare parent mailbox; or to a commuter via an ambassador at the train station platform...these techniques are innovative and different, and disrupt typical consumer patterns. These disruptions are good; in fact, the goal of the most effective sampling programs should be to surprise and delight!

The advent of the internet and social media has proven to be a double-edge sword in the world of sampling. It is true that brands and agencies have many new tools at their disposal to engage their customers, many of which are very effective. That said, the internet and social media have also made it too easy for freebie cheapskate seekers (with no brand loyalty and no intention of ever buying your product) to steal your samples from you. We call these people freces (yes, that's pronounced freecees)!

Here are some sample distribution techniques that are a great way to stink up your sampling budget, as they invite the involvement of freces:

* running an ad in a magazine offering a free sample (some freces will see the ad, post the offer on a freebie blog somewhere, and before you know it you'll have 100,000 samples that need to be mailed out one-by-one. Shipping alone will cost you $1 a sample -- there goes $100k plus your sample cost in order to reach a very untargeted group of consumers.)

* asking people to 'like' your brand on Facebook (yes it will generate a huge response, but the consumers will be coming from freebie websites.....totally untargeted)

* putting an 'ask for a free sample' form on your website (once the freces find it you're in deep doodoo...be ready to turn off the offer quickly once the volume gets out of control)

* allowing freces to sign up as 'party throwers' (in this case you are sending an entire box of goodies to someone who wants free stuff!! Are you kidding me???)

All of the above programs are public and opt-in, enabling a freces flash mob to go on a feeding frenzy, infesting your well-intended sampling campaign with vultures who will never payout in an ROI analysis. Overall the message is this...never advertise your free sampling campaign on the web.

2) Is this a solo or co-op effort?

A solo sampling program is one where your brand (and your brand alone) is enjoying the exposure. A co-op program, in contrast, showcases 2+ brands (generally owned by different companies) that are sharing the effort and costs associated with a sampling program, in the hopes that both/all brands will benefit from the effort at a fraction of the cost of a solo program. Solo vs co-op efforts have their pros and cons (see +'s and -'s below):

SOLO

+ your brand alone enjoys the exposure, maximizing the impact for you
+ promotion is customized to your needs, not someone else's
+ dates, geography, venues, demographic target all specified by you
- more expensive

CO-OP

+ cheaper

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+ category exclusivity generally offered (i.e. if your product is a shampoo, there will typically be no other shampoos allowed in the co-op)
+ complementary brands can be paired (i.e. yogurt and granola; cracker and cheese; etc etc)
+ your brand may benefit from the reputation of other brands in the co-op
- dates, geography, venues, demographic target dictated by the co-op program manager and/or other brands
- possible odor/taste migration issues (i.e. your potato chips are paired with a soap; therefore your chips start to taste/smell like soap)
- no control over the other brands in the co-op, with a possible negative impact on the image of your brand

3) Who will manage the sampling effort?

Really the question is....can your company handling the sampling effort yourself? Or do you prefer outsourcing the sampling effort to a seasoned third party agency?

There are advantages to both options. Handling it yourself allows your company full control. It also saves you money (no premium paid to another company).

Outsourcing has the advantage of leveraging another firm's experience (particularly in the staffing, shipping, and research categories), and providing a turnkey solution. A third party agency will also generally be able to ramp up and complete the project much more quickly than a team that is learning as they go.

How Will You Measure Success?

This is perhaps the most important factor to discuss before executing a sampling program, so that your efforts (and/or your agency's efforts) can be driven to maximize the metric you will use to measure success. There are many tools companies use to measure the success of their sampling program:

* Coupon redemption
* Qualitative feedback from sample recipients
* Qualitative feedback from sampling staff
* Sales lift at retail

If you are interested in discussing any of these measurement tactics, or have other tools you have used to measure success, please let me know.

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