Building an annual plan

What it will look like | how we will build it

- Week by week, month by month, quarter by quarter plan that looks out the next 18 months

- Built around key levers (e.g.: improving temp of food) and occasions (e.g.: large parties for dinner)

- Dollar value attached to each program along with timing/sequence

- A set of leading indicators that we know through analysis drive traffic (likely built around consumer and field response to programs)

- Built bottoms up

- Fact based either through direct experience in the business, third-party insights, or through generally accepted and validated information in the marketplace

- In conjunction with other key stakeholders to leverage their knowledge and insights and ensure alignment

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Context to develop hypotheses and direction

Financial trends
What are we working from

- Traffic, average check, price, menu mix, on/off prem, daypart mix on a quarter by quarter basis YoY and on a two-year basis

- Interesting or important regional or store level notes

- Volumes by store and MSA

Future intent
How demand might be shaping up over near term

- Future visit intent scores on a quarterly basis v PY and on a two-year basis

- Change in branded search versus whomever you typically track against

Consumer / customer
Understand where to focus and what to focus on

- Who is the target?

- Study showing how market thinks about Millers overall, by daypart, by other occasions?

- Drivers analysis by attributes

Brand
Leveraging the power to drive focus and efficiency

- Defined and agreed upon promise and principles along with any brand strategy information

- Any brand expression/ identity information

Customer experience
Optimizing to reduce churn and increase frequency

- What do we know about rewards and penalties and how these link to traffic—any programs planned to address?

- What do we know about what in the CX links/ drives future intent?

Product & Pricing
Planned actions we can leverage

- What system launch or ltos are planned? What financial targets are tied to them?

- What pricing actions are planned and when?

- What analysis exists on recent pricing actions?

Marketing comms
What are we comping and what learns do we have

- FY20 & FY21 marketing calendars with traffic overlaid to show impact

- FY 20-22 media and channel calendar

- Martec stack in place

- FY20/21/22 budgets

Other

- Any major programs being launched next year that will create "no-fly" zones?

- Anything about supply chain or staffing?

- What has NUO person learned about customer/ markets?
- Other distribution channels

Other considerations

1. **Should we assume that going to markets with no penetration will require no marketing?**
   - In my experience, the models are predicated in part off of current customers—which as we move further afield will not benefit from built-up experiences with the brand. I don't know if we can or should assume that volumes will hold as we move into new markets. This is too important to future valuation. I would recommend work starts now to develop different NUO scenarios/plans to further ensure these new markets are successful (this might necessitate some investment to understand/learn).

2. **Do we have the marketing spend model right?**
   - As I look at the density of parts of the footprint, and think about how long many of those units have been open, it's likely the spend model for marketing is under-invested. If we start with a hypothesis based on industry and academic information on correct A/S levels, we can walk/test our way into it (this assumes my opening statement is even right).

3. **Sales/traffic is a company-wide endeavor**
   - Marketing mix models typically indicate marketing communications only account for a portion of a company's total sales—critical to utilize all aspects of brand (product, service, employee experience, pricing, etc.).

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