



## MarketReady™ Checklist for Selling to Institutions

This checklist is intended as a reference point for self-examination of your farm business practices to evaluate readiness for selling products to institutions.

Please select the best option for your current production for each best practice listed below.				
	Yes, fully meeting	Making progress	Ready to get started	Unable to work on
<b>BEST PRACTICES</b>				
<b>COMMUNICATION &amp; RELATIONSHIP BUILDING</b>				
I have spoken to the buyer about the best way to contact them				
I have access to email, websites, social networking sites, and other communication channels to discuss product orders and quality				
I have asked the buyer about all requirements involved in selling to the institution				
I present a professional appearance when making in-person business calls				
<b>PACKING</b>				
I have asked the buyer how they want my product packaged				
I understand the industry standard packaging for the product and am prepared to deliver that kind of package				
I have access to standard size cardboard produce boxes or packing materials that meet the needs of the buyer or industry				
I produce and provide products that consistently meet USDA or industry grading, sizing and quality standards				
<b>LABELING</b>				
I understand the legal regulations for labeling my products including Country of Origin labeling, USDA inspection seals, label claims, weights and my business contact information, etc.				
I understand how labeling can help build my farm's identity and improve product presentation				
If selling meat, dairy, or processed products, I understand the legal regulations for labeling those products				
My packaging and labeling allows for product traceability or I can work with the buyer on product traceability procedures if requested				
I have taken the opportunity to explain to buyers what terms like "grass-fed", "natural", "antibiotic free", "organic" and other phrases mean if I use those terms on my labels, literature or product packaging				
I can verify all the label claims on my product labels				

<b>BEST PRACTICES</b>	<b>Yes, fully meeting</b>	<b>Making progress</b>	<b>Ready to get started</b>	<b>Unable to work on</b>
<b>PRICING</b>				
I research current market prices and am aware of the transportation costs I incur in delivery				
I understand processing, packaging costs and any other post-harvest costs				
I priced the product at a level where I can make a profit and be a stable supplier				
I will give an estimate of how much product volume I can provide and for how long				
I understand why the buyer might value my local product more than other wholesale products, and have discussed the benefits of my product's quality, freshness, or locally-grown attributes with them.				
I am prepared to quote a price per pound/case that I would accept for my product.				
<b>SUPPLY</b>				
I have a plan to accomplish steady production of my product				
I have explained what products I offer, new product possibilities, and possible seasonal items before the season				
I am aware that some buyers may want to purchase products from an independent wholesaler in order to improve their logistics and quality assurance procedures				
I am exploring season extension and other production options that allow me to increase volume of products supplied				
I understand the importance of advanced notice to the buyer about product availability and changes in quantity or quality				
<b>DELIVERY</b>				
I understand the cost in time and fuel, etc. that is involved with product delivery				
I can arrange affordable transportation of my products to the buyers requested delivery locations at an acceptable frequency				
I am willing to investigate delivery services in new areas to gain new clients				
I have asked the buyer about delivery procedures and can accommodate				
<b>INVOICING</b>				
I will provide a numbered invoice form with farm name, address, phone number, and other contact information printed on it				
The invoice form will have the date, P.O. number, product description, weight or quantity, price per unit and total price				
I understand the invoicing procedures and have discussed them with the buyer. I have made sure that my invoice statement or system meets their requirements, including electronic delivery if required				
I am prepared to accept payment terms as agreed upon with the buyer				
I have a system in place to keep track of how much I am owed by each customer				

<b>BEST PRACTICES</b>	<b>Yes, fully meeting</b>	<b>Making progress</b>	<b>Ready to get started</b>	<b>Unable to work on</b>
<b>INSURANCE</b>				
I will verify with the buyer their company's vendor requirements for product liability, worker's compensation and other insurance policies				
I will show proof of proper coverage				
I will have liability insurance coverage for my farm business activities				
<b>QUALITY ASSURANCE &amp; TEMPERATURE CONTROL</b>				
I understand that quality assurance from a wholesale buyer's perspective means the vendor guarantees 100% of the product meets their specifications				
I have discussed cold chain requirements for my products with the buyer and/or other food handlers				
I have educated myself about safe food handling, proper temperatures and storage of the products that I will be marketing from my farm				
I am willing to have a farm inspection by the buying organization or a specified third party				
I am willing to receive GAP training and certification if necessary				
I have the necessary documents for USDA and local health inspection where required				
<b>SATISFACTION GUARANTEE</b>				
I have explained how my product will be delivered and presented, and have heard any concerns that they have with my product				
I am working on a relationship with the buyer that allows for honest dialogue about my product quality, and I am able to make production adjustments to improve final product quality if necessary				
I have other products or additional products to offer if I need to reimburse a buyer for poor product quality, or I am able to give notice beforehand				
<b>MARKETING</b>				
I know that it is not always possible for the retailer to mention my products by name				
I have simple, clear print materials that provide information that a retailer or institution could adapt to tell the story of my product				
I am involved with the community of the institution I sell to, and have made an effort to get people involved				
I am aware of promotional materials available through sources like my state department of agriculture, grower association, or other third-parties				
I am willing to host on-farm visits				
I am open to being involved in events like food festivals, trade shows, tastings, educational activities and Harvest dinners				

Adapted for Farm to Institution New York State Market Readiness <https://finys.org>  
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