



CLIENT WELCOME + ONBOARDING PACKET

WE TAKE DTC SUPERSTARS & MAKE THEM **RETAIL LEGENDS.**

We get internet-famous brands onto the shelves that matter.

\$2B+

IN RETAIL SALES
GENERATED

20k+

RETAIL DOORS OPENED

15+

YEARS OF BUYER
RELATIONSHIPS

5

RETAILERS WE GO
IMPOSSIBLY DEEP IN

Target · Walmart · Costco · Whole Foods Market · Sprouts

shelfmadecpg.com

Welcome to ShelfMade

We're excited to officially have you on board. This packet is your guide to getting set up: who we are, how we work, what we need from you, and what happens next.

Read it through, share the relevant sections with your team, and drop assets into your Drive folder as you collect them. The faster we have what's in here, the faster we can put your brand in front of buyers.

Who we are

ShelfMade is a CPG retail brokerage built for the top 1% of DTC brands. We represent brands across Target, Walmart, Costco, Whole Foods Market, and Sprouts. Our reps come from inside those retailers, so we know the buyers, the categories, the line review cycles, and what wins shelf space.

Legends don't wait for category reviews — neither do we. We find off-cycle opportunities, move fast, and get you on shelf before the competition even books the meeting.

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How we work

- **One dedicated rep per retailer.** Each retailer in your scope has a ShelfMade lead who owns that account end to end. They'll introduce themselves directly in Slack.
- **Slack is our home base.** We've set up a private channel for your brand. Day-to-day collaboration happens there.
- **Google Drive is where assets live.** We'll share a link to your dedicated folder. Everything you upload is visible to your ShelfMade team.
- **The ShelfMade Portal is your window in.** Contracts, brand assets, retailer milestones, and weekly sales all live at shelfmadeportal.com.
- **Phuong runs your onboarding.** She's your single point of contact for the first few weeks. Once you're fully set up, your retailer reps take over the day to day on each account.

WHAT HAPPENS NEXT

Your Slack channel is live, your Drive folder is ready, and your portal login is on the way. Send us your team contacts, start dropping assets in, and your retailer leads will kick off buyer strategy the same week.

What we need from you

Three things to get back to us so we can hit the ground running.

1. Your team contacts

Please send the names and emails of anyone on your team who should be in the Slack channel. Brands typically include:

- Whoever owns sales data and channel financials
- Whoever owns brand guides, graphics, marketing, social, and influencer
- Whoever owns operations and manufacturing
- Anyone else you want looped in

We'll add them as soon as we have their info.

2. Universal brand assets

These are the building blocks every retailer pitch is built on. Drop them into your Drive folder as you gather them — you don't need to send everything at once.

Brand & story

- Founder bio and brand story
- Hi-res logo files (transparent background preferred)
- Press, awards, and accolades

Product

- Hi-res product photography: hero, lifestyle, on-shelf, ingredient and feature callouts
- Front and back product renderings for each SKU as separate files per SKU/flavor
- Full SKU list with UPCs
- MSRP and wholesale cost for each SKU
- Product dimensions (L x W x H in inches) for each SKU
- Ingredient lists, nutrition facts, or supplement facts panels
- Certifications and claims (organic, non-GMO, kosher, halal, gluten-free, clean label, woman-owned, etc.)
- Quality badges and icons used on packaging

Sales & financials

- 2025 full year revenue broken out by channel: Amazon, TikTok Shop, Shopify, retail partners
- 2026 YTD revenue & projected 2026 annual sales
- Weekly velocity data from any existing retail partners (\$ per store per week per SKU & units per store per week per SKU)
- Amazon review count and star rating per SKU
- Closest competitors at major retailers or DTC (for pricing and positioning context)

Marketing

- Current ad spend breakdown by platform
- Affiliate and influencer partners with reach and engagement metrics
- Social handles, follower counts, and engagement by platform

3. Retailer-specific items

In addition to the universal assets above, each retailer has specific things we'll need. Only focus on the retailers we're supporting you on.

Target

- Top SKUs ranked by priority for Target. If you can't decide, send data for all and we'll help curate.
- A simple Excel financial workbook can be found [here](#). Please complete as soon as possible.
- A deck review call will be scheduled before submission so you see everything before it goes to the buyer.

Walmart

- Chase will detail Walmart-specific submission requirements directly in your Slack channel based on your category and timing.

Costco

- Manufacturing details: co-packers, square footage, capabilities, capacity
- Current retail doors and where you plan to be by end of 2026 / into 2027
- Key selling points vs competitors
- Club pack and pallet architecture priced backward from Costco's margin model

Whole Foods Market

- WFM New Item Setup Form (NIF) and Category Review New Item Slide. Templates provided [HERE](#).
- Trade promotion and TPR budget planning (plan for 12 to 20 weeks of promo in year one)
- FoodLogiQ compliance setup support
- A WFM-aligned brand deck built around WFM's strategic pillars and customer segments. Phuong will guide you through this.

Sprouts

- Differentiation and unique positioning vs the category
- Innovation pipeline and what's next on your roadmap
- Health and wellness claims substantiation

Samples process

Please ship one sample of each SKU to each of your ShelfMade reps below. Only focus on the retailers we're supporting you on.

REP	ACCOUNT	SHIP SAMPLES TO
Ashley Rogers	CEO	2027 Phalarope Ct, Costa Mesa, CA 92626
Shayla Scales	Target & Walmart	5994 NW Pickering Drive, Port St. Lucie, FL 34987
Chase Laws	Walmart	1527 Saint George Street, Charlotte, NC 28205
Austin Vaughn	Costco	1880 W Windflower Ct, Spokane, WA 99208
Phuong Nguyen	Whole Foods Market	Shipping address shared in your Slack channel
Peter Gialantzis	Sprouts	155 Lincoln Street, Norwell, MA 02061

Note for WFM / Target / Walmart: separate samples will be sent directly to the buyer ahead of submission deadlines. Your rep will coordinate that timing with you.