WHAT IS THIS USER’S GUIDE?

This user’s guide will help trainers introduce New American farmers to concepts and best practices for engaging direct wholesale customers at different market access points such as independent restaurants and groceries. This guide contains learning activities which can be used together for a comprehensive introduction to direct wholesale marketing or used in sections to focus specific market types.

While many New American farmers have experience with selling their crops in their country of origin, it has been observed during hands-on market trainings that some of the particulars of marketing in the US may be novel or counter to their previous experiences.
ACKNOWLEDGMENTS: This teaching resource was developed by Craig Demi of Southside Community Land Trust in Providence, Rhode Island in partnership with the Institute for Social and Economic Development (ISED Solutions). This material is funded by USDA, Risk Management Agency, under award number RM18RMEPP522C018: “Producing and Using Risk Management Educational Resources and Methods for Refugee Farmers.”

VARIATION: Throughout this guide, boxes (like this one) contain variations and adaptations that serve varying programs and farmers. They are suggestions and reflections from other programs based on how they made this workshop work for them.

ICONS: You will find the icons below throughout this guidebook. They are there so you are prepared for the activity and can get an idea of what it will bring at a glance.

- Signs/Cards
- Powerpoint
- Worksheet
- Discussion
- Vocabulary
- Indoor
- Outdoor
- Talking Points
Is this guide right for you?

AUDIENCE:
• **Who:** Refugee farmers and growers

• **Language / Literacy:** Advanced. If using an interpreter, this module should be appropriate for most English-speaking levels.

• **Farming Experience:** This module is appropriate for third-year farmers who have experience in direct retail marketing, such as at farmers markets.

• **Prerequisites: Skills, experience, and knowledge:** Some numeracy is required for this module.

• **Region/Climate:** This module is appropriate for all regions and climates.

• **Program Structure:** This module is appropriate for direct wholesale and aggregation wholesale programs.

• **Season:** This module is appropriate for off-season classroom training.

RESOURCES NEEDED:
• **Time:** 1 hour and 45 minutes

• **Staff/Interpreters:** This guide can be used with one instructor, plus language interpreters as needed.

• **Location:** Classroom.

• **Resources and Materials Needed to Complete this Module:**
  • Whiteboard, blackboard, or flipchart
  • Post-It notes
  • Paper and pens for participants
  • Sample Invoice Form
  • Sample Billing Statement Form
5 OBJECTIVES AND SKILLS
• Vocabulary
• Objectives
• Proof of Learning

6 LESSON 1 / ICEBREAKER
10 MINUTES
• Participants create a list of potential direct wholesale customers by naming local businesses where they buy food.

7 LESSON 2 / UNDERSTANDING DIRECT WHOLESALE CUSTOMERS & WHAT CUSTOMERS WANT
20 MINUTES
• Participants discuss the difference between wholesale and direct wholesale customers to understand what types of businesses are most likely to buy produce directly from farmers. They compare their experience in selling to retail customers to the different needs and priorities of direct wholesale customers.

10 LESSON 3: HOW CONVINCE DIRECT WHOLESALE CUSTOMERS TO BUY YOUR PRODUCE
30 MINUTES
• Participants discuss how to approach potential direct wholesale customers, identify what they need to know about a small business beforehand, and what information they will need to share and gather. Roleplay is used to illustrate good and not-so-good tactics.

15 LESSON 4: DELIVERING TO DIRECT WHOLESALE CUSTOMERS: TAKING ORDERS, INVOICES, AND BILLING STATEMENTS
30 MINUTES
• Participants practice taking produce orders from direct wholesale customers and use the order information to fill out invoices and billing statements in a role play activity.

17 LESSON 5: BRINGING IT ALL TOGETHER
15 MINUTES
• Participants create a list of potential customers to contact and a strategy for successful engagement with these potential customers.
Objectives and Skills

VOCABULARY: • Wholesale • Direct sale • Invoice • Billing statement

OBJECTIVES: By the end of this module, farmers will:
• Understand how to engage with direct wholesale customers when making sales contacts
• Understand how to engage with direct wholesale customers when delivering crops
• Understand how to make invoices and billing statements
• Be able to create a list of potential direct wholesale customers
• Assess options and choose the best way to engage potential direct wholesale customers

PROOF OF LEARNING: I will know that farmers have achieved learning objectives because:

• They demonstrate understanding through in-class role play type activities.

• They demonstrate understanding by practicing making invoices and billing statements.

• They demonstrate understanding by creating lists of potential direct wholesale customers.

• They demonstrate understanding by creating an engagement strategy for direct wholesale customers.
Icebreaker

TIME: 10 Minutes

OVERVIEW:
Participants create a list of potential direct wholesale customers by naming local businesses where they buy food.

MATERIALS NEEDED:
• A place to write participant responses (whiteboard etc.)

OBJECTIVES / LEARNING:
By the end of this activity, participants will:
• Identify local, independent businesses which are potential customers for their farm products.

LESSON STEPS

1. Ask each participant to introduce themselves and name the business closest to their home at which they buy food. This can be a grocer or a restaurant of any scale, such as Walmart or a family-run taqueria.

2. After each introduction, write the name of each business given on the board, and ask the other participants to raise their hand if they have also ever been to that business.

3. Ask if anyone has ever sold produce there or talked with the owner about selling produce there.
LESSON STEPS

1. Using the list generated in the previous activity, ask participants to decide for each business listed if they think it is a big business with many different locations or a small business with only one or two locations.

TIME: 20 Minutes

OVERVIEW:
Participants discuss the difference between wholesale and direct wholesale customers to understand what types of businesses are most likely to buy produce directly from farmers. Participants use their experience with selling to retail customers to understand the needs and priorities of direct wholesale customers.

MATERIALS NEEDED:
• A place to write participant responses (whiteboard etc.)
• Post-it notes

OBJECTIVES / LEARNING:
By the end of this activity, participants will:
• Understand the difference between wholesale and direct wholesale customers.
• Name the needs and priorities of direct wholesale customers.

VOCABULARY:
• Wholesale
• Direct wholesale
LESSON STEPS, CONTINUED

2. Highlight or underline the small businesses with only one or two locations.

3. Explain that the large businesses with many different locations, like chain stores and restaurants, are most likely to buy wholesale, which means they are buying from a middleman or distributor, not directly from farmers like themselves.

4. Explain that the smaller businesses, which have been highlighted, might buy from many places, including directly from farmers. This is what is called ‘direct wholesale.’

5. At this point the trainer can inform the participants that, while it is sometimes possible to sell produce to large businesses which usually buy wholesale, the rest of this workshop will focus on smaller businesses which are more likely to buy directly from farmers.

6. Explain that the next goal is to figure out what makes different kinds of direct wholesale customers happy.

7. Ask farmers to identify things that make their farmers market customers happy. Write these on post-it notes and put them on the board. Examples should include:
   - Good quality
   - Good price
   - Consistency
   - Friendly interactions
   - Trust
   - Good communication
   - Easy payment methods
   - Being on time
   - Variety of products
8. Lead the group in rearranging the post-its in the order that wholesale customers might prioritize them. There can be some variations, but the top priorities should be:

- Good quality
- Consistency
- Being on time
- Good price

9. **Discussion**: Discuss why these are the top priorities for direct wholesale customers.
LESSON STEPS

1. Using the list of potential small business customers identified during the icebreaker activity, lead students in a discussion of things they need to learn about each potential customer.

TIME: 30 Minutes

OVERVIEW:
Participants discuss how to approach potential direct wholesale customers and identify what they need to know about a small business beforehand. Roleplay is used to illustrate good and not-so-good tactics.

MATERIALS NEEDED:
• A place to write participant responses (whiteboard etc.)
• Post-it notes

OBJECTIVES / LEARNING:
By the end of this activity, participants will:
• Develop an appropriate and convincing sales pitch for direct wholesale customers.
• Identify the right contact person and best time to approach each potential direct wholesale customer.
2. Discussion: Ask participants what, if any, experience they have had approaching wholesale customers. For those who have had experience, how did it go/happen? What kinds of things did they talk about?

3. Important things to learn about each potential customer include:
   - What kinds of produce does this customer use? What would they want to buy?
     - Products they already sell or use, not something that is unfamiliar to them.
   - Who is the best person to contact?
     - A manager or buyer or chef. Not a cashier or waiter.
   - When is the best time to talk to them?
     - When they are not busy or getting ready for a busy time.
     - When there are not a lot of customers shopping or eating.

4. Discussion: How do you find out this information? You could go in and ask a cashier or waiter who the best person is to speak to about purchasing produce and what the best time is to call or come back to speak to them.

5. For each of the highlighted businesses, write down the specific answers for each of these questions on a post-it note. Place these answers next to the name of the appropriate business on the board.
LESSON STEPS, CONTINUED

6. Use the post-its from Activity 2 which identify the needs and priorities of direct wholesale customers to develop talking points that farmers can use to talk to potential small business customers about buying from them. Ask farmers to reflect on cases when they pitched selling their produce to customers in the past. What was successful? Participants can share.

7. **Discussion:** Talk about how farmers might “pitch” their business or selling opportunity to a potential customer. Information they might include can be:

   - Who they are
   - Where their farm is
   - Method of growing (organic, sustainable, small-scale, etc)
   - What they grow—kind of products, and why these are good products (fresh, organic, only place they can find this product, etc)
   - Potentially some of their personal history (how long they have been farming, why they got into farming)

*Note:* The topic of “telling their story” or giving a pitch is an important one for farmers, and could use its own learning module. Here, this topic is only covered minimally. It is recommended to go into greater depth on how to make a pitch or tell a story, in terms of marketing, in another session.

8. Learn from the Customer their preference and needs for purchasing, confirming that you would be able to provide these. These should include:
LESSON STEPS, CONTINUED

• Kinds of products they are interested in

• Prices

• Delivery times

• How customers will pay (check, cash), and how often

If there is an agreement about purchasing, other optional things to discuss include types of packaging/bunching, whether produce needs to be washed or not; entry and delivery specifications at the location, and frequency of payments.

Note: If you as the farmer are unable to provide what the potential customer requests or needs, for example if you cannot deliver the produce at the frequency or delivery time they request, then be clear about that, so as not to make an agreement you cannot fulfill.

Alternative: Programs may want to have photos available to represent each of these things.

9. Basic role play: Have pairs of participants act out a farmer approaching one of the businesses for which the group has identified whom to talk to and the times when they are busy or not busy. One participant plays the farmer and one plays the potential customer.

10. Scenario role play: Using the information collected about each business on the post-its, have the different pairs of participants roleplay each of these scenarios with one playing the role of the role of the farmer and the other the role of the customer:
LESSON STEPS, CONTINUED

• A farmer goes to place at a less busy time and talks directly to the manager/owner.

• A farmer goes to a place at a less busy time and talks to someone other than the manager/owner.

• A farmer goes to a place at a busy time and talks to the manager/owner.

11. Ask the group to evaluate each situation and suggest how things might be done differently to improve success. It may be helpful to reenact the roleplay using the group’s suggestions.

Alternatives: For programs that prefer not to use role plays, they may use photo stories and do photo narration.
Delivering to Direct Wholesale Customers: Taking Orders, Invoices, and Billing Statements

TIME: 30 minutes

OVERVIEW:
Participants practice taking produce orders from direct wholesale customers and use the order information to fill out invoices and billing statements.

MATERIALS NEEDED:
• Sample invoice form
• Sample billing statement form
• Pens

OBJECTIVES / LEARNING:
By the end of this activity, participants will be able to:
• Take produce orders from direct wholesale customers.
• Correctly deliver produce as ordered by each customer.
• Make invoices and billing statements.

VOCABULARY:
• Invoice
• Billing Statement

LESSON STEPS

1. Using a sample invoice form, demonstrate how to enter information for an order. Emphasize the importance of entering the correct date and invoice numbers.
LESSON STEPS, CONTINUED

2. Acting as a customer, place an order of one to three crops with each participant, or group of participants, depending on class size. Be sure to state the date of your order. Give each participant or group a different date, for example say, “I’m Brenda making an order for Brenda’s Bodega on Monday July 15th. I want 10 pounds of cabbage for $1.00 per pound and 30 pounds of carrots for $1.25 per pound.”

Alternative: Some offices may like to use a visual representation for this, either on PowerPoint or with flashcards, visually showing the order from the customer.

3. Give time for each participant and/or group to fill in the invoice with the order information. Provide assistance, or invite participants to help each other, if needed.

4. Explain that it is always important to have two copies of the invoice when the farmer makes a delivery. One is for the customer to keep, the other is for the customer to sign and the farmer to keep. The farmer keeps the signed, or original if using carbon copy invoices.

5. Explain that there are different payment options; the customer may pay each time produce is delivered or pay each month for all the produce sold during that time. In the latter case, the farmer might need to make billing statements to give to the customer. Using a sample billing statement, fill out an example, again noting the importance of dates and invoice numbers.

6. Collect all of the invoices, then pass them out in packets of twos or threes. Ask the participants to use the packets of invoices to fill out billing statements.
LESSON STEPS

1. Draw a table on the board with the following column headings (Or prepare a handout with this table in advance and distribute it to the participants):
   - Customer/Business name
   - Manager/Owner
   - When to Contact
   - Crops to Sell

TIME: 15 minutes

OVERVIEW:
Farmers create a list of potential customers to contact and a strategy for successful engagement with these potential customers.

MATERIALS NEEDED:
- A place to write participant responses (whiteboard etc.)
- Paper on which participants can write

OBJECTIVES / LEARNING:
By the end of this activity, participants will be able to:
- Create a list of potential direct wholesale customers
- Assess options and choose the best way to contact potential wholesale customers
LESSON STEPS, CONTINUED

<table>
<thead>
<tr>
<th>Customer</th>
<th>Manager/Owner</th>
<th>When to Contact</th>
<th>Crops to Sell</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Instruct the participants to copy the table onto their sheet of paper. This will be the template for their personal outreach strategy.

3. The participants can begin filling in the table with any potential customers they can think of and all the information corresponding to the other columns they happen to know. Emphasize that it is acceptable to only know the name of the potential customer and that the unknown parts can be researched later.

4. End the activity by asking each participant to report to the group the name of one customer and at least one reason they think this might be a good place to try to sell. (Suggested format for the report back: “I put [customer] on my list because I know [the manager/owner or the best time to contact them or the buy the crops].”)

Note: You may want to give participants “homework” at the end of the class to visit 1-2 locations and talk about the potential of selling there in the coming season. Some programs may accompany participants on their first visit with them to propose selling to a potential customer.
As a part of Lesson 3, creating a pitch and talking to potential customers, it could be helpful to help participants put together an information packet that they can present to potential customers. Things to include might be: basic information about their farm, product list and price ranges, types of payment they accept, delivery options, certificate or statement of food safety practices.

As an extension to the role play of introducing themselves to a potential customer, some trainers may want to add role plays for problem solving when problems occur with the customer. (Examples: if a farmer is unable to deliver on time; if the customer finds something they did not order, or does not find something they did order; if the customer is not satisfied with the way produce is dropped off/packaging/etc.) Having a chance to role play these possibilities and discuss strategies will equip participants to deal with potential issues in real life, and to practice customer service skills in those scenarios. These role plays can be in person or telephone conversations.