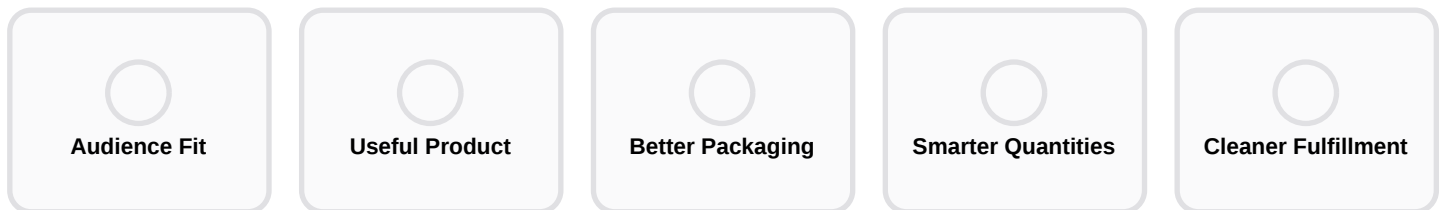


Smarter Merch Planning Guide

A practical tool to help teams choose branded merch people actually want to keep, use, wear, and remember.



Inside this guide:

- ✓ Audience & moment filter
- ✓ Usefulness scorecard
- ✓ Quantity, budget, and inventory planner
- ✓ Packaging, kitting, and delivery checklist
- ✓ Merch decision worksheet

1. Audience & Moment Filter

Before choosing products, clarify who the merch is for, what moment it supports, and what the recipient should think, feel, or do next.

1. Who is receiving this?

Employees, customers, prospects, franchisees, dealers, recruits, event attendees, or another group.

2. What is the moment?

Welcome, reward, educate, thank, launch, promote, celebrate, recruit, or drive loyalty.

3. What should happen next?

Use it, wear it, share it, remember the event, scan a code, visit a location, or feel appreciated.

4. Where will it be used?

At work, at home, at an event, in-store, in the field, on travel, or publicly.

5. What would make it feel intentional?

Better quality, packaging, personalization, timing, usefulness, or connection to a campaign.

Key filter:

The right product changes depending on the audience and the moment. A recruiting gift, customer thank-you, event giveaway, and employee welcome kit should not all feel the same.

2. Usefulness Scorecard

Score each product idea from 1-5. A strong branded merch idea should be useful, appropriate for the

Criteria	1	2	3	4	5
Useful					
Durable					
Brand-appropriate					
Easy to distribute					
Appropriate for the audience					
Likely to be kept					
Worth the cost					
Easy to reorder					
Supports the campaign goal					
Feels better than generic swag					

Scoring Guide

40-50: Strong merch candidate

30-39: Good idea, but refine before ordering

20-29: Risk of waste or low impact

Under 20: Reconsider the product or strategy

3. Quantity, Budget & Inventory Planner

Use this page to avoid one of the most common merch problems: ordering more than the audience, timing, or storage plan can support.

Estimated audience size

Event or campaign date

Quantity needed

Buffer quantity

Reorder plan

Ship-to locations

Storage needs

Budget per recipient

Estimated total landed cost

Leftover inventory plan

Poke-the-bear question:

What happens to leftover inventory?

If the answer is unclear, the program may need a better quantity, reorder, storage, or print-on-demand strategy before money is spent.

4. Packaging, Kitting & Delivery Checklist

Merch feels more valuable when the experience is intentional. Use this checklist to pressure-test the packaging and delivery plan.

- ☐ Packaging is part of the experience, not an afterthought
- ☐ Items are being shipped individually or in bulk with a clear plan
- ☐ Kits are personalized where needed
- ☐ Location-specific or audience-specific versions are defined
- ☐ Inserts, handwritten notes, QR codes, or instructions are included
- ☐ Addresses or location lists are confirmed
- ☐ A replacement plan exists for damaged or missing items
- ☐ A post-event storage, reuse, or disposal plan is defined
- ☐ Reorder needs are anticipated before the first order ships
- ☐ Tracking and delivery reporting are available to the right team

Useful reminder:

The box, insert, delivery timing, and unboxing experience can be just as important as the product itself.

5. Merch Decision Worksheet

Compare product ideas before committing. The best choice is not always the cheapest option - it is the one that best fits the audience, moment, and goal.

Product Idea	Audience Fit	Usefulness	Brand Fit	Cost	Fulfillment	Keep / Rethink

When nbn360 can help

- Choosing better product options
- Building kits and packaging
- Managing quantities and inventory
- Fulfilling to people, teams, or locations
- Creating branded stores or reorder programs

Want a second set of eyes on your next merch

Book a Review