

Distributor Launch Checklist

Everything to handle from the moment a distributor says yes through twelve months of onboarding and maintenance. Built to work with any distributor, written with KeHE and UNFI's actual processes in mind.

1 The Moment They Say Yes Day 0-7

- ☐ Get the acceptance in writing (approved new item form or written confirmation) and note the effective date.
- ☐ Assign one internal owner for this distributor relationship, even if that owner is you.
- ☐ Read the distributor's full vendor or supplier compliance guide cover to cover: routing, packaging, labeling, chargeback schedule, OTIF requirements.
- ☐ Confirm your broker or rep of record is registered on the account.
Both KeHE and UNFI require a broker-of-record registration before commissions and buyer visibility work correctly.
- ☐ Gather compliance paperwork: Certificate of Insurance meeting their minimum liability requirement, signed W9, ACH/banking details for payment.
- ☐ Confirm your GTIN/UPC barcodes are valid, unique, and scan cleanly at both the unit and case level.
- ☐ Pull together full product specs: ingredient statement, nutrition panel, allergen statement, shelf life method, country of origin, case pack, pallet ti/hi, unit and case dimensions and weight.

2 Item Setup & First Order Week 1-4

- ☐ Submit the New Item Setup Form with final pricing, case pack, and product data.
KeHE's new item submission runs through KeHE Connect. Confirm UNFI's current vendor portal process with your rep.
- ☐ Confirm item numbers are assigned and active in the distributor's system.
- ☐ Confirm GS1-128 case labeling / SSCC requirements, and get your co-packer or facility compliant before the first pallet ships.
- ☐ Confirm EDI trading partner setup for 850 (purchase order), 810 (invoice), and 856 (ship notice). Get set up through an EDI provider now if you don't have in-house EDI.
- ☐ Confirm inbound freight routing: appointment scheduling system, dock hours, floor-load vs. palletized, carrier requirements.
- ☐ Ship the first order exactly to spec. Mislabeled or misconfigured pallets are one of the most common sources of first-order chargebacks.
- ☐ Confirm who, on your team or your broker's, is watching for incoming POs daily so nothing gets missed.

3 Go-Live: First 30 Days Week 2-6

- ☐ Confirm the item is fully live and orderable at every distribution center you were approved for, not just the flagship DC.
Both KeHE and UNFI run multiple regional DCs. Live in one does not mean live everywhere.
- ☐ Check that your item displays correctly on the distributor's retailer-facing ordering platform: pricing, description, image if applicable.
- ☐ Remember distributor authorization is not retailer authorization. Confirm which specific banners or stores have actually authorized the item at shelf.
- ☐ Start tracking OTIF (on-time, in-full) performance from the very first order. It gets scored and it follows you.
- ☐ Audit your first invoice against your PO and packing list for shortages or pricing errors.
- ☐ Confirm your first payment lands correctly and log the actual payment terms in your cash flow plan.
- ☐ Loop in your broker or rep team to start driving demos and buyer visibility now, don't wait for a slow start to react.

4 Build the Rhythm Month 1-3

- ☐ Set a weekly cadence to check open orders and your fill rate / OTIF dashboard.
- ☐ Log every deduction or chargeback the moment it appears. Most distributors give you a 30-90 day dispute window, don't let it lapse.
- ☐ Reconcile invoices against POs and payments monthly.
- ☐ Pull your first velocity/POS report and identify which DCs or regions are actually moving product.
- ☐ Watch DC-level inventory positions closely. An early stockout can trigger a review-out before you've had a fair shot.
- ☐ Schedule a 90-day check-in with your distributor category manager.
- ☐ If budget allows, fund your first demo or sampling program through the distributor's demo network.

5 Growth & Compliance Check Month 3-6

- ☐ Pull your OTIF / compliance scorecard and fix any recurring issue before it becomes a bigger problem.
- ☐ Assess whether you need to expand into additional DCs beyond your original launch footprint.
- ☐ Submit any promotional requests on the distributor's timeline. Most require 60-90 days lead time for ad or circular placement.
- ☐ Build a trade spend budget for the back half of the year, tied to upcoming resets and category reviews.
- ☐ Reconcile broker commission statements against actual sales to confirm accuracy.

6 Mid-Year Review Month 6-9

- ☐ Pull a full 6-month velocity trend and flag your best and worst performing DCs or regions.
- ☐ Evaluate demo/sampling ROI and reallocate budget toward what's actually working.
- ☐ Start prepping materials for any category or line review meeting on the calendar.
- ☐ Audit your full deduction history: total dollars, percent of gross, and the root cause behind each recurring category.
- ☐ Recheck that your packaging and case pack still match the distributor's current compliance guide. These get updated more often than founders expect.

7 Annual Review & Renewal Month 9-12

- ☐ Prepare an annual business review if your distributor or retailer requests one: velocity, trade ROI, upcoming innovation.
- ☐ Reassess your pricing and cost structure for year two. Decide if a price change or promo strategy shift is needed.
- ☐ Renew your Certificate of Insurance before it lapses. Distributors will suspend orders over an expired COI.
- ☐ Re-read the current compliance guide in full. Requirements change more than founders expect.
- ☐ Complete a full-year deduction and trade spend reconciliation against what you budgeted.
- ☐ Decide, with real data in hand: expand distribution, add new items, or pause and fix what isn't working before going further.

ONGOING RHYTHM

The Ongoing Maintenance Rhythm

Once you're live, this doesn't stop. This is the cadence that keeps you off the review-out list.

DAILY	Monitor the EDI order queue. Confirm every PO is acknowledged, nothing sits unshipped or unnoticed.
WEEKLY	Check your OTIF / fill rate dashboard. Respond to any compliance alert the same week it lands, not the week you notice it.
BIWEEKLY	Update your deduction and chargeback log. Don't let disputes age past the distributor's response window.
MONTHLY	Pull velocity/POS reports. Reconcile invoices against POs and payments. Check DC-level inventory so you don't stock out.
QUARTERLY	Review trade spend against budget. Re-check the compliance guide for anything that changed. Get ahead of the next reset or category review window.
ANNUALLY	Renew your Certificate of Insurance. Prepare your annual business review. Reassess pricing. Re-read the current compliance guide start to finish, it moves more than founders expect.

Directional guidance built from standard grocery, natural, and specialty distributor practices. Requirements vary by distributor, region, and category — always confirm specifics against your distributor's current compliance guide. · Want this managed for you? [hbabrands.com](#)