BAMKO

Strategic Advisory
Program Diagnostics

EXECUTIVE DIAGNOSTIC FRAMEWORK

PROGRAM RESET AUDIT

A comprehensive evaluation across 7 key pillars to assess program health, eliminate wasted inventory, and prioritize high-impact merchandise investments.

7 EVALUATION PILLARS ASSESSED WITHIN THIS DOCUMENT

1. Purpose & Goal Planning
2. Performance & Reporting
3. Collection & Assortment
4. Digital Store & Ordering
5. Recognition, Onboarding & Gifting
6. Events & Activations
7. Budget & Efficiency

Best For: Marketing Teams · Digital Store Managers · HR/People Teams · Procurement Leaders · Enterprise Teams

BAMKO

Merchandise Program Audit

For Marketing Programs, HR Solutions, Digital Ordering Platforms, Events, New Programs, & More.

An honest look at what's working, what's collecting dust, and where to invest next.

This audit helps you answer questions about where your merch is working, where your budget is going, and what needs to change. In about **10 minutes**, you'll score your program across seven areas, see where it's strongest and where it's holding you back, and leave with your top four priorities for the next planning cycle.

How to Use It:

1. Work through each area with the people who manage and use your program.
2. Rate each question 0-3.
   - 0 = No progress.
   - 1= Some progress.
   - 2 = Considerable progress.
   - 3 = Process optimized.
3. Use the calculation & results sections at the end to complete your audit.

Stage 1: Program Purpose and Goal Planning

A program with a clear purpose is easier to fund, measure, and grow.

AUDIT QUESTION & DELIVERABLE	Score (0-3)	Notes
Program Objective Our program has a clear goal, such as recognition, onboarding, brand building, customer engagement, or events.		
Audience & Intent We know who the program serves and what matters to them.		
Success Metrics We have success measures and review them at least twice a year.		
Internal Alignment HR, marketing, procurement, and finance are aligned on the program.		
Budget Model & Policy We have an intentional budget model for our merchandise programs.		

Total: _____

How BAMKO can help: We can facilitate a planning session to define goals and success measures with your stakeholders.

Stage 2: Performance & Reporting

Your data shows what's resonating and what's sitting on the shelf.

AUDIT QUESTION & DELIVERABLE	Score (0-3)	Notes
Inventory Performance We know our top 10 most-ordered items from the past 12 months		
Inventory Movement We review program or store reporting regularly: who orders what, when, and how often.		
Inventory Strategy Slower-moving and leftover inventory has a plan to feature, bundle, or retire it.		
Program Reception We regularly gather feedback from employees and recipients.		
Program Updating We track requests that keep coming up but haven't been fulfilled.		

Total: _____

How BAMKO can help: We can pull reporting from your online store and walk through top performers, slower movers, and trends with you.

Stage 3: Collection & Assortment

The best merch earns its place: people reach for it because they want to, not because it's free.

AUDIT QUESTION & DELIVERABLE	Score (0-3)	Notes
Quality Control & Product Selection Every item meets a quality bar we'd be proud to receive ourselves.		
Decoration & Design Colors, decoration, and packaging feel cohesive and on-brand.		
Collection & Assortment The assortment is balanced across apparel, everyday carry, wellness, and tech.		

Stage 3: Collection & Assortment *(continued)*

The best merch earns its place: people reach for it because they want to, not because it's free.

AUDIT QUESTION & DELIVERABLE	Score (0-3)	Notes
Product Desirability Our audience would choose these items even without our logo on them.		
Product Collection & Refresh We refresh the collection with limited-time drops to keep it exciting.		

Total: _____

How BAMKO can help: Our team follows retail trends year-round and can curate a refreshed collection tailored to your audience and brand.

Stage 4: Digital Store & Ordering Experience

A great program is easy to use for everyone it serves.

AUDIT QUESTION & DELIVERABLE	Score (0-3)	Notes
User Experience Our online store looks current and is easy to navigate.		
Streamlined Processes Ordering, approvals, and budgets are simple for the people using them.		
Global Access & Experience Remote, hybrid, and international teams have equal access.		
Product Selection, Decoration, Sizing, & Delivery Recipients have choice where it matters.		
Quality Control & Timing Delivery timing and quality consistently meet expectations		

Total: _____

How BAMKO can help: We can refresh your store's look, navigation, simplify ordering and approvals.

Stage 5: Recognition, Onboarding, and Gifting

These are the moments people remember about where they work.

AUDIT QUESTION & DELIVERABLE	Score (0-3)	Notes
New Hire Welcome & Onboarding New hires receive a memorable branded welcome.		
The Hybrid/Remote/In-Office Experience Remote and hybrid hires get the same experience as in-office hires.		
Milestone Recognition Milestones and wins are recognized with something meaningful		
Curated, Gift-of-Choice Experience Gifting offers a curated choice so people can pick what feels like them.		
Delivery & Unboxing Delivery and unboxing feel like part of the gift.		

Total: _____

How BAMKO can help: We can refresh your store's look, navigation, simplify ordering and approvals.

Stage 6: Events & Activations

Today's attendees are looking for experiences, not just a booth and a tote bag.

AUDIT QUESTION & DELIVERABLE	Score (0-3)	Notes
Event Objectives Each event has a clear goal and a feeling we want attendees to leave with.		
Merch as an Experience, Not an Afterthought Merch is part of the event experience, not handed out afterward.		
Event Elevations & Activations We've considered on-site activations, such as live customization.		
Event ROI & Tracking We measure event success: traffic, leads, social shares, or survey scores		

Stage 6: Events & Activations (*continued*)

Today's attendees are looking for experiences, not just a booth and a tote bag.

AUDIT QUESTION & DELIVERABLE	Score (0-3)	Notes
Social Capture & Future-Proofing We capture photos and video to extend each event's reach.		

Total: _____

How BAMKO can help: We can refresh your store's look, navigation, simplify ordering and approvals.

Stage 7: Budget & Efficiency

With budgets under closer watch, every dollar should show its impact.

AUDIT QUESTION & DELIVERABLE	Score (0-3)	Notes
YoY Spend by Category We know our previous year's spend by category and how it compares to usage		
Order Quantity & Inventory Management Order quantities are right-sized to minimize waste and leftover inventory.		
Budget & Spend Optimization Every area of spend is delivering value for its audience.		
Vendor Consolidation & Order Simplification Vendors and programs are consolidated where it simplifies ordering and reporting		
Clear Value & ROI We can clearly show stakeholders the value of our program.		

Total: _____

How BAMKO can help: We can review spend and inventory with you and help you show the return on your program.

Audit Scoring

Use this table to calculate your overall score.

Section	Role	Your Score	Max Points
1. Purpose & Goal Planning	Marketing & HR		/15
2. Performance & Reporting	Marketing & HR		/15
3. Collection & Assortment	Marketing		/15
4. Digital Store & Ordering	Marketing & HR		/15
5. Recognition, Onboarding, Gifting	HR		/15
6. Events & Activations	Marketing		/15
7. Budget & Efficiency	Marketing & HR		/15
TOTAL PROGRAM	All		/105

Interpret Your Score

Use this table to understand what your score means, and how to use that information.

Program Maturity	Score	What it Means	Strategy
Effective	12-15 Points	Strategic Advantage: Process is measured, predictable, and high-impact.	**Protect budget; iterate with seasonal drops and retail collabs.**
Developing	6-11 Points	Operational Friction: Core assets exist, but gaps cause waste or lost sentiment.	**High-leverage zone; targeted fixes yield immediate efficiency gains.**
Needs Attention	0-5 Points	Foundational Vulnerability: The program is reactive, unmeasured, or defenseless.	**Immediate reset needed; pause expansion until fundamentals are stabilized.**

How to Build Your Strategy

1

Isolate Any Gaps

Highlight every item where you scored 0 (no progress) or 1 (some progress).

2

Apply the Foundations Rule

If Section 1 OR Section 2 scored under 40%, at least one of your four priorities MUST come from that section. (*Without clear goals and data, you cannot validate whether any other changes are working. This is the foundations rule.)*

3

Filter Priorities by Role

- Marketing Leads: Prioritize gaps in Section 3 (Collection) and Section 6 (Events).
- HR / People Leads: Prioritize gaps in Section 4 (Store Experience) and Section 5 (Onboarding).
- Procurement / Shared Leads: Review Section 1, 2, and 7 (Budget & Governance).

4

Impact vs. Effort Matrix

Plot remaining gaps and select the top 4 initiatives that offer High Impact with Low/Medium Effort.

BAMKO

Merchandise Program Audit

Results & Next Steps for Strategic Execution

EXECUTIVE RESULTS SUMMARY

I recently conducted a comprehensive audit of our merchandise and branded engagement programs using a diagnostic framework provided by BAMKO. Here is a summary of our baseline results, our primary vulnerability, and our top strategic priorities.

OVERALL PROGRAM MATURITY:

☐ EFFECTIVE
Total Score: 71- 105

☐ DEVELOPING
Total Score: 41-70

☐ NEEDS ATTENTION
Total Score: 0 - 40

CURRENT STATUS & BIGGEST GAP:

Our Program Audit identified our lowest-scoring area as

Pillar: _____ , which is currently causing operational friction, unmeasured spend, or low recipient engagement.

TOP 2027 STRATEGIC PRIORITY:
To drive measurable return in the upcoming cycle, our immediate focus is:

1: _____

2: _____

3: _____

4: _____

TURN YOUR AUDIT INTO ACTIONABLE RESULTS

You've scored your program and identified your gaps. Now let's build the plan to solve them. Auditing your program is the critical first step. Translating those findings into an executive business case requires accurate supply-chain pricing, inventory velocity data, and fresh product curation.

Book a 30-Minute Strategy Session with BAMKO's strategic advisory team. Bring your scorecard and Top 4 Priorities, and we will focus the session on your lowest-scoring pillar:

1. **If your lowest score is in Strategy, Reporting, or Budget (Pillars 1, 2, or 7):**

   We will conduct an inventory velocity analysis, audit vendor markups, and help you model fully burdened unit economics for your CFO.

2. **If your lowest score is in Store Experience or Onboarding (Pillars 4 or 5):**

   We will map automated HRIS/SSO workflows, audit international fulfillment routing, and review elevated custom unboxing concepts.

3. **If your lowest score is in Collection or Events (Pillars 3 or 6):**

   Our retail trend forecasters and product designers will curate a custom 2027 capsule lookbook and architect interactive, on-site live activations.

We'd Love to Help.

Lasting brand connection requires more than just products; it demands strategic design, responsible global sourcing, and flawless execution. BAMKO operates as an extension of your brand team, managing every detail from ideation to delivery.

Book a 30 minute discovery call to get started with BAMKO today.