



# Best Practices for Independent Operators

A guide for independent c-store operators from PDI Technologies

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# 3

## Ways to Ensure Success

Even if you don't have the same size or scale as large convenience retailers, you can make up for it with your agility and entrepreneurial advantages.

But you also need data and insights to open new opportunities that help ensure your profitability. For instance, how easy is it to track your sales for the prior week? How quickly can you check inventory? Do you have a reliable way to monitor shrinkage or perform a margin analysis for specific products?

Adopting the right technology can help you make smarter, data-driven business decisions to compete more effectively. Here are three ways to get started.

### 1

#### Leverage technology to generate business insights

If you're still working with spreadsheets or manually printing reports from your POS system, it's hard to make the data-driven decisions that large chains have been making for years.

The right back-office software can automate or streamline inventory tracking, pricing/margin analysis, promotions, and many other processes. It can also lead to actionable insights that help you stand out against larger competitors.

### 2

#### Get creative with customer engagement

You already know your customer base, so try engaging them in compelling new ways. Stay on top of the latest industry trends such as foodservice, delivery, and self-service options.

It's also important to attract new shoppers beyond your loyal everyday customers. You can work with digital partners and platforms to develop an online presence and create a more holistic customer experience they'll love.

### 3

#### Double down on what's working

You've built your "corner store" into a trusted place of business on some of the most customer-friendly real estate. When you know something resonates with your customers, keep doing it!

But, how exactly do you know what's working? Ongoing success requires quantifiable data and insights that help you make your site even more valuable—to you, your customers, or even potential investors.

# 3 Keys to Success

1

Leverage technology to generate business insights



2

Get creative with customer engagement



3

Double down on what's working



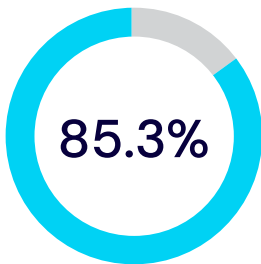
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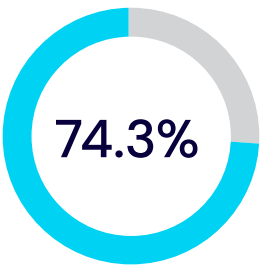
# How Do You Stack Up?

Check out how over 1,000 independent operators in North America responded to a recent survey from PDI Technologies.

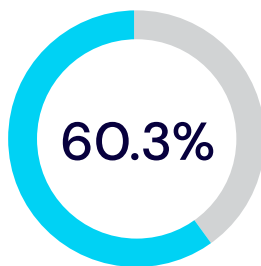
## Top 3 Best Practices



Have a back-office or pricebook system

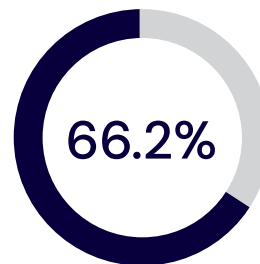


Participate in tobacco rebate programs

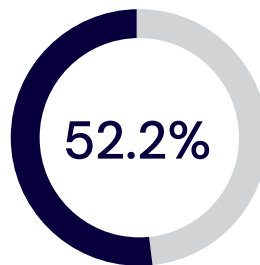


Participate in a major oil loyalty program

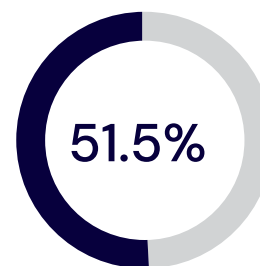
## Top 3 Challenges



Keeping up with rapidly changing technology



Competition from large c-store chains



Cost to implement new technologies

# What's Trending?



## Digital transformation

It's great that loyal customers love your store, but could you grow your business with an online presence or digital signage inside your store? There's no shortage of technology partners who have the tools and expertise to increase your efficiency and expand your reach.



## Data-driven decisions

You don't know what you don't know. If your competitors are capturing data to make increasingly smarter decisions, you can't simply rely on gut feelings or anecdotal evidence from your staff. Otherwise, you risk missing some big opportunities or ignoring potential issues.



## Foodservice

You face increased competition from grocery stores, large c-store chains, and quick-service restaurants. Expanding your foodservice offerings gives you a better way to keep pace with fresh ingredients, healthier options, and even food delivery.



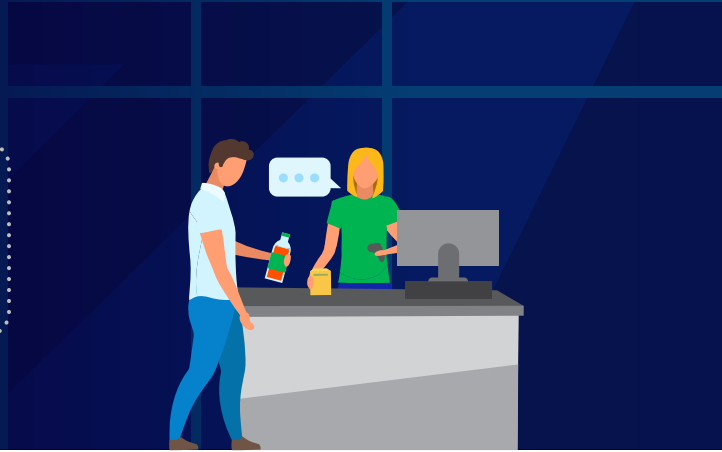
## Self-checkout

Have you had any staffing shortages? Do some of your tech-savvy customers expect a faster checkout experience? You can address both issues by introducing self-checkout options, especially during your busiest dayparts.

### DID YOU KNOW?

**5X** It costs five times more to attract a new customer than retain an existing one.

Source: PDI Loyalty Playbook



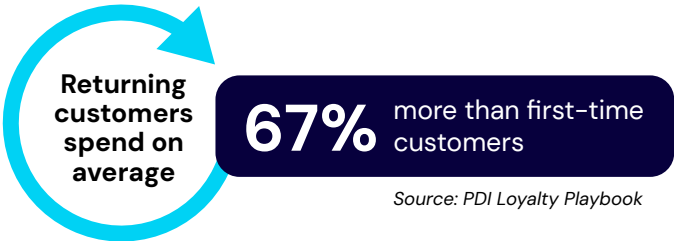
# Embrace Your Place as the Neighborhood Store

Always there. Trusted. Friendly. Hopefully, that's how your customers think about your store.

Although it's sometimes easy to get intimidated by larger c-store chains, you have the competitive advantages of being the local go-to spot for convenience.

## Remember what makes your store unique

- > **Proximity:** You're in their neighborhood, so you have a location advantage over larger chains.
- > **Control:** You determine your store culture and customer experience—not the corporate office.
- > **Intimacy:** You know your customers by name and offer a personal touch that others can't.
- > **Relationships:** You have a higher employee retention rate with less disruptive turnover.
- > **Accountability:** You can solve issues in real time, rather than waiting for someone else.
- > **Trust:** Your customers know you and trust that you're looking out for them.



Source: PDI Loyalty Playbook



## Tap into CPG Brand Dollars

Consumer Packaged Goods (CPG) brands are looking for smart ways to invest their program dollars. Is your business a good candidate for CPG-funded deals, promotions, and scan data rebate programs?

CPG brand spending in convenience and independents is at an all-time high, but CPGs often outsource their promotional and distribution strategies to a select number of partners.

You can easily collaborate with these select partners to secure your own deals—including highly valuable tobacco loyalty rebates.

### 3 Tips for Collaborating with CPG Brands

- 1 Participate in as many CPG-funded programs as competitively possible.
- 2 Regularly check with local and national vendors to identify which programs you're eligible for.
- 3 Be willing to provide a test market for new products and innovations.

# Modernize Your Back Office

You already run a successful store, but one specific investment could open up much higher efficiency—and profitability.

A modern back-office system provides the foundation for everything from ordering and inventory to transaction data capture and analysis. As a result, it can deliver the details you need to save time, control your inventory, and reduce loss.



## Do the Math

It's almost impossible to track every single item in your store. Losing even a few high-cost, low-margin products can take a big bite out of your profits.

For example, if you lose just one energy drink, how many additional drinks would you need to sell to make up for that loss?

Tighter inventory management in your back-office system can help prevent shrink and keep you profitable.

**1.6%**  
of sales

Annual average  
c-store shrink rate

“

With PDI CStore Essentials I can see everything happening in our stores in real time and can take action no matter where I am.

– Goodway

”



# Loyalty Pays Dividends

Did you know it costs five times more to attract a new customer than to retain an existing one? Loyal customers can be your secret weapon in competing with larger chains for repeat shoppers.

The good news is you don't necessarily have to buy new software or become an expert in loyalty. If you don't have the resources to manage your own loyalty program, consider partnering with a fuel brand loyalty program that:

- Is typically free or included in the licensing rights for the fuel brand
- Drives more shoppers to your store without a significant investment from you
- Helps you increase average basket size and overall sales



“  
The promotions we can offer through PDI have been so effective that we've actually grown our tobacco-related revenues by more than 10%.  
”  
- Midwest Retailer



# Avoid Being a Target for Ransomware

**Myth:** Cybercriminals predominantly target the largest retail chains because they have more money—and offer a bigger payout in a ransomware attack.

**Reality:** SMBs—including many independent retailers—are primary threat targets, especially with the latest flood of AI-generated cyberattacks.

If you don't want to become yet another ransomware statistic, you need a strong cybersecurity strategy, up-to-date security tools, and the expertise to stay ahead of threats.



**43%**

of cyberattacks target small businesses

Source: Accenture

## Follow these steps to protect your data and customers

- 1** Update your firewall technology to secure your networks and data.
- 2** Ensure that your payment systems are PCI-compliant.
- 3** Secure any device that's connected to the Internet, including computers, security cameras, and smart devices.
- 4** Deploy a reliable threat monitoring and response solution, and give your staff security awareness training.
- 5** If you need help with any of these steps, find a reputable Managed Security Services Partner (MSSP) to assist you.

# About This Guide

This guide includes consumer buying data collected from over 18,000 independent convenience retail sites across all key US geographic locations. It reflects just one of the ways PDI is “Connecting Convenience” across the globe to help retailers simplify their operations and engage more effectively with their customers.

You can leverage PDI’s independent convenience retail solutions and data to gain visibility over your store performance and increase profitability.

Designed specifically for independent operators, the **PDI CStore Essentials** back-office and loyalty solution includes:



Back-office operations



Scan data (powered by Skupos)



Loyalty (powered by Skupos)

Learn more at



[pdicstoreessentials.com](https://pdicstoreessentials.com)



## About PDI Technologies

With 40 years of industry leadership, PDI Technologies, Inc. resides at the intersection of productivity and sales growth, delivering powerful solutions that serve as the backbone of the convenience retail and petroleum wholesale ecosystem. By “Connecting Convenience” across the globe, we empower businesses to increase productivity, make informed decisions, and engage faster with their customers.

[pditechnologies.com](https://pditechnologies.com)

