

PITCHFORK CONSULTANCY

# AI in the real-world

Practical AI for FMCG | Mindpick

June 2026

# Three stages of working with AI

1

## You ask, it answers

You're experimenting.  
Asking questions, testing what's possible.

2

## You brief, it delivers

You're building habits.  
Giving clearer direction and getting usable output.

3

## You set the direction, it runs

You're operating strategically.  
AI handles the heavy lifting while you focus on judgment.

**One constant across every stage: HUMAN JUDGEMENT**

# Your AI tool matters less than how you use it

## Which tool?

Go with what your company provides, and get the full enterprise version for security

- M365 Copilot – not Copilot Chat
- Enable Claude in Copilot
- Claude Teams
- ChatGPT Teams

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**Pick one. Go deep.**

## Master the foundations first

Prompting, planning, using built-in agents & features.

Common platform features are merging across Claude, ChatGPT & Copilot.

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**Use it daily.**

**Practice new use cases regularly.**

## Separate work & personal

Work information is confidential

Free accounts = Minimal privacy

Not your account, but your risk

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**Don't let company IP walk out the door**

# Make it work for you

## Check Privacy

**Enterprise/ Teams** =  
Automatically on

**Work files** = Check access  
setup for internal privacy.

Shared drives are a must.

**Free ChatGPT** = Turn OFF  
'Improve the model for  
everyone'

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**Don't mix Work & Personal.**  
**Protect company IP**

## Create 'About Me'

XXXX.

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**Role, focus, language style, what  
does 'done' look like. Human check.**

## Update Instructions

**COPILOT/ GPT:** Settings >  
Personalisation > Custom  
Instructions

**CLAUDE:** Save 'About\_Me.md' to  
Customise > Skills

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**Review regularly and update**

# AI is not Google. It's a new team member

01

## Think

with me

Brainstorm, pressure-test,  
get unstuck



02

## Write

with me

First drafts, reformats,  
tone shifts



03

## Organise

with me

Summarise, synthesise,  
structure fast



04

## Build

with me

Templates, SOPs,  
repeatable systems



# PRACTICAL REAL WORLD

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# 1 Data to insights



Turn raw sales data into actionable category stories



Automate weekly reporting - highlight what matters



Find patterns in retailer sell-through data



Build dashboards from messy spreadsheets

**Basic:** [Retailer Negotiation prep](#) tool to manage potential price changes (Excel/ Sheets)

**Advanced:**

Report automation including insights, priority focus areas and recommended plans → Use Cowork (Copilot/ Claude)

# Simple Idea starters:

**Sales** Field / Merchandising activation plan. "Create an interactive activation plan for the next 26 weeks, based on key seasonal activity and new product launches at \_\_\_\_\_ and \_\_\_\_\_. Include Gantt calendar with priority projects for next 13 weeks"

**Marketing** Campaign tracker. "Build a campaign planner with columns for channel, objective, audience, key message, go-live date and owner. Add a status dropdown: Draft / In Review / Live / Complete."

**Finance** Budget vs actual. "Here is my annual budget and YTD spend by category. Create a variance summary showing underspend/overspend in dollars and %, flag anything over 15% variance in red."

**Operations** Supplier log. "Create a supplier tracking sheet with columns for supplier name, category, lead time, MOQ, last order date and notes. Sort alphabetically and freeze the header row."

Explain outputs and ensure files attached or Connectors enabled

## 2 Shelf and planogram reviews



Upload shelf photos for AI-powered layout analysis



Identify white space opportunities for NPD



Compare planograms across retailers and flag gaps



Generate ranging recommendations backed by data

Use photos of shelf 📷 + ask:

- Share of shelf
- Identifying potential white space opportunities (combine with scan data)

*'If you were the Category Manager for \_\_\_\_ how could we change layout to improve upsell to \_\_\_\_'*

### 3

## Retailer-specific prep



Tailor presentations and activation plans per retailer



Compare retailer contracts side by side



Build retailer-specific launch plans with rationale



Prep for buyer meetings with AI-generated briefs

**Basic:** Paste your product brief into AI and ask it to draft a retailer pitch structure: Key slides, talking points, and a suggested narrative flow.  
*You review and refine.*

**Advanced:** Upload last year's sales data, the retailer's strategy document, and your product brief. Ask AI to build a tailored pitch with data-backed ranging rationale, shopper insights, and retailer-specific activation ideas, ready to drop into slides.  
*You review and refine.*

# 4

## Pressure-test your category strategy



Use AI as a devil's advocate to stress-test your plan



Identify blind spots against retailer strategies



Run premortems to surface risks before launch



Apply Ehrenberg-Bass to find Category Entry Points

You are a Retailer Advisory Board assembled for [company name] in the [category] category, operating in [key markets]. Your role is to pressure-test product pitches, ranging proposals, and retailer strategies from seven distinct commercial perspectives.

### BOARD MEMBERS:

- (1) Commercial Strategist — revenue, margin, pricing structure, long-term profitability.
- (2) Category Whisperer — category structure, shelf logic, segmentation, shopper navigation.
- (3) Shopper Marketer — shopper behaviour, triggers, packaging, in-store conversion.
- (4) Buyer Challenger — retailer lens on space, duplication, commercial return, and risk.
- (5) Retailer Relationship Coach — how to sell the idea, stakeholder management, timing.
- (6) Data Analyst — category data, trends, rate of sale, benchmarks.
- (7) Negotiator — trade terms, funding, margin splits, deal structure.

When I type "Retailer Board", reply from this board in a table format by board member. Be direct. Challenge assumptions. Simulate the buyer objection before I walk into the room.

# Launching Petcare into USA ChatGPT

- Independent advisor
- Full board



Gemini Gem  
'Petcare Pete' 🐶

# Reorganise your day

Automation options like Cowork (Claude, Copilot) can tackle repetitive areas

## Morning

### Prioritise and respond

Triage inbox into priorities, decisions, and quick replies. Draft 80% of responses in minutes. You review and send.

*“Triage my inbox into top priorities, decisions needed, and quick replies”*

## Mid-morning

### Think and plan

AI = thinking partner, not search engine. Pressure-test ideas before starting work.

*“Give me 3 approaches, risks, and what would actually work in NZ FMCG”*

## Midday

### Create first drafts fast

Quick drafts, summaries, slides vs. longer docs and sharper thinking.

*“Turn this brief into a structured deck outline with key messages”*

## Afternoon

### Analyse and structure

Upload data into Sheets or Excel. Build charts, summaries, and talking points in minutes.

*“What are the key trends? Where is growth coming from?”*

## End of day

### Close the loop

Turn notes into email updates, action lists, and weekly summaries.

*“Summarise today’s work into decisions, actions, and what’s next”*

# More ideas

## Sales

- Premortem before launch
- Compare retailer contracts
- Plan field team call cycles
- Store-specific ranging analysis
- Quarterly reviews
- Shopper activation plans
- Retailer negotiation prep

## Marketing

- Category Entry Points (E-B)
- NPD ideation from trends
- Packaging concept development
- Post-campaign reviews (shopper, social)
- Retailer activation planning including budget, calendar, material deadlines & clash-grid management

## General

- Personal Chief of Staff
- Strategic plan: where to play, how to win
- S&OP planning + risk analysis
- Role-play negotiations
- Daily timesheet tracking
- Business Development

# Automation: three things to get right

Applies across M365 Copilot, Claude and ChatGPT



## Define the output

Know exactly what you need before you start. A report? A summary? A decision? Clear output = clear prompting.



## Map the process

Break the workflow into steps AI can follow. What happens first, what feeds into what, and where you check the work.



## Structure your data

AI works best with clean, organised inputs. Label your files, use consistent formats, and make key information easy to find.

# Going deeper = doing more upfront



## Get clear on the problem

Define your outcomes before you prompt. The better the brief, the better the output.



## Build detailed skills and SOPs

Create reusable instructions AI can follow every time. Consistency beats creativity.



## Use built-in features first

Memory, custom instructions, agents. Master the platform before adding complexity.

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**Start small. Start now.**  
**The best tool is the one you actually use.**

**Janine Chamley**

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