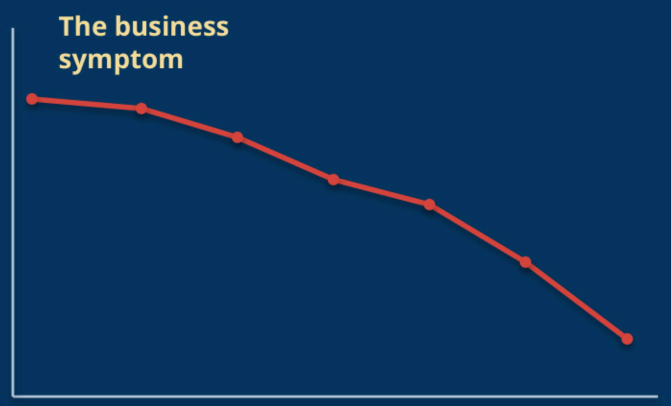
Every Product Needs a Role

A story about a team that learned growth is not the same as portfolio health

CHAPTER 1

The Portfolio That Looks Healthy from Far Away



GoodDay Foods has a bigger portfolio, but not every product has a clear enough role.

The Portfolio Grew for Reasonable Reasons

GoodDay Foods is a medium-sized food company.

Not a global giant with a chilled-meals empire large enough to require its own national anthem.
Not a tiny start-up where one person still approves every recipe, retailer email and emergency label change.

GoodDay Foods sits in the middle.

Big enough to launch new products, negotiate with retailers, build plans and chase growth.
Small enough that every extra product is felt across the business: in sales meetings, factory planning, finance reviews and shelf conversations.

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The Portfolio Grew for Reasonable Reasons

GoodDay Foods has been through pressure before.

The team learned an important lesson then:

A sales decline is a symptom, not a diagnosis.

That lesson still matters. This course does not replace it.

This story starts later.

The company has expanded the range, responded to retailer requests and moved into new occasions.

Now the pressure is different.

The Portfolio Grew for Reasonable Reasons

For a while, this expansion looked like maturity.

The team was asking better questions.

Retailers saw GoodDay Foods as more responsive.

Marketing wanted the brand to reach more occasions. Sales wanted stronger account stories. Finance wanted growth that created value. Innovation wanted to test new ideas.

None of this was foolish.

That is what makes the problem interesting.

The portfolio did not grow because people stopped thinking.

It grew because many reasonable decisions were made one at a time.

SECTION 1

Meet the Team Facing the Portfolio Review

A
Anna
Marketing Director
Keeps the team focused on the decision

E
Eva
Brand
Looks at meaning, coherence and customer choice

M
Marek
Finance
Looks at margin, value and commercial discipline

D
David
Sales
Looks at retailers, shelf reality and account pressure

L
Lucie
Insights / Category
Looks for evidence, interpretation and category logic

Six Products on the Table

At the centre of the discussion are six GoodDay Bowls SKUs, each with a plausible role claim.

Pesto Chicken Pasta Bowl — the core product.

Smoky Chilli Pasta — the possible growth engine.

Mini Protein Pot — the smaller lunch format.

Family Pasta Bake — the possible family and evening-meal expansion.

Metro Market Teriyaki Bowl — the retailer-specific SKU.

Winter Mac & Cheese Bowl — the limited-edition seasonal product that stayed.

They look harmless on the table. Products often do. They sit in neat packaging, quietly pretending they have not caused three months of meetings.

Strategic Intelligence

SECTION 1

Six Products on the Table

This is not a story about six foolish decisions.

On its own, each product can explain why it exists.

That is exactly why the meeting is difficult.

Good portfolio problems rarely arrive wearing a sign that says:

"I am obviously the problem."

A product's reason to exist is not the same as a clear portfolio role.

Net Sales Are Up, But the Room Does Not Relax

The portfolio review begins with a number that should make the room feel better.

Net sales are up. Not dramatically. Not in a way that makes anyone high-five near a projector. But up.

The index has moved from 100 to 103.

David notices it first.

"Can we agree that sales being up is normally considered acceptable behaviour?"

SECTION 1

Net Sales Are Up, But the Room Does Not Relax

Lucie moves to the next slide. The top line now has company — the kind that makes a management team stop enjoying the first number.

The portfolio is bigger. Promotions are doing more work.

Margin is lower. Repeat purchasing is weaker. Retailer concern is higher.

No single metric screams. That is part of the problem.

The story is not "everything is broken."

Net Sales Are Up, But the Room Does Not Relax

The story is more uncomfortable:

The portfolio is growing in a way that may be making the business less healthy.

Metric	Before	Now
Net sales index	100	103
Gross margin	39%	35%
Promo share of sales	24%	32%
Active SKUs	4	6
Repeat purchase index	100	92
Retailer concern	Low	High

SECTION 1

The Business Symptom

The portfolio has grown.

But growth is not the same as portfolio health.

The symptom is clear enough to matter:

GoodDay Foods has a bigger portfolio, but not every product has a clear enough role.

Growth is not the same as portfolio health.