



Category Management Knowledge Group

Category and Business Insights 2

This program develops your skills at a more advanced level of category analytics when you're ready to move to concepts like baseline & incremental sales and analytic thresholds.

For introductory courses on this topic please see our document "Category and Business Insights 1"



INDIVIDUAL PURCHASE

\$198.00 USD

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TEAM PURCHASE

Minimum of 5 people
required for bulk pricing

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QUESTIONS?

Check out our website.

CMKG.ORG

Upgrade Your Skills

Use Category "Health Checks" to See the Big Picture.

You should know how to complete "health checks" on your categories / brands to understand the big picture perspective. This includes in-depth understanding of consumer trends, the economy, competitive environment and each tactic. A deep dive understanding will highlight strengths, weaknesses, opportunities and threats for your categories or brands that may not be apparent from a superficial look at the data.

Identify Key Sales Drivers.

Your program starts by looking across multiple data sources, with an emphasis on baseline and incremental sales, to move to a more strategic understanding of your business. By understanding the key drivers for each of baseline and incremental, you will be able to much more effectively analyze the category tactics and understand their impact on category and brand results.

Identify Opportunities Using Multidimensional Analytics.

The next course on advanced analytics gives different data perspectives and views of the data. You'll learn about relationships between different data dimensions and how to correlate the insights into a highly effective, multi-dimensional view of category or brand results. Moving to this next level of analytics will teach you to derive deeper and more strategic insights through these new approaches, and identifying the biggest opportunities for your category / brand.



Program Curriculum

Measuring Category Health (Baseline & Incremental Drivers)

Intermediate Accredited Category Management Training Course

Participants learn how to complete a category health assessment, including an exploration of internal and external influences. An in-depth understanding of baseline and incremental sales volume, drivers and measures are included in this assessment. Participants will acquire the to address important questions that relate to a category's health, including those associated with the consumer, trends, the economy, competition and tactics associated with winning segments and brands. A SWOT analysis introduced as means to captures the most important strengths, weaknesses, opportunities and threats in the category as the health assessment is completed. Calculations include seasonality index, quadrant analysis, baseline sales and incremental sales measures, tactics % change results, temporary price reduction, and shopper measures.

Advanced Analytics: Relativity

Intermediate Accredited Category Management Training Course

Participants learn to bring together their skill areas and competencies in pricing, promotion and efficient assortment techniques. From this, a multi-faceted approach to a category health assessment is developed. Participants learn how to calculate volume thresholds for product assortment, pricing and promotion. From this, the core business drivers can be identified for both sources of volume, and subsequent opportunity identification.

Shopper Insights & Shopper Marketing are Part of Category Management

Here's a resource to help you understand why Shopper Insights and Shopper Marketing are both part of the category management process.

Excerpt from **BLOG.CMKG.ORG**

Best Practices • Industry Updates • Resources • Thought Leadership

Category Management and Shopper Insights/Shopper Marketing have parted ways in many organizations.

Shopper Marketing reports to Marketing. Category Management reports to Sales.

According to new industry standards, this is not the best way to set your organization up for Shopper success.

At the Category Management Association's conference a few weeks ago, much discussion centered around "CatMan 2.0™". This updated approach to category management reflects some of the changes in data, technology, analytics, digital and the changing Shopper and applies them to all aspects of the category management process.

The biggest, and most positive, change I see in CatMan 2.0™ is the incorporation of Shopper Insights and Shopper Marketing into the category management discipline.

According to CatMan 2.0™:

*"Roles that are inter-dependent should be in the same organization. **Shopper insights, shopper marketing and category management are inter-dependent** in creating the necessary output for the ultimate client (the retailer), the category platform." (CatMan 2.0™)*

That means Shopper Insights and Shopper Marketing should be within the Category Management team.

Furthermore, the Category Management Team within a manufacturer should report through their sales team:

*"CatMan's reporting locations should be driven by its purpose (e.g., improving brand/retailer category sales, profits and shopper satisfaction) and therefore **should report to Sales** since Sales is most closely associated with retailer activities.*

When you think about it, this makes sense. Why?

Because the Retailer owns the Shopper. And they own the category management process that should focus on that Shopper.

Despite everything that we do to talk about the Shopper and the importance of them, including a significant investment in Shopper insights for many Manufacturers, we haven't mastered how to activate Shopper insights.

As Manufacturers, we used to be able to directly reach the consumer in their homes and on their more linear path to purchase that ultimately pushed them to retail stores. But now, with digital media, mobile devices and ecommerce, it's more difficult to reach them before they get to the store.

Once they enter the store, Retailers have more influence on Shoppers that can affect their purchase decisions. In net, Manufacturers can't develop Shopper insights and marketing programs without the support and collaboration of their retail partners, including integrating components into the category management process.

And, Retailers need to look at the current ways they are practicing category management and do a better job incorporating the Shopper within their category management process.



What are some of the barriers to this new approach?

It's not that we lack Shopper insights – in fact, many Manufacturers have incredible Shopper insights. One problem is that some organizations find their Shopper insights so valuable that they don't want to share them with their Retailer partners.

This is ironic, because it's the Retailer's Shopper that they are gaining insights on, and without the support of the Retailer they will never truly maximize the potential behind their Shopper insights.

So, Manufacturers need to define who their true collaborative partners are that will work with them to develop category solutions that result in win-win-win for Retailer, Shopper and Manufacturer.

Often the Shopper is forgotten in most of our current category management work. When you scratch below the surface behind most category reviews and category plans, the Shopper is missing. This is particularly problematic when trying to understand the Shopper in the assessment phase of the catman process (including why they buy), and also at the tactical level.

We forget about the Shopper because our category management teams have become too tactical in their approaches, with little consideration (or understanding) for overall category strategy or the Shopper.

How to move to a more strategic, Shopper-focused approach in category management:

1. **Elevate category management as a strategic pillar in your organization and train your multi-functional teams on the foundations of category management.** This includes teaching individuals and teams how to think about, and consider, the category and Shopper to determine how to leverage your Shopper insights in each step of the category management process.
2. **Develop best-in-class corporate processes and standards** that incorporate category and Shopper perspectives in innovation and space management; best-in-class category reviews, and business reviews that link processes and approaches for your entire organization.
3. **Share your Shopper insights with your Retailer partners and work with them** to determine how to best incorporate them into category definitions, segmentation, store clusters, category roles, category strategies and category analytics for Shopper satisfaction. Remember that as a Retailer or Manufacturer, you need to strategically select who you choose as collaborative business partners. [Click here](#) to access an excellent (free) whitepaper developed by the CMA on "Strategic Collaboration for Shopper Satisfaction".
4. **Challenge yourself at your desk and in your role.** Next time you go to do that category review, assortment analysis or planogram project, think about some simple ways to incorporate Shopper into your plans.

Shopper Insights and Shopper Marketing belong as part of the category management process.

This doesn't mean that folks without a marketing background should be doing some of the Shopper Marketing work – there are different skills required for this role that will be kept separate from the category management work. These two teams need to work together for an aligned

Shopper approach that gets to the root of the category by way of the category management process.

These are only a few examples of the type of training you will receive in this skill development program!

questions?

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Train Ahead.

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Which Skill Development Program is best for your needs?

Advanced Retailer Understanding

Assortment & Space Management Skills

Becoming More Effective in Your Category Management Approach

Building Pricing and Promotion Skills

Category and Business Insights

Category and Business Insights 2

Consumer and Shopper Analytics and Insights

Proficiency in Excel

Proficiency in Understanding and Using Data 1

Proficiency in Understanding and Using Data 2

Selling Skills 1: Developing Fact-Based Powerpoint & Presentation Skills

Selling Skills 2: Strategic Selling and Collaborative Business Planning Skills

Understanding Retailer Strategy and Category Management 1

Understanding Retailer Strategy and Category Management 2

www.cmkg.org/category-management-skill-development-programs