



# CPCA Certification Training, Prep & Practice

## Foundational Level

This accredited program teaches you the foundations of Category Management, including the process and how it works, the data and the basic analytics. It is designed to give a solid grounding in the category management process, basic assessment and the category tactics and other fundamentals you need to understand and practice category management in your role in retail / CPG / FMCG.

This training program will give you the training required to be tested for the **Certified Professional Category Analyst (CPCA)** level if you are interested in industry certification.

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# Certification Training

## CPCA Category Management Training Program

This **accredited program** teaches you the foundations of Category Management - including the process and how it works, the data and the basic analytics - and will prepare you for category management certification at the CPCA level (for those interested in certification). It's designed to give a solid grounding in the category management process, basic assessment and the category tactics and includes a set of online courses that will give you the fundamentals to understand and practice category management in your role in retail / CPG / FMCG.

If you're interested in category management certification, this program will prepare you for the CPCA designation with the CMA, and meets 10 of 10 learning requirements for the CPCA designation.

### Program Curriculum

- Category Management Overview
- Retailer Strategy
- Category Definition and Segmentation
- Category Roles
- Category Strategies
- Understanding and Using Data
- Category Assessment
- Category Tactics and Analytics
- Category Management on Limited Data
- Develop and Implement the Category Plan
- Building PowerPoint and Presentation Skills
- Building Excel Skills

### Program Details

- Approximately 35-40 hours to complete
- No Prerequisites

## Exam Preparation Package for CPCA Accreditation

This category management certification **exam preparation package** consists of full practice exams, as well as a set of mini-exams for each learning requirement. These mini-exams will give you valuable feedback and additional resources to boost your knowledge in areas where you need help. You have 3 opportunities to complete each of the mini-exams with each question giving you multiple opportunities to answer so that you can practice and feel ready for the CMA exams.

To best prepare, we recommend you use a combination of training and/or exam preparation. These materials will help you prepare for the tests, but do not guarantee that you will pass them.

# Program Highlights

## **Understanding the Category Management Process**

Develop a deeper understanding of how the process works, who owns it and overall strategic considerations associated with the catman foundations. This piece is missing for many organizations, and will help you strategically understand the process and details of each step.

## **Data and Analytics**

A big part of category management is around data and analytics – not only understanding the key data sources, but knowing how to drill through them for insights, and turn the opportunities into action through the category tactics. Learn how to effectively approach and analyze basic data, draw relevant insights, and make the best tactical recommendations for your categories.

# Program Curriculum

Below, you'll find a short summary of each of the courses in the CPCA program.

## **Category Management Overview**

It's important to have a strong understanding of category management, how it works, and why it's important for your business. You'll learn what category management is, the different perspectives to consider, the key steps of the process and details of each one, and the importance of understanding retail strategy.

## **Retailer Strategy**

Category management is a retail-driven process, so you need to understand overall retailer strategies in order to be successful in category management. You'll learn what should be included in a retailer's overall strategy and the importance of both articulating and understanding the strategy (from both a retailer and supplier's perspective).

## **Category Definition & Segmentation**

One of the important catman foundations is proper category definitions and segmentations based on the consumer decision tree. You'll learn how to define a category from the Shopper's point of view, and then segment the items that are assigned to a category to reflect the consumer decision tree.

## **Category Roles**

By establishing category roles, a retailer will determine the most important categories for their Shoppers, as well as the corresponding tactics that match best with each category role. You'll learn how to assign category roles across a retailer's categories, and how these role assignments should be reflected in a store layout. You'll also learn how tactics should be strategically applied to each category role for an aligned approach.

## **Category Strategies**

Category strategies take category roles one step further, with consideration for how the category Shopper shops, and what's most important to the most loyal and heavy buyers in the category. You'll learn about the different category strategies, and how these strategies further influence the category tactics.

## **Understanding & Using Data**

Before you analyze data, you need to ensure that you have a solid foundation of understanding the key data sources and how to use data. You'll develop these data foundations, including an 8-step analytic process to set you up for success, and a review of the different types of standard catman data and their strengths & watch outs (retail POS, retail measurement, consumer panel and other data sources).

## Category Assessment

Now that you've got your strategic foundations in place, you're ready to analyze the category through a category assessment. You'll learn how to drill down through data, determine the most and least developed brands & segments, and learn many calculations that are included in a standard category assessment. You'll complete some hands-on workshop to try out some of the calculations and learn how to draw insights from the data.

## Category Management on Limited Data

Most of us are in some type of limited data environment – and it's important to understand how to maximize the use of the data you DO have access to. Because you don't have access to all of the data sources doesn't mean you can't do category management – you're just a bit more limited in your approach. You'll learn about different report layouts and perspectives, with suggestions for specific data gaps in your business (including the category tactics).

## Develop & Implement a Category Plan

Development of the category plan is the ultimate goal of the category assessment, and sets up the category for success. You'll learn what should be included in the category plan and what to include in it, and how to develop an implementation plan to ensure success of the entire plan.

## Building Excel Skills

In today's world, and all of the data and reports that we have access to, you typically require strong Excel skills. This isn't your typical Excel course – it's broken into mini-modules where you'll learn everything from the basics to more advanced topics using examples and perspectives related to category management. It covers range names, absolute and relative references, basic formula writing, custom formats, custom lists, text functions and VLOOKUP and HLOOKUP formulas.

## Building PowerPoint & Presentation Skills

Many of us use PowerPoint on a regular basis, but have never learned how to properly use it. You'll build your skills in technical and tactical functionality of PowerPoint, learn how to create logic and flow in your presentations through a 5-step process, and develop the skills to deliver an impressive presentation.

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# 4 Ways to Become More Strategic Using CatMan Foundations

## How does category management help you build your business?

### 1. Understand different perspectives to uncover more opportunities

There are 3 perspectives that should be considered in category management:

1. **Retailer Perspective:** Every Retailer has unique strategies, Shoppers, formats and approaches. By better understanding each, you will develop better solutions to help them achieve their objectives.
2. **Category Perspective:** Most Retailers have structured their business around categories (or items that offer similar solutions to Shoppers). If you're only looking at the business from a brand perspective, your recommendations may overlook important implications on the Retailer's total category business. You're also limiting the opportunities for both national brands and store brands by not looking at a bigger picture perspective.
3. **Shopper Perspective:** If you have Shopper insights / marketing in your organization, it needs to align with the Retailer, their category approach and their Shoppers. This is best done by incorporating Shopper into the overall assessment and opportunity identification done through a category assessment (see more details in #3 below).

### 2. Learn how to develop category/business/Shopper insights

We have more access to data than we have ever had in the past. In some regions / markets / industries the set of data may not be as robust, but you most likely have more data than ever before.

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*It's better to make fact-based decisions that tie in with our knowledge of the business, rather than to rely only on intuition or experience to make decisions.*

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Learning how to drill down through data (whether it's market data, consumer panel data, warehouse data, shipment data) is an essential skill that will help you take your analytics to a whole new level, particularly if you're incorporating the insights with the strategic understanding that you developed in #1 above.

### **3. Build skills in the tactics**

Many of us spend time and money on driving the tactics (assortment, space management, pricing, promotion), ultimately to drive sales and profits for our brands / categories / business. But how do you know that the recommendations that you are making are the right ones for your business? Most Retailers do not (or should not) make decisions on each of the tactics on a brand-by-brand basis.

Start turning your data into action through the category tactics. You can learn how to become more strategic in your approach for each tactic, and learn how to effectively analyze and determine the biggest areas of opportunity for your business.

### **4. Develop presentation skills**

A big area of opportunity for many organizations is to develop fact-based presentation and selling skills across their teams. Traditional sales approaches are no longer working, and we can't rely on relationships alone to sell our ideas anymore. anyone who develops sales presentations or business reviews need to learn how to apply fact-based principles into a logical, well-formed presentation. Without a persuasive approach, great ideas can get lost in a poorly developed presentation.

### **5. Five Benefits of Moving to a More Strategic Approach grounded in the principles of category management**

1. Uncover new ideas and opportunities to build your business that considers the bigger picture perspective
2. Develop better solutions for your business partners
3. Increase alignment in your organization in your approach to analyzing data
4. Improve return on your investment in data and technology
5. Improve your business results

Use the category management framework to create a strategic approach in your business that will ultimately help you to improve your business results – whether or not you have category management training or background.



# CPCM Certification Training, Prep & Practice

## Intermediate Level

This accredited category management training program is for anyone who wants to advance their category management understanding beyond the foundations. It's designed to build skills at an intermediate level, including in-depth data and analytics across key data sources and category tactics.

This training program will give you the training required and exam preparation materials to prepare you for the **Certified Professional Category Manager (CPCM)** level of industry certification.

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# Certification Training

## CPCM Category Management Training Program

This accredited category management **training program** is for anyone who wants to move to an intermediate level of category management understanding, with focus on in-depth data and analysis. It's also for anyone who wants to achieve the CPCM designation from the CMA, meeting 15 of the 15 learning requirements as outlined by the CMA.

This training program mostly focuses on in-depth data and analytics across more advanced data sources, including deep dives into the category tactics. It includes a set of online courses that will give you skills to function at an intermediate level in your role in retail / CPG / FMCG.

### Program Curriculum

- Building Data Competency: Panel Data
- Building Data Competency: POS Data
- Measuring Category Health (Baseline & Incremental Drivers)
- Efficient Assortment: A Step-by-Step Process
- Pricing Strategies and Analysis Techniques
- Promotion Analysis Techniques
- Advanced Analytics: Relativity
- Fact Based Selling; Space Management Fundamentals
- Store Clustering Through Store Level and Geodemographic Data
- Retailer Economics and the Product Supply Chain

### Program Details

- Approximately 30 hours to complete
- Prerequisites: Foundational / CPCA

## Exam Preparation Package for CPCM Accreditation

This category management certification **exam preparation package** consists of full practice exams, as well as a set of mini-exams for each learning requirement. These mini-exams will give you valuable feedback and additional resources to boost your knowledge in areas where you need help. You have 3 opportunities to complete each of the mini-exams with each question giving you multiple opportunities to answer so that you can practice and feel ready for the CMA exams.

To best prepare, we recommend you use a combination of training and/or exam preparation. These materials will help you prepare for the tests, but do not guarantee that you will pass them. Note that you must have passed the CPCA certification exam before you can take the CPCM exam.

# Program Highlights

## **Dive Deeper Into CatMan Data**

Once you've got the catman foundations mastered, the opportunity is to build your data understanding to an intermediate level – with a focus on two key catman data sources – retail POS and consumer panel data. These two important sources are critical for you to master and use in your day-to-day work.

## **Turn Data to Insights**

At an intermediate level, you need to start being able to dive deeper into your data and draw insights from it. This includes things like baseline and incremental sales, data thresholds and tactical analysis – to truly understand the category and draw insights from the data. And this all needs to be done while keeping the Shopper and their needs in mind.

## **Turn Insights to Action!**

Once you identify the opportunities for a category, you need to understand the tactics – including assortment, space, pricing and promotion – from both a strategic and analytic perspective. The tactics create action for the category, and are the key drivers of volume and profit for retailers.

## **Create Compelling Presentations**

It's not enough to be good at analyzing data and drawing insights. You also need to learn how to put together a compelling story – and effectively integrating data, insights and action into your presentation for your buyer to say “yes” to your idea.

# Program Curriculum

Below, you'll find a short summary of each of the courses in the CPCM program.

## **Building Data Competency: Panel Data**

Household panel data is one of the primary data sources required to do category management work – this course gives an in-depth look at consumer panel data, including how it's derived, commonly-used measures, and examples of how to think about and maximize its potential. Retailers as well as sales and marketing professionals will learn how to use it to get a clear picture of consumer behavior so that they can adjust their strategies to focus on the consumer dynamics that drive category and brand performance.

## **Building Data Competency: POS Data**

This course covers retail POS data, including retailer and third-party scanned sales data. It gives an in-depth look at how it's derived and introduces key measures and definitions. Trends, out of stocks, sales and profitability, distribution and shopper insights will all be reviewed in the context of retail POS data, so that participants can learn how to maximize its potential.

## **Measuring Category Health (Baseline & Incremental Drivers)**

This course captures how to complete a category health assessment, including an exploration of internal and external influences. Participants will acquire the knowledge needed to address important questions related to a category's health, including those associated with the consumer, trends, the economy, competition and tactics associated with winning segments and brands. SWOT analysis is introduced as means to capture the most important strengths, weaknesses, opportunities and threats in the category.

## **Efficient Assortment: A Step-by-Step Process**

Efficient assortment is the analytical process behind product assortment and underpins the other steps in the category management plan. Participants will learn about retailer assortment strategies, and the importance of understanding these strategies, before moving on to complete a manual assortment project, which will give them a foundation from which they can better understand the assortment tools being used in their own organization and build their own assortment capabilities.

## **Pricing Strategies and Analysis Techniques**

This course addresses retailer strategies related to pricing, including price-setting definitions, price rules, and details on how prices are set, including promotional and new product pricing. Also covered are a variety of advanced analytic techniques participants can use to assess retailer pricing.

## Promotion Analysis Techniques

Promotion is a key driver of incremental sales, as well as an important point of differentiation for retailers. Learn what promotion means for retailers from a marketing as well as a promotion/flyer program perspective, how retailer promotion planning, execution and assessment are completed, and the factors that can impact the outcome of a promotion.

## Advanced Analytics: Relativity

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 can be developed and core business drivers identified for subsequent opportunity identification.

## Fact Based Selling; Space Management Fundamentals

Rather than presenting just data, it's critical to present insights derived from the data. Learn how to create a presentation that focuses on a fact-based selling approach that has both logic and flow. Learn how to consider the conditions, needs, limitations and opportunities of the "customer" (either internal or external), and align a presentation to this situation.

## Store Clustering Through Store Level and Geodemographic Data

Learn how to use store-level data to evaluate category performance and in-store execution, to create store clusters and measure before/after performance, along with effective use of geodemographic and behavioral data to identify product demand by store and zip or postal code.

## Retailer Economics and the Product Supply Chain

Many retailers have sophisticated computer programs to perform retail math calculations but, for both retailers and suppliers, it's important to understand how this "retail math" works and, more importantly, what it *means*. It's also important to understand how a retailer's financial statement works, what drivers the overall results, and some of the most common retail math calculations that tie in to the results.

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# 8 Ways to Move to More Advanced Category Management Analytics

Learn how to build strategic thinking into your analysis.

**Time to advance your skills?** If you've been doing catman for >1 year, it may be time to advance your approach. Think outside the box, incorporate strategy into your choices and recommendations, dig deeper only when necessary and tie in insights and opportunities with action through the category tactics. Once you've done this, the next step is to move to more advanced category analytics. Following are suggestions for ways to advance your catman analytics and your career!

## 1. Start “higher in your analysis:

Before starting an analysis project – particularly if you're going to do an in-depth tactical analysis (for example an assortment, promotion, shelving or pricing analysis), start with a bigger picture perspective. Take some time to review the category and trends from a big picture perspective. Look one or two levels above in geography – not just retailer vs rest of market or remaining market. For example, look at the national market across key channels:

- Who's growing and declining?
- How does this compare to your region and channels?
- And how does the Retailer / banners compare to these results?

These insights can give you some perspective on the bigger picture opportunities that you can then incorporate into your tactical analysis and recommendations.

## 2. Drill down for better insights:

Drilling through data gives you a broader perspective of your business results.

- Look at more than one time period (at least one long-term and one short-term period, for example “latest 52 weeks” and “latest 12 weeks”) to understand short- and long-term trends.
- Look across different segments based on the consumer decision tree to consider the Consumer or Shopper in your analysis.
- Look across different data measures to consider volumetric and share results as well as tactical results and trends. [Click here to see a video](#) on drilling through data.

## 3. Don't be linear in your analysis:

When completing analysis, use multiple data sources: Retailer point of sale data (syndicated market data, market gap opportunities, comparison vs market); Consumer panel data (consumer demographics, consumer purchase behavior, heavy / light buyers). We're taught how to pull and use each data source in isolation with more of a tactical approach to the data. The opportunity is to learn

how to look across data sources and incorporate insights from one source to help you make better decisions in business issues or opportunities that you are trying to understand. This will take you from “good” to “great” (or even “amazing!”) in your analysis and insights. My Tip #8 below can help you with this.

## 4. Don't generalize what your numbers mean:

Think beyond a number. If you tie in with strategy or find relevant benchmarks to compare against or create volume opportunities, the numbers can become much more meaningful. Here are some examples:

- When using a fair share index, don't assume it's “good” or “bad” based on if it's above or below 100. Think about how the index relates to the goals and objectives for the category, target Shopper and overall Retailer strategies. [Click here to learn more about Fair Share Index.](#)
- When using consumer purchase behavior, compare to numbers that help establish benchmarks to determine where the opportunities are. You'll only know if a penetration or share of requirements measure is “high” or “low” by comparing with other Retailers in the same category or comparing to related categories.

RETAILER ONLY

## 5. Incorporate Retailer strategy and Shopper into your analysis:

Retailers need well-developed strategies that relate to their store formats, the tactics, Private Label and their target Shopper. They need to incorporate these overarching strategies into their category decisions, including data analysis, insights and decisions for their categories. The strategies give a Retailer the guidelines, principles and processes associated with the most important elements of their strategy. It helps your retail teams make the best decisions for their categories based on what the Retailer is trying to accomplish. The better articulated the strategies, the better and more aligned the decision making for your retail organization.

VENDOR ONLY

## 6. Think “category” and “brand”:

Start looking at your business through a category, subcategory and brand lens. Looking at the category and subcategory levels gives a broader Shopper perspective and allows you to understand the business based on the most important segments for them (based on the consumer decision tree). This understanding also helps you uncover better solutions for your brands.

## **7. Incorporate Retailer strategy and Shopper into your analysis:**

Don't forget the Retailer's strategy and their unique Shopper when you are completing any type of analysis for them and making fact-based recommendations. Whether you're creating an assortment analysis, doing shelving work, creating a pricing analysis or setting up promotions for next year, remember to check back to their target Shopper and overarching strategies to make sure that the recommendations you're making match well with what they're trying to accomplish.

## **ADVANCED CATEGORY ANALYTICS**

### **8. Use thresholds in your analysis:**

Thresholds can be applied to your analysis to give perspective on whether the business drivers we apply to our business are actually driving sales. This can be done across the tactics. For example, we can measure SKU (or item) efficiency by looking at the number of items that each brand added in this period, as well as the \$ share of each item, as indicators of efficiency. Then we can bucket the results together to look from a different perspective for the # items change vs year ago.

Moving to more advanced analytics also includes predictive analytics including collaborative filtering, clustering algorithms, regression models and time-to-event models to name a few. The only way you'll be successful in these more advanced approaches is making sure you keep some of the tips above in consideration.