

READY TO LEARN
CMKG



Category Management Knowledge Group

Understanding Retailer Strategy and Category Management 2

This accredited program builds proficiency in the category management process at a deep level, including category definition, roles, strategies and implementation of the plan.



**INDIVIDUAL
PURCHASE**

\$396.00 USD

BUY NOW

TEAM PURCHASE

Minimum of 5 people
required for bulk pricing

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QUESTIONS?

Check out our website.

CMKG.ORG

Upgrade Your Skills

Set Yourself Up For Success.

By moving into more depth about the category management process, you will learn how to properly set up your categories for success through these more detailed foundations in category management.

Create Your Own Category Plan.

Your program starts with a detailed course on how retailers define categories and the importance of using consumer decision trees to properly segment the category. Next you will learn about the importance of assigning category roles, including how to assign tactics to different roles. Once you learn about category roles, the next learning is about assigning category strategies that are assigned to the category. Finally, you'll learn how a category plan is developed, develop a category plan in a hands-on workshop and then learn how to implement the plan in retail stores (as well as the obstacles that may impact the success of the execution).

next

PROGRAM CURRICULUM >>



Program Curriculum

Develop and Implement a Category Plan

Foundational Accredited Category Management Training Course

Participants will learn that although this is the last step of the category management process, it is also the most important. After all of the category management work is done and the category plan is complete, successful execution of the plan in stores is critical to the success of the entire plan. This course gives examples of what is included in a category plan, and also explains the important considerations to ensure successful execution of the plan at store level.

Category Definition and Segmentation

Foundational Accredited Category Management Training Course

Participants learn to define a category from the consumer's point of view. How the category is defined affects the tactics, or how the category is merchandised, priced and promoted. Once the category is defined, it needs to be segmented based on a consumer decision tree. This sets up the category for effective analysis based on how the consumer shops the category. Key steps and varying methods are explored in completing these steps of the Category Management process.

Category Roles

Foundational Accredited Category Management Training Course

This course gives a comprehensive understanding of the importance of the category roles for retailers, based on the purpose of the category for a specific retailer. Participants will learn how assigning a category role to each category allows retailers to strategically lay out their store based on the roles. It will also explain the impact that different role assignments can have on the category tactics (4 Ps: pricing, promotion, placement, product availability).

Category Strategies

Foundational Accredited Category Management Training Course

Participants learn how retailers can take category roles one step further, by assigning strategies to each category. These strategies help the retailer to define the purpose of each category in the store, beyond the category role. The strategies consider how the consumer shops, the image of the retailer, and the competitive nature of the categories. Participants will understand how these category strategies dictate more detail surrounding the tactics that relate to each category.

questions?

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Train Ahead.

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Category Roles: Why all categories are not created equal

Excerpt from **BLOG.CMKG.ORG**

Best Practices • Industry Updates • Resources • Thought Leadership

Here's why you shouldn't treat all your categories the same...

Imagine a retailer who sells hundreds of categories and treats each of them exactly the same – including decisions on assortment, shelving, promotions and pricing. Remember – equal treatment would require the same number of resources and time spent against every category.

Sound like a good idea?

Absolutely not! Retailers need to assign roles across categories to get a broad look at their category mix, determine the category's relative importance, and apply similar tactical strategies across categories with the same role. This is an important foundation of their overall Retailer strategy.

Here are some great resources from CMKG for you to get started on your learning journey:

Category Roles:

- Category management [training course preview](#) (video)
- [Complimentary download](#) that reviews the roles of the category
- [Certified course details](#)

Before you determine roles for your categories, consider these 3 factors.

1. Category roles are assigned at a strategic corporate level

Assigning roles to categories requires broad perspective across a Retailer's category mix to determine the category's relative importance. This view will vary by channel, format and banner. In the Convenience channel, there are completely different role definitions (derived by NACS), driven

by the significant differences in a Convenience store shopping trip.

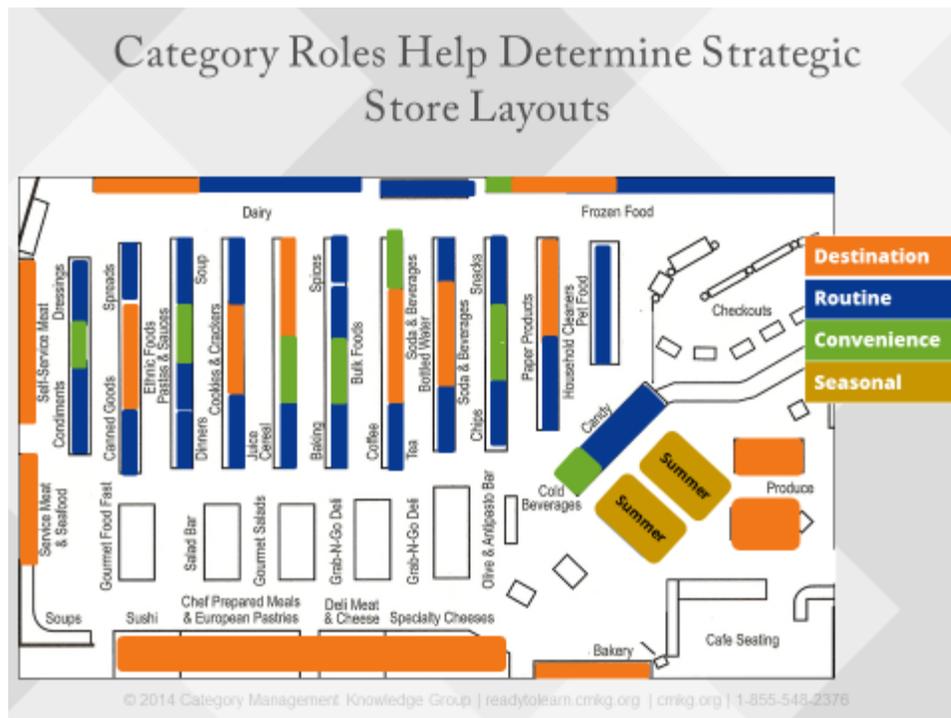
For Retailers, categories that may play a destination role in a large Grocery format may have little importance in their Convenience format (think about Laundry Detergents as an example). These differences in roles will also affect the tactics at a category level.

Vendors need to understand that assigning category roles is based on the relative importance of the category to the total store – and not the relative importance of their brands to their total brand portfolio for the Retailer. If you think your category is destination, consider if it is in the top 15% of category sales for the total retail store (if it's not then it's most likely not destination).

2. Category roles help determine the strategic layout for your stores

Retailers need to think about how the Shopper will move through their store and figure out how to get them moving up and down the aisles (vs perimeter shopping only). Their overall plan should direct traffic flow so that Shoppers will shop the entire store.

You can balance and manage Shopper traffic flow by placing categories strategically within identified destination roles throughout the store and surrounding them with related routine and impulse categories.



3. Category roles set the stage for assortment, pricing and merchandising strategies

Retailers need to establish their own strategic guidelines and principles across the tactics based on the role that is assigned. For example, destination categories may have a broader assortment, more promotional activity and more competitive market pricing strategies. By applying these strategies broadly across categories within a specific role, it makes a Category Manager's job much easier when they are making tactical choices for their categories.

To summarize — category roles are an important part of a Retailer’s strategic category management foundations. By assigning these roles and formalizing the tactical guidelines for each role, it ensures a more aligned and consistent approach to categories across the store.

If you’d like more information on **Category Roles**, we have a certified category management training course that will walk you through these 3 factors and more, so you can make the best decisions on assigning category roles.

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