



# Category Management Knowledge Group

Category Management Educational Programs – Courses – Case Studies

# Table of Contents

CMKG Program Options.....	3
Training Formats .....	3
<i>Assessment Test</i> .....	4
Skill Development Programs .....	5
<i>Understanding Retailer Strategy and Category Management</i> .....	5
<i>Understanding Retailer Strategy and Category Management 2</i> .....	5
<i>Advanced Retailer Understanding</i> .....	6
<i>Proficiency in Understanding &amp; Using Data 1</i> .....	6
<i>Proficiency in Understanding &amp; Using Data 2: Consumer Panel and POS Data</i> .....	7
<i>Proficiency in Excel</i> .....	7
<i>Category and Business Insights 1</i> .....	8
<i>Category and Business Insights 2</i> .....	8
<i>Consumer and Shopper Analytics and Insights</i> .....	9
<i>Building Assortment and Space Management Skills</i> .....	9
<i>Building Pricing and Promotion Skills</i> .....	10
<i>Selling Skills 1: Developing Fact-Based PowerPoint and Presentation Skills</i> .....	10
<i>Selling Skills 2: Strategic Selling and Collaborative Business Planning Skills</i> .....	11
<i>Becoming More Effective In Your Work</i> .....	11
Category Management and Certification Programs.....	12
<i>Foundational / CPCA Level</i> .....	12
<i>Intermediate / CPCM Level</i> .....	12
<i>Advanced /CPSA Level</i> .....	13
Category Management For Your C-Store (Small Store) .....	14
Sales Programs.....	15
<i>Develop and Present Compelling, Fact-Based Sales Presentations</i> .....	15
<i>Mastering Selling Skills</i> .....	15
<i>Mastery of Strategic Selling Skills</i> .....	16
Business Priority Programs.....	17
<i>Improve Return on Data Investment</i> .....	17
<i>Aligning Your Team in the Category Management Foundations</i> .....	18
<i>BUSINESS ANALYTICS 1: Improve Return on Data Investment</i> .....	18
<i>Business Analytics 2: Improve Return on Data Investment</i> .....	19
<i>Category Management with Limited Data 1</i> .....	19
<i>Category Management with Limited Data 2</i> .....	20
Case Studies.....	21
<i>Overview</i> .....	21
<i>Foundational Case Study</i> .....	21
<i>Intermediate Case Study</i> .....	22
<i>Advanced Case Study</i> .....	23
Course Overviews .....	24

# *Welcome to our course catalogue!*

I'd like to welcome you to Category Management Knowledge Group's catalogue which captures all of our program, case study and course options that are currently available. Of note, we now have training available in Spanish – please contact us for more details if you'd like to learn more.

This catalogue gives different program options that seem to work best for our clients – the objective is to provide you with training curriculum that meets your specific team or organizational needs. If you don't see what you're looking for, please reach out to me and we will help to find the right solution for you. Whether you are looking for training in specific skill development areas, category management and certification programs, sales programs and/or based on business issues (like "I want to improve return on data investment", "I'm in a limited category management data environment", "I want to align my newly structured team"), we've got you covered.

Our training is available online (either through "Our House", Category Management Knowledge Group's learning center, or "Your House, your own internal learning management system). We also offer live training to supplement or replace any training that you see in this manual, facilitated by highly experienced trainers.

I hope you find this catalogue helpful. If you're looking for considerations when choosing a training partner, [click here](#) for a great infographic to help you out.

Good luck in your search for a great training program – I hope you choose Category Management Knowledge Group!

Regards,



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# CMKG Program Options

There are different types of programs available to meet your different needs (click on the title to move to that portion of the catalogue):

1. **Skill Development Programs (Retailer and Vendor):** Programs that focus on specific skill areas required within different roles across teams in an organization. The opportunity is to identify the right programs based on responsibilities within each role.
2. **Category Management and Industry Certification Programs:** Programs for category management professionals who want to perform at a basic, intermediate or advanced level and/or are interested in industry certification.
3. **Convenience Store Programs:** Programs for those who are in the c-store or small store industry and looking for training that meets the unique needs of this important channel.
4. **Sales Programs:** Programs for sales teams who want to advance to a more strategic, fact-based sales approach in their business.
5. **Business Priority Programs:** Programs for executives who are looking for training solutions to help them solve common problems. If your area of interest isn't listed in those above, we can work with you to create a unique curriculum that will work for you.

These are only examples of programs – if you want courses added or deleted into any of them, we can accommodate to your requests. The objective is to create a training solution that will meet your specific needs – no matter how large or small.

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## Training Formats

While the foundations of our training are online, we also offer different training options for a true blended learning approach!

1. **Online Training:** We house all of our online training in a state-of-the-art learning management system that gives you access to courses, materials, resources and much more. Courses include knowledge checks, workshops, downloadable notes and a test that you're required to complete with a minimum 80% passing grade.
2. **Live Webinars:** We run regular live webinars for our student body on different topics that are chosen by them six times per year. We also run checkpoint webinars for clients who have a large group completing a training program together. Finally, we can run a large group webinar for up to 200 people on a particular subject or topic area.
3. **Live Training:** Live training is a great way to kick off or end a learning program – it's the opportunity to "roll up your sleeves" and apply all of the learning in a classroom setting with other team members. We can customize this program to you're your specific needs.
4. **Case Studies:** Case studies add in a dimension to the training that takes it from "great" to "excellent"! You can choose from our standard case studies or we can work with you to customize based on your specific data and needs. We also create case studies for national meetings as a way of training a large group in a shorter time period.
5. **Consulting:** Consulting is sometimes required by our Clients based on opportunities for you to become more strategic in your approach as a team or organization (often uncovered as the training is completed). We offer consulting services to help you work through some of these strategic opportunities.

These are only examples of programs – if you want courses added or deleted into any of them, we can accommodate to your requests. The objective is to create a training solution that will meet your specific needs – no matter how large or small.

*Not sure where to start? Start with our assessment test!*

## **ASSESSMENT TEST**

When investing in training, you want to get a return on investment for every dollar spent. If you're looking for a way to understand where your biggest training areas of opportunity are, our assessment test is a great way to determine where your team or organization's knowledge level is currently at.

The assessment test can also be done "pre" and "post" a training program to measure return on investment (ROI).

**Cost:** \$100 USD per person

**Time Requirement:** 90-120 minutes (spans across 29 areas of knowledge based on industry certification requirements)

We also offer preparatory exams for certification – contact us for more details!

# Skill Development Programs

## UNDERSTANDING RETAILER STRATEGY AND CATEGORY MANAGEMENT

**Description:** Understanding the foundations of category management is critical to anyone who touches retail. Without the big picture perspective, it's difficult to understand the role that you play within it and how to create the best solutions. It starts with understanding the process, with specific focus on Retailer Strategy.

**Skill Development Areas:** Retail expertise; Retail strategy; Retailer perspective; Category Management process.

Retailer Overview	Vendor Overview
Develop solid foundations in category management, with a focus on your internal process and the overarching strategies for your organization.	Develop stronger relationships and understanding of your Retail customers, by learning what they are trying to accomplish from a big picture perspective.

**Time Required:** Approximately 5 hours to complete.

**Cost:** \$297 USD\* (discounts apply for groups)

### 3 Courses Included:

Category Management Overview  
Retailer Strategy  
Retailer Strategy in the Convenience Channel

## UNDERSTANDING RETAILER STRATEGY AND CATEGORY MANAGEMENT 2

**Description:** By moving more in depth about the category management process, you will learn how to properly set up your categories for success (that focus on the Shopper) through these more detailed foundations in category management.

**Skill Development Areas:** Retail expertise; Retail strategy; Retailer perspective; Category Management process.

Retailer Overview	Vendor Overview
Clarify processes and "how to's" at a deeper level within your Retailer strategy, including category definitions, roles and strategies - with a focus and emphasis on Shopper. Learn how to effectively implement the category plan through strong plans and communications.	Delve deeper into this Retailer-driven process to understand how your categories roles, definitions and strategies may vary by Retailer based on their unique strategies and their target Shopper. Also learn how to plan for successful implementation of the category plan down to store level.

**Time Required:** Approximately 6 hours to complete.

**Cost:** \$396 USD\* (discounts apply for groups)

### 4 Courses Included:

Category Definition and Segmentation  
Category Roles  
Category Strategies  
Develop and Implement a Category Plan

## ADVANCED RETAILER UNDERSTANDING

**Description:** In order to make the best decisions or recommendations for retail stores, you need to have an understanding of what Retailers are trying to accomplish. A combination of understanding the Retailer income statement, product supply measures, and the product supply chain will give you new perspective that you can apply to future decisions and recommendations that you make.

**Skill Development Areas:** Retail strategy; Retail perspective; Advanced Retailer understanding.

Retailer Overview	Vendor Overview
Develop a deeper understanding of retail strategy through an analysis of the income statement, including how Category Managers influence the income statement (through sales and cost of goods sold). Develop your retail math skills and learn how these measures have an influence on the income statement. Hone your skills on inventory management and how this ties in with the larger product supply chain.	Develop a deeper understanding of what a Retailer is trying to accomplish through an analysis of the income statement, including how Category Managers influence the income statement (through sales and cost of goods sold). Also build your retail math skills through practicing many of the common measures that are important to Retailers. Hone your skills on inventory management and how this ties in with the larger product supply chain.

**Time Required:** Approximately 5 hours to complete.

**Cost:** \$198 USD\* (discounts apply for groups)

**2 Courses Included:**

Retail Economics and the Product Supply Chain  
Strategic Supply Chain Management

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## PROFICIENCY IN UNDERSTANDING & USING DATA 1

**Description:** Your Company spends a lot of money on data. The big data and analytics market continues to grow. To start using this data, first you need to understand how data sources are generated, including their strengths and weaknesses. You also need to identify the data sources you have access to and where you are limited in your data approach.

**Skill Development Areas:** Basic data understanding.

Retailer Overview	Vendor Overview
Build confidence in your understanding of key data sources including retail scanned sales, syndicated, consumer panel, shipment, big data and other data sources. This includes identifying gaps in your existing data sources and determining ways to fill these data gaps.	Build confidence in your understanding of key data sources including retail scanned sales, syndicated, consumer panel, shipment, big data and other data sources. This includes identifying gaps in your existing data sources and determining ways to fill these data gaps.

**Time Required:** Approximately 3.5 hours to complete.

**Cost:** \$198 USD\* (discounts apply for groups)

**2 Courses Included:**

Understanding and Using Data  
Category Management with Limited Data

## **PROFICIENCY IN UNDERSTANDING & USING DATA 2: CONSUMER PANEL AND POS DATA**

**Description:** If you purchase or have access to consumer panel data and retail scanned sales (POS) data, you want to ensure that you are getting the most out of it – these are two of the most important category management data sources. This program will get you running with these 2 great data sources to ensure you are correctly interpreting and analyzing their key outputs.

**Skill Development Areas:** Proficiency in panel data and retail point of sale (POS) data.

Retailer Overview	Vendor Overview
Develop your data analysis skills to a deeper level in consumer panel data (purchase behavior, demographics, interaction) and point of sale data (category assessment, out of stocks, basket analysis).	Develop your data analysis skills to a deeper level in consumer panel data (purchase behavior, demographics, interaction) and point of sale data (category assessment, out of stocks, basket analysis).

**Time Required:** Approximately 4 hours to complete.

**Cost:** \$198 USD\* (discounts apply for groups)

**2 Courses Included:**

Building Data Competency: Panel Data

Building Data Competency: POS Data

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## **PROFICIENCY IN EXCEL**

**Description:** Master your Excel skills through our application-driven approach in mini modules that span from basic to advanced. Examples tie in with data sources used in your business, so you get the benefit of also learning how to manipulate similar data sources within Excel.

**Skill Development Areas:** Working with spreadsheets; Proficiency in Excel – basic to advanced.

Retailer Overview	Vendor Overview
Develop your Excel skills from basic through advanced and complete, to improve your efficiency and effectiveness in this important analytic software.	Develop your Excel skills from basic through advanced and complete, to improve your efficiency and effectiveness in this important analytic software.

**Time Required:** Approximately 4 hours to complete.

**Cost:** \$99 USD\* (discounts apply for groups)

**1 Course Included:**

Build Excel Skills



## CATEGORY AND BUSINESS INSIGHTS 1

**Description:** Learning how to turn data into insights and insights into action can be done in simple yet powerful ways - it's not rocket science and your multi-functional team should know how to do it! It starts by completing a basic category assessment across a category and its key segments and brands, and then needs to tie in to tactics to create action. This drilldown approach will allow you to quickly become productive in an increasingly digitized workplace.

**Skill Development Areas:** Basic data understanding.

Retailer Overview	Vendor Overview
Develop your analytic skills and learn how to drill through data to derive insights, create benchmarks vs all store sales and vs market, and identify opportunity gaps in your business. Once you understand the opportunities, you can analyze the tactics to understand the key drivers of your business and determine how to turn your insights and opportunities into action.	Develop your analytic skills and learn how to drill through data at a category level to derive insights, create benchmarks vs all store sales and vs market, and identify opportunity gaps in your Retailer customer's business and in your brands. Once you understand the opportunities, you can analyze the tactics to understand the key drivers of your business and determine how to turn your insights and opportunities into action.

**Time Required:** Approximately 4 hours to complete.

**Cost:** \$198 USD\* (discounts apply for groups)

**2 Courses Included:**

Completing a Category Assessment  
Category Tactics and Analytics

## CATEGORY AND BUSINESS INSIGHTS 2

**Description:** If you purchase baseline and incremental sales data and you want your organization to maximize the use of it and get to the next level of analytics, this program is strongly recommended. Moving your team to this more advanced level will increase your strategic category understanding.

**Skill Development Areas:** Advanced analytics and data insights; Proficiency in baseline and incremental sales.

Retailer Overview	Vendor Overview
Develop your data analysis skills across baseline and incremental sales (as well as their key tactical drivers) and thresholds, to better understand your categories and where the biggest opportunities are.	Develop your data analysis skills across baseline and incremental sales (as well as their key tactical drivers) and thresholds, to better understand your categories and brands that you compete within across Retailers and vs competition.

**Time Required:** Approximately 5 hours to complete.

**Cost:** \$198 USD\* (discounts apply for groups)

**2 Courses Included:**

Measuring Category Health (Baseline and Incremental Drivers)  
Advanced Analytics: Relativity

## CONSUMER AND SHOPPER ANALYTICS AND INSIGHTS

**Description:** Understanding the Shopper is a priority for most Retailers and Vendors. By considering different approaches to understand the Shopper, you can create effective solutions that result in Shopper satisfaction. These courses will give you a great grounding to get started in a more strategic Shopper approach.

**Skill Development Areas:** Understanding the Shopper; Marketing to your Shopper; Proficient in Consumer and Shopper understanding.

Retailer Overview	Vendor Overview
Develop skills required to better understand your Shopper from different perspectives. You will learn how to cluster stores, how to complete geodemographic analysis, who the Shopper is and then how to market to them. This will help you to create better solutions and identify opportunities to meet your Shopper's needs.	Develop skills required to better understand the Retailer's Shopper from different perspectives. You will learn how to cluster stores, how to complete geodemographic analysis, who the Shopper is and then how to market to them. This will help you to create better solutions and identify opportunities to meet your Retailer Shopper's needs.

**Time Required:** Approximately 6 hours to complete.

**Cost:** \$396 USD\* (discounts apply for groups)

### 4 Courses Included:

Store clustering through Store Level and Geodemographic Data  
Understanding & Marketing to Your Shopper  
In-Store Marketing Overview: The Basics  
6 Steps to Create Effective In-Store Materials

## BUILDING ASSORTMENT AND SPACE MANAGEMENT SKILLS

**Description:** If you make recommendations or decisions that affect product assortment and the shelf, you need to understand the impact that your actions have on these two tactics. By better understanding assortment and shelving you will become more strategic and successful in the future. This training does not include any planogram software training.

**Skill Development Areas:** Strategic efficient assortment and shelf analysis; Mastery of launching new products in retail.

Retailer Overview	Vendor Overview
Develop an in-depth understanding of what's required to complete strategic assortment, space analysis, and recommendations, and how it ties in with your unique Retailer strategies. Learn the best practices for effective space management and consider how your assortment and shelving decisions affect your organization all the way down to execution at the shelf.	Develop an in-depth understanding of what's required to complete strategic assortment, space analysis, and recommendations, and how it ties in with each unique Retailer's strategies. Learn the best practices for effective space management and consider how your assortment and shelving recommendations affect the Retailer and what they are trying to accomplish.

**Time Required:** Approximately 6 hours to complete.

**Cost:** \$297 USD\* (discounts apply for groups)

### 3 Courses Included:

Efficient Assortment – A Step-by-Step Process  
Space Management  
Leveraging Data for Advanced Shelving Solutions

# BUILDING PRICING AND PROMOTION SKILLS

**Description:** Pricing and promotion are important tactics that have a significant impact on volume and profit in a category. In order to make the best recommendations or decisions for pricing and promotion, you need to understand strategy, data, and analytics associated with each of them, ultimately driving volume and profit.

**Skill Development Areas:** Strategic pricing and promotional analysis; Determining optimal prices; Investing in the highest payout promotions.

Retailer Overview	Vendor Overview
Develop the skills to understand overall strategies related to pricing and promotion, and then tie those strategies with the strategic analysis of your categories. The outputs from this analysis will result in more fact-based pricing and promotion decisions (and potential increased sales and profit) that align to overall Retailer strategies.	Develop the skills to understand overall Retailer strategies associated with pricing and promotion, and then tie those strategies in with the strategic analysis of your categories in these two tactics. The outputs from this analysis will result in more fact-based pricing and promotion decisions (and potential increased sales and profit) for your brands and your Retailer's categories.

**Time Required:** Approximately 5 hours to complete.

**Cost:** \$198 USD\* (discounts apply for groups)

- 2 Courses Included:**
- Pricing Strategies and Analysis Techniques
  - Promotional Analysis Techniques

# SELLING SKILLS 1: DEVELOPING FACT-BASED POWERPOINT AND PRESENTATION SKILLS

**Description:** Imagine completing some compelling, fact-based analytics with great insights and action, and easily being able to put it into a presentation that looks good, is relevant for your audience, has logic & flow and tells a story. This is where art and science meet.

**Skill Development Areas:** Fact-based selling; Effective presentation skills.

Retailer Overview	Vendor Overview
*Not Applicable*	Develop and deliver impactful, fact-based sales presentations that provide solutions that consider your Buyer or Category Manager's conditions, needs, limitations and opportunities.

**Time Required:** Approximately 4 hours to complete.

**Cost:** \$198 USD\* (discounts apply for groups)

- 2 Courses Included:**
- Build PowerPoint and Presentation Skills
  - Fact-Based Selling Presentations

# SELLING SKILLS 2: STRATEGIC SELLING AND COLLABORATIVE BUSINESS PLANNING SKILLS

**Description:** Once you've mastered creating effective, fact-based presentations, it's time to move into strategic selling and then collaborative business planning. This is the highest level of strategic selling that requires a partnership between the Retailer and the Vendor partner. These courses will take you to an advanced level of strategic business development.

**Skill Development Areas:** Joint business planning; collaborative relationships; strategic business partners; Advanced strategic selling.

Retailer Overview	Vendor Overview
Develop the skills necessary to move from a more traditional, relationship-driven sales approach to a more strategic one. This includes better understanding the Buyer-Seller relationship, and as a Retailer, you must understand what you should expect from your Sellers. Once strategic selling skills are understood, there's an opportunity to move to collaborative selling and joint business planning.	Develop the skills necessary to move from a more traditional, relationship-driven sales approach to a more strategic one. This includes better understanding the Buyer-Seller relationship, and how to effectively communicate with Buyers. Once strategic selling skills are developed there's an opportunity to move to collaborative selling and joint business planning.

**Time Required:** Approximately 4 hours to complete.

**Cost:** \$198 USD\* (discounts apply for groups)

- 2 Courses Included:**
- Strategic Selling
  - Collaborative Business Planning

## BECOMING MORE EFFECTIVE IN YOUR WORK

**Description:** As a category management professional, you need to be able to multitask across a variety of responsibilities. It's important to develop the skills to learn how to manage your time and resources to ensure that you are moving to a more strategic approach in your job.

**Skill Development Areas:** Time management; managing projects; Tactical vs strategic work.

Retailer Overview	Vendor Overview
Develop your time management skills and learn how to be more strategic in how you allocate your time (and even the time of day) to be more efficient and effective in your day.	Develop your time management skills and learn how to be more strategic in how you allocate your time (and even the time of day) to be more efficient and effective in your day.

**Time Required:** Approximately 2 hours to complete.

**Cost:** \$99 USD\* (discounts apply for groups)

- 1 Course Included:**
- Increasing Your Effectiveness in an Analytic World

# Category Management and Certification Programs

## **FOUNDATIONAL / CPCA LEVEL**

**Description:** This foundational comprehensive course grouping is designed to give a solid grounding in the category management process, basic assessment, and the category tactics. Upon the successful completion of this program, you will qualify for the Certified Professional Category Analyst designation with the CMA ([www.cpgcatnet.org](http://www.cpgcatnet.org)). This program meets 10 of 10 learning requirements for the CPCA designation.

**Who should take this program?** Anyone looking for a basic understanding of Category Management - including the process and how it works - and/or is looking to achieve CMA designation at the CPCA level.

**Prerequisites:** None

**Time Required:** Approximately 35 - 40 hours to complete.

**Cost** (does not include accreditation with the CMA):

\$1,188 USD\* (discounts apply for groups)

### **12 Courses Included:**

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

**\*Cost Includes:** Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course Testing, email Support, 1 year Access.

## **INTERMEDIATE / CPCM LEVEL**

**Description:** A comprehensive course grouping to achieve an intermediate level of category management understanding, and/or to achieve the CMA Certified Professional Category Manager designation requirements. This program meets 15 of 15 Learning Programs required by the Category Management Association's (CMA) CPCM designation. Regardless of whether you are interested in industry certification (which is an additional fee that is paid to the CMA), this program gives a solid grounding in the skills required to perform at an intermediate level.

**Who should take this program?** For those looking to build from basic to more intermediate category management skills and/or achieve the Certified Professional Category Manager (CPCM) designation through the Category Management Association (CMA).

**Prerequisites:** None

**Time Required:** Approximately 50 hours to complete.

**Cost:** (does not include the cost of accreditation with the CMA)

\$1,980 USD\* (discounts apply for groups)

## 20 Courses Included:

- Retailer Strategy
- Category Definition & Segmentation
- Category Roles
- Category Strategies
- Completing a Category Assessment
- Category Management on Limited Data
- Develop and Implement a Category Plan
- Building PowerPoint and Presentation Skills
- Building Excel Skills
- Building Data Competencies: Panel Data
- Building Data Competencies: 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 (Retailer version: "Fact Based Presentations")
- Space Management Fundamentals
- Store Clustering Through Store Level and Geodemographic Data
- Retailer Economics and the Product Supply Chain

**\*Cost Includes:** Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course Testing, email Support, 1 year Access.

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## **ADVANCED /CPSA LEVEL**

**Description:** A comprehensive course grouping to move to the most advanced level of category management and/or achieve Category Management Association (CMA) Certified Professional Strategic Advisor (CPSA) designation requirements. This program meets 8 of 8 learning requirements for the CPSA designation.

**Who should take this course?** Anyone who already has an intermediate category management skillset and wants to move to a more advanced level in their role, and/or wants to attain their CPSA designation educational requirements.

**Prerequisites:** CPCA and CPCM programs are highly recommended.

**Time Required:** This program is offered fully online and can meet any individual's timing requirements.

**Cost:** (does not include the cost of accreditation with the CMA)

\$ 792 USD\* (discounts apply for groups)

## 8 Courses Included:

- Retailer Strategy
- Building Data Competencies: Panel Data
- Efficient Assortment: A Step-by-Step Process
- Leveraging Data for Advanced Shelving Solutions
- Understanding and Marketing to Your Shopper
- Strategic Supply Chain Management
- Strategic Selling
- Collaborative Business Planning

**\*Cost Includes:** Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course Testing, email Support, 1 year Access.

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# Category Management For Your C-Store (Small Store)

**Description:** This unique, hands-on online training program provides a real-world experience targeted to small chains and store owners of convenience or small store formats. The training was developed by convenience store (known as small stores in some parts of the world) and certified category management professionals using CMKG's certified training as a foundation.

This 11- module online program begins with an overview of retailer strategy and category management, with a focus on C-Stores (small stores). Then it delves into what you need to do as a C-Store owner to strategically set up your business through category roles and strategies assignments, understanding the data sources you have access to, analyzing your categories (including product assortment, placement, pricing and promotion) and developing a category plan. At the end of the program you will have an action plan ready to implement in your store.

**Who should take this program?** Independent C-Store (Small Store) owners or small C-Store retail chains, distributors and manufacturers who want to learn about this important and unique C-Store perspective.

**Prerequisites:** None

**Time Required:** Approximately 12 - 15 hours to complete.

**Cost\*:** \$699 USD (discounts apply for groups)

**\*Cost Includes:** 12 months access to the program in Category Management Knowledge Group's Online Training & Resource Center | A downloadable and printable Resource Guide for you to review materials, take notes, complete workshops and develop your action plan | A printable certificate upon completion | A certified support team to help you as you complete your program.

## 11 Modules Included:

- Retailer Strategy in the Convenience Channel
- Category Management in the Convenience Channel
- Category Definition & Segmentation
- Category Roles & Strategies
- Understanding & Using Data
- How to Read and Affect Your Income Statement
- Category Assessment
- Efficient Assortment Process & Analytics
- Space Management
- Pricing Strategy & Analytics
- Promotion Strategy & Analytics

## Learning Objectives:

- To explain how Retailer strategy drives the overall category management process for C-Stores and create the overall retail strategy for your C-Store(s)
- To list the steps of the category management process and explain how each step plays an important role for your C-Store(s)
- To describe how categories are defined and segmented and determine the best approach for your C-Store(s) based on store characteristics
- To assign category roles and strategies based on your target Shoppers and your most important categories
- To understand the key category management data sources, including how they are used and where you can get access to them
- To develop an understanding of your income statement and how your decisions affect sales, cost of goods sold and profit for your C-Store(s)
- To develop the skills to analyze a category, interpret data and ask fact-based questions of your Suppliers
- To make strategic decisions for your C-Store(s) as it relates to efficient assortment, space management, pricing and promotion

# Sales Programs

## **DEVELOP AND PRESENT COMPELLING, FACT-BASED SALES PRESENTATIONS**

**Description:** Learn the most effective ways to get your products on the shelf by understanding a Retailer's strategy and communicating clearly and effectively in your sales presentations.

Presentations have become the de facto business communication tool. Developing fact-based presentations that flow well and look great are key to getting your audience to agree to your idea(s). In this group of courses, participants start by building their technical skills in PowerPoint, and learn presentation skills and how to effectively present their fact-based PowerPoint presentation to either internal or external audiences. The second course teaches participants how to create a fact-based sales presentation. They are taught the skills to add fact-based insights into their presentation with logic and flow, while considering the conditions, needs, limitations and opportunities of their "customer" (either internal or external). By proactively anticipating the outcomes from your presentation, you can plan for objection handling, negotiations and your walkaway position for the presentation. Finally, you will learn about collaborative business planning and the joint business planning process - which is the highest level of sales for you to achieve. Learn what's required and develop plans to move to the next level of selling.

**Who should take this course?** Key Account Managers or sales people with less than 2 years of experience and have a good understanding of data and data analysis.

**Prerequisites:** None

**Time Required:** Approximately 7 hours to complete.

**Cost:** \$396 USD\*

### **4 Courses Included:**

- Building PowerPoint and Presentation Skills
- Fact-Based Selling
- Strategic Selling
- Collaborative Business Planning

\*Cost Includes: Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course Testing, email Support; 12 Months Access.

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## **MASTERING SELLING SKILLS**

**Description:** The world of sales is changing dramatically. Retail Buyers are looking for sales people who understand their business and who can help them grow. The opportunity is to build skills in areas that will ultimately allow the sales person to create Retailer-centric solutions, which are fact-based and tie in with the Retailer's specific strategies.

The program starts with a detailed overview of category management and the role that Vendors and Retailers play in the process. Next, participants review the four pillars of a Retailer's strategy in detail, which includes the opportunity for them to define their Retailer's overall strategies. Participants learn how to complete a category assessment, which is where many sales opportunities can arise, followed by a course on the category tactics or 4 P's, and some of their basic measures and analytics. Finally, participants will complete a PowerPoint and presentations course to learn how to develop a presentation that looks good and has logic and flow. The last course focuses on Fact-Based Selling, with the opportunity for participants to tie in their learnings from all of the other courses in their program into a compelling, fact-based presentation.

**Who should take this course?** Key Account Managers or sales people who want to move to a more strategic, fact-based sales approach with their Retailers through the foundations of category management.

**Prerequisites:** None

**Time Required:** Approximately 11 hours to complete.

**Cost:** \$693 USD\*

### **7 Courses Included:**

- Category Management Overview



Retailer Strategy  
Understanding and Using Data  
Category Tactics and Analytics  
Completing a Category Assessment  
Retail Economics and the Product Supply Chain  
Building PowerPoint and Presentation Skills  
Fact-Based Selling

\*Cost Includes: Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course Testing, email Support; 12 Months Access.

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## ***MASTERY OF STRATEGIC SELLING SKILLS***

**Description:** If you're ready to move your team to a place where they deliver more strategic, fact-based decisions and recommendations, this program will get you to that place. This includes a focus on turning data into action through the tactics.

This program gives participants the skills to move to a more strategic sales approach with their Retailers, with a focus on the data and analytics required to understand retail opportunities in more depth. It starts with an Excel course that will teach participants the basic-to-advanced functions in Excel. More importantly, it gives examples that are applicable for Manufacturers and the data that they have access to. Next, participants learn about two key retail data sources - retail POS data and panel data - including the measures and analytics associated with each. Once they have a strong data understanding, it's time to analyze the tactics, including pricing, promotion, and the shelf (yes, sales people need to understand the shelf!). The pricing and promotional courses include examples of Retailer strategies associated with each, followed by detailed measures and associated analytics. With all of these new skills developed from these courses, participants then complete a "Strategic Selling" and "Collaborative Business Planning" course to teach them how to maximize their new skills in a selling environment.

**Who should take this course?** Key Account Managers or sales people who want to move to an advanced level of strategic, collaborative business planning with their Retailers.

**Prerequisites:** "Mastering Selling Skills"

**Time Required:** Approximately 25 hours to complete.

**Cost:** \$991 USD\*

### **9 Courses Included:**

Building Excel Skills  
Building Data Competency: Panel Data  
Building Data Competency: POS Data  
Efficient Assortment: A Step-by-Step Process  
Space Management  
Pricing Strategy and Analytics  
Promotional Analysis Techniques  
Strategic Selling  
Collaborative Business Planning

\*Cost Includes: Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course Testing, email Support; 12 Months Access.

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# Business Priority Programs

## IMPROVE RETURN ON DATA INVESTMENT

**Description:** If you spend a lot of budget dollars on data, you want to ensure that you are getting a return on the money invested. One of the problems may be that organizations believe the "point & click" and tactical training that comes with software and data training does not teach the strategies and insights associated with data.

This program increases your team's analytical prowess and arms them with the skills to understand data and how to use it, draw insights from it, and turn it into action through the category tactics. Participants start by learning some general data tips and learning about the key data sources. Next, they learn some of the key data measures associated with basic category/business reviews and how to drill through data to find insights. There's a module dedicated to addressing analysis in a limited data environment (which is a reality in certain scenarios for most organizations). Once a category or business review is completed, the next step is to turn the insights into action through the category tactics (product, placement, pricing, promotion) - the key drivers of volume and profit for Retailers and Vendors.

**Who should take this course?** Anyone in a role that needs to improve their skills and usage of basic data and analysis.

**Time Required:** Approximately 10 hours to complete.

**Cost:** \$495 USD\*

### 5 Courses Included:

- Understanding and Using Data
- Category Management With Limited Data
- Completing a Category Assessment
- Category Tactics and Analytics
- Retail Economics and the Product Supply Chain

\*Cost Includes: Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course Testing, email Support; 12 Months Access.

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## Improve Return on Data Investment 2

**Description:** This program takes you to the next level of data understanding and usage that will improve data usage and return on investment of your data purchases.

**Who should take this course?** Anyone in a role that needs to improve their skills and usage of more advanced data and analysis.

**Prerequisite:** Improve Return on Data Investment 1

**Time Required:** Approximately 10 hours to complete.

**Cost:** \$396 USD\*

### 4 Courses Included:

- Building Data Competency: Panel Data
- Building Data Competency: POS Data
- Category Health Assessment: Measuring Baseline and Incremental Sales
- Advanced Analytics: Relativity

\*Cost Includes: Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course Testing, email Support; 12 Months Access.

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## **ALIGNING YOUR TEAM IN THE CATEGORY MANAGEMENT FOUNDATIONS**

**Description:** With all of the consolidation and restructuring going on in organizations, or if you are in a region where category management is evolving, new teams are formed. Sometimes the teams struggle because there are inconsistent approaches, processes, and definitions that each member brings based on their own personal experiences and training. The opportunity is to train the team on the fundamentals of category management. This allows for the team to clarify (or define) the best in class category management foundations that they will all follow for an aligned and consistent approach - and find new and better approaches!

This program includes an overview of the category management process, an in-depth review of Retailer strategy and the importance of having strongly defined strategies (including category definition & segmentation, roles and strategies). This is followed by a review of the key data sources, drawing insights through a category assessment, and creating action by learning the essentials when analyzing the category tactics. This can be supplemented with a case study that gives them a hands-on experience analyzing a category (at an additional cost).

**Who should take this course?** Teams that want to level set or align category management approaches/processes across their team.

**Time Required:** Approximately 25 hours to complete.

**Cost:** \$990 USD\*

### **10 Courses Included:**

- Category Management Overview
- Retailer Strategy
- Category Definition & Segmentation
- Category Roles
- Category Strategies
- Understanding and Using Data
- Category Tactics and Analytics
- Completing a Category Assessment
- Category Management on Limited Data
- Develop and Implement a Category Plan

---

## **BUSINESS ANALYTICS 1: IMPROVE RETURN ON DATA INVESTMENT**

**Description:** If you spend a lot of budget dollars on data, you want to ensure that you are getting a return on the money invested. One of the problems may be that organizations believe the "point & click" and tactical training that comes with software and data training does not teach the strategies and insights associated with data.

This program increases your team's analytical prowess and arms them with the skills to understand data and how to use it, draw insights from it, and turn it into action through the category tactics. Participants start by learning some general data tips and learning about the key data sources. Next they learn some of the key data measures associated with basic category/business reviews and how to drill through data to find insights. There's a module dedicated to addressing analysis in a limited data environment (which is a reality in certain scenarios for most organizations). Once a category or business review is completed, the next step is to turn the insights into action through the category tactics (product, placement, pricing, promotion) - the key drivers of volume and profit for Retailers and Vendors.

**Who should take this course?** Anyone who needs to develop their skills in using and analyzing basic data in retail and CPG/FMCG.

**Time Required:** Approximately 10 hours to complete.

**Cost:** \$495 USD\*

### **5 Courses Included:**

- Understanding and Using Data
- Completing a Category Assessment
- Category Tactics and Analytics
- Category Management With Limited Data
- Retail Economics and the Product Supply Chain

\*Cost Includes: Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course Testing, email Support; 12 Months Access.

## **BUSINESS ANALYTICS 2: IMPROVE RETURN ON DATA INVESTMENT**

**Description:** This is the second level of Business Analytics 1 and expands on the data and analytics skill development areas.

**Who should take this course?** Anyone who needs to develop more intermediate skills in using and analyzing basic data in retail and CPG/FMCG.

**Prerequisite:** Business Analytics 1

**Time Required:** Approximately 9 hours to complete.

**Cost:** \$396 USD\*

### **4 Courses Included:**

Building Data Competency: Panel Data

Building Data Competency: POS Data

Category Health Assessment: Measuring Baseline and Incremental Sales

Advanced Analytics: Relativity

\*Cost Includes: Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course testing, email Support; 12 Months Access.

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## **CATEGORY MANAGEMENT WITH LIMITED DATA 1**

**Description:** There are some industries and regions where limited data is a reality. It doesn't mean that you can't take a category management approach, but there are some areas that will not be relevant for you (particularly in areas where you do not have any data available). This program includes the foundational category management programs, basic data, and analytics that are important for you to learn. Once you've completed this program you may want to move to the "Category Management with Limited Data 2", which is a more advanced program.

**Who should take this course?** Anyone who is responsible for category management in a region or industry where there is limited data.

**Time Required:** Approximately 35 hours to complete.

**Cost:** \$1188 USD\*

### **12 Courses Included:**

Category Management Overview

Retailer Strategy

Category Definition & Segmentation

Category Roles

Category Strategies

Understanding and Using Data

Category Tactics and Analytics

Completing a Category Assessment

Category Management on Limited Data

Develop and Implement a Category Plan

Building PowerPoint and Presentation Skills

Excel Skills

\*Cost Includes: Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course Testing, email Support; 12 Months Access.

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## **CATEGORY MANAGEMENT WITH LIMITED DATA 2**

**Description:** These more advanced courses are important for anyone who wants to move to the next level of category management in a limited data environment.

**Who should take this course?** Anyone who is responsible for category management in a region or industry where there is limited data.

**Prerequisite:** Category Management with Limited Data 1

**Time Required:** Approximately 16 hours to complete.

**Cost:** \$693 USD\*

### **7 Courses Included:**

- Efficient Assortment: A Step-by-Step process
- Space Management
- Retail Economics and the Product Supply Chain
- Leveraging Data for Advanced Shelving Solutions
- Understanding and Marketing to Your Shopper
- Strategic Supply Chain Management
- Collaborative Business Planning

\*Cost Includes: Downloadable Fill-in-the-Blank Notes, Downloadable Workshops, Individual Course testing, email Support; 12 Months Access.

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# Case Studies

## OVERVIEW

CMKG offers 3 case studies for clients and students that results in a highly effective learning platform to complement the online training courses:

1. Foundational case study (in the Chilled Juice category);
2. Intermediate case study (in the Dry Cereal category); and
3. Advanced case study (a dynamic case study that provides a framework for students to complete their own project).

The case studies can be **customized** so that they reflect your categories, approach, and data. The benefit of this approach is that it allows you to embed your specific strategies and data examples into the learning experience for a truly relevant approach. Many of our clients choose to stay with our standard case studies (in Chilled Juices and Dry Cereal), because it takes students out of their “comfort zone” and not to rely as much on their intuition because of their strong category knowledge in their own categories. As a supplement to the case studies, our “best in class” clients have students present their recommendations in a fact-based presentation format (via a category plan that they have developed in the case study) to a live panel, as if the panel is the Retail customer. This additional piece creates a compelling and insightful opportunity for breakthrough learning, and teaches students the importance of storytelling and presentation skills.

### Considerations:

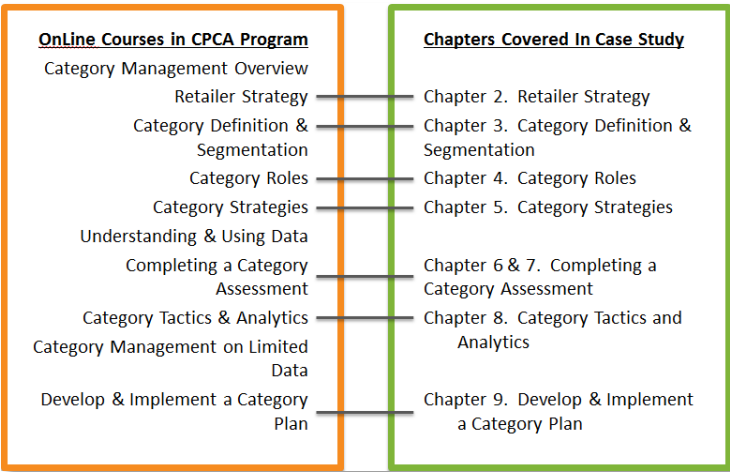
- Match case study levels with roles across your Category Management team or have all students complete 3 case studies as a team over the course of 2 years.
- Determine if all 3 levels would result in live presentations in front of a client panel.
- Determine if everyone participates up front based on role, or if it is an “earned” honor for a certain # of people (run in cohorts).
- Opportunity to run a pilot on the customized case studies with one cohort across all 3 levels, adjust the case studies based on their feedback, and then deploy across the team / department.

Following are the details for each case study.

## FOUNDATIONAL CASE STUDY

**ASSIGNMENT:** You are a consultant for Retailer X, and will be working with them to develop a category plan in the Chilled Juice category. As you progress through the CPCA training courses, you will build parallel components into a category plan. After viewing all of the training courses and completing the category plan, you will be required to submit your category plan for grading.

The case study is broken into the following “Chapters”, which match up with your on-line courses as follows:



You should complete your case study chapters as you complete your online training (if you are taking an online training program).

## Case Study Materials:

Following are the materials required for you to complete your case study:

- Online Case Study Course – access to instructions, videos and materials for the case study
- Case Study Data – Excel workbook with all of the data in the Chilled Juice category
- Category Plan Template – where you complete your category plan in a 2-page document to be handed in to CMKG for training
- Sample Category Plan – a sample laundry detergent plan is included for students to see an example of what their plan should look like

## INTERMEDIATE CASE STUDY

The intermediate case study provides you with the opportunity to put your analytic skills into action, by completing a full category review and creating a sales presentation based on your recommendations. Following is some background information for you.

“Happy Jacks” is a grocery retailer, who is completing an annual category review in Dry Cereal. You have been hired to develop a category plan, based on a) the knowledge you bring with you either from your CMKG online courses or from previous experience; and on b) the information included in this case study. There are 2 parts to the case:

1. Create a category plan for the Dry Cereal category that will help drive sales and profit for Happy; and
2. Create a presentation for Happy Jacks, one that captures the key learnings and opportunities that you have uncovered from your analysis.

The 2-page category plan is handed in for grading by CMKG. For corporate clients (where applicable), you may be presenting your final presentation to a panel in a live session or to your manager.

### Case Study Structure

There are different chapters in this case study, which run in parallel to some of the courses that you may be taking in your CPCM online training program (this is not applicable for those of you who are only completing the case study). Following are the chapters (and the corresponding online courses in brackets):

		Suggested Online Courses to Complete
Chapter 1	Welcome and Case Study Overview	This is where you start your case
Chapter 2a	Category Assessment: Consumer Analysis	Building Data Competency: Panel Data; POS Data; Baseline and Incremental Sales
Chapter 2b	Category Assessment: Market and Segment Analysis	Building Data Competency: POS Data; Measuring Category Health: Baseline and Incremental Sales
Chapter 3	Efficient Assortment Analysis	Efficient Assortment: A Step by Step
Chapter 4	Pricing Analysis	Pricing Strategies and Analytics
Chapter 5	Promotional Analysis	Promotional Analysis Techniques

### Files Required for the Case Study:

There are several different files that you should have access to in order to successfully complete the Case Study. You can find these documents under the “Resource” area for this CPCM Case Study course. This includes:

1. [CPCM Dry Cereal Data.xlsx](#): This is the file that contains all of the data required to complete the Case Study. This is a robust set of data and includes different data sources, measures and perspectives for you to complete a robust category analysis and develop a category plan.
2. [CPCM Case Study Category Plan.xlsx](#): This is the 2-page template that you need to complete the category plan assignment. Once this has been filled out, you will send it in for final grading as part of your requirement to pass the CPCM program.
3. [CPCM Case Study Presentation Template.pptx](#): This is the 10-page PowerPoint template that will help to guide you through creating your own PowerPoint presentation to sell in the new category plan to Happy Jacks.
4. [CPCM Case Study Rubric.pdf](#): This breaks out how the points are generated and expectations of what to include in your final category plan.

## ADVANCED CASE STUDY

The structure of this case study is different from the other case studies, because it is an actual business assignment that uses your live category data.

### Overall Objective:

The objective of the Case Study is to:

1. Develop a Strategic Business Plan for a specific retailer and in a specific category, and
2. Develop a presentation to sell that plan.

Firstly, you need to identify the business issue or opportunity that relates to your specific business, and the advanced data that you have access to in your role. You need to ensure that your issue is broad enough to allow you to span across consumer, market, and retail opportunities and in-depth tactical analysis. You will complete the strategic business plan and presentation following “The Four Steps to the Strategic Business Plan”, outlined in detail in the case study. Each of these steps is outlined, and relates to a specific page in the “Case Study Workbook” section of this case study.

Following the completion of your strategic business plan, you must prepare a presentation to ‘sell’ your plan to CMKG. Strong sales skills and being able to tell a story is a critical skill for anyone who completes analytics and makes recommendations based on their findings.

In the resources section of the “CPSA Case Study” course in the eLearning Center, you will find a PowerPoint template that is a suggested starting point for building your presentation. You may choose to present to CMKG via live webinar (details of which have been provided to you by email), or you can submit your PowerPoint file with a completed script in the notes section for grading. Additional instructions and tips for the presentation are included in the first slide of the PowerPoint template.

### Outline Of The Case Study:

#### PART 1: Complete the “Four Steps to the Strategic Business Plan”:

1. Describe the Business Situation
  - a. Overall Retailer & Category Strategies
  - b. Overall Supplier & Category Strategies
2. Find a Common Ground (What are the top 3 potential areas of mutual interest based on #1 above?)
3. Understand Category Opportunities
  - a. Market, consumer and category assessment (in-depth tactics analysis where required)
  - b. Retailer SWOT Analysis
  - c. Supplier SWOT Analysis
4. Develop a Strategic Business Plan

**PART 2: Develop a 15-minute presentation** to ‘sell’ your strategic business plan to CMKG and schedule your presentation, or submit your presentation to [info@cmkg.org](mailto:info@cmkg.org).

We strongly encourage that those who complete the advanced case study have full manager support, and some type of internal presentation is done based on the potential breakthrough findings from this case study.



# Course Overviews

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## Category Management Overview



Category management is the Retailer/Vendor process of managing categories as strategic business units, producing enhanced business results by focusing on delivering consumer value. Category management provides strategic business approaches and analytics that will benefit sales, marketing and category management professionals to understand.

If you're working in a category management environment, you need to understand the whole process, from a big picture perspective.

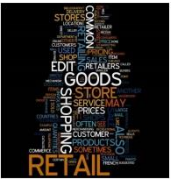
### Learning Objectives:

- Define Category Management, and explain why it is an important process for both Retailers and Vendors;
- List the different perspectives to consider in category management;
- State the key steps in the Category Management process;
- Explain why Retailer Strategy is an important piece of category management for both Retailers and Vendors to understand; and
- List the key components of each step in the Category Management process.

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## Retailer Strategy



Retailer strategy sets the foundation for category management at the Retailer. Their corporate strategies create the rules & guidelines from which category decisions are made by internal category managers, as well as by Vendors (sales and category management).

Learn what's important to a Retailer and why. Without this knowledge, how can you consider this important perspective?

### Learning Objectives:

- Explain how Retailer strategy affects category management;
- List different examples of what may be included in a Retailer strategy;
- Identify the strategies of a specific Retailer; and
- State why it is important for Retailers to communicate a clear & consistent strategy to consumers.

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## Category Definition and Segmentation



Category definition and segmentation both affect a Retailer's market position. When Retailers define a category, they identify the items that belong within the category. To segment a category, the decision tree is used to determine consumer needs. Next, based on the consumer decision tree, the items that meet each consumer need are identified and segmented accordingly.

Learn the fundamentals of defining and segmenting categories, including how to assign segmentation at an item level. Everyone in category management and space management needs to understand these critical category foundations.

### Learning Objectives:

- Explain why defining and segmenting the categories is a key step in the "Retailer Strategy" piece of category management;
- Give examples of different ways that a category can be defined based on different Retailer strategies; and
- Identify the steps to properly segment a category.

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## Category Roles



Category roles are assigned so that Retailers can take a broad look across their category mix to determine the category's relative importance, and apply similar tactical strategies across categories with the same role. The role assignments across all categories should also be considered when determining store and aisle layouts, to ensure destination categories are spread across the store.

Learn about the category roles, how they should be assigned to categories, and some of the key tactics usually associated with each role.

### Learning Objectives:

- Explain how "category roles" fit into the category management process;
- Describe how the category roles can help with effective store layout, based on how the consumer shops;
- Identify the different category roles, and describe each role; and
- Give insights into how the category roles influence the "4 P's" (promotion, pricing, product availability, placement/shelving).

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## Category Strategies



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Retailers need to consider the category strategy they should follow to drive shopper loyalty, penetration, and spending. The category strategy helps to further define what the Retailer is trying to accomplish by carrying this category in their stores.

Learn some of the more common category strategies and how they further influence the category tactics.

### Learning Objectives:

- Explain how category strategies fit into the category plan, and the importance of developing category strategies;
- Describe which category strategies work most effectively with each category role; and
- Give examples of category strategies and some of the tactics that they focus on.

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## Understanding and Using Data

The key category management data sources are Retailer POS (point of sale), retail measurement data (Nielsen & IRI scanned data), household panel data, and transactional and loyalty data. Each of these data sources are derived differently, and their measures can add strategic value to catman, sales, and marketing.



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Solidify your understanding of these category management data sources to ensure you are using and interpreting each source correctly.

### Learning Objectives:

- List the data dimensions required to properly reference data;
- Describe some considerations how category strategies fit into the category plan;
- Understand the importance that category strategies are to achieve the overall category goals and objectives;
- List and describe some common category strategies;
- List the standard category management data sources and their basic measures;
- Describe the best data sources to address different business issues; and
- Explain some key questions you can address with each of the standard data sources.

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## Completing a Category Assessment



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This is the first step in developing a category plan, but the flow and logic applies to development of category reviews, business reviews, and internal planning documents. You should be able to analyze, benchmark, interpret, and identify opportunities and weaknesses through an effective category assessment.

Learning the key data measures, and how to compare and benchmark against them, will teach you how to effectively and quickly drill through data.

### Learning Objectives:

- Give examples of different ways to assess a category, based on different perspectives (time, product, geography);
- Explain why benchmarking is a critical part of assessing a category;
- Understand the importance of looking across different consumer segments to truly understand category results; and
- Describe ways to effectively benchmark against the market and competitors

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## Category Tactics and Analytics



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The category tactics, or 4 P's, include Product, Placement, Pricing, and Promotion. Each tactic influences volume and share within a brand or category, and are the key drivers. They need to be monitored and analyzed, in order to understand how they impact volume growth or decline within a brand or category.

Learn to analyze the 4 P's to understand the effect that changes you make to the tactics have on brand, segment, and category volume.

### Learning Objectives:

- List the tactics and give some examples of Retailer strategies
- Explain how the tactics can influence a consumer's purchase decisions
- Describe some key measures and basic analytics for each tactic
- Explain the importance of each tactic

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## Category Management with Limited Data



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Category management practices and analytics are applicable for everyone in a limited data environment. In fact, almost every company out there has limited data in some areas of the business. You need to be more creative in data usage, and not just "poke holes" in the data, or you'll always stay where you are.

Learn some creative and compelling ways to create markets and analyze the tactics in a limited data environment.

### Learning Objectives:

- Describe the data sources required to take a "basic" category management approach;
- Explain the importance of the Retailer/Vendor relationship in a limited data environment; and
- Explain how to analyze the data from both a Retailer & Vendor perspective, and across the tactics.

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## Develop and Implement a Category Plan



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In order to have successful implementation of a category plan, the plan needs to consider the Retailer's overall strategies, has to be approved by senior management, and should be communicated to all those affected by the plan. Successful execution of the plan in stores is critical to the success of the entire plan.

Identify the key barriers to the success of an implementation plan through this course, so that you can effectively plan yours.

### Learning Objectives:

- Describe the key components of a category plan;
- Create a category plan;
- Explain what needs to be included in an effective implementation plan;
- List the barriers that will inhibit implementation of the category plan; and
- List the requirements to successfully implement a category plan.

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## Build PowerPoint and Presentation Skills



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Many business professionals spend much of their time in PowerPoint - whether it's creating an entire presentation, or editing and making changes for someone else. These same people have typically had little or no training in PowerPoint, and don't capitalize on some of the great (and easy!) functionality in PowerPoint. Also, the PowerPoint presentations need to have logic and flow, so that it meets the needs of the specific audience that they are presenting to.

Learn how to maximize PowerPoint through some basic but powerful functions, and then create a well thought out, compelling presentation.

### Learning Objectives:

- Maximize the basic functionality in PowerPoint to save time and develop more effective presentations;
- Follow presentation guidelines that help create fluid, visually appealing and coherent presentations; and
- Assess their own presentation techniques and have tools to assess and improve their skills going forward.

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## Building Excel Skills



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Think you're proficient in Excel? Excel is a requirement for most business professionals - particularly those who are analyzing and graphing data. Working smarter in Excel saves you time, gives you confidence in your analytics, reduces errors, and can actually be pretty fun! Learning Excel in an applicational way - and using the data and analytics that you are already familiar with - makes the training even more relevant.

Choose the modules that are of most interest to you in our hands-on, self-paced Excel course that will arm you with new capabilities you never knew existed.

### Learning Objectives:

- Leverage formulas, text functions, auto filtering;
  - Extract data, filter and next functions;
  - Use charts, graphs, pivot tables and links to other programs; and
  - Have methods to translate basic data into added value, strategic work ideas that generate breakthrough results.
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## Building Data Competency: Panel Data



Consumer panel data, or household panel data, is one of the most powerful category management data sources that should be well understood by catman, sales and marketing professionals. It is a great source for getting information about the consumer, including demographics, interaction between Retailers or product groupings, and purchase behavior.

Take this course to learn how to maximize and understand the use of this data source that's full of "nuggets" just waiting to be found!

### Learning Objectives:

- Define panel data and identify the different data sources that it can be derived from;
- Describe the key facts available on panel data and how they are used;
- Understand how to analyze and use demographic data; and
- Explain the opportunities that exist to change shopper behavior based on insights from panel data.

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## Building Data Competency: POS Data



Retailer POS (point of sale) or scanned sales data is the "king" of category management data. Retailer Scanned point of sale data and Retailer Measurement data from 3rd parties, like Nielsen and IRI (key account data), are derived from scanned point of sale data. Catman, sales, and marketing professionals should have strong competencies with POS data, well beyond pulling and reading POS data.

Maximize the potential of POS data with this course, which focuses on the calculations and insights in critical areas such as trends, profitability, out of stocks, shopper insights and more!

### Learning Objectives:

- Define retail POS data and explain the different sources of this data;
- Calculate shelf capacity, comp stores, gross margin, markup, initial markup, markdown, margin;
- Describe the uses and watch outs for POS Data;
- Explain how POS data can be used for shopper insights; and
- Leverage POS data to identify and explore business opportunities

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## Measuring Category Health (Baseline & Incremental Drivers)



Every retail and sales organization should complete "health checks" on their categories / brands to understand the big picture perspective of overall performance. 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 topline look at the data.

Learn how to look across multiple data sources, with an emphasis on baseline and incremental sales, to move to a more strategic understanding of your business.

### Learning Objectives:

- Complete a category health assessment;
- Complete a multi-dimension SWOT analysis;
- Understand baseline vs. incremental volume and the key drivers;
- Calculate different measures that relate to a category health assessment; and
- Relate category results back to category and Retailer strategy for assessment.

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



Adding new items to the assortment, or reducing items from assortment, is an ongoing process for Retailers. This process can be referred to as Efficient Assortment, which fits within the category management framework. Many organizations have automated assortment tools, but anyone responsible for launching new products (including sales, marketing, and catman) should understand the manual assortment process.

Learn how to make more strategic assortment decisions or recommendations that are beneficial for each unique Retailer behind innovation, distribution opportunities, or category management initiatives.

### Learning Objectives:

- Explain the efficient assortment process;
- Describe the different Retailer strategies and other considerations that need to be understood prior to completing an assortment analysis;
- Explain the difference between variety and duplication of items;

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- Describe how market coverage is calculated, and how this number can be used;
- Create a Pareto chart, and explain the significance of this chart in product assortment;
- Develop and manipulate an item rank report;
- Explain the rationale for adding, deleting or keeping an item in distribution; and
- Identify assortment opportunities.

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## Pricing Strategies and Analysis Techniques

Pricing is one of the sales fundamentals, or tactics. It is an important marketing tool in retailing, and has become much more analytically and strategically focused on than in the past. It is important to note that prices vary based on different promotions, and on differing Retailer strategies. A difference of 5 or 10% in price can influence sales and profit significantly. Pricing decisions directly affect category sales, inventory positions, and category profitability.

If you are involved with setting pricing or making pricing recommendations, you should take this course to ensure that you strategically and analytically understand this important tactic.

### Learning Objectives:

- Describe different aspects of a Retailer's pricing strategy;
- Explain why it is important to understand Retailer's price setting definitions and price rules;
- Calculate slope and activity based costing in assessing price points;
- Explain and complete a Correlation and Price Regression analysis;
- Determine the most impactful price buckets for a given item for both regular and feature price; and
- Assess current Retailer pricing as compared to the overall marketplace.

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## Promotion Analysis Techniques

Promotion is one of the category management tactics and is a key driver of incremental sales, as well as a point of differentiation for Retailers. Promotional events are executed by Retailers and Vendors to influence consumer demand, thereby driving sales and profit. Promotion is a means of moving merchandise through the Retailer to the consumer. Promotion can result in a lift in sales by more than 2 or 3 hundred percent in some categories.

Take this course to ensure that you understand and can strategically influence promotions in ways that deliver winning solutions to drive volume and profit for both Retailer and Vendor.

### Learning Objectives:

- Describe the differences between Retailer and Vendor promotional strategies and objectives;
- Quantify the best/worst promoted weeks for a given product, segment or category;
- Determine and interpret promotion measures including lift, depth, and subsidy - from both a topline perspective, as well as drilling down to specific weekly results;
- Assess promotional effectiveness using a return on investment approach;
- Calculate lift factor, subsidized sales, incremental sales, pantry loading, cannibalization, return on investment, and breakeven point; and
- Review and explain a detailed Vendor profit evaluation tool.

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## Advanced Analytics: Relativity

There are different dimensions that need to be considered in advanced category analytics, driven by different data perspectives and views of the data. There are relationships between the different data dimensions that exist, and understanding these relationships and learning how to correlate the insights can result in a highly effective, multi-dimensional view of category or brand analysis.

Prepare to move to a whole new level of analysis and strategy with the multi-dimensional approach covered in this course.

### Learning Objectives:

- Take a category health assessment one level deeper through a relativity analysis;
- Bring together the 4 P's in a multi-dimensional analysis;
- Determine core business drivers and their effectiveness.

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## Fact-Based Selling/Presentations



The combination of an increasingly complex world, the vast proliferation of data, and the need to stay one step ahead of the competition has sharpened focus on using analytics within organizations. When making any kind of presentation that presents business issues or opportunities, effective use of industry, or market and consumer data, it can build your image as an expert on the categories in which you are presenting.

Learn how to tell a compelling story that is aligned to your customer's conditions and needs, no matter who you are "selling" to.

### Learning Objectives:

- Understand the steps of a sales call;
- Explain how turn data points into an insight;
- Determine relevant data points and methods of presenting them;
- Understand the importance of using only fully understood, substantiated data; and
- Leverage tips & techniques of selling with data.

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## Space Management



Don't leave your understanding of space management only to your space management specialists. Understanding the shelf is critical for sales, category management, and marketing professionals! New product launches, product dimension changes, listings and delisting's, promotion, and Retailer strategies can all have an impact at the shelf.

Focus on the shelf in this course, and learn how to think more strategically about decisions and recommendations that you make that affect the shelf.

### Learning Objectives:

- Understand key space management metrics and drivers
- Assess planogram performance and profitability
- Improve shelf productivity as it relates to inventory and space allocation
- Identify appropriate product adjacencies based on shopper needs
- Develop space management strategy that aligns with the Retailer's objectives

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## Leveraging Data for Advanced Shelving Solutions



Most Retailers lack the means to create space plans that optimally balance inventory, assortment, and presentation requirements. Some Retailers are still treating all stores the same, with store clusters being based on section sizes in stores vs consumers that shop within the stores. And others are making decisions based on listing fees, instead of strategic assortment and shelving choices. There's an opportunity to move to a more strategic space approach.

This course will teach you to consider the implications of recommendations or decisions that you make on the shelf, and how they influence retail selling space and inventory for strategic advantage.

### Learning Objectives:

- Describe some of the best practice methodology and principles related to the shelf;
- Conceptually understand the requirements to create sophisticated planograms (ie. store level);
- Optimize inventory productivity;
- Read and act on detailed planogram reports; and
- Assess planogram layouts with all of the correct inputs.

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## Store Clustering Through Store Level and Geodemographic Data



Store clustering and geodemographic data analysis is really the starting point for understanding shopper marketing, or shopper insights. As technology and data has evolved over the years, and the Retailer battleground for market share has continued, category management has continued to shift and change. The templated, “one size fits all” approach to category management has shifted to a customized approach to fit the unique needs of each Retailer. And the most recent focus is on Shopper Marketing.

This course will teach you how to strategically cluster stores using different types of clustering, and to use store location data to move to a new level of analysis with geodemographic data.

### Learning Objectives:

- Create store clusters using different methodologies;
- Track performance by store cluster;
- Measure before and after results for in store testing;
- Create demand ranking reports;
- Compare demand indices across products and Retailers;
- Identify best product fit (ie. high vs low demand stores);
- Compare demographic profiles; and
- Identify leisure activities and preferences.

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## Understanding and Marketing to Your Shopper



Many Retailers tend to focus on traditional tasks such as selling Retailer marketing programs to their vendors, negotiating trade promotion events, finding space for new items, and finding missing orders to support an ad. And many Vendors tend to focus on traditional tasks, like Retailer trade promotion events, finding space for their new items in a crowded plan-o-gram, clearing deductions, and chasing down missing orders needed to support an ad. Who's missing in this formula? The shopper. It is the Retailers, along with their vendor partners, who pay attention to the shopper that will win in tomorrow's marketplace.

This course gives you the foundations you need to know to understand shopper insights, and how to market to the shopper.

### Learning Objectives:

- Define shopper marketing;
- Describe the shoppers “path to purchase”;
- List some examples of trip missions, and some ways to market based on these different types of trips;
- Explain some of the things that drive shopper marketing;
- Describe the key requirements for successful shopper marketing; and
- Describe some key measurables related to shopper marketing.

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## Retailer Economics and the Product Supply Chain



Retail math is imperative to understand, because ultimately, these calculations impact the Retailer's income statement. The opportunity is for Retailers and Vendors (including catman, sales and marketing) to consider how the decisions / recommendations that they make affect the Retailer's overall business, including inventory.

Learn retail math and product supply calculations, and gain a strategic understanding of how the category decisions / recommendations that you make impact the Retailer's income statement.

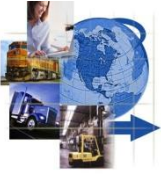
### Learning Objectives:

- Read a Retailer's income statement and explain the areas of the income statement that a Category Manager can influence;
- List the key measures that affect the Retailer's income statement, and how they are calculated;
- Describe the key economic drivers for retail customers; and
- Describe the product supply chain and how different components influence the Retailer's income statement.

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## Strategic Supply Chain Management



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Supply chain is very important to Retailers, and tends to be on Retailer's minds much more than on Vendor's minds. With lean operating margins in retail, small improvements in Supply Chain can mean big gains in profitability for Retailers. Understanding the Retailer's Supply Chain is fundamental to Vendor's success with a Retailer.

Learn all the fundamentals of the supply chain that will help you to see the bigger picture for Retailers from a supply chain management perspective.

### Learning Objectives:

- Describe the key components of the product supply chain;
- List various retail strategies employed to optimize profits;
- Explain inventory management strategies from both the Vendor and Retailer perspectives; and
- Define key terminology that relates to the product supply chain.

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## Strategic Selling



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Selling takes place internally within Retailers and Vendors, across departments and teams, like the category manager at the Retailer selling an idea or concept to their business unit lead or manager. Or, a Vendor's category analyst or category management director selling in an idea or concept to a marketing director or sales director within their organization. So when we refer to the Seller and Buyer, realize that the concepts and analogies are relevant across multiple types of relationships.

Moving to a more strategic selling approach requires a more data-focused, "win-win" approach to selling. Learn how to sell in this more strategic approach that is required by many Retailers.

### Learning Objectives:

- Explain the importance and benefits of collaboration;
- Identify Retailer's strategies and objectives;
- Determine synergy between Retailer and internal strategies and objectives;
- Negotiate for mutually beneficial solutions; and
- Build a business plan to achieve agreed upon goals.

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## Collaborative Business Planning



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Everyone talks about this, but what is collaborative selling, and how do you get there? Collaborative business planning results in a partnership between Retailer and Vendor that is built on mutual trust and win-win solutions.

Learn how to move to a more collaborative selling approach, including details on joint business planning.

### Learning Objectives:

- Describe how Retailers & Vendors collaborate most effectively;
- Develop collaborative recommendations that deliver win-win outcomes for all;
- Articulate key methods of influencing others;
- Build productive relationships;
- Effectively handle concerns, questions and objections;
- Demonstrate effective techniques to probe for understanding;
- Employ good listening skills;
- Gain customer's trust; and
- Solve their Retailer's problems with practical recommendations.



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## Increasing Your Effectiveness in an Analytic World

Many category management professionals end up in a very tactical role that results in them pulling and compiling data, with little room left for analyzing the data and becoming more strategic in their role. The opportunity is to become more strategic by learning where you are spending too much time doing unimportant work, and making some usually simple changes to free up some time for that more strategic work that you've always meant to get to.



Learn how to save time and become much more proficient in your category management role - this includes some great tools to use in your own role.

### Learning Objectives:

- Explain the difference between tactical, administrative and strategic activities;
- Complete an activity diary to measure amount of time spent against different activities;
- List some ways to reduce time spent on tactical activities by becoming more efficient;
- Describe personal opportunities to reduce time spent on administrative activities;
- Articulate added value, strategic work ideas to generate breakthrough results; and
- Create an action plan to move to a more strategic approach to the business.

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## Baby Boomers: An Incredible Marketing Opportunity

The Baby Boomer generation's significance in size alone makes it an important opportunity for marketers and Retailers. They have very specific needs that need to be understood, as they are not to be treated the same as "senior citizens" from the past. This course gives in-depth details about this incredibly important consumer group.



Learn how to better market to this group by better understanding their priorities, their goals & aspirations, and their shopping behaviors.

### Learning Objectives:

- To define who Baby Boomers are and the generation they represent;
- To review the importance of Baby Boomers and understand their key purchases;
- To understand the top priorities for Baby Boomers based on uniqueness;
- To describe the opportunities and considerations to effectively market towards Baby Boomers for both Retailers and Vendors; and
- To provide tactical examples for marketers that will resonate with Baby Boomers.

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## Hispanic Americans: An Opportunity for Marketers and Retailers

Hispanic Americans are the most significant and fastest growing demographic in the United States, projecting to \$1.5 trillion by 2015. Learn the distinguishing factors of this important demographic, including the foods they eat, how and where they shop, and the differences based on country of origin.



Learn how to better market to this group by better understanding their priorities, their culture, and their shopping behaviors.

### Learning Objectives:

- To define who Hispanic Americans are and the importance of this large and growing demographic;
- To review the differences between Hispanic American shoppers and the average American shopper;
- To understand the importance of Hispanic Americans and understand their purchase behaviors and eating habits;
- To describe six distinguishing factors about Hispanic Americans that directly affect marketing opportunities for Retailers and Vendors;
- To capture the important implications associated with Hispanic Americans for marketers.

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## In-Store Marketing Overview: The Basics



It's important to understand all different aspects of in-store marketing, including in-store marketing materials, explanation on how in-store media has to tie in within pre-defined in-store marketing objectives, different in-store marketing examples that work well with the different in-store marketing objectives that have been defined, and the requirements for best-in-class shopper marketing programs.

**Learn how in-store marketing fits into the larger "shopper marketing" umbrella, and the importance of tying in consistent messaging along the path to purchase.**

### Learning Objectives:

- To define how in-store marketing fits into the overall shopper marketing umbrella;
- To understand the importance of tying in consistent messaging to the consumer and shopper along the path to purchase;
- To review different types of in-store marketing materials that can be used around the store and at the shelf;
- To provide examples of in-store marketing objectives and tie in with industry examples for each objective; and
- To outline some best-in-class shopper marketing requirements for the best return on investment for Retailers and Vendors.

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## 6 Steps to Create Effective In-Store Marketing Materials:



Creating effective in-store marketing materials is a skill that anyone who is responsible for making decisions in this area needs to be knowledgeable on. Our 6-step process will help you to improve in-store advertising and marketing. Relevant consumer trends are also covered in this course.

***Learn how to gain an understanding of the opportunities to improve in-store advertising and marketing through a 6-step approach.***

### Learning Objectives:

- To explain the 6 steps to create effective in-store market materials;
- To understand why the consumer decision tree plays a significant role in the development of in-store materials
- To define purchase barriers and explain how to create relevant claims to overcome barriers;
- To identify the types of in-store materials and which ones work best around the store at and at the shelf;
- To understand the importance of the "creative" or look of in-store materials;
- To explain the benefits of aligning with the Retailer in advance of the execution to increase ROI; and
- To list some relevant consumer trends that should be considered when creating in-store marketing materials.

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## Retailer Strategy in the Convenience Channel



Retailer strategy has a significant impact on category management, and needs to be defined across different buckets, including retail format, target consumer, competitive environment, and private label or no name. This course focuses specifically on strategy in the Convenience channel.

***Learn what's important to a Convenience Retailer, including store clusters and the target consumer!***

### Learning Objectives:

- Explain how Retailer strategy drives category management approach;
- List the store formats, types and consumers in the Convenience channel;
- List different examples of what may be included in a Retailer strategy, with specific examples in the Convenience channel;
- Identify the strategies of a specific Convenience Retailer; and
- Explain why it is important for Retailers to communicate a clear & consistent strategy to consumers.

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