



# Category Management Knowledge Group

Category Management Educational Programs – Courses – Case Studies

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Hi, and welcome to our course catalogue!

We are a training company with a true passion for everything related to category management. We can customize a training solution meet your specific training needs. Here are your options with CMKG:




- Purchase an Individual course / set of courses / all course option
- Training for one individual / team / total organization
- Custom curriculum by role
- Online training housed in “Our House” (CMKG’s Online Training & Resource Center) or “Your House” (your own internal learning management system)
- Optional live training, webinars and case studies

Our training can help increase data return on investment, create alignment across your multifunctional team, level set your team, move to a more fact-based approach in your team or organization, increase your strategic approach to the business and/or move your organization to breakthrough business insights and actions.

We work with every client to ensure that we are delivering a solution that meets both their short- and long-term needs. Please contact us to help you develop the right curriculum for your situation!

Best regards,  
Sue Nicholls  
President, CMKG

# Mission Statement

CMKG delivers a  **value-added**, dynamic learning experience to every client and student that yields increased **knowledge** , skill, expertise and competitive advantage. In everything we do, our goal is to spread  **passion** for category management and continuous learning.

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# Return On Investment

If you're looking for a way to understand where your biggest training areas of opportunity are, the assessment is a great way to determine this. It can also be done "pre" and "post" a training program to measure return on investment (ROI).

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

## All CMKG Courses and Programs include:

- ✓ Workshops
- ✓ Downloadable Notes
- ✓ Downloadable Reference Guide
- ✓ Knowledge Checks through the course
- ✓ Course Test



Courses are valid for 30 days from date of purchase



Programs are valid for 1 year from date of purchase

# Certified Programs & Courses

## *Foundational*

Category Management Overview

Retailer Strategy

Category Definition & Segmentation

Category Roles

Category Strategies

Understanding & Using Data

Completing a Category Assessment

Category Tactics & Analytics

Category Management on Limited Data

Develop & Implement the Category Plan

Build PowerPoint & Presentation Skills

Building Excel Skills

## *Intermediate*

Build PowerPoint & Presentation Skills

Building Excel Skills

Building Data Competency: Panel Data

Building Data Competency: POS Data

Category Health Assessment: Baseline & Incremental Drivers

Efficient Assortment: A Step-by-Step Process

Pricing Strategies and Analysis Techniques

Advanced Analytics: Relativity

Fact-Based Selling / Presentations

Space Management

Store Clustering Through Store Level and Geodemographic Data & Tools

## *Advanced*

Leveraging Data for Advanced Shelving Solutions

Understanding and Marketing to Your Shopper

Retailer Economics and the Product Supply Chain

Strategic Supply Chain Management

Strategic Selling

Collaborative Business Planning

NOTE: Intermediate Program includes Foundational Program

Purchase Foundational Program ♦♦♦ 12 courses ♦♦♦ \$1,188 USD

Purchase Intermediate Program ♦♦♦ 20 courses ♦♦♦ \$1,980 USD

Purchase Advanced Program ♦♦♦ 8 courses ♦♦♦ \$792 USD

# *Additional Courses*

Increase your  
Effectiveness in an  
Analytical World

Baby Boomers: An  
Incredible Marketing  
Opportunity

Hispanic Americans:  
An Opportunity for  
Marketers and  
Retailers

In-Store Marketing  
Overview: The Basics

6 Steps to Create  
Effective In-Store  
Marketing Materials

**[NEW]** Retailer  
Strategy in the  
Convenience Channel

**[NEW]** Trade  
Promotion and Trade  
Management –  
**COMING MAY 2015**

# Specialized Programs

## *KAM PROGRAM*

Fact-Based Selling Overview

Understanding the Retailer

Data Availability

Completing a Category Review

Selling Distribution

Selling Shelving

Selling Pricing

Selling Promotion (Feature & Display)

Trade Promotion / Marketing Funds

Fact-Based Selling Presentations

**\*\*Coming in June 2015**

## *MARKETING PROGRAMS*

Brand Health Overview

- Understanding and Using Data
- Completing a Category Assessment
- Category Tactics and Analytics

Brand Health Assessment

- Building Data Competency: POS Data
- Building Data Competency: Panel Data
- Measuring Category Health (Baseline & Incremental Drivers)
- Advanced Analytics: Relativity

Marketing Mix Remix

- Category Tactics and Analytics
- Promotion Analysis Techniques
- Pricing Strategy and Analysis
- Efficient Assortment: A Step-by-Step Process
- Space Management Fundamentals

Shopper Insights Basics

- Building Data Competency: Panel Data
- Store Clustering Through Store Level and Geodemographic Data
- Understanding and Marketing to Your Shopper

Purchase Brand Health Overview Program ♦♦♦ 3 courses ♦♦♦ \$297 USD

Purchase Brand Assessment Program ♦♦♦ 4 courses ♦♦♦ \$396 USD

Purchase Marketing Mix Remix Program ♦♦♦ 5 courses ♦♦♦ \$495 USD

Purchase Shopper Insights Basics Program ♦♦♦ 3 courses ♦♦♦ \$297 USD

# Course Overviews

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## Category Management Overview



Category management is the retailer/supplier process of managing categories as strategic business units, producing enhanced business results by focusing on delivering consumer value. Category management provides strategic businesses 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 suppliers;
- 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 Suppliers 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 suppliers (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

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.



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**Learn to analyze the 4 P's to understand the affect 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/supplier relationship in a limited data environment; and
- Explain how to analyze the data from both a retailer & supplier 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 or 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;
- 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



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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 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



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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 suppliers 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 supplier.**

### Learning Objectives:

- Describe the differences between retailer and supplier 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 supplier profit evaluation tool.

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## Advanced Analytics: Relativity



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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



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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, market and consumer data 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 in on the shelf in this course, and learn how to think more strategically about recommendations that you make that affect the shelf.**

### Learning Objectives:

- Understand key space management metrics and drivers
- Assess planogram performance and profitability
- Recommend assortment and product placement changes for the planogram
- 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.**

### 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 suppliers 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.



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**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 suppliers (including catman, sales and marketing) to consider how the decisions / recommendations that they make affect the retailer's overall business, including inventory.



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**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.**

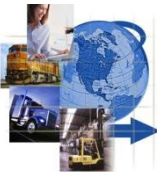
### Learning Objectives:

- 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

Supply chain is very important to retailers, and tends to be on retailer's minds much more than on supplier'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 supplier's success with a Retailer.



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**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 supplier and retailer perspectives; and
- Define key terminology that relates to the product supply chain.

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## Strategic Selling

Selling takes place internally within retailers and suppliers, 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 supplier'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.



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**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

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 supplier that is built on mutual trust and win-win solutions.



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

### Learning Objectives:

- Describe how retailers & manufacturers 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 always mean to get to.



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**Learn how to save time and become much more proficient in your category management role - 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



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The Baby Boomer generation's significance in size alone makes it an 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 suppliers; 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



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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 suppliers;
- To capture the important implications associated with Hispanic Americans for marketers.

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## In-Store Marketing Overview: The Basics



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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 suppliers.

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



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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



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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.



# Case Study Overviews

## Foundational / Category Analyst

The Certified Professional Category Analyst (CPCA) Case Study brings together all of the foundational requirements of the category analyst. The participant is presented with a series of steps and data that correspond to the foundational training courses, and must:

- analyze the customer scenario presented;
- interpret the data presented;
- prepare a category plan;
- prepare a presentation to present the plan.

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Estimated time for completion: 4-8 hours

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## Intermediate / Category Manager

The Certified Professional Category Manager (CPCM) Case Study brings together all of the technical and analytic requirements of the category manager. The participant is presented with a robust dataset, corresponding to the intermediate level training courses, and must:

- analyze the customer scenario presented;
- analyze the data and find key insights;
- prepare a category plan;
- prepare a presentation to present the plan.

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Estimated time for completion: 10-12 hours

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## Advanced / Strategic Advisor

The Certified Professional Strategic Advisor (CPSA) Case Study brings together all of the analytic and strategic requirements of the Strategic Advisor. The participant is presented with a framework in which to analyze a 'real life' business issue, completing the "Four Steps to the Strategic Business Plan". The structure follows the courses designated to the strategic advisor, and the participant must:

- assess business strategies for both retailer and manufacturer;
- gather relevant data
- determine opportunities;
- develop strategic plan;
- prepare a presentation to present the plan.

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Estimated time for completion: 10-16 hours

# CMA Details and Matrix


## Foundational / CPCA Level

CMA Level	Certification Requirement Description	CMKG Course Requirements
<b>CPCA Level</b>	Basic Industry Knowledge	Category Management Overview
	Category Management History and Process	Retailer Strategy
		Category Definition and Segmentation
		Category Roles
		Category Strategies
	Pricing Analysis	Category Tactics and Analytics
	Promotion Analysis	Category Tactics and Analytics
	Assortment Analysis	Category Tactics and Analytics
	Spreadsheet Development	Building PowerPoint and Presentation Skills
	Presentation Development	Building Excel Skills
	Syndicated Scanner Data	Understanding and Using Data
Syndicated Panel Data	Understanding and Using Data	
Retailer POS Data Analysis	Understanding and Using Data	



CMA Level	Certification Requirement Description	CMKG Course Requirements
<b>CPCM Level</b>	Assortment Analysis	Efficient Assortment: A Step-by-Step Process
	Spreadsheet Development	Building Excel Skills
	Presentation Development	Building PowerPoint and Presentation Skills
		Fact Based Selling
	Syndicated Scanner Data	Building Data Competency: POS Data
	Syndicated Panel Data	Building Data Competency: Panel Data
	Retailer POS Data Analysis	Building Data Competency: POS Data
	Space Management	Space Management Fundamentals
	Syndicated Store Level Data	Building Data Competency: POS Data
	Syndicated Geodemographic/Behavioral Data	Store Clustering Through Store Level and Geodemographic Data
	Opportunity Identification for Actionable Insights	Completing a Category Assessment
		Category Management on Limited Data
		Develop and Implement a Category Plan
		Measuring Category Health (Baseline and Incremental Drivers)
	Root Cause Analytics	Advanced Analytics: Relativity
		Completing a Category Assessment
		Measuring Category Health (Baseline and Incremental Drivers)
		Pricing Strategies and Analysis Techniques
	Comprehensive Category Reviews	Efficient Assortment: A Step-by-Step Process
		Retailer Strategy
Category Definition and Segmentation		
Category Roles		
Category Strategies		
Completing a Category Assessment		
Understanding Category Shopper Behavior	Develop and Implement a Category Plan	
	Building Data Competency: Panel Data	
Leveraging Data for Basic Business Solutions	Completing a Category Assessment	
	Category Management on Limited Data	
Retailer Economics and Supply Chain	Retailer Economics and the Product Supply Chain	



CMA Level	Certification Requirement Description	CMKG Course Requirements
<b>CPSA Level</b> 	Retailer Economics and Supply Chain	Strategic Supply Chain Management
	Joint Business Planning & Value Creation	Collaborative Business Planning
	Collaborative Partnerships	Strategic Selling
		Collaborative Business Planning
	Consultative Selling	Strategic Selling
		Collaborative Business Planning
	Understanding Shopper Behavior Beyond the Category	Building Data Competency: Panel Data
		Understanding and Marketing to Your Shopper
	Retailer Shopper Segmentation	Retailer Strategy
Understanding and Marketing to Your Shopper		
Leveraging Data for Advanced Shelving Solutions	Leveraging Data for Advanced Shelving Solutions	
Leveraging Data for Advanced Assortment Solutions	Efficient Assortment: A Step-by-Step Process	