CMKG
Train Ahead.

Training Services & Solutions Catalogue

Learn about the breadth of training options available for catman, sales, marketing and shopper teams to help you solve your business problems and meet your objectives through team and organizational training.

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Welcome!

Training is a privilege and my team and I feel honored to work with so many amazing retailers, suppliers and solution providers to drive learning in our industry. I started this training company over 16 years ago and it has evolved into one of the best online training companies in the world for teaching topics like data to insights, presentation and storytelling skills, retail strategy and category management, and staying relevant in today's complex world. We are also well-known for our many online assessments that help individuals to understand their knowledge gaps and help organizations to understand their team and organizational gaps.

This catalogue gives an overview of our training solutions available for small teams, large teams, and total organizations. Our products are available on-demand and online, through instructor-led virtual or live classroom sessions, or through a blended learning approach.

If you don't see what you're looking for, or if more information is needed, we can customize any or all parts of a learning program and will work with you to develop the best program to meet your specific needs.

I hope CMKG will be considered as a potential training partner for you and your organization!

Regards,

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On-Demand Training Programs

We offer online training programs that combine different sets of courses with immediate and "24/7" accessibility for different levels and audiences (including catman, sales, marketing, shopper insights, space management and others).

Accredited Training Programs

Accredited training programs are great for organizations that want their team course time full, as well as comprehensive category management training programs and/or industry certification. Start off with an assessment to identify knowledge gaps prior to completing the training (optional). Programs includes on-demand courses (including workshops and resource guides) and a course test.

Level 1 (CPCA)

This set of foundational courses gives a solid grounding in the catman process, analytics and presentation skills. This program meets all learning requirements for the designation of Certified Professional Category Analyst (CPCA) designation for those who are interested in certification.

Who should take this course? Retail, catman, sales and shopper teams looking for an intermediate understanding of Category Management and/or who is looking to achieve CPCA certification.

Options: Available with or without the CPCA Exam Preparation Materials package (for those wanting to attain CPCA certification with the CMA).

On-Demand Courses Included

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

Program Details

- o   Approximately 30-35 hours course time; Prerequisite: none
- o   Options: Available in Spanish

Level 2 (CPCM)

This training program is designed to build catman skills at an intermediate level, including in-depth data and analytics across key data sources and the tactics. It includes a set of on-demand courses that will give participants skills to function at an intermediate level in a catman or sales role in retail/CPG/FMCG. This program meets all learning requirements for the Certified Professional Category Manager (CPCM) designation with the CMA for those who are interested.

Who should take this course? Retail, catman, sales and shopper teams looking for an intermediate understanding of Category Management and/or who is looking to achieve CPCM certification.

Options: Available with or without the CPCM Exam Preparation Materials package

On-Demand Courses Included

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

Program Details

- o   Approximately 30-35 hours course time
- o   Prerequisite: Foundational / CPCA Designation (if pursuing certification)

Level 3 (CPSA)

This advanced training program is designed to build skills in areas like shopper and product supply. It includes a set of on-demand courses that gives participants the skills to function at an advanced level in their role in retail / CPG / FMCG. This program meets all learning requirements for the CPSA designation.

Who should take this course? For those looking for an advanced understanding of Category Management - and/or who is looking to achieve CMA designation at the CPSA level.

CMKG
Train Ahead.

On-Demand Courses Included

- o Leveraging Data for Advanced Shelving Solutions
- o Understanding and Marketing to Your Shopper
- o Strategic Supply Chain Management
- o Strategic Selling
- o Collaborative Business Planning

Program Details

- o Approximately 20 hours course time
- o Prerequisite: Intermediate/CPCM Designation (if pursuing certification).
- o Note that the CPSA level does not include exam preparation materials as certification is by an essay-based exam that also considers the candidate's experience.

CatMan Master's Program (Level 4) (non-certification)

The CatMan Master's Series is a set of 12 virtual courses (recorded) with information about CatMan 2.0™ that will impact individuals' day-to-day and futures role using an updated, advanced category management process. Get yourself or your team ready with topic-based recorded virtual courses that help learners apply new & refreshed Catman 2.0 principles through examples, strategies and tips.

Who should take this program? Category management practitioners, analysts, sales, marketing, and other roles who want to move to more advanced.

What will I learn?

- o How each topic is, or will be, affected by changes in the industry, Shopper, and CatMan 2.0.
- o How to incorporate the most relevant topics into participants existing category management framework.
- o How to apply new concepts in day-to-day work.
- o How to speak to one's manager, peers, and customers about the changing dynamics across different topics with clarity and understanding.
- o How to determine which topics are the biggest priorities and opportunities for learners and their role.

On-Demand Courses Included

- o CatMan 2.0™ Introduction: What's Changed?
- o The "What" Assessment: Category Insights Using Advanced Data Sources
- o The "Why" Assessment: Shopper Insights, The Missing Puzzle Piece
- o Developing Shopper-Focused Category Management Scorecards
- o Assortment: New Shopper-Focused Metrics and Advanced Technologies.

- o   Space Management: Space Optimization and Advanced Technologies
- o   Pricing: New Analytics, Issues, Challenges and Opportunities
- o   Promotion: New Analytics and Implications for Retailers and Manufacturers
- o   Shopper Marketing: Applying a New Tactic into Category Management
- o   Building an Organizational CatMan Structure and Strategy from the Inside Out
- o   Developing Shopper-Based CatMan Foundations: Category Definition, Roles, and Strategies
- o   Deployment, Supply Chain, and ROI: Important Considerations for Long-Term Success

Sales Program

This program is intended for Sales Professionals who want to build their skills in areas related to retail understanding and category management, shopper insights, data to insights and presentation skills. Includes an assessment for individuals to take before starting these courses to identify knowledge gaps.

Retail Understanding
- o   Category Management Overview
- o   Retailer Strategy
- o   Retail Economics and the Product Supply Chain

Data & Analytics
- o   Understanding and Using Data
- o   Category Assessment
- o   Category Tactics and Analytics
- o   Category Management on Limited Data

Presentations & Storytelling
- o   Building PowerPoint & Presentation Skills
- o   Fact-Based Selling
- o   Developing Data Visualization Skills, Part 1 and 2
- o   Moving to More Strategic Presentations Through Storyboarding
- o   Strategic Selling
- o   Collaborative Business Planning

Staying Relevant
- o   Evaluating & Managing Risk in Your Business
- o   Nail Your Next Virtual Meeting
- o   Creating Category Reviews to Reflect the Omni-Channel
- o   Innovative Responses to the Pandemic

Shopper Insights Programs

These programs give participants some important strategic foundations to help them better understand the Shopper focus in category management, retail, shopper insights and shopper marketing, and help individuals move to a more strategic approach within their shopper insights team. Includes an assessment before starting these courses to identify any knowledge gaps and the areas on which participants should focus.

Level 1 (Foundations)

- Category Management Overview
- Retailer Strategy
- Understanding and Using Data
- Building Data Competency: Panel Data
- The Power of Shopper Insights: Why it's important and what to do about it
- The "Why" Assessment: Shopper Insights, The Missing Puzzle Piece

Level 2 (Intermediate)

- Understanding and Marketing to Your Shopper
- Identifying Business Opportunities Through Improved Shopper Focus
- In-Store Marketing: The Basics
- Improving Your Business Acumen in Category Management
- Story Telling, More Than Just Fact-Based Selling
- Moving to more strategic, fact-based presentations through storyboarding

Level 3 (Advanced)

- Ways to Identify Growth Opportunities in Your Business
- Identifying and Understanding Trends
- Shopper Marketing: Applying a New Tactic in Category Management
- Developing Data Visualization Skills for Better Storytelling, Part 1
- Developing Data Visualization Skills for Better Storytelling, Part 2
- The Latest and Greatest Shopper Insights Data

Skill Development Programs

For teams that need training in specific skill areas, we have developed these programs to focus in on particular topic areas. We can also create custom programs based on individual needs.

Category Tactics

This course grouping draws on tactical strategies and analytics to build a deep understanding of each tactic as a key driver for category volume and profit. It builds a deep understanding of each of the tactical strategies, as well as the analytics required to better understand them.

On-Demand Courses Included

- o Category Tactics and Analytics
- o Efficient Assortment: A Step-by-Step Process
- o Pricing Strategies and Analysis Techniques
- o Promotion Analysis Techniques
- o Space Management Fundamentals
- o Leveraging Data for Advanced Shelving Solutions
- o Understanding and Marketing to Your Shopper
- o In-Store Marketing: The Basics
- o 6 Steps to Create Effective In-Store Marketing Materials
- o Assortment: New Shopper-Focused Metrics and Advanced Technologies
- o Space Management: Space Optimization and Advanced Technologies
- o Pricing: New Analytics, Issues, Challenges and Opportunities
- o Promotion: New Analytics and Implications for Retailers and Manufacturers
- o Shopper Marketing: Applying a New Tactic in Category Management

Data & Analytics

This course grouping draws on key data sources and corresponding analytics to build a deep understanding of Category, Shopper, Consumer and Customers to inform business decisions and guide category decisions. It builds a deeper understanding of key data sources and their measures for improved knowledge and foresight.

On-Demand Courses Included

- o Understanding and Using Data
- o Category Assessment
- o Category Management on Limited Data
- o Building Excel Skills
- o Building Data Competency: Panel Data
- o Building Data Competency: POS Data

- Measuring Category Health (Baseline & Incremental Drivers)
- Advanced Analytics: Relativity
- Store Clustering Through Store Level and Geodemographic Data
- The "What" Assessment: Category Insights Using Advanced Data Sources
- The "Why" Assessment: Shopper Insights, The Missing Puzzle Piece
- Seasonality Analysis for Your Post Season Holiday Evaluation
- Best in Class Category Reviews Parts 1 and 2
- Identifying Business Opportunities Through Improved Shopper Focus

Omni-Channel Understanding

This course grouping focuses on changes in the Shopper Journey and new retail formats that combined become the Omni-Channel (offline and online). It gives details of the different components of the Omni-Channel Shopper Journey that are imperative for retail and supplier business professionals to better understand the bigger picture in our rapidly changing world.

On-Demand Courses Included

- Applying Critical Thinking to your Category Management Work
- Improving Your Business Acumen in Category Management
- Ways to Identify Growth Opportunities in Your Business
- Category Management in eCommerce
- The Power of Shopper Insights: Why it's important and what to do about it
- Identifying and Understanding Trends
- Evaluating and Managing Risk in Your Business
- Creating Category Reviews to Reflect the Omni-Channel

Retail / Industry Understanding

This course grouping identifies mutual areas for customer and internal growth through a deep understanding of category management and overarching retail strategies based on what retail customers are trying to accomplish. It creates a strategic foundational understanding of retailing based on category.

On-Demand Courses Included

- Category Management Overview
- Retailer Strategy
- Category Definition and Segmentation
- Category Roles
- Category Strategies
- Develop and Implement a Category Plan
- Developing Shopper-Focused Category Management Scorecards

- o Developing Shopper-Based CatMan Foundations: Category Definition, Roles, and Strategies
- o The Latest and Greatest Shopper Insights Data
- o Changing Shopper Behavior in a Pandemic
- o Innovative Responses to the Pandemic

Storytelling & Presentation Skills

This course grouping develops strong selling and influencing skills with the aim of delivering value-based selling stories to customers. It focuses on key areas of presentation skills from slide development through to delivering presentations in a virtual world.

On-Demand Courses Included

- o Building PowerPoint and Presentation Skills
- o Fact-Based Selling
- o Strategic Selling
- o Collaborative Business Planning
- o Story Telling, More Than Just Fact-Based Selling
- o Rocking Your Presentations in PowerPoint, Part 1
- o Moving to More Strategic, Fact-Based Presentations Through Storyboarding
- o Rocking Your Presentations in PowerPoint, Part 2
- o Developing Data Visualization Skills for Better Storytelling, Part 1
- o Developing Data Visualization Skills for Better Storytelling, Part 2

Supply Chain

This course grouping focuses on important aspects of retail economics and supply. It arms participants with a bigger picture perspective of the supply chain that increases their business acumen and drive decisions, as well as recommendations with consideration for the supply chain.

On-Demand Courses Included

- o Retailer Economics and the Product Supply Chain
- o Strategic Supply Chain Management
- o Building an Organizational CatMan Structure and Strategy from the Inside Out
- o Deployment, Supply Chain, and ROI: Important Considerations for Long-Term Success
- o Upheaval in Retail Product Supply Chains and Its Impact

Category Management in Your C-Store/Small Store Program

The unique program consists of a series of modules that provides a unique perspective that is valuable for retailers who manage or distribute to C-Stores, wholesalers and manufacturers who want to understand and better service this important retail segment.

On-Demand Courses Included

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

Program Details

- o Approximately 12-14 hours course time

Instructor-Led Training

Instructor-Led training sessions can be developed for any of our on-demand courses and programs and can be customized with individual's data and information. Virtual live sessions can also be used to kick off or wrap up an online learning program, tied in with checkpoint webinars for a highly effective, blended learning program.

Virtual Training

Instructor-led, virtual training sessions are basically a simulation of live classroom training through cloud software like Zoom or Teams. They can be done in 60 to 120-minute sessions as standalone topics or as part of a larger blended learning program. The emphasis in these sessions is in hands-on learning (vs lecture-only), and include engagement tools like contests, breakout groups, case studies, gamification and more.

Following are examples of our most common sessions that we facilitate in the virtual space. These topics can be modified to reflect learners' specific needs:

CatMan 101

- To explain how the catman process works and how it's relevant for our organization and our customers.
- To develop strategic catman plans for the team based on catman foundations.
- To describe internal data sources available and analyze some common reports to draw insights.
- To analyze the tactics and identify ways to draw action based on the insights.

Data to Insights

- To explain the different between facts and insights
- To combine different facts together to develop compelling insights
- To identify the most relevant insights pertaining to a specific business situation

Storyboarding and Storytelling

- To describe the steps in a storyboard and explain why they are important.
- To explain the purpose of the presentation from an internal perspective and from their audience's perspective.
- To calculate the "size of the prize" based on the opportunities identified from the insights.
- To identify the key compelling and relevant insights to back up the opportunity.
- To summarize the overall opportunity in a few sentences.
- To describe the benefits and importance of using storyboarding in presentation development.

Data Visualization

- To explain what data visualization is and why it's an important component of storytelling and presentation skills.
- To list the key components of good data visualization, describe each component and give some examples.
- To identify ways to improve data and non-data visuals to better meet the purpose.

Developing Your Presentation

- To describe how to move a storyboard from an outline to compelling slides.
- To add logic and flow to your presentation.
- To describe differences in presenting virtually vs in live sessions.
- To identify ways to present in a virtual space to ensure engagement with an audience.

Category Management in eCommerce

- To understand the challenges in data and analytics in eCommerce vs Brick & Mortar stores.
- To list the key data sources and KPIs in eCommerce.
- To give examples of ways to analysis eCommerce data.
- To explain how product assortment differs in eCommerce vs Brick & Mortar stores.

Collaboration and Joint Business Planning

- To define collaboration and share requirements for effective collaboration.
- To explain the importance of internal collaboration and why it's key to successful external collaboration.
- To describe joint business planning and the steps to successful JBP sessions with retailers.
- To identify opportunities for collaboration improvement in an organization.

Live Classroom Training

Catman 101
A one-day session that gives teams a strong foundational understanding of category management and how to apply the process to improve business results across a team or organization.

Catman In-Depth
This three-day session arms teams with the strategic and analytic skills to develop category plans for their business.

Fact-Based Presentations and Storytelling
A ½- to 2-day session that teaches participants how to draw insights from your data and present them in an effective way with flow and logic. Great for sales teams, category management teams and/or multi-functional teams.

A Day in the Life of a Retail Category Manager
This half-day session teaches participants how to think like a retailer with an emphasis on retail income statement and supply chain.

Assessment Tools

Assessment tests identify the current knowledge level in a team/organization. Our assessments are derived from our online course tests which we have combined to create a bank of questions (over 70 topic areas). We have created some standard assessments (see the list below) or we can build one for participants based on the competencies / topics they would like to assessment their team on.

Once the assessment is completed, each student will receive a report that summarizes their individual results and a personal email from CMKG with recommendations on the courses to focus in on. We can also provide a report of the scores for teams and will work with them to review the results and make specific curriculum recommendations. By comparing pre- and post-assessment tests (once the training is complete), we can also measure ROI on training investments.

Standard Assessments:

1. **Category Management Assessment (CatMan Level 1,2,3)**
   This is our standard 90-minute test; it includes 140 questions covering all 3 levels of accredited category management programs (CPCA, CPCM, CPSA).

2. **Partial Category Management Assessment (CatMan Level 1,2)**

   This test has 115 questions and a 75-minute time limit. It draws from the same pool of questions as the Full Assessment but only covers content at the CPCA and CPCM levels (Level 1,2)

3. **Masters Assessment (CatMan Level 4)**

   Based on the content of our twelve Master's courses, this assessment has 60 questions and a 45-minute time limit.

4. **Sales Assessment**

   A 90-minute assessment of 150 questions based on the content in our Sales Program; the content is drawn from a selection of relevant on-demand courses.

5. **Shopper Assessment (Level 1,2,3)**

   A 60-minute assessment of 90 questions based on the content in our Shopper Insights Program; this consists of a mixture of content from CMA-accredited courses, Masters courses and our skill-building virtual courses.

Certification Prep & Practice Exams

Available for both Level 1 (CPCA) and Level 2 (CPCM) programs, these packages include both the mini-exams and the practice exams covering each of the knowledge areas required for that level of certification.

On-Demand Course Descriptions

We have over 70 courses available in our learning portal from our Accredited and Master's programs, as well as our Virtual courses and a few extras. These are combined to create our standard programs or create a custom program to meet participants needs.

Accredited Category Management Courses

Level 1 (Foundational/CPCA)

Our Level 1 Foundational on-demand courses can be purchased separately, combined with other courses for a custom curriculum, or be purchased as part of the Level 1 Foundational CPCA Program.

Category Management Overview

Course 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 benefit sales, marketing and category management professionals to understand. If participants are working in a category management environment, they need to understand the whole process, from a big picture perspective.

Learning Objectives
o   Define category management and explain its importance for both retailers & suppliers;
o   List the different perspectives to consider in category management;
o   State the key steps in the category management process;
o   Explain why retailer strategy is an important piece of category management for both retailers and suppliers to understand; and
o   List the key components of each step in the category management process.

  Approximately 1.5 hours course time

Retailer Strategy

Course Overview

Participants increase their understanding of what is included in a retailer's overall strategy, and the importance of being able to understand and articulate the strategy (from both a retailer's and supplier's perspective). 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. Each of these areas will be reviewed in detail. A hands-on workshop allows participants to define the strategy for a specific retailer that they either work for, or that is their client.

Learning Objectives
o Explain how retailer strategy affects category management;
o List different examples of what may be included in a retailer strategy;
o Identify the strategies of a specific retailer; and
o State why it is important for retailers to communicate a clear and consistent strategy to consumers.

Approximately 2 hours course time

Category Definition & Segmentation

Course Overview

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

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

Approximately 2 hours course time

Category Roles

Course Overview

This course gives an understanding of the importance of the category roles based on the purpose of the category for a specific retailer. Participants learn how assigning a category role to each category allows retailers to strategically lay out their stores and help with tactical decision making through pricing, promotion, placement and product availability.

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

Approximately 2 hours course time

Category Strategies

Course Overview

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

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

Approximately 2 hours course time

Understanding and Using Data

Course Overview

This course gives participants a solid foundation of considerations when using data, including properly citing references, using proper analytic techniques, only presenting relevant data, etc. It includes an 8-step analytic process that helps to plan out an analytic project before completing an analysis project, to save time and effort, and have a more successful outcome, as well as provides an overview of the different types of standard data (including retail POS, retail measurement data, consumer panel data and "other" data. There is emphasis on how all data sources are collected. Within each data source, the strengths & watch outs are identified, along with some basic measures available from the data source.

Learning Objectives
o   List the data dimensions required to properly reference data;
o   Describe some considerations how category strategies fit into the category plan;
o   List and describe some common category strategies;
o   List the standard category management data sources and their basic measures;
o   Describe the best data sources to address different business issues; and
o   Explain some key questions you can address with each of the standard data sources.

Approximately 2 hours course time

Category Assessment

Course Overview
Participants learn how course time a category assessment that includes "most" and "least" developed brands and segments, highest and lowest growth brands and segments, and benchmarking concepts. Workshops give the opportunity to review a category assessment and complete observations. This course includes calculations for Category $ Share, $ Sales % Chg, Absolute Sales Change, Share Pt Change, Retailer Share of Market, Index vs. ACV and ACV.

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

o   Approximately 2.5 hours course time

Category Tactics and Analytics

Course Overview
This course reviews each of the tactics, or "4 Ps" (product assortment, product placement, pricing and promotion). Each tactic's definition, measurement, and basic analytics are included. Specific calculations for "Share per Item", "Item Share", "Wtd Distribution", "Sales per Point of Distribution", "Shelf Share", "Feature Share", "Gross Margin", "Penny Profit", and "Avg. Unit Price vs. Avg.Tonnage Price" are included.

Learning Objectives
o   List the tactics and give some examples of retailer strategies;
o   Explain how the tactics can influence a consumer's purchase decisions;
o   Describe some key measures and basic analytics for each tactic;
o   Explain the importance of each tactic.

   Approximately 2.5 hours course time

Category Management on Limited Data

Course Overview
This course gives meaningful insights into maximizing data in a limited data environment. Participants review different report layouts and perspectives, based on limited data in different areas of the business. They learn about the importance of a trust between retailer and strategic trading partners to be successful in a limited data environment, with participants completing the course having examples that they can take back to their desks as examples. The tactics will also be included in the analytics, with suggestions on how to gather and analyze the data for meaningful insights.

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

Approximately 2 hours course time

Develop and Implement a Category Plan

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

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

Approximately 2.5 hours course time

Building PowerPoint and Presentation Skills

Course Overview
Participants build their skills in technical and tactical functionality of PowerPoint and presentation skills. By understanding the fundamentals of PowerPoint, participants become more efficient in developing effective, succinct, and impactful presentations. The presentation skills included in this course allow participants to take their great PowerPoint presentations, and effectively present them to either internal or external audiences. This course is broken into 2 distinct parts, first focusing on PowerPoint skills, then on presentation development and delivery.

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

Approximately 2.5 hours course time

Building Excel Skills

Course Overview
Participants have access to a set of mini-Excel courses that start "basic" and move up to "advanced" topics, while all the data examples used in these courses are appropriate to category management work. Participants learn to maximize their Excel skills across a broad range of topics, and they also benefit from the applied category management learnings provided in these courses. Topics reviewed include Range Names, Dynamic Range Names, Absolute and Relative References, Basic Formula Writing, Custom Formats, Custom Lists, Text Functions and VLOOKUP and HLOOKUP formulas.

Learning Objectives
o   Leverage formulas, text functions, auto filtering;
o   Extract data, filter and next functions;
o   Use charts, graphic, pivot tables and links to other programs; and
o   Have methods to translate basic data into added value, strategic work ideas that generate breakthrough results.

Approximately 2.5 hours course time (more time will be required for participants new to Excel)

Level 2 (Intermediate/CPCM)

Our intermediate courses help take individuals to the next level of data and analytics, including in-depth tactical analysis. This combination of courses comprises our Intermediate/CPCM training program.

Building Data Competency: Panel Data

Course Overview
Gain an in-depth look a third-party consumer panel data, including how it is derived, commonly used measures, and examples of how to think about and maximize its potential. Household panel data is one of the primary data sources required to do category management work. It provides a clear picture of consumer behaviour so that retailers, sales, and marketing professionals can continually adjust their strategies to focus on the consumer dynamics that drive category and brand performance. This course walks through examples of key consumer purchase behaviour measures, interaction data and demographics in detail.

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

Approximately 2 hours course time

Building Data Competency: POS Data

Course Overview
Learners get an in-depth look at retail POS data, including retailer and third-party scanned sales data, and learn how the data is derived and understand key measures and definitions that relate to POS data. Trends, out of stocks, sales and profitability, distribution and shopper insights will be reviewed in retail POS data, so that participants learn how to maximize its potential. This includes calculations like Calculate shelf capacity, comp stores, gross margin, markup, initial markup, markdown, and margin.

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

   Approximately 2 hours course time

Measuring Category Health (Baseline & Incremental Drivers)

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

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

   Approximately 4 hours course time

Efficient Assortment: A Step-by-Step Process

Course Overview
Efficient assortment is the analytical process that fits within product assortment, and within the category management framework. It is an enabler to the other steps within the category management plan. Participants learn about retailer assortment strategies, and the importance of understanding these strategies before moving into any type of assortment work, then learn the steps course time a manual assortment project, which will give them foundation from which they can either build their own assortment capabilities or better understand the assortment tools being used in their own organization. In this course, basic and intermediate techniques of assortment analytics are reviewed.

Learning Objectives
o   Explain the efficient assortment process;
o   Describe the different retailer strategies and other considerations that need to be understood prior to completing an assortment analysis;
o   Explain the difference between variety and duplication of items;
o   Describe how market coverage is calculated, and how this number can be used;
o   Create a Pareto chart, and explain the significance of this chart in product assortment;
o   Develop and manipulate an item rank report;
o   Explain the rationale for adding, deleting or keeping an item in distribution; and
o   Identify assortment opportunities.

    Approximately 2.5 hours course time

Pricing Strategies and Analysis Techniques

Course Overview

Participants review retailer strategies that relate to pricing, including price setting definitions and price rules for the retailer. It covers how prices are set, including promotional and new product pricing. The second half of the course captures a variety of advanced pricing analytic techniques, including breakeven point, correlation and price regression, activity-based costing and slope. Participants learn many different techniques used to assess retailer pricing.

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

    Approximately 2.5 hours course time

Promotion Analysis Techniques

Course Overview
Promotion is a key driver of incremental sales, as well as a point of differentiation for retailers. In this course, participants learn what promotion means for retailers, from both a marketing perspective, as well as a promotion/flyer program perspective. They learn how retailer promotion planning and execution is completed, and the things that can impact the outcome of a promotion. Promotional assessment is completed, including looking at the incrementality of the promotion, promotional price, ad space and positioning, display support, seasonality and competition. Calculations include lift factor, subsidized sales, incremental sales, correlation and regression analysis, pantry loading, cannibalization, return on investment, and breakeven point.

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

Approximately 2.5 hours course time

Advanced Analytics: Relativity

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

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

Approximately 2 hours course time

Fact Based Selling

Course Overview
Participants learn how to create a presentation that focuses on a fact-based selling approach. Rather than presenting just data, they learn how to present insights from the data, and next how to add these fact-based insights into their presentation that has both logic and flow. They learn how to consider the conditions, needs, limitations and opportunities of their "customer" (either internal or external), and align their presentation to this situation.

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

   Approximately 2 hours course time

Space Management Fundamentals

Course Overview
This course gives participants the ability to strategically understand shelf space (without the technical requirements). Participants learn about different retailer shelf strategies, including how to maximize shopper friendliness, minimize out of stocks, minimize excess inventory, maximize profit mix and maximize private label placement. They also learn about the other important inputs that are required course time successful space management projects. Terms and calculations covered include linear feet, fixture sizes, facings, shelf capacity, inventory turnover, space productivity, and lost sales.

Learning Objectives
o   Understand key space management metrics and drivers;
o   Assess planogram performance and profitability;
o   Recommend assortment and product placement changes for the planogram;
o   Improve shelf productivity as it relates to inventory and space allocation;
o   Identify appropriate product adjacency based on shopper needs;
o   Develop space management strategy that aligns with the retailer's objectives.

   Approximately 2 hours course time

Store Clustering Through Store Level and Geodemographic Data

Course Overview
This course gives participants the ability to use store level data to evaluate category performance and in store execution, and to create store clusters and measure before/after performance. Participants learn to effectively use geodemographic and behavioral data by products and retailers, to identify product demand by store and zip or postal code. Calculations include demand index, product demand index, and sales index.

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

   Approximately 3 hours course time

Retailer Economics and the Product Supply Chain

Course Overview
Participants learn and practice some of the more common retail math and inventory calculations in this course. Many retailers have sophisticated computer programs that perform many of the retail math calculations, but for both retailers and suppliers, it is important to understand how this "retail math" works. It is also important to understand how a retailer's financial statement works, what drivers the overall results, and some of the most common retail math calculations that tie into the results. Income statements, balance sheets, cost of goods sold, shrink, gross margin, gross margin %, markup and markdown, and breakeven point are included in the course. The second half of the course focuses on the product supply chain for the retailer, and covers inventory turnover, inventory days on hand and GMROI calculations.

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

   Approximately 3 hours course time

ON-DEMAND & INSTRUCTOR-LED TRAINING SOLUTIONS
TRUSTED BY MAJOR RETAILERS AND CPG BRANDS

Level 3 (Advanced/CPSA)

Our advanced courses comprise our Advanced/CPSA program and will elevate learners skills in shopper understanding, product supply chain and joint business planning. Choose the ones that are right for the specific learners needs.

Leveraging Data for Advanced Shelving Solutions

Course Overview
This course gives participants best practices for designing practical shelving recommendations that simplify the shopping experience and optimize category sales and shelf productivity. There is no technical training in this course. Participants learn how to leverage space management automation and efficiencies and with an opportunity to assess a planogram in a workshop. The last part of the course focuses on cluster- and store-specific planograms, and some of the considerations on development of store-specific planograms.

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

Approximately 2 hours course time

Understanding and Marketing to Your Shopper

Course Overview
This course gives an in-depth overview of understanding the consumer and shopper, their needs, and their behavior beyond the basics, and beyond the category level. Retailers and suppliers need to realize how the big picture of shopper marketing works and ensure that they have the strategies and plans in place to set themselves up for success in future shopper marketing endeavors. "Path to purchase", shopper trip missions, and shopper segmentation are covered. Participants then learn about in-store marketing to shoppers across different stimuli.

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

Approximately 2.5 hours course time

Strategic Supply Chain Management

Course Overview

Participants understand the key dimensions that need to be balanced in effective supply chain management. Different types of supply chains are reviewed, as well as the different types of supply chain strategies for both retailers and suppliers (including "efficient" and "responsive" supply chains). Participants learn about the three supply chain flows (information, product and financial), and how they each relate to the supply chain. Forecasts, inventory levels, order placement, product specifications, general conditions of grade, invoices, order tracking, order delivery methods, product return flows, credit terms, accounts receivable and product pricing/invoicing are covered.

Learning Objectives

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

    Approximately 2.5 hours course time

Strategic Selling

Course Overview

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. We teach that when we refer to the Seller and Buyer, the concepts and analogies are relevant across multiple types of relationships.

Learning Objectives

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

    Approximately 2 hours course time

Collaborative Business Planning

Course Overview
This course gives participants the skills to enable effective collaboration between partners, as well as teaches them how partnerships provide a structure to organize, plan and implement mutually beneficial ideas. It also walks through joint business planning in detail, identifying a framework from which joint business planning should be completed. Participants develop key skills to help them become more consultative category professionals and enables them to become more effective with their efforts to solve customer's key business issues.

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

   Approximately 2 hours course time

Master's (Level 4) Courses

This series of 12 courses are derived from the Level 4 CatMan Master's Program which was developed to help both Retail and Manufacturing organizations understand what they need to do to advance their catman approach in this increasingly complex world. It is based on the CMA's recent launch of a more advanced approach to category management called CatMan 2.0™.

1. CatMan 2.0 Introduction: What's Changed

The category management process has changed to reflect more complex and granular data, more complicated technologies, a more sophisticated Shopper, and an evolving retail Omni-Channel. Learners find out what the most important changes to the catman process are, why each of these changes was made, and the implications of these changes on their work. More importantly, they consider what they need to do differently to navigate the category management road ahead.

Participants gain a strong understanding of:
o   The most important changes to the category management process;
o   Why these changes were necessary;
o   The implications of these changes on catman work; and
o   Considerations for navigating the road ahead.

2. The "What" Assessment: Category Insights Using Advanced Data Sources

Category assessments are WHERE opportunities are identified primarily through the evaluation of historical data. There are many ways that assessments can be improved and enhanced to reflect the Shopper to incorporate more advanced data sources and analytics. Participants learn how to derive deeper category insights.

Explore advanced category assessment approaches, including:
o   New and evolving data sets necessary for best-in-class techniques and analytics;
o   An analytical approach to lead practitioners to create successful category plans;
o   Development of more advanced category assessments and reviews using new data sources and tools.

3. The "Why" Assessment: Shopper Insights, The Missing Puzzle Piece

One of the biggest changes and challenges is the integration of Shopper Insights into the Category Assessment to answer WHY they buy. Answer this very important question, and learn HOW to insert Shopper insights into assessments, review and analytics.

This course covers:
o   New and existing data sources;
o   How-to examples of weaving these insights into your assessments for a better overall category perspective; and
o   Practical ways to tie these insights into category opportunity identification, category plans, and your everyday category management work.

4. Developing Shopper-Focused Category Management Scorecards

Category scorecards are a MUST HAVE for category plans for both Retailers and Manufacturers. That's because every plan needs objectives by which organizations can measure success. Learners develop an advanced, Shopper-focused scorecard that includes category foundations, critical opportunities, and metrics that correlate best with opportunities.

Explore different types of scorecards that:
o   Reflect different category dynamics;
o   Review different types of metrics;
o   Show examples of when to use;
o   Illustrate the integrations of different data sources; and
o   Suggest ways to incorporate advanced approaches into your scorecards.

5. Assortment: New Shopper-Focused Metrics and Advanced Technologies

Product assortment is where large amounts of analytic time is spent since products not carried by a retailer can't sell. Assortment analysis determines how to fit innovation into the product range. Participants inquire how to use new data sources, technologies, and analytics in advanced assortment, and consider the impact demand-based clustering and assortment.

Learn how to create advanced product assortments with:
- o Actionable ways to incorporate Shopper insights into assortment work;
- o Different data sources and technologies that allow more sophisticated approaches;
- o Understanding of how different assortment strategies impact the product supply chain; and
- o Identification of new metrics for added perspective on ways for you to make better assortment decisions and recommendations for the Shopper.

6. Space Management: Space Optimization and Advanced Technologies

Retailers can decide how much space different categories get, which impacts the number of items carried within a category assortment; OR they allocate space to specific categories based on the number of items or product range desired. Learners consider how new data sources, technologies, and analytics can be reflected in advanced space management best practices for shelving — now and in the future.

Work smarter in space management by learning about:
- o Data sources, technologies, and analytics to help advance new approaches in space management;
- o Ways to incorporate Shopper-focused insights into shelving work;
- o The implications of different shelving strategies and their impact on the product supply chain;
- o Approaches to identify new metrics/analytics for broader perspective; and
- o Making better space management decisions and recommendations for your Shopper.

7. Pricing: New Analytics, Issues, Challenges and Opportunities

Pricing is an important but complex tactic in category management because changes can have huge implications on sales and profit. As we continue to expand understanding on just how varied the response to price changes is, we can begin to understand the variables such as online shopping, price transparency, Shopper expectations, and value.

Discover more approaches to strategic pricing, including:
- o The complex data and technology that can increase your understanding;
- o Advanced pricing strategies and common issues in pricing;
- o Examples of more sophisticated data sets and technologies; and
- o Advanced pricing analysis.

8. Promotion: New Analytics and Implications for Retailers and Manufacturers

Promotion has expanded beyond traditional flyers and coupons to include websites, targeted emails, social media, and retailer mobile strategy. Participants learn to use advanced data and technology to plan effectively for this new and expanding complexity in promotion planning.

Consider complex strategies, data & technology, and Shopper as they relate to promotion, including:
- o New data and technologies;
- o Examples of advanced promotional analytics; and
- o Ways for both retailers and manufacturers to develop more sophisticated promotional plans.

9. Shopper Marketing: Applying a New Tactic In Category Management

Shopper Marketing is a new tactic and needs special attention to understand how it can succeed and be analyzed alongside other tactics. Learners identify the requirements for successful Shopper marketing, and the importance of using Shopper insights to develop effective Shopper marketing solutions for retailers and their categories.

Develop and integrate successful Shopper Marketing programs using data and insights as part of the category management process by:
o Reviewing different types of Shopper insights and Shopper marketing (including their sources);
o Learning ways to build successful & collaborative Shopper marketing programs;
o Considering different paths to purchase; and
o Analyzing examples of successful Shopper marketing initiatives.

10. Building an Organizational CatMan Structure and Strategy from the Inside Out

According to CatMan 2.0™, interdependent roles should be in the same organization, which means Shopper Insights and Marketing belong within category management. Internal alignment cannot happen if the CatMan department is separated from the rest of your organization. Participants learn how to unify category and Shopper perspective, strategy, and understanding and how to measure ROI from your more sophisticated category management process and framework.

Clarify how these changes can be incorporated in your organization and the implications by exploring:
o Organizational design considerations that reflect different types of companies;
o Ways to increase internal alignment across an organization using a category management framework; and
o What the future may bring for category management departments to reflect a more advanced and sophisticated approach.

11. Developing Shopper-Based CatMan Foundations: Category Definition, Roles, and Strategies

Well-defined category foundations provide the rules, guidelines, and strategies for a category's success or failure by aligning to how the Shopper most likely views the category; how items are segmented; and a solid category decision tree. Participants learn how to assign Category Roles and Strategies with the Shopper in mind, including their emotional needs, and be more creative when it comes to defining Retailer strategies.

Dive into these strategic foundations to improve these foundations and set up your categories for success, including:
o Ways to improve category definitions and segmentation to reflect the Shopper;
o Different options for developing category decision trees and discuss their importance to the CatMan foundations;
o Examples of how to incorporate Shopper into category roles and strategy assignment; and
o Guidelines that will help you establish foundations for your category or categories.

12. Deployment, Supply Chain, and ROI: Important Considerations for Long-Term Success

This final, but critically important, implementation step is often misunderstood or even forgotten — even though success of your entire category plan relies on effective deployment. Participants understand the most efficient and effective ways for deployment.

Execute at the store shelf by learning how:
o   The supply chain plays a critical role and how it can be better understood and considered by catman practitioners;
o   To solve the biggest supply chain challenges;
o   Changes like online sales, store level assortments, and regional SKUs have an impact on the supply chain;
o   To address the requirements for successful planogram compliance;
o   Discuss opportunities to better align category management and supply chain; and
o   To address the implications of a changing Shopper, as well as online and store-specific initiatives on the supply chain.

Extra Courses

These non-accredited courses can be purchased individually or as part of a larger program.

Increasing Your Effectiveness in an Analytical 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 participants 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 they have always meant to get to.

Hispanic Americans: An Opportunity for Marketers and Retailers

Hispanic Americans are the most significant and fastest growing demographic in the United States, projected to have $1.5 trillion in purchasing power by 2015. Participants 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.

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 previous generations. This course gives in-depth details about this incredibly important consumer group.

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.

In-Store Marketing Overview: The Basics

Helps learners understand all different aspects of in-store marketing, including in-store marketing materials, and explains how in-store media have to tie in to pre-defined in-store marketing objectives as well as the requirements for best-in-class shopper marketing programs. Provides different in-store marketing examples that work with the different in-store marketing objectives that have been defined.

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 know about. Our 6- step process helps participants to improve in-store advertising and marketing. Relevant consumer trends are also covered in this course.

Instructor-Led Virtual Courses

We have over 30 virtual training courses available in our learning portal. These courses are based on topics that are highly relevant for today. We continue to add 6 courses per year to our Virtual Training series on a variety of relevant and topical subjects in the retail and CPG industry. Each course is 60-90 minutes in length and most include downloadable reference materials and a course test.

502 Seasonality Analysis for Your Post Season Holiday Evaluation
503 Best in Class Category Reviews Parts 1 and 2
504 Unlocking CatMan 2.0: What are the Opportunities?
505 Catman 2.0™: Shopper Marketing and Shopper Insights in the CatMan Process
506 Story Telling, More Than Just Fact-Based Selling
507 CatMan 2.0™ Introduction: What's Changed?
508 Applying Critical Thinking to your Category Management Work
509 Developing Your Soft Skills
510 New Shopper Perspectives - The Evolution
512 Trends That Will Affect Category Management
513 Improving Your Business Acumen in Category Management
514 Ways to Identify Growth Opportunities in Your Business
515 Identifying Business Opportunities Through Improved Shopper Focus
516 Category Management in eCommerce
517 Moving to More Strategic, Fact-Based Presentations
518 What happened in 2018 and where are we headed in 2019?
519 The Power of Shopper Insights: Why it's important and what to do about it

520 Rocking Your Presentations in PowerPoint Parts 1 and 2
522 Developing Data Visualization Skills for Better Storytelling Parts 1 and 2
523 Identifying and Understanding Trends
524 Evaluating and Managing Risk in Your Business
525 The Latest and Greatest Shopper Insights Data
526 Changing Shopper Behavior in a Pandemic
527 Nail your next virtual meeting as an organizer, presenter, or participant!
528 Creating Category Reviews to Reflect the Omni-Channel
529 Innovative Responses to the Pandemic
530 Upheaval in Retail Product Supply Chains and its Impact
531 Refreshing Your Shopper Insights
532 New Analytics in Retail & CPG
533 Assortment Planning in the Omni-Channel

Virtual Course Descriptions

502 - Seasonality Analysis for Your Post Season Holiday Evaluation

Seasonal merchandising represents one of the biggest opportunities for retailers to increase GM sales, profits and customer count. To realize its potential, it requires focused attention, with an opportunity to follow a category management process to create a strategic approach to a learner's seasonal categories. The definition of "seasonal events" has expanded with changes in the Shopper and their ethnographies, changing weather patterns and any other events that reflect periodic, unique merchandising opportunities. In this course, participants learn how to apply the foundations of category management to your seasonal pre- and post-planning and analysis to drive sales and profits in these important categories.

503 - Best in Class Category Reviews Parts 1 & 2

Category reviews are an essential part of category management. Too often the day-to-day management of a set of categories focuses on tactical moves only but does not consider the overall strategic direction. By "diving in" to a category at least once, through a category review, learners can ensure the achievement of their long-term goals and ensure they are maximizing consumer appeal. In the first instalment of this series, we go over some of the key components of the category review and gets participants' perspective on improving the process, increasing automation, and what a "best in class" category review would look like. In the second part, we delve further into category review templates (including layouts and key measures) and integrate the learning into some preliminary outlines for future "Category Reviews" that may help participants to improve the ones they develop.

504 - Unlocking CatMan 2.0: What are the Opportunities?

The process we know as CatMan 1.0 is one of the most successful business processes of the 20th century. In a single decade, virtually every major manufacturer and every major retailer embraced it globally. While the trading partners varied in their sophistication and in their capability to practice category management, the trading partners almost universally recognized its value in improving business results. This process needs to be refreshed with updates on more robust data, changing org design and a new process. In this course, we walk learners through a top line overview of CatMan 2.0, which was a refresh of the category management process recently released by the CMA.

505 - Catman 2.0: Shopper Marketing and Shopper Insights in the Category Management Process

"Roles that are inter-dependent should be in the same organization. Shopper insights, shopper marketing and category management are inter-dependent in creating the necessary output for the ultimate client (the retailer), the category platform." (Quoted from CatMan 2.0™) As we have been "preaching" to our students for a few years now, the Shopper can't be kept separate from the category management process – it needs to be integrated into all steps of the process! In this course, participants learn more about this important change to category management, and how to incorporate the Shopper into their category management foundations.

506 - Story Telling, More Than Just Fact-Based Selling

Category management has changed since its introduction over 30 years ago. So how do the solutions/data/technologies that learners sell fit within the new category management framework? CatMan 2.0 (developed by the CMA) provides a framework and guidelines for a new category management approach. We walk learners through a new learning platform that we rolled out in 2017 that includes a solution provider component (both from an educational and a training perspective), as well as learning how participants can get better educated in the future of category management and how they can help the industry move forward.

507 - CatMan 2.0™ Introduction: What's Changed?

The category management process has changed to reflect more complex and granular data, more complicated technologies, a more sophisticated Shopper, and an evolving retail Omni-Channel. In this course, learners will gain a strong understanding of the most important changes to the category management process put forth by the Category Management Association's CatMan 2.0™ whitepaper, why each of these changes was necessary, the implications of Internal Alignment, Shopper Insights, Shopper Marketing, and the importance of adding Shopper into the CatMan processes and best practices.

508 - Applying Critical Thinking to your Category Management Work

When assessing a participant's business or a retailer's business, it starts with understanding how the overall business is performing – volume, share, profit, and growth – vs. targets and vs. competition. Once learners establish how the business is performing, they should tie it in with understanding what shopper behavior is driving the results. In this course, learners will gain the ability to create a vision or to understand the total enterprise and how the parts work.

509 - Developing Your Soft Skills

Having the technical skills and knowledge to successfully execute one's job duties is only one part of being the best they can be in the workplace. In addition to these "hard" skills, we also need "soft" skills. Soft skills are those skills that allow us to effectively work with others. No matter what the position, organization, or industry, we work with people! In this course, we explore how taking the time to build effective soft skills can contribute to a more efficient, more harmonious, and more productive workplace, as well as to one's own overall job happiness and satisfaction.

510 - New Shopper Perspectives - The Evolution

"Shopper" is the focal point of everything these days. Advancements in CatMan 2.0, new data and technology drive the need for us to integrate Shopper more and more in everything that we do in category management. In this course, learners will be given perspective on ways that they can start to better reflect Shopper in the work that they do.

511/520 - Rocking Your Presentations in PowerPoint

Participants learn how to save time and make presentations look better, slicker, and more compelling; how to get people to say "yes" to their ideas. In the first course (511), we explore some tips & tricks to help create better presentations in less time. In the second (520), we show some lesser-known PowerPoint tips and how-to's that will further develop learner's presentation skills with better-looking slides, charts, and tables to will improve your presentations and really help you *Rock Your PowerPoint*!

512 - Trends That Will Affect Category Management

There's no longer a straightforward business industry model or shopper path to purchase, that's traditionally been based on strong brands and mutually beneficial retail partnerships. In this course, we cover some of the key trends on Shopper, Workplace, Marketing and Data/Technology and talk about some of the implications they may have on category management now and in the future.

513 - Improving Your Business Acumen in Category Management

Business acumen requires an understanding of finance, strategy, and decision-making. Most managers and employees, however, are responsible for specific areas, and they have little understanding of the impact their decisions have on other areas. In this course, we walk through a big picture perspective to help learners improve their business acumen and, ultimately, increase alignment with their multi-functional teams and external customers.

514 - Ways to Identify Growth Opportunities in Your Business

In today's business environment, sustaining growth and profitability can be a difficult task. There are shortened product life cycles, changing business models and new competitors arising (particularly in the online space). This constant instability makes it necessary to more strategically seek new ways to grow your business. In this course, participants learn some different ways to find growth opportunities in their business.

515 - Identifying Business Opportunities Through Improved Shopper Focus

This course is all about the Shopper, including ways for learners to incorporate them into their work. With presenters from Video Mining and SwiftIQ, this course includes run through two hands-on case studies in which participants will draw Shopper insights from a set of data and learn how to turn these insights into action.

516 - Category Management in eCommerce

As online sales continue to grow, there is an opportunity to find ways to take category management into the eCommerce space. We explore ways for learners to extend category management into the online space for improved Shopper satisfaction. In this course, participants will be given perspective on how to incorporate category management into their eCommerce business.

517 - Moving to More Strategic, Fact-Based Presentations

Presentation skills continue to be an area that we can all improve on, and it's a topic that we've been working on with a lot of clients through live and course-based training sessions. In this course, we give learners some great tips on ways to draw insights and craft better stories through fact-based presentations and will share a new storyboarding template to help learners develop their.

518 - What happened with the Shopper and where are we headed in the future?

Get perspective on some of the biggest changes in Shopper, omni-channel, and the retail industry through leading-edge industry data sources and solution providers, as well as a glimpse at where things are expected to go in the future. During the course, Sue will share real-world examples and resources that will help learners think about how these changes might affect them, their role, and their company.

519 - The Power of Shopper Insights: Why it is important and what to do about it

This course addresses the power and importance of Shopper Insights in today's world, and how Shopper understanding can help drive growth in your business. By the end of this course, learners are able to define Shopper Insights from both a category management perspective and a broader organizational perspective, explain the different perspectives of Shopper Insights for both retailers and manufacturers, articulate the power of Shopper Insights and explain why it is a critical function in today's organizations, explain the difference between Shopper facts and insights, and identify their organization's level of Shopper insights through a shopper insights framework.

521/522 - Developing Data Visualization Skills for Better Storytelling Parts 1 & 2

Data visualization is the graphical representation of information and data. By using visual elements such as charts, graphs, and maps, data visualization enables us to see and understand trends, outliers, and patterns in data. Data visualization helps to tell stories, getting rid of the noise and highlighting the useful information. It is where art and science meet in category management and shopper insights - the data and analytics are the science, and it needs to work together with the visuals (or art) for great storytelling.

In Part 1 (521), we make connections between creative storytelling and analysis, with some great examples of data visualization for different data sets. In Part 2 (522), we show learners how to create data viz for conceptual ideas and non-data outputs, and how to use diagrams and visual metaphors to illustrate relationships and clarify concepts to reinforce their presentation points.

523 - Identifying and Understanding Trends

Identifying market trends is largely about keeping an ear to the ground and looking for approaching shifts of direction in your industry/market/shopper. By immersing learners in their industry, they start to notice new concepts and themes coming up with increasing regularity. By reading widely, subscribing to newsletters, attending industry events, analyzing their own data, and networking with relevant people, market trends will begin to reveal themselves. Participants learn ways to identify business trends, get them to consider the global drivers and megatrends that result in what you see as category trends, and provide perspective on some resources and materials available at their fingertips to help identify relevant trends for their business.

524 - Evaluating and Managing Risk in Your Business

Risk analysis is a process that helps to identify and manage potential problems that could undermine key business initiatives or projects. Participants may work for an organization who is encouraging them to "take risks", however may not be giving them the roadmap to help to do that and feel comfortable with their decisions. In this course, we share the steps course time a risk analysis to give learners more confidence in the choices they make.

525 - The Latest and Greatest Shopper Insights Data

In today's world, both retailers and manufacturers must gain a deep understanding of shopper needs and behaviors to better inform their marketing activity. This requires organizations to move beyond traditional data sources into some new and exciting data. In this course, through collaboration with some top Shopper data/insights solution providers in North America, we provide some case study examples of new data, measures and insights available for a deeper Shopper understanding. Some of the impacts of the COVID-19 virus are also addressed.

526 - Changing Shopper Behavior in a Pandemic

This course provides new and relevant insights into changing Shopper behaviors resulting from COVID-19 and different perspectives on the implications for future business. We also introduce a COVID-19 Resources Tool to help learners to navigate through the rapidly changing shopper and industry.

527 - Nail your next virtual meeting as an organizer, presenter, or participant!

Virtual meetings are essential for CPG and retail organizations to maintain productivity and continuity during the pandemic, and most likely after it too. They can make it easy to align teams, keep employees engaged, and collaborate with clients and vendors. Even if virtual meetings have been part of someone's work routine for a while, they may still fall victim to virtual meeting faux pas or even worse — bored, distracted, or confused attendees causing a lack of real progress. This course gives the best practices to keep a team's virtual meetings productive, impactful and interactive.

528 - Creating Category Reviews to Reflect the Omni-Channel

In today's world, both retailers and manufacturers must gain a deep understanding of shopper needs and behaviors to better inform their marketing activity. Category reviews focused on a single channel are no longer sufficient to meet changing Consumer and Shopper needs, and this requires organizations to move beyond traditional data sources into some new and exciting territory. In this course learners will see examples of new data, measures and insights that are available for a deeper Shopper understanding and how they affect the category review process.

529 - Innovative Responses to the Pandemic

This course walks learners through what's changed for the shopper along their journey because of the ongoing pandemic, and how retailers and suppliers are responding and need to respond in the future to this changing path.

530 - Upheaval in Retail Product Supply Chains and its Impact

eCommerce is impacting tactics in-store and online. To keep up with consumer needs in both, retailers require a clear understanding of how products move from warehouses to consumers.
The retail supply chain is now more complex than ever due to changing retail assortments, shifting space requirements, effects on cost and new automation tech. Retailers are changing, including making monumental supply chain shifts, rationalizing assortment lineups and changing planograms, re-examining their pricing strategies and promotional activity as stores become distribution centers for in-store pickup, and prioritizing digital platforms as they move to an omni-channel approach.
Participants learn about the changes, challenges, and solutions surrounding the retail product supply chain to help retailers and suppliers make better recommendations and decisions. This course is relevant to and important for anyone who works in the retail industry, sells or supplies to retailers, and/or who wants a broad understanding of retail.

531 – Refreshing Your Shopper Insights

Many of us were struggling with Shopper understanding prior to the pandemic, but now everything has changed. The Shopper's behaviors have changed both in brick & mortar and online across different demographic groups, and new trends have emerged. As a result, we also need to press the "reset" button and do a deep dive into understanding the new and evolving Shopper. This course helps guide learners through some of the changes necessary for improved Shopper understanding.

532 – New Analytics in Retail & CPG

The sheer amount of data available today can be daunting. But its availability also provides an opportunity to redefine our measurables, improve our decision making and more precisely analyze shoppers, assortments, channels and more. In this course, participants will learn to analyze "year ago" data in the most effective ways to make the best decisions moving forward, create a new definition of "market" and describe how to capture using different data sources, and describe new ways to complete assortment analytics in the omni-channel world.

533 – Assortment Planning in the Omni-Channel

As the omni-channel continues to evolve and shoppers demand more from their experience, we need to understand how to create strategic, profitable and shopper-focused assortments. We'll walk you through the requirements, considerations and analytics for Omni-Channel assortments that reflect the needs of shoppers, retailers and manufacturers.

Spanish Training Options

Courses and Programs

All our Foundational courses are available in Spanish, as is the full Foundational/CPCA Category Management Training Program. See the course lists on the Certification Training Programs pages for more information.

Assessment Test

Our Assessment Test is available in Spanish at the CPCA Level. If participants want to measure ROI, we will run the same assessment test after the training is completed and calculate the increase in knowledge from the pre- to the post test.

Time Required: *Approximately 45–90 minutes course time*