



CATEGORY MANAGEMENT LEADERSHIP COLLEGE CURRICULUM



Category Management Leadership College Curriculum

Competency	Foundation (13 Courses)	Advanced (14 Courses)	Mastery (14 Courses)
Strategic Business Planning	Category Leadership - Foundation	Category Leadership - Planning Process	Joint Business Planning
		Category Roles & Prioritization	Department Reinvention
		Category Growth Strategies & Tactics	Re-Defining & Re-structuring Categories
Analysis & Insights	Speaking the Language of CPG	Consumer & Shopper Actionable Insights	Shopper Mind & Behavior
	Fundamental CPG Data Sources, Research & Analytical Techniques	Category Definition & Structure	Next Generation Retailing
Shopper Marketing/ Target Marketing	Understanding Brand Equity & Positioning	Shopper Behavior & Loyalty Building	Department Marketing
		Understanding the Purchase & Consumption Cycle	
Product Development & Assortment	Fundamentals of Assortment Planning	Managing Complex Assortment	Managing Transferable Demand
	New Item Evaluation & Launch	Effective New Product Innovation	Interface Product Development
Retail Merchandising & Service	Effective Shelf Management	Department & Aisle Merchandising	Store Format Design & Layout
Retail Pricing & Promotion	Promo Event Planning & Post-Promo Analysis	Re-thinking Promotion	Retail Pricing & Promotion
	Fundamentals of Retail Price Planning		
Financial & Business Acumen	Retail & Manufacturer Finance	Financial Analysis of (Shopper & Category) Concepts & Initiatives	Value Chain Analysis
Demand Planning & Total Order Management	Fundamentals of Forecasting & Inventory Management	Advanced Forecasting & Demand Planning	Availability Optimization
Retailer & Manufacturer Relationship Development	Influence - Leveraging Effective Communication	Building Productive Relationships	Establishing Industry Thought Leadership
	Negotiation Strategies & Implementation		Influencing Senior Leaders

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Course Overview

Foundation Level	Course Description
Category Leadership - Foundation	<p>This course is designed to review the purpose, rationale and evolution of the industry’s best practices in Category Management. Participants will build awareness on the initial need for Category Management, the initial focus of Category Management and the resulting industry impact. Participants will also explore the changes in the industry landscape that drove the need for an updated approach to Category Management (Category Leadership) with a brief overview of the new process.</p>
Fundamentals of Assortment Planning	<p>This course provides background about the importance of effective assortment management for both distributors and suppliers and how assortment management fits within the Category Leadership Planning process. Participants will learn to apply the best practice Efficient Assortment process to minimize duplication and maximize variety in category offerings, enabling the best possible assortment decisions based on consumer and shopper preference and financial pay out.</p>
Understanding Brand Equity & Positioning	<p>This course will build the participant’s awareness and understanding of Brand Equity (product and retail banner) and competitive Positioning and how they can influence Perception and Loyalty to a product and/or a retailer. Participants will gain a greater appreciation for how various business planning choices and their execution can impact Equity and Positioning for a brand or banner.</p> <p>The course will teach participants the essence of Brand Equity and Positioning: what they are, how they are created and how they can be leveraged or destroyed. The course will address Loyalty to a brand or retail banner: what it is, the various ways of defining it and the linkage to Brand or Banner Equity and Positioning. Participants will learn how brand and banner merchandising decisions and their execution can build/erode Equity, Positioning and Loyalty.</p>
Speaking the Language of CPG	<p>In today’s fast-paced environment it is important to understand the basic CPG industry terminology for more effective understanding and communication. In addition, it is vitally important to leverage the rich sources of data that are available to drive decision making.</p> <p>This course addresses the two components of the “CPG language” that everyone must understand - basic customer management and buying/merchandising terms, along with key syndicated data definitions and how to use these data points to evaluate business opportunities. Throughout the course, participants will be provided real life examples with simulations and quizzes to test understanding & knowledge retention.</p>
Retailer & Manufacturer Finance	<p>This course is designed to gain an appreciation and better understanding of the financial scorecard measures and analyses most commonly utilized by retailers and manufacturers within the consumer products industry in order to make better decisions and work more productively with business partners. This course includes emerging and advance financial measures that are becoming more accepted and are having a significant impact on retail and manufacturer category business planning and implementation. The participant will learn how to apply these financial measures to their day-to-day decision making.</p>
Promotion Event Planning	<p>This course will give participants the fundamental knowledge to create effective promotion events for a given category and to avoid the costly pitfalls typically experienced in the industry.</p> <p>Participants will be introduced to the key criteria for effective category promotional event decision making. They will examine a number of promotion examples in order to enhance their event decision making skills. They will learn how to develop a category promotion event with consideration to all the critical variables. Finally, they will learn a simple, yet highly effective approach to category and brand pre- and post-promotion analysis.</p>
New Item Evaluation & Launch	<p>This course is focused on the key activities required to ensure the success of new item launches. Participants review the strategic importance of new items, including the basis of new item success rates in the marketplace. The New Product Introduction process will be reviewed in detail, including an overview of the roles and responsibilities of both suppliers and retailer.</p>
Negotiation Strategies & Implementation	<p>This course will enable participants to achieve improved collaboration and results at the retailer/supplier interface. Participants will learn to elevate their perspective to understand the key needs of the shopper, retailer and supplier in order to develop solutions that meet the needs of all three constituents. Additionally, participants will learn how to optimize their negotiation results through superior planning. The course will teach key tools for collaboration and negotiation, with a focus on providing real life approaches for improved activation.</p>

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Foundation Level cont.	Course Description
Influence - Leveraging Effective Communication	This course is designed to help participants deliver superior results by maximizing their influence. Participants will learn to apply the 5-step Influence Process, in a collaborative way, for mutual benefit. In addition, participants will assess their personal influence style and learn how to influence effectively across a number of different styles. As a result of the course, participants will be ready to apply their learning in creating win-win solutions with their trading partner and delivering improved results. This course is particularly valuable to people with limited sales experience.
Fundamentals of Retail Pricing Planning	Discover the key considerations that affect pricing decisions from the perspectives of suppliers, retailers, consumers and shoppers. In this course you will learn about retail pricing concepts, the key questions to ask to achieve best practice pricing, supplier-focused pricing concepts and retailer-focused pricing concepts including consumer and shopper considerations. Real world examples and exercises help you build experience in retail pricing so that you can apply your skills immediately.
Fundamental CPG Data Sources, Research & Analytical Techniques	This course provides a basic overview of key CPG industry data sources, research and analytical techniques with a focus on identifying which sources provide the best answers to specific business questions. In addition, participants will learn how to blend information from multiple sources to develop actionable insights that result in measurable business results, even in data poor business sectors. The course will also provide a basic overview of key measures used across the Industry to help ensure more effective planning between suppliers & retailers, and will introduce a helpful tool for framing analytical work, the “5 Cs Toolbox”. Throughout the course, participants will be provided real life examples with activities to test understanding & knowledge retention.
Effective Shelf Management	Discover how shelf management can effectively convert a store shopper into a category buyer. Participants learn the importance of effective shelf management to retailers and suppliers, the critical elements that drive effective shelf management, and how shelf management fits within the Category Leadership Planning process. Participants will learn in detail the best practice Shelf Management Process that can be applied across all categories within the stores to drive both shopper behavior and operational efficiencies.
Advanced Level	Course Description
Understanding the Purchase & Consumption Cycle	In this course, you will learn how to mine insights from this consumer and shopper behavior which can be acted upon within your integrated plans—even plans developed jointly with trading partners.
Financial Analysis of (Shopper & Category) Concepts & Initiatives	This course will help you understand how to turn insights and strategies into commercial success and how to begin to strike the right balance between quantitative and qualitative evaluation.
Category Growth Strategies & Tactics	This course provides a detailed review of three important activities within the Category Leadership Planning Process™ - Category Strategy development, and the downstream activities of Tactic and Initiative development.
Category Leadership Planning Process	This course provides a step-by-step description of how top industry practitioners are approaching the next generation of Category Management through the Category Leadership Planning Process™ that has been built to leverage the strengths and address the opportunities associated with earlier Category Management deployments. In addition, participants will learn how to apply this process within their business and with business partners. Because of the critical importance of effective implementation, additional time is spent reviewing the components that ensure Category Plans are implemented successfully. Of note, other Advanced level courses go into even greater detail on specific steps in the Category Leadership Planning Process™ to include Category Definition, Category Roles, Insight Generation and Strategic, Tactical and Initiative Planning. This course provides an overview of these steps of the process with more detailed focus on the Plan Launch and Review steps.

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Advanced Level cont.	Course Description
Shopper Behavior & Loyalty Building	This course provides an understanding of shopper behavior and segmentation—why one does it and how insights can be leveraged effectively to enhance the shopping experience and improve shopper loyalty. This course will introduce participants to the various methods and criteria by which shoppers can be segmented. It will address how different retail practices influence these various shopper segments and their behavior. In addition, this course will explore retail loyalty marketing programs: how the best are dependent on good segmentation and how they can attract, maintain, and enhance the shopper/retailer relationship.
Rethinking Promotion	This course is focused on the introduction and exploration of how to develop and execute Effective Promotion programs. Users will learn breakthrough new ways to reconsider and reshape your promotions, ways to use Advanced Analytics to understand the interactions of base price and promotion and how to use scenarios and calendar planning to find the optimal mix or blend of promotions. Users will learn a widely usable set of steps that take your promo planning to the next level.
Managing Complex Assortment	This course teaches how assortment can be fully leveraged for competitive advantage as a part of Category Leadership Planning. Participants learn how to build on the foundations of Efficient Assortment management by reviewing when and how to apply more advanced assortment management approaches. This will include considerations that may imply the application of more complex assortment techniques. Time is then spent reviewing in detail store clustering, a foundational mechanism utilized in the application of complex assortments, as well as other techniques useful in complex assortment management. After completing this course, participants can determine when to apply and how to apply complex assortment management techniques.
Department & Aisle Merchandising	The course will introduce several technologies in place today to assist in making proper merchandising decisions across aisles and departments. This course studies the accordion effect that must occur when one department space is increased at the expense of another. Questions involve how store presentation supports a go to market strategy, how space allocation properly represents the category role, how presentation principles accentuate the variety and aid store differentiation, and how proper scorecarding metrics should be addressed. This course also studies proper secondary display locations and flow of traffic. It considers the challenges presented to store operations in executing in-department/aisle merchandising strategy. This course is designed to teach the fundamentals of effective shelf management, and how Best Practice retailers manage their space-to-sales ratios to present their most critical and differentiating categories to their target shoppers, sized right and located in a logical flow.
Consumer & Shopper Actionable Insights	This course is focused on the Best Practice approach for developing actionable insights that will drive development of Category Leadership plans that will drive category and brand growth. Participants will learn the importance of deriving impactful insights and how to develop these insights through a tangible process, the Insights to Action™ Process. Participants will learn each step of the Insights to Action™ Process and how to apply to the 3D Path to Loyalty™ model, with opportunities to practice their skills and learnings throughout the course.
Category Vision & Roles	In this course participants explore the importance of developing a Category Vision & assigning specific Category Roles within the Category Leadership Planning Process™. Participants learn what a Category Vision consists of and how to develop a Category Vision Statement that creates a picture of the future that guides the rest of the Category Planning effort. Participants then review common Category Roles, followed by a detailed discussion of the Best Practice process for Category Role selection. Finally, participants review examples of how Category Roles drive differentiation in different formats & channels.
Category Definition & Structure	This course will provide the best practice definitions of Category Definition and Structure to include an overview of how this work is best completed. In addition, typical research and analytical techniques utilized in defining and structuring a category will be reviewed. Students will be prompted to consider the implications of different Category Definition and Structure decisions and the opportunities and watch-outs that these decisions may create.
Building Productive Relationships	This course is designed to help participants deliver superior results by establishing and maintaining productive relationships. Participants will learn to build productive internal and external relationships at all levels of an organization. They will recognize the importance of reputation & trust, how to identify the people with whom they need to develop productive relationships, and how to cultivate relationships with executives. Also, they will learn to avoid relationship pitfalls and how to mend relationships. Participants will be able to immediately apply their learning in virtually any situation.

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Advanced Level cont.	Course Description
Advanced Forecasting & Demand Planning	This course introduces an industry approach to generating more accurate forecasts between trading partners and advanced metrics useful in managing the overall forecasting process.
Effective New Product Innovation	This course shares a best practice approach used in the development of new products from strategy development to launch and post-launch review. As innovation is the lifeblood of most industries, it is important for participants to understand what happens “behind the scenes” to bring new products to market in order to effectively plan and provide input into new product innovation efforts. The course provides insights into where to connect, as well as how to ensure innovation and renovation efforts are most successful in the marketplace.
Mastery Level	Course Description
Value Chain Analysis	This course teaches a methodology to conduct your own value chain analysis by helping learners identify the interdependent activities in the value chain shared between manufacturers and retailers that improve the flows of product, information, and cash. Although demand creation is a constant focus across all manufacturers and retailers, industry leading companies are exploring opportunities within their value chains to eliminate waste in capacity, product, and time to more effectively serve their customers. A key activity in identifying improvement opportunities is the completion of a comprehensive assessment analyzing each of the key processes, from demand planning to the in-store consumer purchase.
Shopper Mind & Behavior	This course introduces the concept of shopper psychology and demonstrates how it can be used as a means of decoding shopper motivations and the levers that can be pulled to influence shopper decision-making. When learners have completed this course, they should be able to explain why understanding shopper psychology is important for both manufacturers and retailers, and also define shopper psychology, explaining how it differs from traditional market research techniques such as focus groups or in-home visits. Learners should be able to describe how shoppers process information and react to stimuli at a conscious and subconscious level; and finally, they will be able to effectively apply the insights they gather to a retail environment, both in-store and online.
Redefining & Restructuring Categories	Redefining & Restructuring Categories addresses the benefits of redefining and restructuring categories, applying the key techniques for redefining and restructuring categories, working with the research and data required to accomplish the task, and articulating the key watch-outs and tips for redefining and restructuring categories.
Influencing Senior Leaders	In this course, you will learn about influence and how it differs with senior leaders, how to plan and prepare to successfully influence senior leaders, and how to exert your influence, which is your delivery or conversation. Also, you will prepare a preliminary plan to influence a senior leader.
Department Reinvention	In this course, you will learn that department reinvention is a process that a retailer and a supplier engage in together resulting in new insights that drive sales and profits within a collection of need-based related categories while reinventing the shopping experience. You will learn why department reinvention is useful and often necessary and how to conduct an effective reinvention.
Department Marketing	The world of bricks and mortar and the online environment are merging. Retailers are focused on driving department conversion and ongoing loyalty - employing strategies to acquire new shoppers, understanding key gateway moments, and how to incorporate lifestyle or lifestyle differences into a cohesive plan. In this course, you will learn the key components of shopper targeting, department marketing framework, shopper platforms, and plan execution.
Store Format Design & Layout - The Strategic Approach	Store layout is a very intensive cross functional and often subjective activity where the solutions and thinking will vary by retailer type and market. This course provides an understanding of the key drivers of creating a successful store layout, including the key components of store design and layout, a methodology/process for designing a store, how to influence and support the store design process, and current trends in store design.

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Mastery Level cont.	Course Description
Next Generation Retailing: Emerging Channels & Technology	Participants will explore the ever-changing retail landscape. They will consider the past, current, and future state of the retail industry with an emphasis on learning how to effectively classify, then strategize against, macro trends which can impact retailing. Participants will gain an understanding of how driving forces, such as technology (analytical, marketing, social networking, etc.), can be leveraged to achieve and expand upon a multi-channel relationship with today's customers to a true omni-channel retailing relationship. Participants will actively engage in a best practice foresight planning exercise.
Managing Transferrable Demand	In this course, you will learn to effectively manage transferable demand, which affects retail assortment planning. Upon completing this course, a learner should also be able to identify the key factors to consider when doing—or leading others to do—this best-practice assortment planning which takes into account the phenomenon of transferable demand. Learners should be able to plan an assortment that captures incremental and profitable sales with minimal cannibalization, while meeting expectations of the targeted shopper and consumer. And finally, learners should be able to affect the bottom line by removing duplicative SKUs that can confuse shoppers or cause operational issues.
Joint Business Planning	In this course participants will review the current state of Joint Business Planning vs. characteristics of industry Best Practices and learn how to achieve the concept of Joint Value Creation. They will then learn an approach to assessing and deploying various levels of strategic partnerships based on the relative value each partner provides to the organization. Participants review in detail the most recent industry Best Practice approach to Joint Business Planning to include supporting tools and templates. Finally, participants are provided the opportunity to develop an action plan on how to upgrade the JBP capabilities within their organization and with key business partners.
Interface Product Development	In this course participants will learn the best practice approach to collaboratively developing new products between the retailer and supplier. This includes understanding when and where to connect with the supplier's new product innovation and commercialization process, as well as developing the insight based rationale that validates the consumer and shopper need and the size of the opportunity. Participants will learn to collaborate in providing concept ideas that optimize the value chain in an effort to improve the probability of acceptance of new product ideas.
Establishing Industry Thought Leadership	Participants will learn steps—through hands-on practice and case studies—that can be taken to position an organization as a true CPG industry thought leader. They will be exposed to approaches used by companies successful in positioning themselves as thought leaders, and as a consequence, how those companies prospered. They will also learn how to assess their organizational readiness, how to select and collaborate with partner companies, the importance of senior leadership support, and how to avoid the risks associate with shaping unrealistic expectations. Participants will develop a plan to establish industry thought leadership.
Availability Optimization	This course will help you understand the tools and approaches to improve out-of-stocks within your organization and across trading partners. By the end of the course, you'll be able to quantify the impact of out-of-stock failures and apply a proven improvement methodology. The course addresses the financial impact of out-of-stock failures, the fundamental causes of out-of-stocks, and the best practices for improving in-stock performance, including several examples and a simplified approach to improving out-of-stocks across trading partners.
Retail Pricing & Promotion	This course will provide participants with “hands on” application across retail pricing as well as promotion strategies and tactics. Additionally, multiple tiered distribution models will be examined for their effect. Various retail practices affect manufacturers, and shoppers, differently. Understanding “why” and “how” a specific retail strategy is executed in these “2 P’s” enables trade partners to more effectively compete. Importantly, trade partners strive for differentiation in order to drive more shopper trips and purchases to their store and products/services. Leveraging best practice tools from shopper mindset & behaviors, loyalty, Shopper Segment Action Plans and category strategic plans allows the participant to weave a stronger, more efficient and synergistic plan in pricing and promoting their products and/or services. As a result, trade partners can deliver sustained competitive advantage across the Value Chain in a manner consistent with their company philosophy, strategy, and goals.

CONTACT

TPG's Category Management Leadership College is an unparalleled capability development program based upon rigorous assessment, best practice curriculum and innovative e-based & classroom delivery.

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