

Training Solutions Catalog

Learn about the online training options available to you if you are looking for CMA certification or to help you solve your business problems and meet your objectives through team and organizational training.

Welcome!

This product catalogue summarizes our category management training solutions. Choose which option best suits you based on your priorities and learning gaps.

If you don't see what you're looking for, or if you need more information, we will work with you to help find the best program to meet your specific needs and priorities.

Happy learning!

Table of Contents

CatMan Certification Training Programs	4
Foundational / CPCA Training Program.....	4
Intermediate / CPCM Training Program.....	5
Certification Prep & Practice Exams	6
Online Courses and Descriptions	7
Foundational (CPCA) Accredited Training Courses.....	7
Intermediate (CPCM) Accredited Training Courses.....	15

CatMan Certification Training Programs

These programs are great for organizations that want their team to complete full and comprehensive category management training programs at the Foundational (CPCA) or Intermediate (CPCM) level and/or achieve industry certification.

Foundational / CPCA Training Program

This comprehensive set of foundational courses is designed to give a solid grounding in the category management process, basic assessment and the category tactics.

If you're interested in category management certification, this program meets 10 of 10 learning requirements for the designation of Certified Professional Category Analyst (CPCA) designation with the CMA.

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

Program Curriculum

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

Program Details

- Approximately 35-40 hours to complete
- Prerequisite: none
- Cost: USD \$749.00/per person (does NOT include cost of certification with the CMA)

Intermediate / CPCM Training Program

This training program is designed to build category management skills at an intermediate level, including in-depth data and analytics across key data sources and the category tactics. It includes a set of online courses that will give you skills to function at an intermediate level in your role in retail / CPG / FMCG.

If you're interested in category management certification, this program meets 15 of 15 learning requirements for the Certified Professional Category Manager (CPCM) designation with the CMA.

Who should take this course? For those looking for an intermediate understanding of Category Management - including deep dive analytics and tactics - and/or who is looking to achieve CMA designation at the CPCA level.

Program Curriculum

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

Program Details

- Approximately 30 hours to complete
- Prerequisite: Foundational / CPCA
- Cost: USD \$749.00/per person (does NOT include cost of certification with the CMA)

Certification Prep & Practice Exams

Included with both the Foundational and Intermediate programs, these certification exam preparation materials will help you to prepare for the proctored online certification exams with the Category Management Association.

Discovery Exam

Not sure what certification level your team is at? Start with these 45-minute timed exams that will give your team instant feedback on where they should start their certification journey.

Practice Exams

These 90-minute practice exams cover the different knowledge areas that you are required to know for your certification exams at the Certified Professional Category Analyst (CPCA) and/or Certified Professional Category Manager (CPCM) level. Participants will get perspective on the areas that need more study before they take their exam with the CMA.

Mini-Exams

These mini-exams match up with the learning requirements at the CPCA and CPCM levels of certification. In these smaller exams, participants will get feedback on “right” or “wrong” answers as well as explanations and links to other training resource materials. The mini-exams are also tied in with study materials – including flashcards - to help students be fully prepared for their certification exams.

Online Courses and Descriptions

Foundational (CPCA) Accredited Training Courses

Our foundational courses give perspective on the basics of category management — perfect for level-setting, onboarding and/or as a general introduction to the topic.

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 will benefit sales, marketing and category management professionals to understand. If you're working in a category management environment, you need to understand the whole process, from a big picture perspective.

Learning Objectives

- Define category management, and explain why it is an important process for both retailers and suppliers;
- List the different perspectives to consider in category management;
- State the key steps in the category management process;
- Explain why retailer strategy is an important piece of category management for both retailers and suppliers to understand; and
- List the key components of each step in the category management process.

Program Details

- Approximately 1.5 hours to complete
- Prerequisite: None

Retailer Strategy

Course Overview

Participants will 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

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

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

Category Definition & Segmentation

Course Overview

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

Learning Objectives

- Explain why defining and segmenting the categories is a key step in the "Retailer Strategy" piece of category management;

- Give examples of different ways that a category can be defined based on different retailer strategies; and
- Identify the steps to properly segment a category.

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

Category Roles

Course Overview

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

Learning Objectives

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

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

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

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

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

Understanding and Using Data

Course Overview

This course gives participants a solid foundation of important things to consider 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. 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

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

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

Category Assessment

Course Overview

Participants learn how to complete a category assessment that includes “most” and “least” developed brands and segments, highest and lowest growth brands and segments, and benchmarking concepts. Participants complete workshops that give them the opportunity to review a category assessment and complete observations. This course includes the calculations for Category \$ Share, \$ Sales % Change, Absolute Sales Change, Share Pt. Change, Retailer Share of Market, and Index vs. All Sales Share, and ACV.

Learning Objectives

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

Program Details

- Approximately 2.5 hours to complete
- Prerequisite: None

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

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

Program Details

- Approximately 2.5 hours to complete
- Prerequisite: None

Category Management on Limited Data

Course Overview

This course gives meaningful insights into maximizing data in a limited data environment. Participants will review different report layouts and perspectives, based on limited data in different areas of the business. They will learn about the importance of a trust between retailer and strategic trading partners in order to be successful in a limited data environment. Participants will complete the course with 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

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

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

Develop and Implement a Category Plan

Course Overview

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

Learning Objectives

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

Program Details

- Approximately 2.5 hours to complete
- Prerequisite: None

Building PowerPoint and Presentation Skills

Course Overview

Participants build their skill base in technical and tactical functionality of PowerPoint and presentation skills. By understanding the fundamentals of PowerPoint, participants become more efficient and effective 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

- Maximize the basic functionality in PowerPoint to save time and develop more effective presentation;
- Follow presentation guidelines that help create fluid, visually appealing and coherent presentations; and

- Assess their own presentation techniques and have tools to assess and improve their skills going forward.

Program Details

- Approximately 2.5 hours to complete
- Prerequisite: None

Building Excel Skills

Course Overview

Participants will have access to a set of mini Excel courses that start “basic” and move up to “advanced” topics. All of 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

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

Program Details

- Approximately 2.5 hours to complete (more time will be required for a participant who is new to Excel).
- Prerequisite: None

Intermediate (CPCM) Accredited Training Courses

Our intermediate courses will help take individuals to the next level of data and analytics, including in-depth tactical analysis.

Building Data Competency: Panel Data

Course Overview

Gain an in-depth look at 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.

Building Data Competency: Panel Data is accredited by the Category Management Association and is for both retailers and manufacturers. Successful completion qualifies for the Certified Professional Category Analyst (CPCA), Certified Professional Category Manager (CPCM), and Certified Professional Strategic Advisor (CPSA) training requirements.

Also consider ***Building Data Competency: Panel Data*** for further study.

Learning Objectives

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

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

Building Data Competency: POS Data

Course Overview

Get an in-depth look at retail POS data, including retailer and third-party scanned sales data. 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.

Building Data Competency: POS Data is accredited by the Category Management Association and is for both retailers and manufacturers. Successful completion qualifies for the Certified Professional Category Analyst (CPCA), Certified Professional Category Manager (CPCM), and Certified Professional Strategic Advisor (CPSA) training requirements.

Also consider **Building Data Competency: Panel Data** for further study.

Learning Objectives

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

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

Measuring Category Health (Baseline & Incremental Drivers)

Course Overview

Participants learn how to complete 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 will acquire the 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

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

Program Details

- Approximately 4 hours to complete
- Prerequisite: None

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 participants learn the steps to complete 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

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

Program Details

- Approximately 2.5 hours to complete
- Prerequisite: None

Pricing Strategies and Analysis Techniques

Course Overview

Participants will spend Part 1 of this course reviewing retailer strategies that relate to pricing, including price setting definitions, and price rules for the retailer. This includes details on how prices are set, including promotional and new product pricing, based on things like gross margin % or markup %, MSRP, competitive pricing and psychological pricing strategies. 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

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

Program Details

- Approximately 2.5 hours to complete
- Prerequisite: None

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 will 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

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

Program Details

- Approximately 2.5 hours to complete
- Prerequisite: None

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. From this, the core business drivers can be identified for both sources of volume, and subsequent opportunity identification.

Learning Objectives

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

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

Fact Based Selling

Course Overview

Participants will learn how to create a presentation that focuses on a fact-based selling approach. Rather than presenting just data, they will learn how to present insights from the data. Next, they will learn how to add these fact-based insights into their presentation that has both logic and flow. They will 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

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

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

Space Management Fundamentals

Course Overview

This course gives participants the ability to strategically understand shelf space (without the technical requirements). Participants will 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 will also learn about the other important inputs that are required to complete 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

- Understand key space management metrics and drivers;
- Assess planogram performance and profitability;
- Recommend assortment and product placement changes for the planogram;
- Improve shelf productivity as it relates to inventory and space allocation;

- Identify appropriate product adjacency based on shopper needs;
- Develop space management strategy that aligns with the retailer's objectives.

Program Details

- Approximately 2 hours to complete
- Prerequisite: None

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 will also 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

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

Program Details

- Approximately 3 hours to complete
- Prerequisite: None

Retailer Economics and the Product Supply Chain

Course Overview

Participants will 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's important to understand how this "retail math" works. It's 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 in to 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.

Learning Objectives

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

Program Details

- Approximately 3 hours to complete
- Prerequisite: None