Category Management Association

Professional Certification Standards

CM 2.0

1-1-19

Table of Contents

Certification Objectives

1. Purpose of Category Management Standards & Certification

The purpose of this effort achieves several benefits, including:

- Aligning category management expectations for retailers, manufacturers, training companies and solution providers
- Establishing standards will provide common ground for all
- Training programs can be established to train skill proficiencies
- Individuals receive recognition for skill mastery
- Incentives motivate individuals to pursue higher certification
- Certification facilitates better talent evaluation
- Retailers gain a consistent means to evaluate potential category partners
- Universities can better prepare students for careers in category management

2. The Category Management Association

Mission Statement

To advance professional standards in category management

The association is committed to:

- Enabling peer interaction
- Disseminating industry information
- Establishing a platform to improve category management education training
- Integrating all aligned disciplines that interact with category management such as research, sales and shopper marketing activities
- Establishing an industry certification program

3. CMA Executive Committee

A. Purpose

The CMA Executive Board is currently serving in the functional capacity as a steering committee to address opportunities and gaps pertaining to Industry guidelines and skill set definitions for category management professionals. This group is comprised of manufacturers and retailers to ensure all industry perspectives are considered.

Mission

The Executive Committee will be tasked with evaluating considering modifications to the standards required to keep them current and reflective of current thinking in three key industry areas:

- Category management organizational structure and roles
- Skill proficiencies necessary to perform category management function/roles
- Relevancy for certification and assessment programs

Certification Process

4. Category Management Certification

A. Definitions

1. Course: The most discreet element of a curriculum. Often focused on a single topic, which may or may not fully represent a complete skill competency area.
2. Learning Program: A collection of one or more courses that impart the expected proficiency of a specific category management skill.
3. Learning Scorecard: A matrix that identifies the learning programs required or recommended across the certification levels for category management professionals (see below)

Category Management Training Certification Levels

Learning Programs by Level	Certified Professional		
	Category Analyst CPCA	Category Manager CPCM	Strategic Advisor CPSA
Basic Industry Knowledge	REQUIRED		
Category Management History and Process	REQUIRED		
Pricing Analysis	REQUIRED		
Promotion Analysis	REQUIRED		
Assortment Analysis	REQUIRED (basic)	REQUIRED (advanced)	
Spreadsheet Development	REQUIRED (basic)	REQUIRED (advanced)	
Presentation Development	REQUIRED (basic)	REQUIRED (advanced)	
Syndicated Scanner Data	REQUIRED (basic)	REQUIRED (advanced)	
Syndicated Panel Data	REQUIRED (basic)	REQUIRED (advanced)	
Retailer POS Data Analysis	REQUIRED (basic)	REQUIRED (advanced)	
Space Planning Software	Recommended (basic)	Recommended (advanced)	
Relational Databases (Status Canged)	Recommended (basic)	REQUIRED (advanced)	
Presenting Effectively		Recommended	
Ethical Expectations and Legal Implications		Recommended	
Space Management		REQUIRED	
Store Level Data		REQUIRED	
Syndicated Geodemographic/Behavioral Data		REQUIRED	
Opportunity Identification for Actionable Insights		REQUIRED	
Root Cause Analytics		REQUIRED	
Comprehensive Category Reviews		REQUIRED	
Understanding Category Shopper Behavior		REQUIRED	
Leveraging Data for Basic Business Solutions		REQUIRED	
Category Management Economics and Supply Chain		REQUIRED (basic)	REQUIRED (advanced)
Customer Relationship Management		Recommended (basic)	Recommended (advanced)
Organizational Deign Joint Business Planning & Value Creation (REVISED)			REQUIRED
Collaborative Partnerships			REQUIRED
Assessment for Catgeory Management Success (NEW) New			REQUIRED
Consultative Category Management Communication			REQUIRED
Understanding Shopper Behavior Beyond the Category			REQUIRED
Retailer Shopper Segmentation			REQUIRED
Leveraging Data for Advanced Shelving Solutions			REQUIRED
Leveraging Data for Advanced Assortment Solutions			REQUIRED
Advanced Pricing Analysis			Recommended
Advanced Promotion Analysis			Recommended

B. Certification

The Certification Business Unit of the CMA is responsible to objectively review and evaluate all industry course offerings and for the testing process for people, based on the standards established by the Steering Committee.

C. Certification Levels

Individuals register for CMA Certification and are tested to certified by level. The scorecard organizes skill competencies by row (across) and certification levels by column (down). Within a given skill competency, progressive learning programs are plotted across the row to reflect skill advancement. The three certification levels are:

1. Certified Professional Category Analyst (CPCA) 10 Required Learning Programs
2. Certified Professional Category Manager (CPCM) 16 Required Learning Programs
3. Certified Professional Strategic Advisor (CPSA) 9 Required Learning Programs

Note: Category Management Executive level is designated by the individual's company

D. Evaluation Process for Individuals and Training Programs

The CMA utilizes the industry standards to certifiy individuals and accredit proprietary training content for companies and universities. Individuals will be evaluated for their specific skill proficiencies. Training courses will be evaluated and accredited based on their content and evaluative rigor.

1. Certification process for individuals
   a) Initial certification:
      i. Individuals seeking certification will register on line at www.catman.global . Here individuals interested in getting certified begin the process by clicking on login (upper right hand corner of the screen) and the selecting the right path to proceed based on if they are a return user of a new user.
      ii. If a new user they will register for certification testing and proceed.
      iii. Certification testing is accomplished at all 3 Levels of professional standing: CPCA, CPCM and CPSA. CPCA and CPCM use objective testing and CPSA incorporates an essay exam.
      iv. After testing the CMA will provide your test results and certificates and logos for those that pass. For those that fail the testing a report indicating where you need additional training is provided along with the means to retake the exam.
      v. The Association will maintain an individual's certification record indefinitely, but it is necessary to renew your certification annually.
      vi. Individuals can authorize access to their records by others as necessary.
   b) Ongoing certification:
      i. As individuals complete certified training programs, their record will be updated accordingly after appropriate proof of successful course completion is provided.

2. <u>Evaluation process for accrediting training programs</u> – The CMA evaluates industry training on a 3 year cycle. Accreditation indicates that the traning in question imparts the necessary competency for an individual to effectively practice category management at a particular level. In accrediting traing and educational course the CMA:

a) <u>Investigate</u> courses and content; determine the instructionsource, teaching format, hours of instruction and testing methodology.

b) <u>Review</u> teaching method and testing process.

c) <u>Evaluate</u> the program outcome to ensure sufficient rigor is in place to deliver the required level of skills necessary as determined by the standards.

d) <u>Accredit the</u> training programs that meet the Certification Standards or provide remedial steps in cases where training programs do not meet the standards.

e) <u>Communicate</u> accreditation (or denial with remedial steps) and post to database.

Learning Program Detailed Requirements

5. Certified Professional Category Analysts (CPCA)

In order for a training program to be certified, the following skill sets for each learning program must be taught and assessed. Individuals must demonstrate at a minimum the following skill proficiencies for each required learning program in order to be certified at this level.

A. Basic Industry Knowledge – CPCA Required

Learning programs at this level will impart a general understanding of the retail and manufacturing landscape, as well as key dynamics and trends that can affect category performance.

At the completion of this learning program, participants will be able to:

- Identify the industry acronyms and their meanings
- Explain the current channel dynamics and trends
- Understand and having working knowledge of industry data management tools for Business Intelligence/Shopper Insight development systems (i.e. Tableau/Alteryx)
- Describe the current manufacturer and retailer landscapes by category (i.e. major players, channels, etc.)
- Explain differences between various retailer go-to-market strategies including Omni channel, EDLP, high/low, warehouse clubs, specialty, etc.)
- Understand shopper dynamics and voice of shopper data
- Identify current population and demographic trends and their impact on specific categories.

B. Category Management History and Process – CPCA Required

Learning programs at this level will impart understanding of the history, origins, and best practices of Category Management. Participants will learn the key steps in the new (2.0) Category Management process,

At the completion of this learning program, participants will be able to:

- Explain the history, origins and industry best practices of Category Management
- Understand the precepts of Cat Man 2.0 as well as describe the differences in the process steps
- Describe the key steps of the Category Management process including the Alignment Step in Cat Man 2.0
- Explain the typical Category Management capabilities required channel partners
- Demonstrate practical knowledge application of Cat Man process at retail
- Identify various category opportunities
- Understand the impact that new technologies have on category management decisions and process

C. Pricing Analysis – CPCA **Required**

Learning programs at this level will impart the basic skills of understanding key pricing metrics (i.e. non-promoted price, promoted price, average price, etc.) as well as the ability to assess a given retailer's prices compared to the overall marketplace.

At the completion of this learning program, participants will be able to:

- Explain the syndicated methodology for reporting various types of pricing (i.e. non-promoted price, promoted price, average price, etc.)
- Understand new leading data (FSP), lagging data (POS), attitudinal data (panel), financial (ABC) and supply chain data sources
- Be aware of new pricing evaluation technologies
- Assess current retailer pricing as compared to the overall marketplace.
- Quantify the impact of price change (i.e. category sales performance before and after the price change)
- Measure the level of discount between non-promoted and promoted pricing and the impact on profitability

D. Promotion Analysis – CPCA **Required**

Learning programs at this level will impart the skills to evaluate category promotion effectiveness. Analysts at this level will be able to identify the best and worst promoted weeks, as well as the level of effectiveness (i.e. lift, reach, depth and support).

At the completion of this learning program, participants will be able to:

- Be aware of new data sources for promotion analysis such as Frequent Shopper Program data
- Explain the syndicated methodology for reporting various types of promotion activities (i.e. features, displays, temporary price reductions)
- Explain the syndicated methodology for reporting base versus incremental volume, as well as the difference between promoted and non-promoted volume
- Describe the impact of quality merchandising components as measured by incremental volume, breakeven analysis and incremental lift calculations
- Identify promotion effectiveness (i.e. lift, reach, depth and support)
- Quantify the best/worst promoted weeks for a given product, segment or category

E. Assortment Analysis (basic) – CPCA **Required**

Learning programs at this level will impart the basic skills of assortment analytics. Analysts functioning at this level will understand the basics methodologies to provide data-driven assortment recommendations.

At the completion of this learning program, participants will be able to:

- Describe the principles between variety versus duplication
- Explain what market coverage is and its importance
- Explain clustering and its impact on assortment strategy
- Describe how a Pareto chart visualizes item assortment productivity
- Be aware of the latest technologies articulate key rationale for adding new items to distribution
- Be aware of new and existing technologies justify elimination of unproductive SKUs

F. Spreadsheet Development (basic) – CPCA Required

Learning programs at this level will impart the basic skills of working with spreadsheet development software such as Microsoft Excel including: creating worksheets, performing calculations, modifying worksheets, formatting worksheets and printing worksheets. In addition, learning programs at this level will impart advanced skills that leverage the use of formulas, calculate data across worksheets, organize the worksheet and data tables and create charts.

At the completion of this learning program, participants will be able to:

- Use Pivot Tables effectively
- Perform calculations and formulas to analyze data
- Be proficient as modification and formatting of large amounts of data
- Effectively develop data for presentation
- Manage large workbooks, work with multiple workbooks

G. Presentation Development (basic) – CPCA Required

Learning programs at this level will impart functional proficiency of presentation development software such as Microsoft PowerPoint to include creating, navigating and editing presentations with high visual impact.

At the completion of this learning program, participants will be able to:

- Be aware of the new presentation technologies prevalent in Cat Man (i.e. XP3)
- Utilize PowerPoint to tell a story and present effectively
- Create and format individual slides
- Add graphics and drawing objects to your presentations
- Add tables and charts to a presentation

H. Syndicated Scanner Data (basic) – CPCA Required

Learning programs at this level will impart the basic skills of utilizing syndicated scanner data software such as Nielsen or IRI. Analysts at this level will demonstrate the ability to identify the market or customer-level data measures required when confronted with a

specific task. Proficiency in performing basic market or customer level data pulls must be acquired in order to help address business specific issues. Analysts at this level will develop a comprehensive understanding of the basic market-level analysis capabilities.

At the completion of this learning program, participants will be able to:

- Explain the basic syndicated scanner data methodologies for gathering raw data and preparing it for general syndicated use
- Describe the basic fundamentals of syndicated scanner data (i.e. drivers of sales volume, difference between base and incremental volume, etc.)
- Identify the appropriate market or customer-level data measures to utilize when confronted with a specific task
- Chart the seasonality of a given product's, segment's or category's sales
- Access and utilize the full basic capabilities in syndicated scanner analytic tools (i.e. Nielsen, IRI)
- Pull basic market or customer level data to assess business-specific issues

I. Syndicated Panel Data (basic) – CPCA Required

Learning programs at this level will impart analysts with the ability to use consumer household panel data to evaluate how shoppers purchase and use products of key brands and categories. Completion of this learning program will provide analysts with the insights necessary to better work with deal with consumer and shopper behavior data.

At the completion of this learning program, participants will be able to:

- Explain the basic syndicated panel data methodologies for gathering raw data and preparing it for general syndicated use
- Describe when it is appropriate to use panel vs. scanner data
- Develop consumer demographic profiles for the category, segments and key brands, as well as for specific retailers
- Quantify the components of sales volume (i.e. consumer buying rate, frequency, purchase cycle and purchase size)
- Identify shopper penetration and loyalty across retailers and channels
- Assess the importance of heavy vs. light buyers
- Identify market basket value when a given item is in the basket

J. Retailer POS Data Analysis (basic) – CPCA Required

Learning programs at this level will impart analysts with the ability to access and use store level data to assist in category performance evaluation and in-store execution. Additionally, analysts will learn to use store clusters to determine category performance (control/test stores). Finally, this learning program will teach analysts how to integrate store POS data with syndicated and other data for analysis.

At the completion of this learning program, participants will be able to:

- Access and prepare for use general POS data
- Use store clustering analysis
- Measure before and after results for in-store testing
- Integrate retailer POS data with scanner and other data

K. Space Planning Software (basic) – CPCA Recommended

Learning programs at this level will impart the basic skills of using space planning software including; opening and loading program files, changing files and accessing software features. Analysts at this level will be able to demonstrate the ability to build projects from scratch, opening and editing projects to include moving existing products from shelf to shelf. Proficiency at this level requires an excellent understanding of space planning software. This includes changing certain values at different levels and understanding how these changes will affect results.

At the completion of this learning program, participants will be able to:

- Create a new project from scratch
- Load previously created files
- Add, remove and move products from shelf to shelf
- Demonstrate an ability to maintain an aesthetic layout (i.e. clean lines, blocking)
- Explain relationships across levels (i.e. how data changes relate across le

L. Relational Databases (basic) – CPCA Recommended

Learning programs at this level will impart a variety skill relating to relational database software, such as Microsoft Access functionality including: understanding access operators and expressions, creating multi-table and crosstab queries, creating and updating relational database tables with action queries, designing custom multi-table forms and preparing advanced reports.

At the completion of this learning program, participants will be able to:

- Work with relational databases and tables
- Enter, edit, and validate access table data
- Sort, find, and filter data
- Link, import, and export tables
- Design queries for relational databases, and create and use database form

6. Certified Professional Category Managers (CPCM)

In order for a training program to be certified, the following skill sets for each learning program must be taught and assessed. Individuals must demonstrate at a minimum the following skill proficiencies for each required learning program in order to be certified at this level.

A. Assortment Analysis (advanced) – CPCM Required

Learning programs at this level will impart advanced skills of assortment analytics. Mangers at this level will demonstrate the ability to integrate different data and software resources in order to create the appropriate assortment recommendations. This includes connectivity with space planning software solutions in order to create multiple "what if" scenarios.

At the completion of this learning program, participants will be able to:

- Understand the importance of clustering in assortment strategy
- Explain the importance and implications of incremental contribution versus cannibalization
- Integrate key consumer data to assess item level importance
- Explain the concepts of activity based costing and its implications on assortment
- Integrate assortment output with space management software to assess shelf implications (i.e. facings, days of supply, pack out, productivity, etc.)
- Rationalize additional space for growing segments
- Be aware of new assortment data and technologies (IRI/JDA) and the implications of improved granularity of data on assortment strategy.
- Demonstrate how Increased competition is stressing new concepts of total store optimization and space requirements
- Translate the role omnichannel will play in the future to assortment strategy, in store and on line
- Demonstrate proficiency in working with Category Decision Trees Identify comprehensive category management strategies and objectives

B. Spreadsheet Development (advanced) – CPCM Required

Learning programs at this level will impart the advanced skills of developing pivot tables, streamlining workflow, collaborating on worksheets, auditing worksheets, restricting worksheet access, tracing cell precedents, importing data and linking multiple worksheets.

At the completion of this learning program, participants will be able to:

- Calculate data with advanced formulas
- Analyze data using pivot tables and pivot charts
- Insert graphic objects
- Customize and enhance workbooks and the spreadsheet environment
- Streamline workflow
- Collaborate with others
- Audit worksheets
- Import and export data
- Be aware of new business intelligence systems and how they allow for more productive use data (i.e.Tableau/ Alteryx) and the accuracy and efficiencies they bring to a category management team

C. Presentation Development (advanced) – CPCM Required

Learning programs at this level will impart proficiency of advanced functions of presentation development software such as Microsoft PowerPoint to include the use of: custom themes, graphics, media clips and animations. At this level managers, should be proficient at animation, multimedia and integrating with other Office Tools.

At the completion of this learning program, participants will be able to:

- Understand how new presentation technologies and their impact on productivity
- Work with all graphics and multimedia content
- Tell stories more effectively using animation and new technologies (i.e. Brainshark)
- Integrate the presentation with other programs such as Microsoft Office

D. Syndicated Scanner Data (advanced) – CPCM Required

Learning programs at this level will impart advanced skills of utilizing syndicated scanner data software such as Nielsen or IRI. Mangers at this level will demonstrate the ability to apply advanced techniques with the data software, such as filtering, scripting and aggregation. Additionally, managers at this level will be able to identify the appropriate store-level data and combining different data sets to perform in-depth analyses.

At the completion of this learning program, participants will be able to:

- Utilize advance filtering, scripting and aggregation capabilities of the software
- Create reports that can be updated regularly
- Dynamically link data pulls to spreadsheet tables or graphs
- Create relationships between data pulls (i.e. link ranges, selections, etc.)
- Pull cluster or store-level data and combining different data sets to perform in-depth analyses to address business-specific issues

- Understand how new data streams and new forms of Business Intelligence to create insight and create better business insights

E. Syndicated Panel Data (advanced) – CPCM Required

Learning programs at this level will impart managers with advanced household panel data skills that increase their proficiency to leverage this consumer and shopper data in ways that identify current behavior and growth opportunities. This level will be fluent in key concepts such as conversion, leakage and share of wallet.

At the completion of this learning program, participants will be able to:

- Describe the different syndicated panel sources and how the available data from each can be applied (i.e. difference between data available in Nielsen's Consumer Facts vs. Nielsen's Cross Outlet Facts)
- Identify buyer conversion for a given retailer and benchmark against other retailers or categories
- Explain share of wallet and where category dollars are leaking to
- Analyze the importance and profiles of heavy, medium and light buyers
- Create reports that can be updated regularly to provide trended consumer and shopper behavior
- Identify opportunities to change consumer and/or shopper behavior based on current profiles and trends
- Understand how new shopper insights to create superior category management plans

F. Retailer POS Data Analysis (advanced) – CPCM Required

Learning programs at this level will impart managers with the ability to use retailer POS data in conjunction with syndicated store level data to evaluate category performance and in-store execution. Additionally, managers will learn how to create store clusters and measure before/after performance (i.e. control/test stores).

At the completion of this learning program, participants will be able to:

- Explain the basic scanner data methodologies for gathering store level raw data and preparing it for integration with general syndicated data
- Create store clusters
- Track performance by store or cluster
- Use before and after store testing results to make recommendations
- Integrate retailer POS data with scanner and other data to make recommendations
- Understand how new data streams and technology to create shopper insights

G. Space Planning Software (advanced) – CPCM Recommended

Learning programs at this level will impart the advanced skills of using space planning software including: manipulating, editing, and creating products, fixtures, and objects. Managers at this level will demonstrate the ability to import and export data for reporting purposes as well as the ability to utilize pre-built tables and charts in order to provide periodical reports. Learning programs at this level will also impart advanced skills including; manipulating, editing, and creating static and dynamic reports in the space planning software. Managers at this level will demonstrate proficiency in integrating database systems or third party services with the space management software in order to enable broad-based reporting and editing. In addition, they will be able to automatically update product and fixture libraries including images and 3-D objects.

At the completion of this learning program, participants will be able to:

- Manipulate, edit and create products, fixtures, and objects
- Import and export data for reporting purposes
- Utilize pre-built tables and charts to provide periodical reports
- Manipulate, edit, and create static & dynamic reports in the space planning software
- Integrate database systems and/or other software with the space planning system to enable broad-based reporting and editing
- Integrate different database systems or third-party services to automatically update product and fixture libraries, as well as images and 3-D objects
- Leverage software automation (i.e. scripts to automate the generation of multiple POG variations)
- Understand how new technologies (i.e. JDA) to create superior planograms

H. Relational Databases (advanced) – CPCM Required

Learning programs at this level will impart advanced skills of working with relational database functionality including: adding graphs, pivot charts, and pivot tables, moving from relational database queries to Transact-SQL, managing a database, designing database protection and automating relational database applications with macros.

At the completion of this learning program, participants will be able to:

- Add graphs, pivot charts, and pivot tables
- Move from relational database queries to Transact-SQL
- Manage a database
- Establish database protection
- Automate relational database applications with macros
- Understand new technologies in the space

I. Presenting Effectively – CPCM Recommended

Learning programs at this level will impart effective presentation skills that enable category managers to be comfortable in front of an audience and capable of delivering compelling presentations that are fact-based, insightful and solution-oriented.

At the completion of this learning program, participants will be able to:

- Present confidently with authority
- Present effectively (i.e. demeanor, pace, tone)
- Create concise, compelling presentations that have a logical build
- Quantify the business issues and identify practical solutions
- Create presentations that are aesthetically pleasing to the eye

J. Ethical Expectations and Legal Implications – CPCM Recommended

Learning programs at this level will impart important knowledge and awareness of ethical expectations of category management professionals. Additionally, these learning programs must educate managers on the legal implications of category management work and recommendations.

At the completion of this learning program, participants will be able to:

- Articulate the ethical expectations of category managers, such as:
  – Integrity, objectivity, trust
  – Restrictions in sharing data
- Describe legal implications of category management work, such as:
  – Antitrust law
  – The Sherman Act
  – Pricing
- Avoid illegal situations

K. Space Management – CPCM Required

Learning programs at this level will impart managers with the ability to strategically manage shelf space and provide effective recommendations to optimize space productivity. Managers at this level will understand the key metrics used to measure shelf productivity as well as inventory hurdles that are often required.

At the completion of this learning program, participants will be able to:

- Understand key space management metrics and drivers
- Assess planogram performance and profitability
- Recommend assortment and product placement changes for the planogram
- Improve shelf productivity as it relates to inventory and space allocation
- Identify appropriate product adjacencies based on shopper needs
- Develop space management strategy that aligns with the retailer's objectives
- Understand how new technologies (JDA) to create better shopper experience at the shelf
- Understand how to integrate Category Decision Trees into Space Managment

L. Store Level Data – CPCM **Required**

Learning programs at this level will impart managers with the ability to use store level data to evaluate category performance and in-store execution. Additionally, managers will learn how to create store clusters and measure before/after performance (i.e. control/test stores).

At the completion of this learning program, participants will be able to:

- Explain the basic scanner data methodologies for gathering store level raw data and preparing it for general syndicated use
- Create store clusters
- Track performance by store or cluster
- Measure before and after results for in-store testing
- Understand how new segmentation data to create a better in store experience

M. Syndicated Geodemographic/Behavioral Data – CPCM **Required**

Learning programs at this level will impart key skills to effectively use geo-demographic/behavioral data (i.e. Spectra). This includes demographic profiles by products and retailers as well as identifying product demand by store and zip code. Additionally, managers at this level will be able to identify associated leisure activities for these targets.

At the completion of this learning program, participants will be able to:

- Explain the basic syndicated data methodologies for gathering raw data and preparing it for general syndicated use (i.e. Spectra)
- Create demand ranking reports
- Compare demand indices across products and retailers
- Identify best product fit (i.e. high vs. low demand stores)
- Compare demographic profiles
- Identify leisure activities and preferences
- Understand how new segmentation technologies such as store clustering to create plans to improve customer demand

N. Opportunity Identification for Actionable Insights – CPCM **Required**

Learning programs at this level will teach managers the overall process and key skills for identifying and quantifying a business situation. Importantly, this learning program serves as a critical foundation for category management professionals as it is a cornerstone for solving business issues with fact-based recommendations.

At the completion of this learning program, participants will be able to:

- Identify the business issue or question
- Assemble relevant facts and information
- Interpret and draw conclusions
  - What do you know?
  - Why did it happen?
  - What do you think?

- Identify opportunities
- Make recommendation(s)
- Evaluate results and impact
  – What did you learn post implementation?
- Understand how to use new data resources to create insights for consumer action

O. Root Cause Analytics – CPCM Required

Learning programs at this level will impart category managers with key analytical skills to uncover the key drivers of sales growth or decline, as well as identifying fair share performance and category opportunities.

At the completion of this learning program, participants will be able to:

- Analyze category, segment and/or brand trends to uncover key sales drivers
- Demonstrate fluency with data mining tactics
- Articulate the various drivers of base and incremental sales
  – Base: distribution, price, shelving, and marketing drivers
  – Incremental: promotion quantity, quality and price
- Conduct various types of fair share analysis
- Identify category, segment and/or brand opportunities using analytic roadmap
- Be aware of how new business intelligence systems (Alteryx, Tableau) are used to create shopper insight

P. Comprehensive Category Reviews – CPCM Required

Learning programs at this level will impart managers with the ability to develop comprehensive category reviews that utilize scanner data and household panel to identify and prioritize retailer opportunities

At the completion of this learning program, participants will be able to:

- Apply the Category Management process when performing analysis (for example, if you do not know the role of the category you cannot make effective assortment decisions)
- Ask clarifying questions to fill in gaps in the Category Management process (for example, do you know the definition of the category and the tactics being employed?)
- Identify and interpret appropriate scanner or panel data measures to address business-specific issues
- Develop comprehensive category reviews that cover all of the relevant process steps and identify the business situation and business opportunities
- Demonstrate the importance of category scorecards and the typical metrics that can be used to measure progress against category goals.

Q. Understanding Category Shopper Behavior – CPCM Required

Learning programs at this level will impart managers with the ability to use consumer data such as household panel data to understand consumer and shopper behavior within the category and thereby identify opportunities to improve category performance. This learning will allow managers to provide with the ability to:

At the completion of this learning program, participants will be able to:

- Articulate the various sources that provide shopper behavior insights
- Assist retailer with better understanding of their primary shopper groups
- Identify gaps, and trends between different shopper types
- Facilitate the development of potential promotions and cross merchandising opportunities
- Communicate the market basket dynamics and overall brand importance
- Identify new and void items that fit best with their consumer strategy
- Determine the impact of brand switching by consumers
- Differentiate the importance of new and lost buyers to the category
- Understand how frequent shopper club data is used to create shopper insight and indicate shopper planning

R. Leveraging Data for Basic Business Solutions – CPCM Required

Learning programs at this level will impart managers with the ability to utilize scanner data, household panel, Spectra, and other research (i.e. shopper decision factors) to develop basic in-store retail solutions (i.e. distribution, shelving, merchandising, pricing, etc.)

At the completion of this learning program, participants will be able to:

- Differentiate usage between aggregated and disaggregated data
- Develop provocative hypotheses that address retailer's most important issues
    – Analyze current assortment and develop recommendations
    – Assess marketplace price conditions
    – Develop recommendations that maximize category promotions
    – Optimize return on category promotion effectiveness
    – Develop rationale for shelving standards
- Create compelling, shopper-focused presentations though the use of new technologies (i.e. Tableau)

S. Category Management Economics and Supply Chain (basic) – CPCM Required

Learning programs at this level will impart the basic skills of understanding the key economic drivers for category and supply chain management and how they affect decisions made between manufacturers and retailers .

At the completion of this learning program, managers will be able to:

- Describe financial analytics that are used to maximize profitability, in particular when forecasts are being made on a store specific basis
- Identify analytical approaches where there is a lack of data resources
- Recognize supply chain focused economic drivers for category management to eliminate the following problems:
  - Out of stocks/virtual out of stock situaions
  - On shelf positions
- Describe supply chain management strategies that impact key retail decisions

T. Customer Relationship Management (basic) – CPCM Recommended

Learning programs at this level will impart the basic skills of working with CRM systems including system navigation. In this learning program, students must demonstrate the ability to manage: contacts, leads, accounts, pipeline and dashboards. At this level analysts will be capable of managing posting documents, managing tasks and calendars and communicating through the CRM contact system.

At the completion of this learning program, participants will be able to:

- Set up and navigate the application
- Create and manage leads, accounts, and contacts
- Manage sales pipelines with opportunities
- Manage your calendar and client communications with activities
- Leverage critical data and visualize results with reports and dashboards

7. Certified Professional Strategic Advisors (CPSA)

In order for a training program to be certified, the following skill sets for each learning program must be taught and assessed. Individuals must demonstrate at a minimum the following skill proficiencies for each required learning program in order to be certified at this level.

A. Retailer Economics and Supply Chain (advanced) – CPSA Required

Learning programs at this level will impart knowledge of supplier strategies that optimize retail profits and how a retailer generates profits. Additionally, this level provides an understanding of inventory management strategies from both the supplier and retailer perspectives.

At the completion of this learning program, participants will be able to:

- Describe what supplier strategies are used to optimize retail profits
- Identify the various retail strategies employed to optimize profits
- Explain inventory management strategies from both the supplier and retailer perspectives

B. Customer Relationship Management (advanced) – CPSA Recommended

Learning programs at this level will impart the following advanced CRM proficiencies: planning and budgeting, campaign management and analysis, managing accounts contacts and pipeline as well as use and development of dashboards and reports. At this level strategic advisors will be capable of posting documents, managing tasks, updating contact information, calendars and creating revisions to pipeline forecasts.

At the completion of this learning program, participants will be able to:

- Explain the CRM user interface and application terminology
- Apply advanced navigation and record maintenance
- Leverage Outlook functionality and synchronization
- Plan and budget tasks related to marketing campaigns
- Create and manage customer lists
- Create marketing campaigns
- Manage campaigns, track campaign responses
- Utilize account, contact, and activity record management
- Leverage service scheduling functionality

C. Organizational Design, Joint Business Planning & Value Creation – CPSA Required

Learning programs at this level will impart skills that help managers understand the key benefits of collaboration and the need to have both retail and manufacturers "aligned" on the objectives, strategies, measurement products and organization of categories and subcategories before meaningful category management planning can occur, Additionally, managers will learn skill sets that help them negotiate for win-win solutions as well as develop a plan that supports achieving the stated goals.

At the completion of this learning program, strategic advisors will be able to:

- Communicate effectively with business partners
- Ascertain the intentions and motivation for collaboration with partners
- Explain the importance and benefits of collaboration
- Demonstrate proficiency in working with Category Decision Trees
- Esatblish the criteria for selecting appropriate partners and levels of involvement for partners
- Identify comprehensive category management strategies and objectives
- Determine synergy between retailer and manufacturers strategies and objectives
- Understand how to motivate all members of the partnership
- Build a business plan to achieve agreed upon goals

D. Collaborative Partnerships– CPSA Required

Learning programs at this level will impart advisors with key skills that enable effective collaboration between partners. Importantly, these learning programs will teach advisors how partnerships provide a structure to organize, plan and implement mutually beneficial ideas.

At the completion of this learning program, participants will be able to:

- Describe how retailers and manufacturers collaborate most effectively
- Develop collaborative recommendations that deliver win-win outcomes for all
- Articulate key methods of influencing others
- Build productive relationships (i.e. trust among collaborators)
- Effectively influence others
- Effectively handle concerns, questions and objections
- Mobilize people and resources to execute strategy and tactics

E. Assessment for Category Management Success – CPSA Required

Learning programs at this level will impart advisors with the ability to explain what happened but also why. Strategic advisors must be familiar with technology, data and the analytics to with great certainty to conclude what happened and today how to drive consumer action to produce superior results in Cat Man 2.0 we refer to these as assessments "what and why". These analyses lead to effective shopper marketing strategies and successful activity.

At the completion of this learning program participants will be able to:

- Demonstrate effective knowledge of the root cause analytics
- Help CPCA's understand what happened
- Help CPCM's understand why it happened
- Understand today's more sophisticated data sets and analytics
- Understand and utilize shopper causal data
- Understand more sophisticated shopper segmentation schemes
- Develop shopper marketing actions to optimize category performance

F. Consultative Category Management Communication – CPSA Required

Learning programs at this level will impart advisors with key skills that help them become more consultative category professionals. While category managers do not sell products, they do communicate ideas. Learning programs at this level will enable strategic advisors to become more effective in communicating solutions to solve category management problems.

At the completion of this learning program, participants will be able to:

- Demonstrate effective techniques to probe for understanding
- Employ good listening skills
- Gain trust (i.e. integrity, expertise and reliability)
- Solve their category management problems by developing practical recommendations

G. Understanding Shopper Behavior, Beyond the Category – CPSA Required

Learning programs at this level will impart managers with the ability to use consumer and shopper data such as household panel data and retailer loyalty data to understand their behavior beyond the category (i.e. channel trends, retailer preferences, relevant adjacencies and aisle implications). This learning will allow strategic advisors to provide true category management insights.

At the completion of this learning program, participants will be able to:

- Establish shopper marketing actions to optimize category performance
- Leverage both category shopper behavior understanding and aisle/store behavior to address business issues
- Develop differentiated solutions to conform to category management strategy
- Integrate advanced shopper behavior research and data into business solutions
    – Shopping trip patterns (i.e. category and merchandising placement)
    – Consumer need states (category shelf organization, adjacencies)
    – Trip missions and occasions (shopper mindset)
    – Aisle and/or store insights (i.e. strategic shopper marketing)
- Leverage shopper data to build consumer and customer loyalty
- Identify cross-category solutions (meal solutions, seasonal needs)

H. Retailer Shopper Segmentation– CPSA Required

Learning programs at this level will impart skills that allow category management professionals to understand and leverage shopper data in ways that deliver better solutions to those targeted shopper segments that are most likely to drive the business. These learning programs must help category managers understand ways to connect internal brand or consumer segmentation with a given retailer's shopper segmentation.

At the completion of this learning program, participants will be able to:

- Explain the importance and benefits of shopper segmentation
- Develop in-store tactics that maximize shopper activation
    – Frequency, trips, conversion, transactions
- Integrate brand/consumer segmentation with retailer shopper segmentation

I. Leveraging Data for Advanced Shelving Solutions – CPSA Required

Learning programs at this level will impart best practices for designing practical shelving recommendations that simplify the shopping experience and optimize category sales and shelf productivity. Managers will also learn advanced programming skills that leverage space management automation and efficiencies.

At the completion of this learning program, participants will be able to:

- Activate best practice methodology and principles
- Create sophisticated planograms (i.e. store level)
- Optimize inventory productivity
- Create detailed reporting

J. Leveraging Data for Advanced Assortment Solutions – CPSA Required

Learning programs at this level will impart managers with the skill sets to critically assess assortment efficiencies and provide recommendations that maximize category performance. Strategic Advisors at this level will understand advanced concepts such as cannibalization, source of volume and incremental item contribution.

At the completion of this learning program, participants will be able to:

- Activate best practice methodology and principles
- Generate incremental item contribution by understanding cannibalization and source of volume
- Develop recommendations that optimize assortment based on retailer's goals
- Provide insights that maximize shopper conversion

K. Advanced Pricing Analysis – CPSA Recommended

Learning programs at this level will impart advisors with key understanding of the various techniques used in the industry to model pricing scenarios and shopper behavior. Personnel at this level will also understand price elasticity methodologies as well as predictive technologies used today in the area of pricing.

At the completion of this learning program, participants will be able to:

- Articulate the various techniques and benefits of price modeling
- Describe the major predictive technologies used today for pricing
- Demonstrate fluency with price elasticity methodologies

L. Advanced Promotion Analysis – CPSA Recommended

Learning programs at this level will impart advisors with key understanding of the various techniques used in the industry to model promotion scenarios and shopper behavior. Personnel at the Strategic advisor level will also understand best practices for shopper marketing events.

At the completion of this learning program, participants will be able to:

- Articulate the various techniques and benefits of promotion modeling
- Describe the major predictive technologies used today for promotion effectiveness
- Demonstrate fluency with shopper marketing best practices