

# Competency Framework for Category Management



		Optimising Range, Availability and Promotions	The Shopper/Eater based Decisions	Data into Insight
Score	General Meaning	Range, Availability & Promotions are directed, managed and working in partnership with the retailer for the benefit of the category.	The Shopper and Eater (consumer) are at the heart of the decisions made by people within the business and their business partners.	Data is analysed efficiently and effectively to identify valuable opportunities that will benefit the 3 legged stool; Shopper/Eater, Retailer and Supplier.
0	Nothing planned	Range, Availability and Promotions are managed day-to-day with no strategic plan, partnership, shopper/eater consideration and with no understanding of the return on investment.	The shopper/eater are not understood and there are no plans to understand how they shop or eat the products.	Some internal sales/waste data is analysed and the analysis occasionally used.
1	Early stages, not yet properly implemented	At least one of the Range, Availability and Promotion's dimensions has a 12 month plan, a measure & a target and is regularly reviewed.	Some shopper/eater knowledge exists and plans are in place to understand the shopper/eater much better, though yet to be implemented.	Internal data is analysed and regularly used to identify opportunities. External data has been considered and there are plans to purchase.
2	Up and running	Two of the Range, Availability and Promotion's dimensions has a 12 month plan, a measure & a target, and is regularly reviewed.	The business can demonstrate an understanding of the shopper/eater and that some of the knowledge has been used to make better category decisions.	Internal data is analysed, opportunities identified with some examples of positive results. External data is purchased, partly validated, limited analysis carried-out, with no clear examples of changes made using the data.
3	High degree of implementation	Range, Availability and Promotions each have measures & targets, and planned reviews. Evidence exists that demonstrates working together to deliver the three legged stool; Shopper/eater, Retailer and supplier.	An in-depth understanding of the shopper/eater can be demonstrated and clear examples of using that knowledge to make changes to the category with positive results.	Internal data is analysed on a planned schedule, opportunities identified, recommendations accepted and implemented - Examples exist to demonstrate wins. External data is purchased, validated against several sources, analysed ad-hoc, opportunities identified, recommendations accepted and implemented - Some wins can be demonstrated.
4	Full strategic support	Range, Availability and Promotions each have measures and targets, planned reviews and a 12 month plan. The return on investment is targeted, analysed and learned from. Partners work together to improve the performance of the 3 dimensions putting the shopper/eater at the heart of all decisions.	The Shopper/Eater fixture decisions, segmentation and reasons for buying are thoroughly understood throughout the business, and research is planned, evolving & continuous. Key decisions are made in the business and with business partners knowing the affect on the shopper/eater.	Internal and external data are analysed on a planned schedule, opportunities identified, recommendations accepted and implemented. The business can demonstrate regular examples of wins from using data. The relationship with both the retailer and the data supplier can be described as collaboratively working together to identify new insight solutions.

**[Identify More Category Opportunities, Land More Category Opportunities, And Grow Your Category – See the Category Management Course Outline by clicking here.](#)**

# Competency Framework for Category Management Availability

Level	General Meaning	Category Management Availability is about the ability to optimise availability, whilst minimising waste by understanding availability from the Shopper, Supermarket, and Supplier's perspective – The 3 legged stool metaphor. The 7 essential qualities of Availability are; A. Accurate forecasting, B. Understanding shopper substitution, C. Optimal Merchandising fit, D. Analysing on-shelf data, E. Optimising promotions, F. Optimal waste/sales/availability, G. Reducing waste.
4	Fully delivering	<p><b>7 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 7 of the essential qualities of Availability are being demonstrated regularly. For example, the Learner has (F) Optimise waste/sales/availability use the flag system, and (G) delivering significant waste reductions through effective project management.</p>
3	High level of delivery	<p><b>5 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 5 of the essential qualities of Availability are being demonstrated regularly. For example, the Learner has (D) Analysing on-shelf data to identify insights, and (E) Improved availability on promotions with targets &amp; reviews.</p>
2	Some delivery	<p><b>3 of the essential qualities being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 3 of the essential qualities of Availability are happening regularly. For example, the Learner has (B) an thorough understanding of shopper substitution &amp; has applied that to Availability, and (C) understood how the products will fit on-shelf to maximise availability,</p>
1	Early stages of delivering	<p><b>Some essential qualities being demonstrated irregularly</b></p> <p>The Learner is able to demonstrate that some of the essential qualities of Availability are happening, but irregularly. For example the Learner is (A) Improving forecasting accuracy but is not targeted, or reviewed.</p>
0	Not delivering	<p><b>Service Levels Focussed on and achieved</b></p> <p>No essential qualities of Availability being demonstrated; A. Accurate forecasting, B. Understanding shopper substitution, C. Optimal Merchandising fit, D. Analysing on-shelf data, E. Optimising promotions, F. Optimal waste/sales/availability, G. Reducing waste.</p>

# Competency Framework for Category Management

## Category Insight

Level	General Meaning	Category Management Category Insight is about having an understanding of the category and leveraging that understanding to increase sales. The 7 essential qualities of Category Insight are; A. Appropriate data sources, B. Analysis to Insights, C. Opportunities regularly identified, D. Opportunities landed target, E. Learning from new sources, F. Wider business informed, and G. demonstrating category leadership.
4	Fully delivering	<p><b>7 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 7 of the essential qualities of Category Insight are being demonstrated regularly. For example, the Learner has (F) helped the wider business to understand the category, and (G) shown category leadership, from a category vision, to buy-in across-the-board to the category's direction.</p>
3	High level of delivery	<p><b>5 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 5 of the essential qualities of Category Insight are being demonstrated regularly. For example, the Learner has (D) a target for the percentage of opportunities landed, and (E) is learning from new sources, e.g. other categories.</p>
2	Some delivery	<p><b>3 of the essential qualities being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 3 of the essential qualities of Category Insight are happening regularly. For example, the Learner has (B) Analysing data to identify useable insights, and (C) Identifying opportunities in the category.</p>
1	Early stages of delivering	<p><b>Some essential qualities being demonstrated irregularly</b></p> <p>The Learner is able to demonstrate that some of the essential qualities of Category Insight are happening, but irregularly. For example the Learner is (A) Using appropriate data sources to gain understanding of the category.</p>
0	Not delivering	<p><b>Very limited understanding of the category</b></p> <p>No essential qualities of Category Insight are being demonstrated; A. Appropriate data sources, B. Analysis to Insights, C. Opportunities regularly identified, D. Opportunities landed target, E. Learning from new sources, F. Wider business informed, and G. demonstrating category leadership.</p>

# Competency Framework for Category Management Innovation

Level	General Meaning	
		Category Management Innovation is about identifying, managing, and delivering value adding innovation to the category for the Shopper, the Supermarket, and the Supplier. The 7 essential qualities of Innovation are; A. Accessing Shopper Innovation, B. Innovation Pipeline, C. Managing innovative ideas, D. A clear innovation process, E. Achieving landing target, F. Achieving Sales target, G. Winning awards.
4	Fully delivering	<p><b>7 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 7 of the essential qualities of Innovation are being demonstrated regularly. For example, the Learner has (F) a sales target that innovation must achieve, and (G) a number of type of awards to be won each year.</p>
3	High level of delivery	<p><b>5 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 5 of the essential qualities of Innovation are being demonstrated regularly. For example, the Learner has (D) a process for taking innovation from seed to store, and (E) a landing target for innovation that is reviewed regularly.</p>
2	Some delivery	<p><b>3 of the essential qualities being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 3 of the essential qualities of Innovation are happening regularly. For example, the Learner has (B) a pipeline of innovation that is continuous, and (C) a way of managing ideas that is structured. .</p>
1	Early stages of delivering	<p><b>Some essential qualities being demonstrated irregularly</b></p> <p>The Learner is able to demonstrate that some of the essential qualities of Innovation are happening, but irregularly. For example the Learner is (A) Having access to shoppers that share their problems to solve.</p>
0	Not delivering	<p><b>Little, or no innovation</b></p> <p>No essential qualities of Innovation are being demonstrated. The 7 essential qualities of Innovation are; A. Accessing Shopper Innovation, B. Having a Pipeline of Innovation, C. Managing innovative ideas, D. A clear innovation process, E. Achieving landing target, F. Achieving Sales target, G. Winning awards.</p>

# Competency Framework for Category Management Promotions

Level	General Meaning	Category Management Promotions is about understanding the ROI from promotions and working to improving that ROI. The 7 essential qualities of Promotions are; A. 3 legged stool design, B. Analysis to Insights, C. 12 month plan, D. New ideas tried, E. Measures & targets agreed, F. Year-on-year improvements, and G. ROI understanding.
4	Fully delivering	<p><b>7 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 7 of the essential qualities of Promotions are being demonstrated regularly. For example, the Learner has (F) delivered year-on-year improvements in ROI, and (G) a thorough understanding of the Return on Investment and has a plan to improve the ROI.</p>
3	High level of delivery	<p><b>5 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 5 of the essential qualities of Promotions are being demonstrated regularly. For example, the Learner has (D) tried and is trying new ideas to improve ROI, and (E) measures &amp; targets in place.</p>
2	Some delivery	<p><b>3 of the essential qualities being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 3 of the essential qualities of Promotions are happening regularly. For example, the Learner has (B) taken the analysis to actionable insights, and (C) a plan of 12 months ahead at all times.</p>
1	Early stages of delivering	<p><b>Some essential qualities being demonstrated irregularly</b></p> <p>The Learner is able to demonstrate that some of the essential qualities of Promotions are happening, but irregularly. For example the Learner is (A) designing the promotional plan with the Shopper, Supermarket, and Supplier in mind.</p>
0	Not delivering	<p><b>Same promotions done each year</b></p> <p>No essential qualities of Promotions are being demonstrated; The 7 essential qualities of Promotions are; A. 3 legged stool design, B. Analysis to Insights, C. 12 month plan, D. New ideas tried, E. Measures &amp; targets agreed, F. Year-on-year improvements, and G. ROI understanding.</p>

# Competency Framework for Category Management Range

Level	General Meaning	Category Management Range is about delivering a range in-store that is easily shopped by the Shopper, maximises shopper choice, and is constantly improving against agreed measures. The 7 essential qualities of Range are; A. Appropriate gaps filled, B. Shopper map aligned, C. Shopper segmentation & flow aligned, D. In-store operations understood, E. New products targeted & measured, F. Shopper communication achieved, and G. Range Reviews evaluated vs agreed targets.
4	Fully delivering	<p><b>7 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 7 of the essential qualities of Range are being demonstrated regularly. For example, the Learner has (F) understood how successful shopper communication will be measured &amp; delivered, and (G) targets &amp; measures in place for each range review.</p>
3	High level of delivery	<p><b>5 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 5 of the essential qualities of Range are being demonstrated regularly. For example, the Learner has (D) understood how the range is implemented and filled in-store, and (E) agreed measures and targets for new products.</p>
2	Some delivery	<p><b>3 of the essential qualities being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 3 of the essential qualities of Range are happening regularly. For example, the Learner has (B) aligned the range with the shopper map (purchase decision hierarchy), and (C) aligned the range with shopper segmentation and desired flow.</p>
1	Early stages of delivering	<p><b>Some essential qualities being demonstrated irregularly</b></p> <p>The Learner is able to demonstrate that some of the essential qualities of Range are happening, but irregularly. For example the Learner is (A) filling the gaps that add to shopper choice, add profit and category value.</p>
0	Not delivering	<p><b>Range changes led by the retailer</b></p> <p>No essential qualities of Range are being demonstrated; A. Appropriate gaps filled, B. Shopper map aligned, C. Shopper segmentation &amp; flow aligned, D. In-store operations understood, E. New products targeted &amp; measured, F. Shopper communication achieved, and G. Range Reviews evaluated vs agreed targets.</p>

# Competency Framework for Category Management Shopper

Level	General Meaning	Category Management Shopper is about understanding who they are, how they shop, why they shop, and how more sales can be delivered by leveraging these insights. The 7 essential qualities of Shopper are; A. Shopper profiles living in the business, B. Shopper, Preparer and Eater understood, C. Shopper barriers & motivations clear, D. Q & Q data turned into actionable insights, E. Insights driving business decisions, F. Wider business understanding of the shopper, and G. Supermarket shopper category profiles understood.
4	Fully delivering	<p><b>7 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 7 of the essential qualities of Shopper are being demonstrated regularly. For example, the Learner has (F) ensured that the wider business understands the shopper, and (G) understood the supermarket's shopper profiles &amp; how they relate to the category shopper profiles.</p>
3	High level of delivery	<p><b>5 of the essential qualities are being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 5 of the essential qualities of Shopper are being demonstrated regularly. For example, the Learner has (D) turned Q &amp; Q data into actionable insights, and (E) ensured that the shopper insights are driving business decisions.</p>
2	Some delivery	<p><b>3 of the essential qualities being demonstrated regularly</b></p> <p>The Learner is able to demonstrate that 3 of the essential qualities of Shopper are happening regularly. For example, the Learner has (B) understood &amp; used the understanding of the shopper, preparer, and eater to increase sales, and (C) understood what will encourage the shopper to increase their consumption.</p>
1	Early stages of delivering	<p><b>Some essential qualities being demonstrated irregularly</b></p> <p>The Learner is able to demonstrate that some of the essential qualities of Shopper are happening, but irregularly. For example the Learner is (A) bringing the shopper profiles to life across the business.</p>
0	Not delivering	<p><b>Shopper not understood</b></p> <p>No essential qualities of Shopper are being demonstrated; The 7 essential qualities of Shopper are; A. Shopper profiles living in the business, B. Shopper, Preparer and Eater understood, C. Shopper barriers &amp; motivations clear, D. Q &amp; Q data turned into actionable insights, E. Insights driving business decisions, F. Wider business understanding of the shopper, and G. Supermarket shopper category profiles understood.</p>