

Conducting a Category Management Team Assessment for a Consumer Products Company

A large consumer products company with a focus on confectionaries was seeking to optimize the workflows and efficiency of its Category Management team, including identifying opportunities to streamline manual work and create a greater focus on activities driving growth and strategic alliances with customers.

The Clarkston team assessed the current Category Management team and its processes through individual interviews with field team members, directors, and subject matter experts (SMEs), surveying more than 100 members of the team across all roles and levels of the organization, as well as reviewing industry best practices and research.

Through the discovery process, Clarkston identified key challenges and inefficiencies in both how the team manages work and collaborates as well as in the workflow processes. Solutions were developed to address these unique challenges with both short-term attainable outcomes and a longer-term roadmap to achieve their bigger aspirations. The Clarkston team identified solutions for time requirements, financial investment, and change impact, allowing the internal leadership team to prioritize the opportunities.

After reviewing the recommendations, the team aligned on three key pillars as critical to future success. The Clarkston team provided an in-depth roadmap and key considerations for moving forward on the three pillars and worked with the newly identified pillar owners to outline specific action plans and next steps toward the vision.

Consumer Products Case Study

PROJECT OVERVIEW



INDUSTRY:



Consumer Products

PRODUCTS AND SERVICES:



Confectionaries

PRIMARY OBJECTIVES:

- Discover the current landscape of the Category Management team at the organization and identify more efficient and optimized ways of working
- Uncover key strengths and challenges of the Category Management team
- Align on a unified vision for how the team should accomplish and prioritize work
- Identify opportunities to streamline work, create a more efficient environment, and standardized expectations across the Category Management team for both the short term and long term
- Develop recommended solutions to optimize current Category Management processes and pain points

RESOLUTION:

- Executed internal stakeholder interviews to uncover the strengths and challenges of the Category Management team
- Developed and deployed a survey for internal stakeholders to uncover the strengths and challenges of the Category Management team across channels and role levels
- Reported findings of those strengths and challenges to the larger group
- Identified more than 20 solutions for achieving the future vision
- Developed a roadmap of recommended solutions and worked with the internal team to prioritize recommendations
- Socialized executive summary to key stakeholders and future solution owners

KEY BENEFITS:

- Established six categories as areas for optimization, with the client committed to ongoing efforts for improvement
- Identified 28 solutions— including both quick wins and low-cost commitments to long-term wins with substantial financial requirements -- showing areas for optimization and automation
- Developed a two-year roadmap outlining key activities and timelines to move the organization along the three internally prioritized pillars

KPIs

- **More than 100 surveys completed and 30+ interviews carried out**
- **3 key pillars and owners were identified from 28 solutions**
- **Aligned vision for future work with 4 directors and leadership**

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