

Category Leadership Transformation: Developing a National Category Story and Dashboard

A leading global consumer products company with brands across most sections of the store was seeking to develop a national category story and dashboard that could be leveraged across a new proposed Center of Excellence (COE) as part of the overall Category Leadership transformation. In collaboration with Clarkston Consulting, a Pilot team was created with team members from both the client and Clarkston to do this important work.

With so many categories and no single source of truth for building cohesive, brand-agnostic presentations, there were disparate data, different templates, and varied language being used with external retail partners as well as internally. The goal of the Pilot project was to pull all of the key stakeholders together to build a brand-agnostic category story that focused on macro shopper and channel trends that could be used at scale for all of the categories in which this client competes.

Clarkston's work over the six-week window allowed the client to see the vision of the COE come to life with two categories developed and successfully built. The feedback from the organization was that this work provided true category management, with a brand-agnostic view of the categories and recommendations to help retailers increase household penetration and buy rate, while bringing to bear the brands that will help generate sales and excitement at shelf. This was all done with the existing strength of the client's team and data resources, which allowed the Clarkston team to set the framework for the client's long-term success.

Consumer Products Case Study

PROJECT OVERVIEW



INDUSTRY:



Consumer Products

PRODUCTS AND SERVICES:



Center Store, Fresh
and Frozen Products

PRIMARY OBJECTIVES:

- Create a national brand-agnostic category story for teams to use and customize for their specific retailers, including macro shopper insights, shopper consideration set insights, category insights, and retailer insights
- Create a dashboard that feeds the national category story for all categories and is the primary source of analyzing category performance with long-term goal of automation
- Facilitate knowledge transfer with category leadership team for customization and use with customers

RESOLUTION:

- Created a state-of-the-art National Category Story with high-level macro trends and national insights that tell a story of the category and what it means for retailers
- Set the stage for Category Field Teams to translate and deploy the National Story to their retailer-specific circumstances
- Facilitated the cross-department coordination of ideas, content, and presentation development over the six weeks of the project
- Developed and built a three-level dashboard using syndicated data that feeds different chapters and levels of granularity, including:
 - Level 1: High-level category overview to identify categories winning and losing at retail
 - Level 2: Overall food & beverage landscape view providing visibility by aisle, class of trade, category, adjacencies, and branded vs. competitor vs. private label
 - Level 3: Detailed category analysis allowing visibility into sub-category performance across classes of trade, retailers, and brands
- Built the dashboards to feed directly into the National Category Story and enable long-term scalability for the client in Power BI- and/or Tableau-type platforms

KEY BENEFITS:

- Holistic state-of-the art national category story
- Scalable national story across all categories
- Excel dashboard that feeds national story and can become the primary source of category performance analysis and be adopted by the client for their reporting platforms
- Unified design and language so that the organization has “one voice” to retailer partners
- A tool that can be used internally across senior leadership and different departments to drive innovation, marketing plans, category management, and sales strategy

KPIs

- National Category Storyboard creation leveraging existing resources
- Brand-agnostic insights to drive category growth
- Macro trends that encompass all categories
- Single dashboard creation for client team to use for all categories/brands

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