

Category Management Transformation Implementation & Center of Excellence Activation

INDUSTRY



Consumer Products

PRODUCTS AND SERVICES



Food and Beverage

BUSINESS TRANSFORMATION STORY & BUSINESS CHALLENGE

Following the completion of a strategic assessment and operating model design for their North America Category Management team, a global food and beverage leader continued their partnership with Clarkston to move from transformation planning into implementation. The first phase of work identified opportunities to elevate the function's strategic impact, streamline ways of working, improve resource allocation, and build stronger category management capabilities across customer teams. In the second phase, the organization needed to enable a new organizational structure and bring the transformed operating model to reality.

To do this, the organization leveraged their Global Business Services team to onboard and enable a new internal analyst group across both offshore and onshore teams. These analysts would be responsible for supporting category reporting, insight generation, national story development, and repeatable analytical processes to support assortment and planograms.

Another critical component of this second phase was standing up a Category Management Center of Excellence (CoE), designed to centralize national category stories, standardize reporting support, and provide scalable analytical capacity across priority categories and customers

PRIMARY OBJECTIVES

- Prepare new onshore and offshore analysts to support the transformed category management function
- Evolve an existing category-focused business development team into a Category Management CoE focused on national category stories, shelving best practices, and standardized reporting
- Build a structured training program that helped analysts develop the business knowledge, technical skills, and process understanding needed for their roles
- Create a license-to-operate framework that defined when analysts were ready to support the business independently
- Give leaders a practical way to measure readiness through knowledge checks, surveys, progress tracking, and feedback loops
- Establish a repeatable learning approach that could support future onboarding, continued skill development, and long-term capability building



SOLUTION

- Partnered with client leadership to translate the approved operating model into clear messaging on future role expectations, processes, and governance
- Refocused a team of 10 resources into a best-in-class Category Management CoE by identifying priority national category stories, selecting the right tools to support the work, building dashboards, and developing category stories alongside the client team to model the new way of working
- Supported the design and deployment of the global business services model for category management, helping define how offshore resources would collaborate with onshore category management teams and contribute to category and customer reporting and insights
- Developed a comprehensive training strategy for new analysts, including onboarding planning, training curriculum, and delivery approach
- Identified trainers and change champions to support adoption, provide peer guidance, reinforce new behaviors, and help sustain momentum across the transformed organization
- Created role-based training content to prepare analysts for core category management responsibilities, including reporting processes, analytical expectations, category review development, and planogram generation
- Built a continuous learning plan to reinforce knowledge after initial onboarding and provide a structure for ongoing skill development
- Developed a “License-To-Operate” framework to define the required knowledge, behaviors, and demonstrated skills for analysts to begin independently supporting category management activities
- Designed and administered knowledge assessments to evaluate analyst understanding of training content and determine where additional coaching or reinforcement was needed
- Supported leadership with reporting and insights on training completion, readiness, knowledge assessment results, and adoption risks to help guide license-to-operate decisions

KEY BENEFITS

- Onboarded 38 onshore and offshore analysts with structured training and clear role expectations
- Gave leaders a clear view of analyst readiness through knowledge checks, readiness surveys, progress reporting, and License-to-Operate framework
- Created a scalable training and learning approach that helped analysts build skills after onboarding and deliver consistent category reporting, analysis, and insights

KPIs

- Projected \$100M lift to NSV from enhanced retailer partnership stemming from the superior capabilities, upskilling, and process improvement
- Enabled ~\$1.2MM+ in annualized productivity gains by eliminating redundant research costs and underutilized tools through in-house shopper insights and omnichannel capabilities
- 48 training courses created and administered
- 38 new resources completed training and received a “License to Operate,” signally their readiness to support the category management function

“By partnering with Clarkston, we brought focus and clarity to a complex environment. By putting our team first and giving them a voice, we defined clear behaviors, mindsets, and equipped the team with the tools and training they needed. Building industry-leading capabilities in our India GCC made this a truly innovative transformation in the food and beverage sector.”

- Head of Category Management

ABOUT CLARKSTON CONSULTING

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For more information about how we can help your company, [please contact us](#).

