

# **Oracle® Retail Category Management**

User Guide for the RPAS Fusion Client

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Oracle Retail Category Management User Guide for the RPAS Fusion Client, Release 13.4

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# Preface

This guide describes the Oracle Retail Category Management user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

## Audience

This User Guide is for users and administrators of Oracle Retail Category Management. This includes merchandisers, buyers, business analysts, and administrative personnel.

## Documentation Accessibility

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For more information, see the following documents in the Oracle Retail Category Management Release 13.4 documentation set:

- *Oracle Retail Batch Script Architecture Implementation Guide*
- *Oracle Retail Category Management Implementation Guide*
- *Oracle Retail Category Management Installation Guide*
- *Oracle Retail Category Management Release Notes*
- Oracle Retail Predictive Application Server documentation set

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## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.4) or a later patch release (for example, 13.4.1). If you are installing the base release or additional patches, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

## Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

[http://www.oracle.com/technology/documentation/oracle\\_retail.html](http://www.oracle.com/technology/documentation/oracle_retail.html)

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

# Conventions

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.



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## Introduction

Effective merchandising is the cornerstone of a successful retail business because it determines the variety and presentation of merchandise, which defines the customer's in-store experience. It is one of the most important aspects of a retailer's brand image. In recent years, retailers have experienced increased difficulty in achieving desired levels of same store sales growth, gross margin, and inventory productivity. This is due, in part, to smaller buying staffs, shorter product life cycles, increasingly savvy and demanding customers, and cutthroat competition.

In light of these issues, retailers are looking to service their customers, drive profitable growth, and further differentiate themselves from the competition by tailoring their product offerings to the needs of their local customers. In the past, micro-merchandising or local market assortments were extremely complex, labor intensive, and yielded marginal results.

Category Management functionality addresses the crucial process of determining four primary merchandising dimensions:

- Categories of merchandise carried within a store
- Space allocated to each category of merchandise
- Assortment of items carried in each category
- Space allocated to each item in each category

The Category Planning task enables the retailer to perform higher level category planning activities within the Oracle Retail Category Management RPAS solution.

This solution supports the development of category business plans and follows the traditional eight-step Category Management business process to provide the following:

- Structured, measured set of activities designed to produce specified output, that is, the development and implementation of a written category business plan
- Emphasis on how work is done within and across retailer/distributor and supplier organizations
- Specific ordering of activities across time and place
- Blueprint for strategic and tactical action within a category
- Ability to analyze by consumer segments (sometimes called the ninth step in the Category Management business process)

Consumer insights are core to this application by utilizing external market and consumer data. Oracle Retail Category Management includes the ability to view retailer-specific data versus the competition and market as a whole.

Consumer segment and store clustering can be utilized to tailor assortments to specific markets and consumer segments by providing a profile mix of who is shopping the store and trading area. Store clusters are typically created for each product category in a trading area based upon similarity in consumers, stores, product attributes, sales profiles, and demographics such that assortments can be generated at the store cluster level. Assortments can also be generated at the store level.

Visibility to category role, strategies, tactics and financial objectives ensure assortments align back to overall category-level objectives.

## Solution Task Flows

Figure 1-1 illustrates the flow of tasks for Category Planning.

Figure 1-1 Category Planning Task Flow

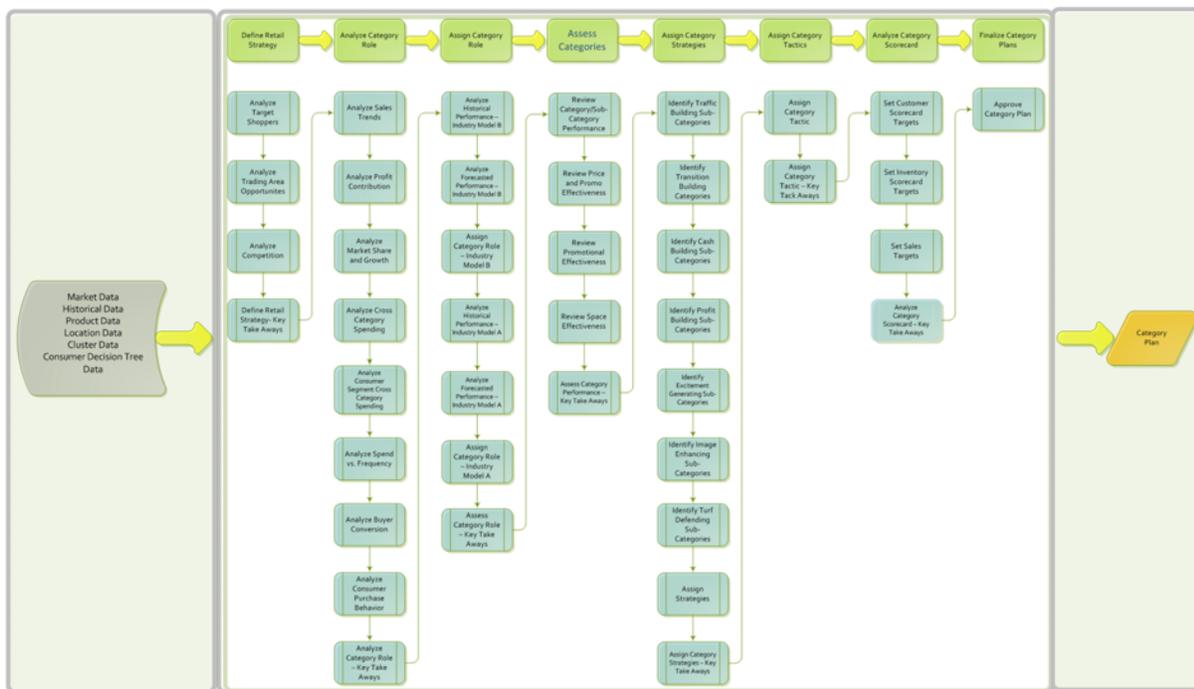


Figure 1-2 illustrates the flow of tasks for Assortment Rationalization @ Cluster.

Figure 1-2 Assortment Rationalization @ Cluster Task Flow

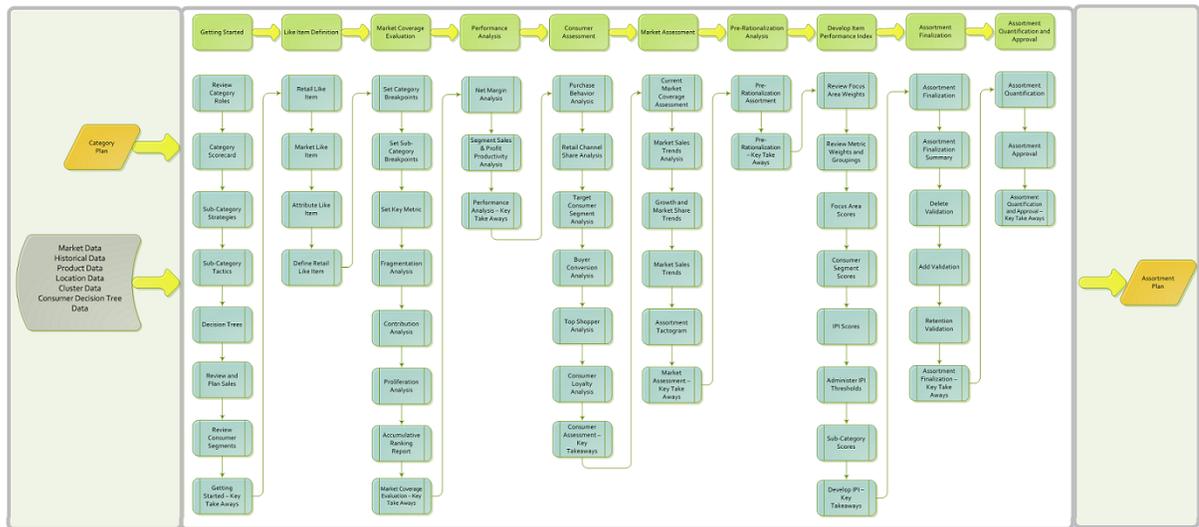
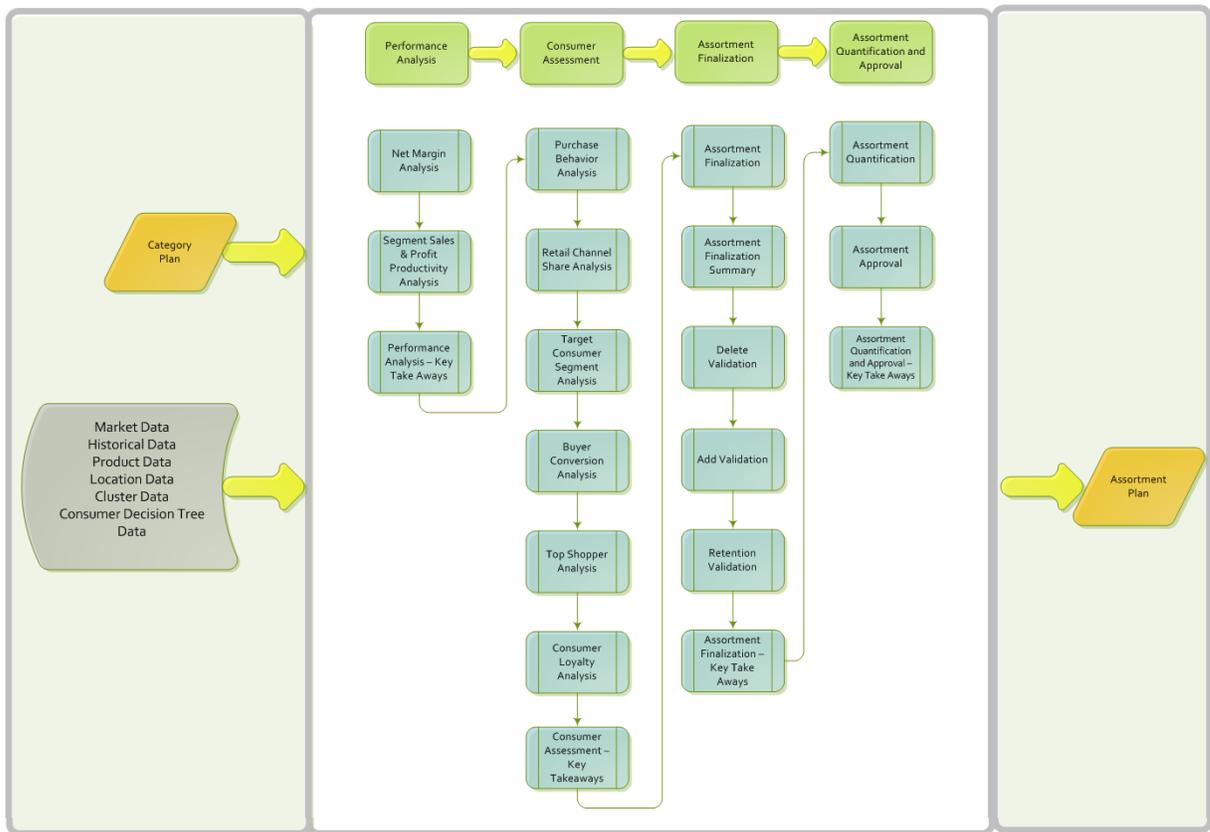


Figure 1-3 illustrates the flow of tasks for Assortment Rationalization @ Store.

Figure 1-3 Assortment Rationalization @ Store Task Flow



## Types of Data

Table 1–1 describes the types of data used for Category Management.

**Table 1–1 Types of Data**

<b>Data</b>	<b>Description</b>
Customer Loyalty	Data supplied to retailers by syndicated data suppliers, such as Nielsen or Symphony IRI. It represents loyalty metrics associated with consumers within a particular trading area, that is, loyalty to a particular retailer.
Loyalty Card	Data captured through loyalty cards for a particular retailer. Retailers mine the data of their loyalty card holders for the purpose of understanding who their profitable customers are, what they buy, how often they buy, and which products and attributes they buy.  Customer loyalty data is a critical component of Assortment Rationalization as retailers need to ensure they are carrying products that appeal to their most profitable customers. This data is also referred to as frequent shopper data.
Market	Retail and consumer data provided to retailers and their suppliers from third-party syndicated data suppliers. This data reflects all retailers as a whole.
Market Basket	Data about the total transaction (such as, market basket) of which SKUs are a part. This type of information provides insight into the halo/cannibalization effects of items that are purchased, which items are typically found in high basket rings, and so on.
Market Loyalty	Market loyalty represents consumer loyalty within the market. For example, brand loyalty is an example of market loyalty data which represents the percent of the category dollar volume that is satisfied by the brand among brand buyers within a particular trading area.

## Required Data

This section lists all of the data that is required, along with its source, before a user can begin the category planning process.

The following data is required for category planning:

- Product categories fully defined for each vertical
- Products fully defined for each product category
- Consumer and customer segments defined for each vertical
- Trading areas defined

The data is acquired by importing the following:

- Store clusters
- Consumer decision trees
- Product hierarchy
- Location hierarchy
- Market scan data of the retailer
- Market scan data of the competition
- Retailer's POS data
- Space performance data

- Retailer's loyalty data
- Market basket data

## Key Take Aways

Some tasks include a key take aways step. A key take away is a free-form text field that enables the user to enter notes pertinent to the task:

- The notes can be anything the user wants to capture such as additional information (personal knowledge or supplier insight) used in the decision rational or why they made the decision they did.
- The take aways can be used for saving notes from findings from the analytics.
- A workbook may be viewed by multiple users and the take aways provide a way for each user to record their individual perspective.
- Key take aways can be used by the owner of a step to provide notes to other users who have lower privileges.
- The take aways are preserved so that one user's comments do not wipe out the comments of any other user.

## Roles

Roles can be defined by analyzing the part each category plays for a retailer by trading area based on different Category Management frameworks. The Category Management framework provides insights into which categories are most strategic in the market, as well as for the retailer's target shoppers. This sets the foundation for understanding which categories should be assigned which roles within the retailer's portfolio.

Users are assigned to the specific roles, typically based on organization structure.

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**Note:** Access to tasks is controlled by security permissions. If you do not have the permission to access a task, that task does not appear in your task list.

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The following is an example list of roles:

- Administrator
- Executive
- Manager
- Planner

## Custom Menu Options

Custom menu buttons are located above the top right corner of the content area for some workbooks. The custom menus are specific to the steps in the different tasks. If you are on a specific step, you see the custom menus that have been configured for that step.

The following is a list of the available custom menus:

- Assortment Rationalization @ Cluster:
  - Getting Started: Seed Sales
  - Like Item Mapping: Seeding Likeitems
  - Market Coverage Evaluation: Fragmentation Analysis
  - Market Assessment: Create Assortment, Seed Assortment
  - Develop IPI: Seed IPI Weights from Strategy, Calculate IPIs, Perform IPI based Rationalization
- Category Planning:
  - Analyze Category Scorecard: Seed Sales
  - Finalize Category Plans: Approve
- Data Validation and Seeding:
  - Administration Data: Seed Third Party Data
  - Market Data: Seed Third Party Data
  - Household Panel Data: Seed Third Party Data
  - Acutals-Sourced: Seed Third Party Data
  - Space: Seed Third Party Data
- CDT Editor:
  - CDT Meta Data: Accept XML

## Getting Started

Before using Category Management, be sure that you are familiar with how to access the application and use the Fusion user interface. If you need more information, see the *Oracle Retail Predictive Application Server User Guide for the Fusion Client*.

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## CDT Editor Task

Consumer Decision Trees (CDT), with their dynamic hierarchical structure, help retailers get insights on the consumer decision process by analyzing and understanding the prioritization or importance of specific product attributes that determined the consumer's purchase. The output of a CDT is used to rationalize assortments for specific consumer segments.

The relationship of product segments to one another in terms of perceived consumer importance is called the structure or decision tree of the category. The CDT structure provides attribute ranking, which measures the importance of each attribute to the consumer relative to the other attributes within the category. The decision process varies for each consumer segment within the category, which in turn influences the importance of attributes to vary per consumer segment.

Structure implies a hierarchical relationship among the segments. A consumer makes a specific judgment first (such as, what flavor do I want), proceeds to the second most important decision (such as, what size?), and then proceeds to the third decision (such as, do I want a branded SKU or retail branded SKU?). Therefore, the structure of a category (the relationship of the segments) can be thought of as a road map that consumers use to weed their way through the maze of segments and SKUs to arrive at a purchase decision.

Typically, the retailer can only store one hierarchy/decision tree. Since there are numerous consumers with varying decision tree processes, the process leverages the stored hierarchy, but enables the rationalization to accommodate multiple decision trees.

The following capabilities are supported:

- View the assortment list by CDT.
- View and compare the differences between the current CDT and the previous CDT used at the time the assortment was created.
- Edit the current CDT.

For more information on viewing and editing the CDT, see the *Oracle Retail Predictive Application Server User Guide for the Fusion Client*.

This task has the following step:

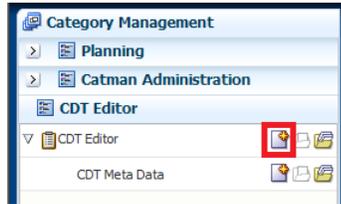
- [CDT Meta Data Step](#)

## Create the CDT Editor Workbook

To create the workbook:

1. Select the **New Workbook** icon in the CDT Editor task.

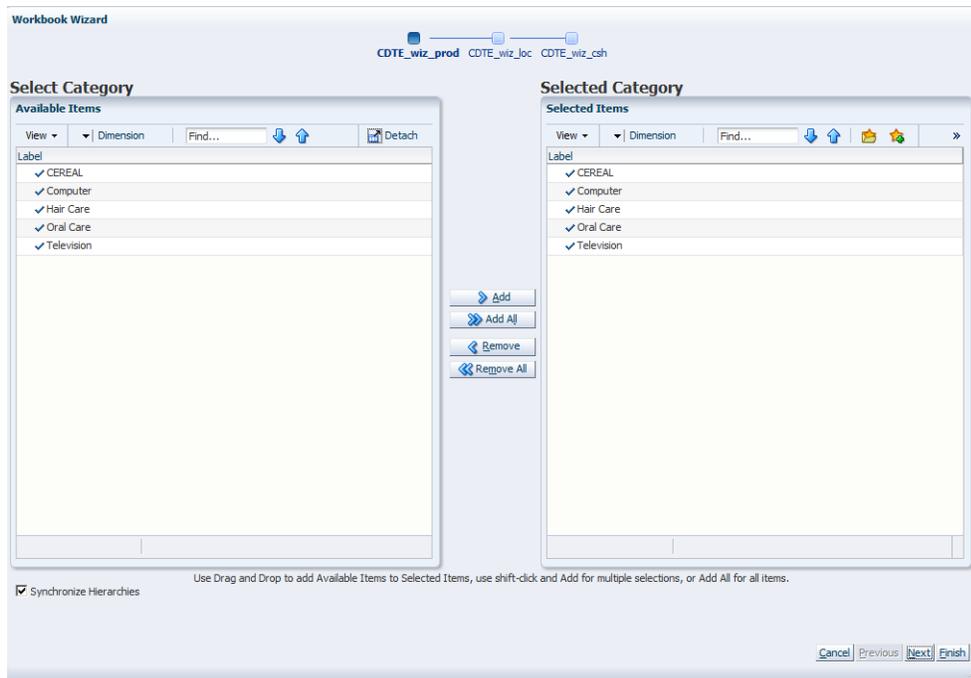
**Figure 2–1 CDT Editor Task**



The workbook wizard opens.

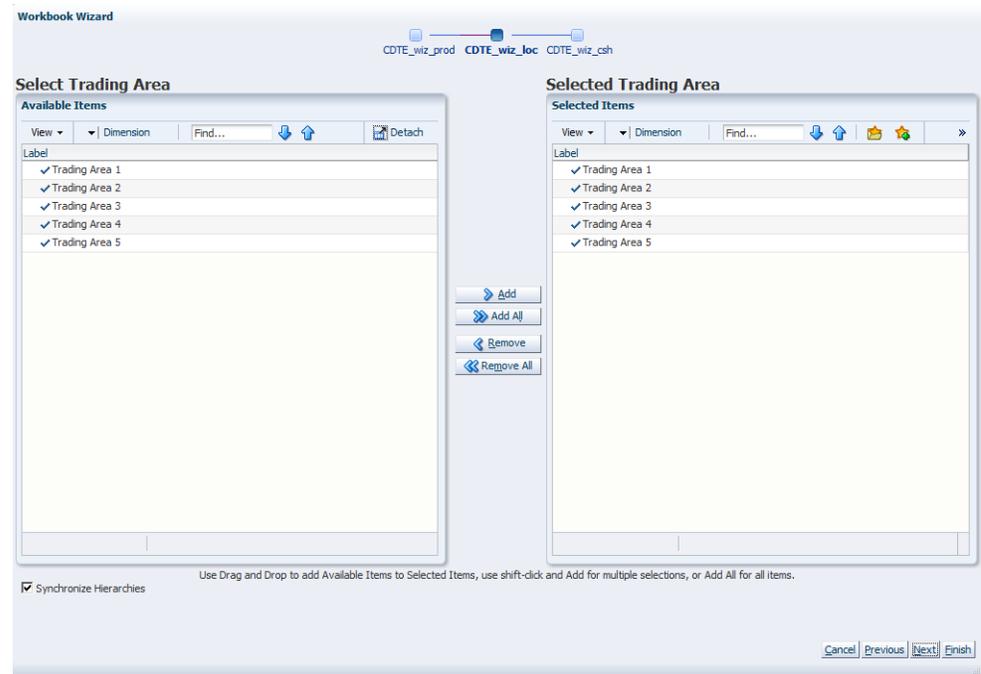
2. Select the categories and move them to the Selected Category box. Click **Next**.

**Figure 2–2 Workbook Wizard Select Category Page**



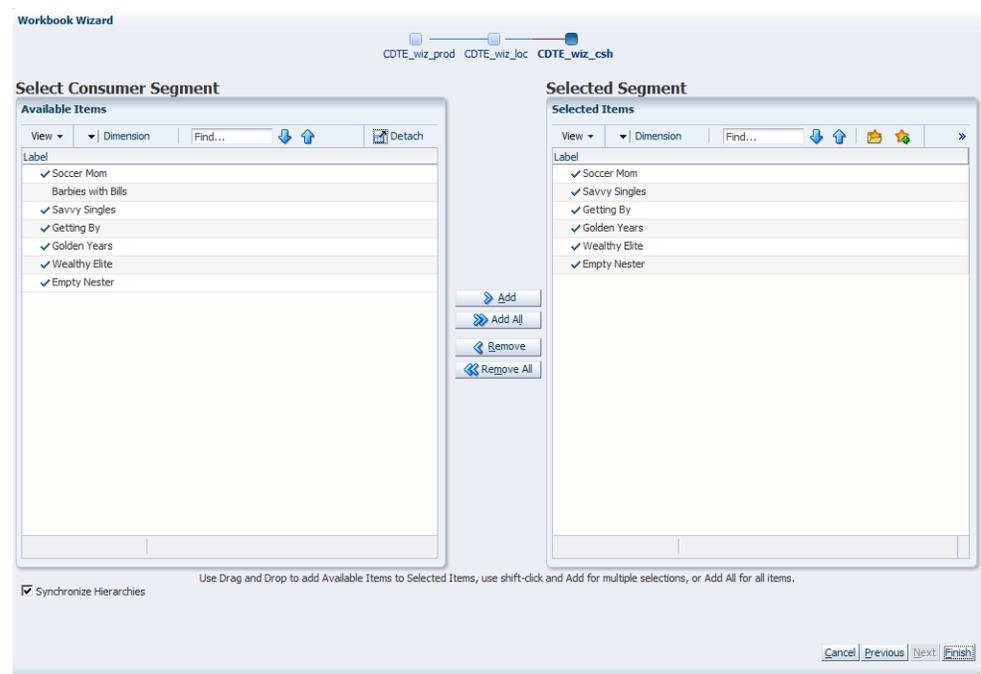
3. Select the trading areas and move them to the Selected Trading Area box. Click Next.

**Figure 2–3 Workbook Wizard Select Trading Area Page**



4. Select the consumer segments and move them to the Selected Segment box. Click Next.

**Figure 2–4 Workbook Wizard Select Consumer Segment Page**

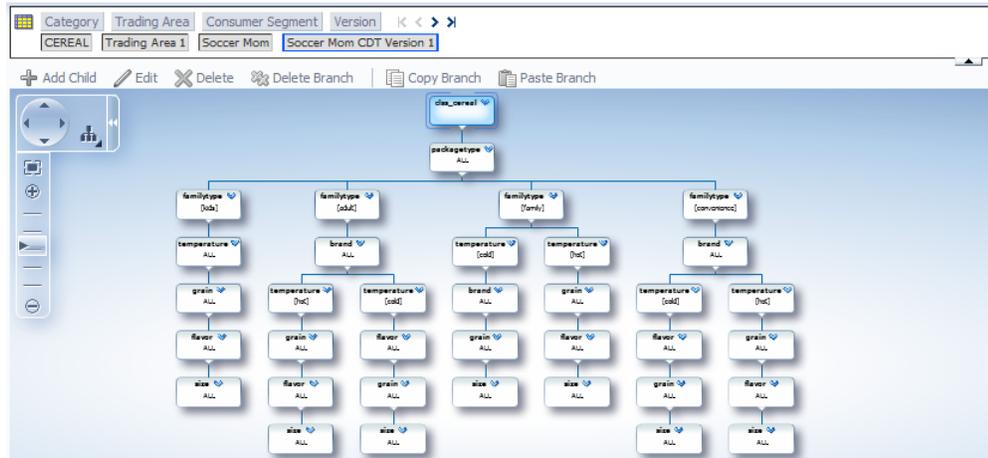


The workbook is created.

## CDT Meta Data Step

This step has one view. Use the view to review and make changes to the CDT.

**Figure 2–5 CDT Meta Data View**



## Next Steps

After all CDT edits are made, commit the workbook.

The CDT Editor workbook has a custom menu attached to it. This menu is called Accept XML. This action is necessary for the changes made in the CDT Editor to be visible in the rest of the product. The custom menu processes all new and modified CDTs. This processing sets up the dynamic hierarchies that are used in the views in Assortment Rationalization.

After the Accept XML custom menu has been run, the CDT needs to be enabled in the domain. See [Select CDT Version View](#) in [Chapter 4](#).

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## Assortment Rationalization Administration Task

The Assortment Rationalization Administration task is used to define the corporate guidelines and data required for assessment and optimization. It has steps and views that mirror the Category Management workflow. Each view requires the entry of corporate level data. As such, an administrator would manage and maintain this workbook.

All other administrative parameters are set in this Administration activity. For more information, see the *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*.

This task has the following steps:

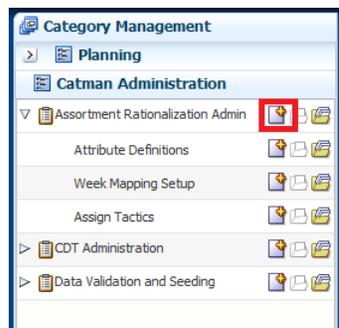
- [Attribute Definition Step](#)
- [Week Mapping Setup Step](#)
- [Assign Tactics Step](#)

### Create the Assortment Rationalization Administration Workbook

To create the workbook:

1. Select the **New Workbook** icon in the Assortment Rationalization Administration task.

**Figure 3–1 Assortment Rationalization Administration Task**



The workbook is created.

## Attribute Definition Step

This step has one view. Use the view to map the list of measures for each focus area.

**Figure 3–2 Define and View Attribute Mapping View**

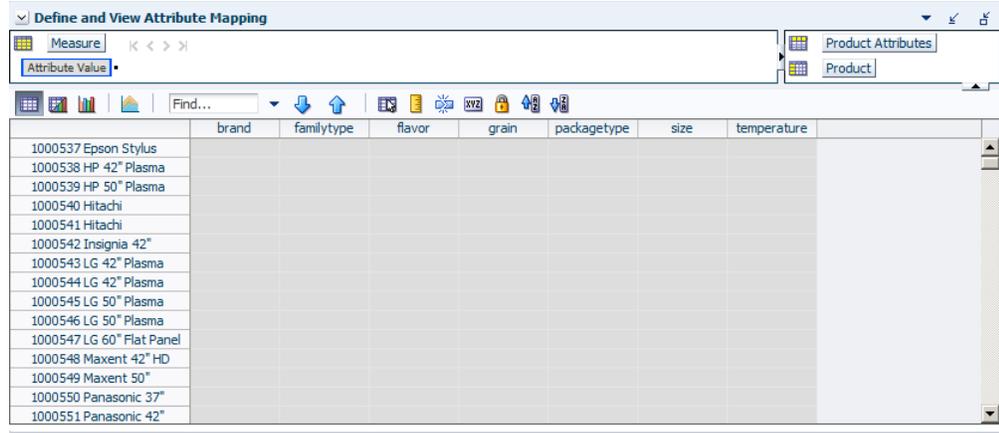


Table 3–1 lists the measure available in this view.

**Table 3–1 Define and View Attribute Mapping Measure**

Label
Attribute Value

## Week Mapping Setup Step

This step has one view. Use this view to assign and validate the last year week mapping. By default, the loaded file maps the last year as the same week last year. The mapping for any week can be reassigned in this workbook.

**Figure 3–3 Week Mapping Setup View**

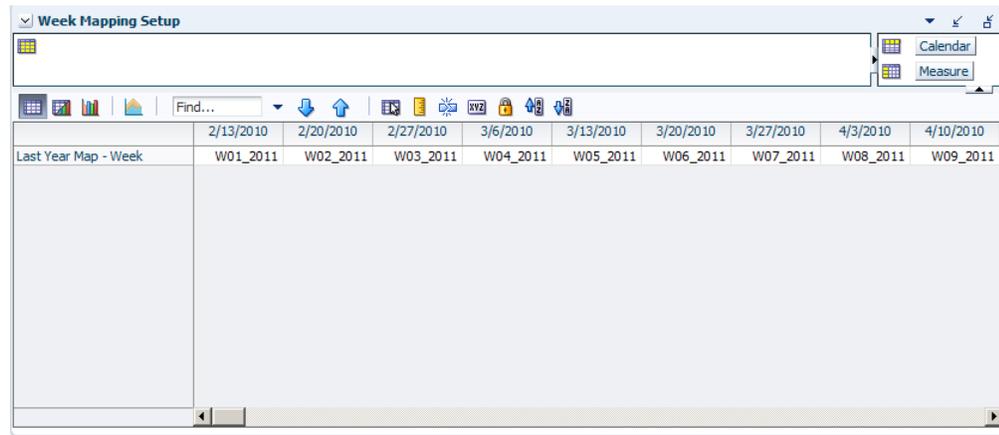


Table 3–2 lists the measure available in this view.

**Table 3–2 Week Mapping Setup Measure**

Label
Last Year Map - Week

## Assign Tactics Step

This step has one view. Use the view to assign tactics for each tactical area:

- Assortment
- Inventory
- Pricing
- Promotion
- Space

Entries made in this table are used to populate-drop down lists that are used in Category Planning.

**Figure 3–4 Assign Tactics View**

	Assortment	Inventory	Pricing	Promotion	Space
01					
02					
03					
04					
05					
06					
07					
08					
09					
10					

Table 3–3 lists the measure available in this view.

**Table 3–3 Assign Tactics Measure**

Label
Assigned Tactics

## Next Steps

After completing all of the Assortment Rationalization Administration steps, commit the workbook. Continue to the [CDT Administration Task](#).



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## CDT Administration Task

The CDT Administration task is used to select the CDT versions available in the workbook.

This task has the following step:

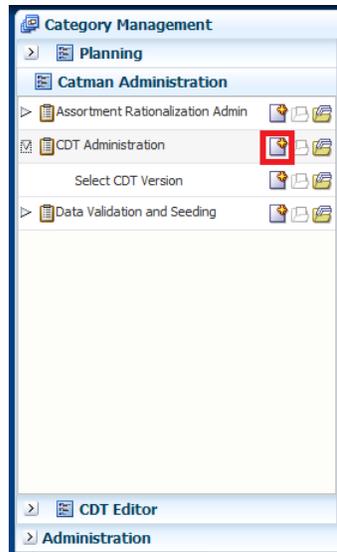
- [CDT Administration Step](#)

### Create the CDT Administration Workbook

To create the workbook:

1. Select the **New Workbook** icon in the CDT Administration task.

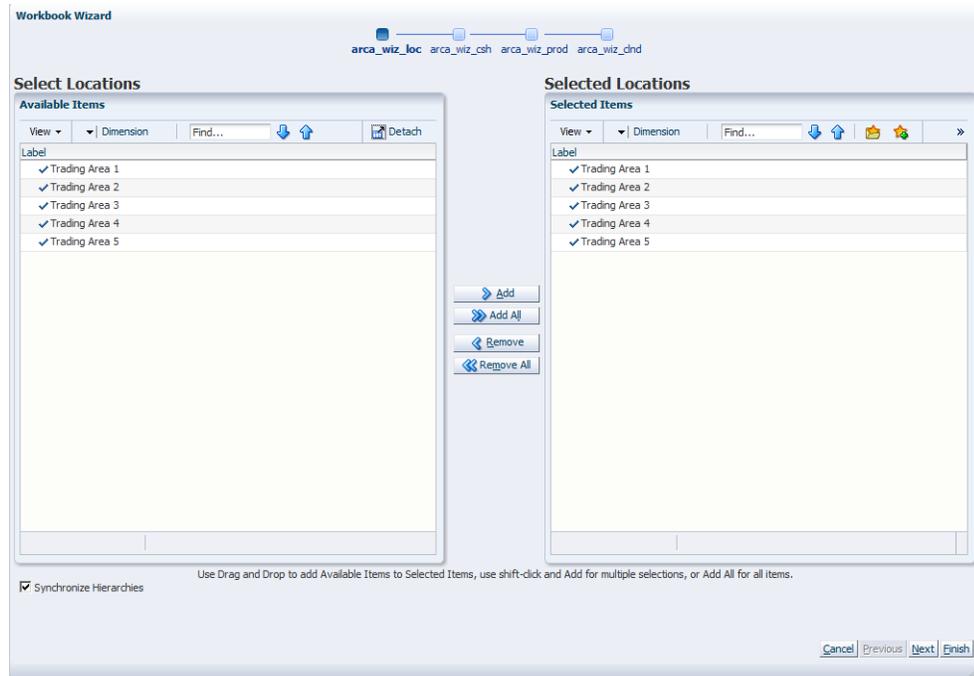
*Figure 4–1 CDT Administration Task*



The workbook wizard opens.

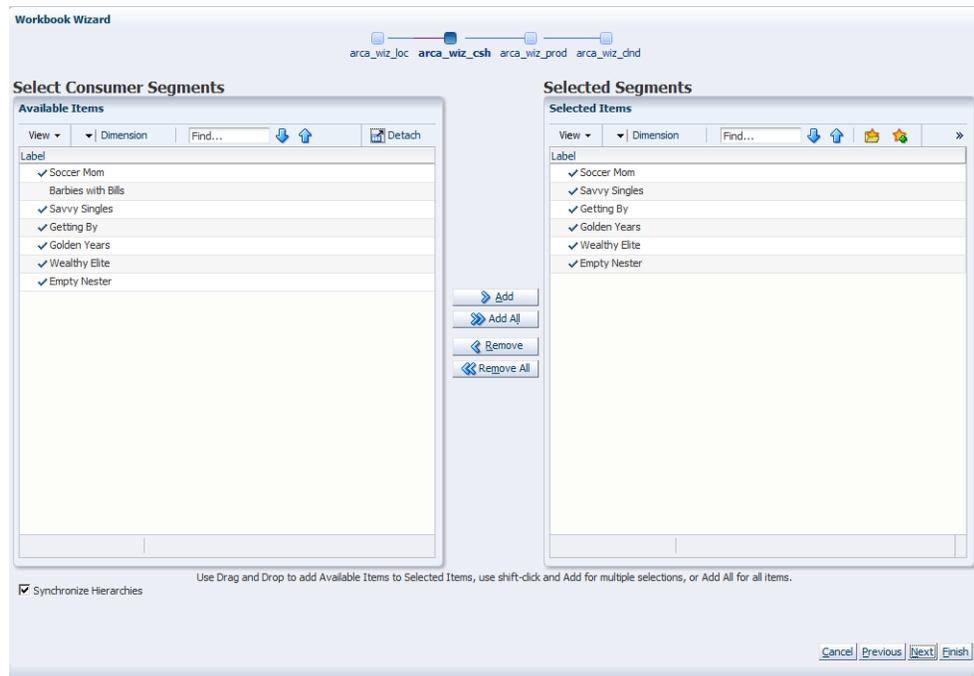
2. Select the locations and move them to the Selected Locations box. Click **Next**.

**Figure 4–2 Workbook Wizard Select Locations Page**



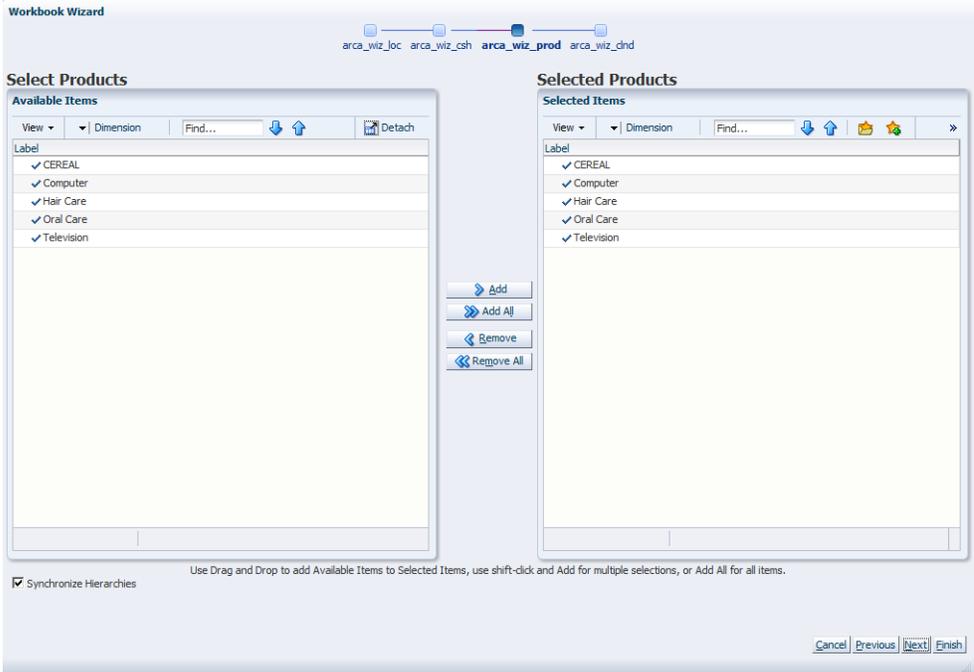
3. Select the consumer segments and move them to the Selected Segments box. Click **Next**.

**Figure 4–3 Workbook Wizard Select Consumer Segments Page**



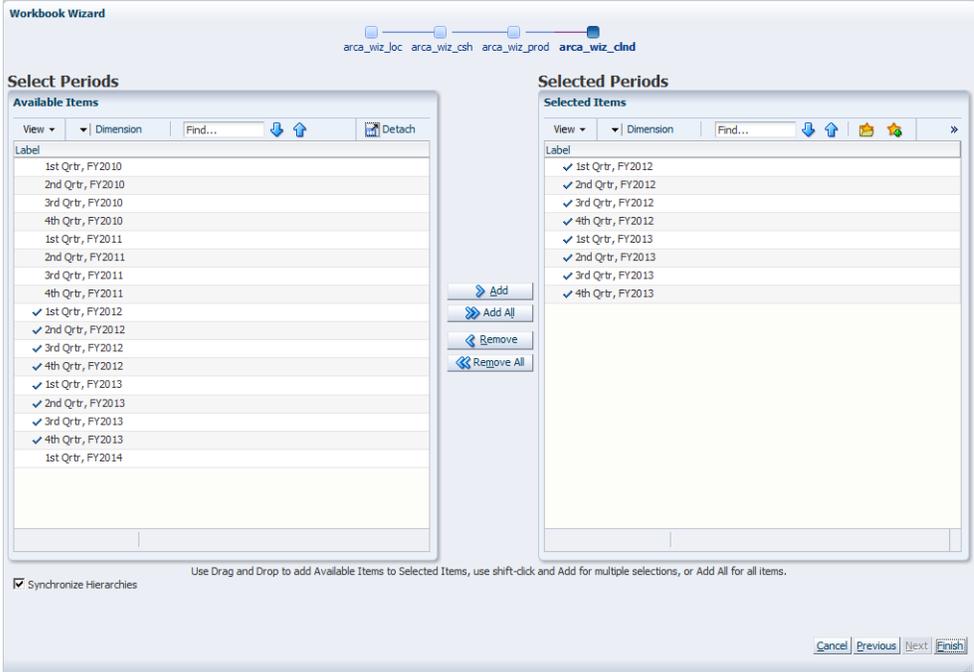
- 4. Select the products and move them to the Selected Products box. Click Next.

Figure 4-4 Workbook Wizard Select Products Page



- 5. Select the calendar periods and move them to the Selected Periods box. Click Finish.

Figure 4-5 Workbook Wizard Select Periods Page



The workbook is created.

## CDT Administration Step

This step has one view:

- [Select CDT Version View](#)

### Select CDT Version View

Use this view to select the CDT versions that are available in the workbook. A CDT version must be enabled here before it can be used elsewhere in the application.

**Figure 4–6** *Select CDT Version View*

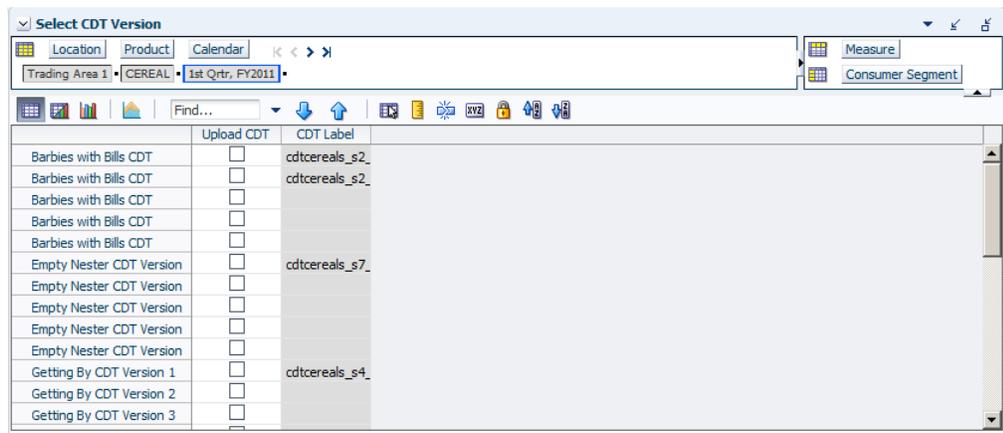


Table 4–1 lists the measures available in this view.

**Table 4–1** *Select CDT Version Measures*

Label
Upload CDT
CDT Label

## Next Steps

After completing all of the CDT Administration steps, commit the workbook. Continue to the [IPI Setup Task](#).

# 5

## IPI Setup Task

The Item Performance Index (IPI) Setup task enables the user to assign weighting to each of the focus areas for the defined strategies. In the example shown in the following table, the traffic building strategy is weighted 50% on attributes, 30% on market basket, and the remaining 20% on performance.

	Weights for Focus Areas					
Strategy	Attribute	Brand	Loyalty	Market Basket	Performance	Demand Transference
Traffic Building	50%	0%	0%	30%	20%	0%

For each strategy/focus area, a weight is assigned to each metric. In the example shown in the following table, the metrics associated with a 50% weighting on the attribute focus area for the traffic building strategy is weighted 30% on sales revenue, 50% on sales units, and 20% on inventory turns.

	Attribute Focus Area					
	Weights					
Strategy	Sales Revenue	Sales Units	Margin \$	Turns	Sales per Square Foot	Profit per Square Foot
Traffic Building	30%	50%	0%	20%	0%	0%

For each strategy/focus area, a *Group By* attribute is defined for each metric. All items with the same value for the attribute are grouped together for IPI calculations. Using the preceding example, the Group By values could be set as shown in the following table.

Group By					
Sales Revenue	Sales Units	Margin \$	Turns	Sales per Square Foot	Profit per Square Foot
Size	Brand	Package Type	Calorie	Price Segment	Country of Origin

The computation of each item's IPI is specific to each assortment. Setting up IPI weights is necessary to compute IPIs and assortments based on IPIs in the Assortment Rationalization @ Cluster Task.

This task has the following step:

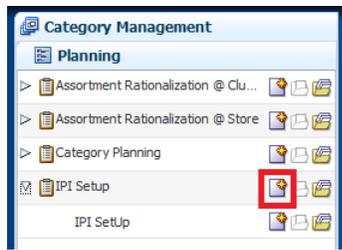
- [IPI Setup Step](#)

## Create the IPI Setup Workbook

To create the workbook:

1. Select the **New Workbook** icon in the Setup IPI activity.

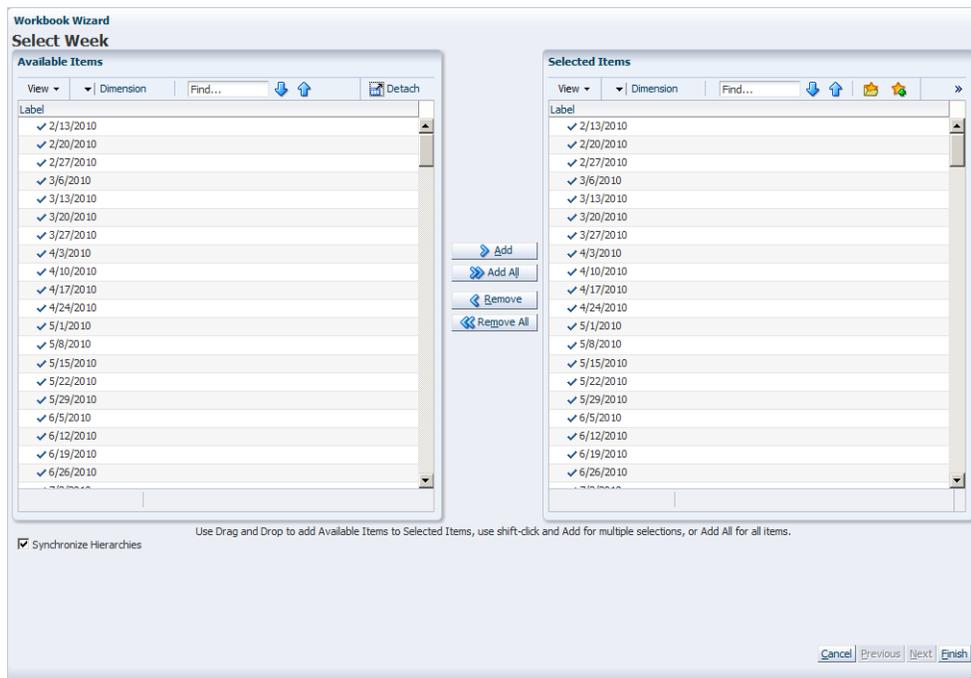
**Figure 5–1** *Select IPI Task*



The workbook wizard opens.

2. Select the calendar weeks and move them to the Selected Items box. Click **Finish**.

**Figure 5–2** *Workbook Wizard Select Week Page*



The workbook is created.

# IPI Setup Step

This step has the following views:

- [Assign Focus Area Weights View](#)
- [Assign Metric Weights View](#)

## Assign Focus Area Weights View

Use this view to assign weights for each focus area and defined strategy.

**Figure 5–3 Assign Focus Area Weights View**

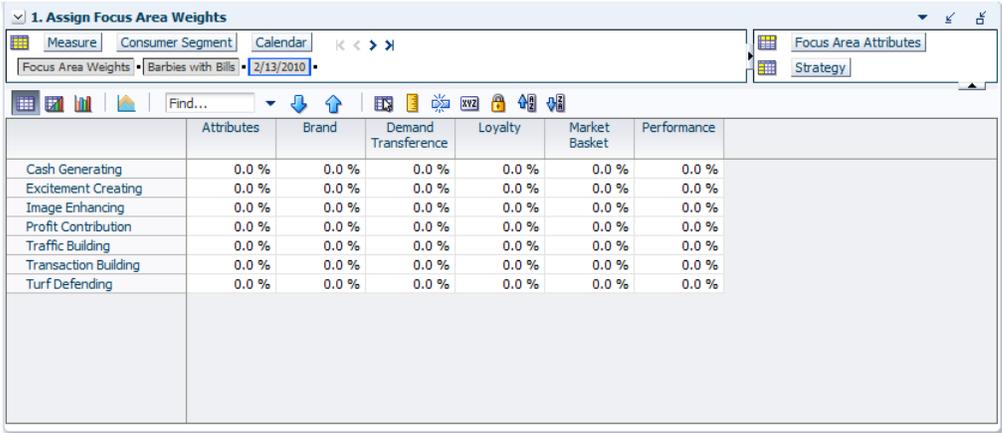


Table 5–1 lists the measure available in this view.

**Table 5–1 Assign Focus Area Weights Measure**

Label
Focus Area Weights

## Assign Metric Weights View

Use this view to assign weights to each metric for each focus area.

**Figure 5–4 Assign Metric Weights View**

	Attributes	Brand	Demand Transference	Loyalty	Market Basket	Performance
Sales Unit Weigt	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Sales Units Grouping	All Product	All Product	All Product	All Product	All Product	All Product
Sales Weightage	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Sales Revenue Grouping	All Product	All Product	All Product	All Product	All Product	All Product
Gross Margin Weightage	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Gross Margin Grouping	All Product	All Product	All Product	All Product	All Product	All Product
Exclusivity Weightage	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Exclusivity Grouping	All Product	All Product	All Product	All Product	All Product	All Product
Loyalty Weightage	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Loyalty Grouping	All Product	All Product	All Product	All Product	All Product	All Product
Profit / sq. ft. / week	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Profit / sq. ft. / week Grouping	All Product	All Product	All Product	All Product	All Product	All Product
Profit Weightage	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Profit Grouping	All Product	All Product	All Product	All Product	All Product	All Product

Table 5–2 lists the measures available in this view.

**Table 5–2 Assign Metric Weights Measures**

Label
Sales Unit Weight
Sales Units Grouping
Sales Weightage
Sales Revenue Grouping
Gross Margin Weightage
Gross Margin Grouping
Exclusivity Weightage
Exclusivity Grouping
Loyalty Weightage
Loyalty Grouping
Profit /sq. ft /week Weightage
Profit /sq. ft /week Grouping
Profit Weightage
Profit Grouping
Sls/sq. ft Weightage
Sls/sq. ft Grouping

## Next Steps

After completing the IPI Setup task, commit the workbook. Continue to the [Data Validation and Seeding Task](#).

---

## Data Validation and Seeding Task

The Data Validation and Seeding task is used to validate the loaded measure values. All the measures that are loaded into the workbook are visible in this workbook as read-only measures.

This task has a custom menu called Seed Third Party Data. It copies data in select measures backwards in time by a user-specified amount.

This task has the following steps:

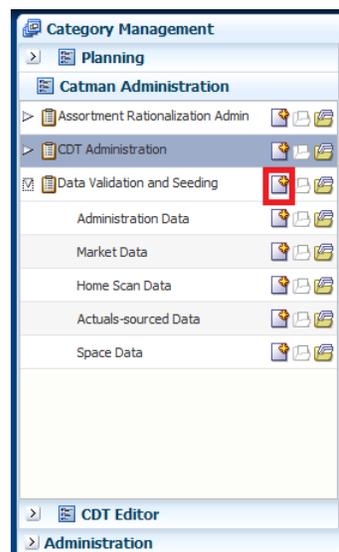
- [Administration Data Step](#)
- [Market Data Step](#)
- [Household Panel Data Step](#)
- [Actuals-Sourced Data Step](#)
- [Space Data Step](#)

### Create the Data Validation and Seeding Workbook

To create the workbook:

1. Select the **New Workbook** icon in the Data Validation and Seeding task.

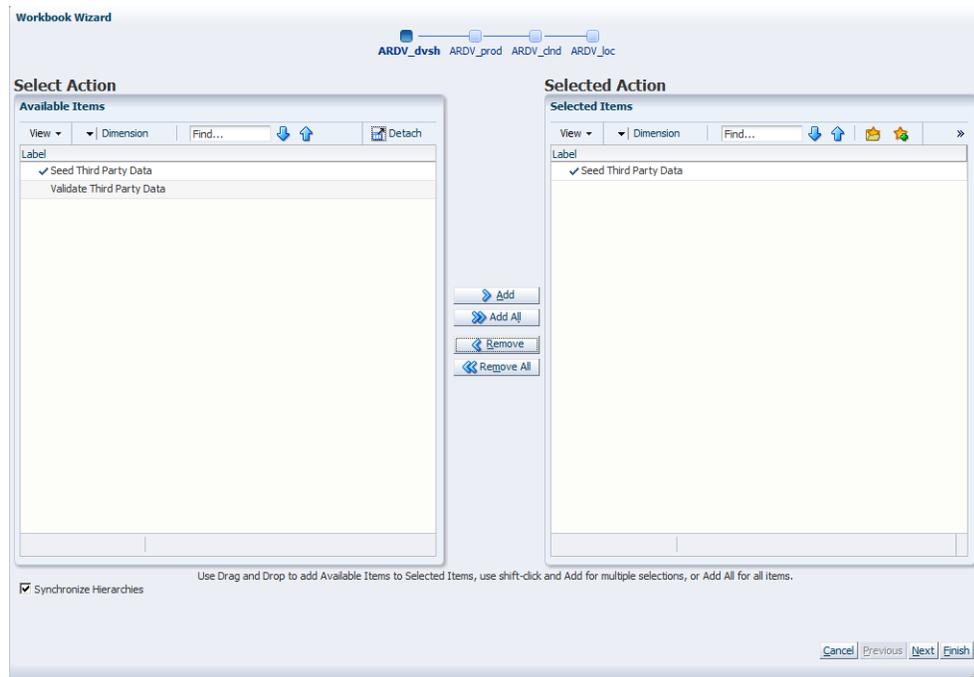
*Figure 6–1 Data Validation and Seeding Task*



The workbook wizard opens.

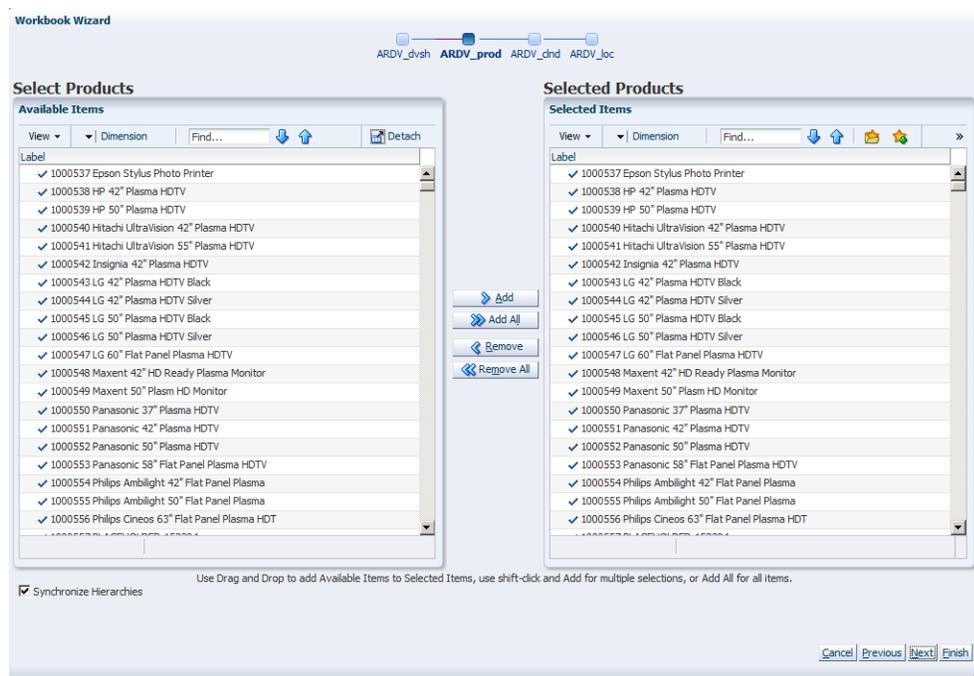
2. Select the action and move it to the Selected Action box. Click **Next**.

**Figure 6–2 Workbook Wizard Select Action Page**



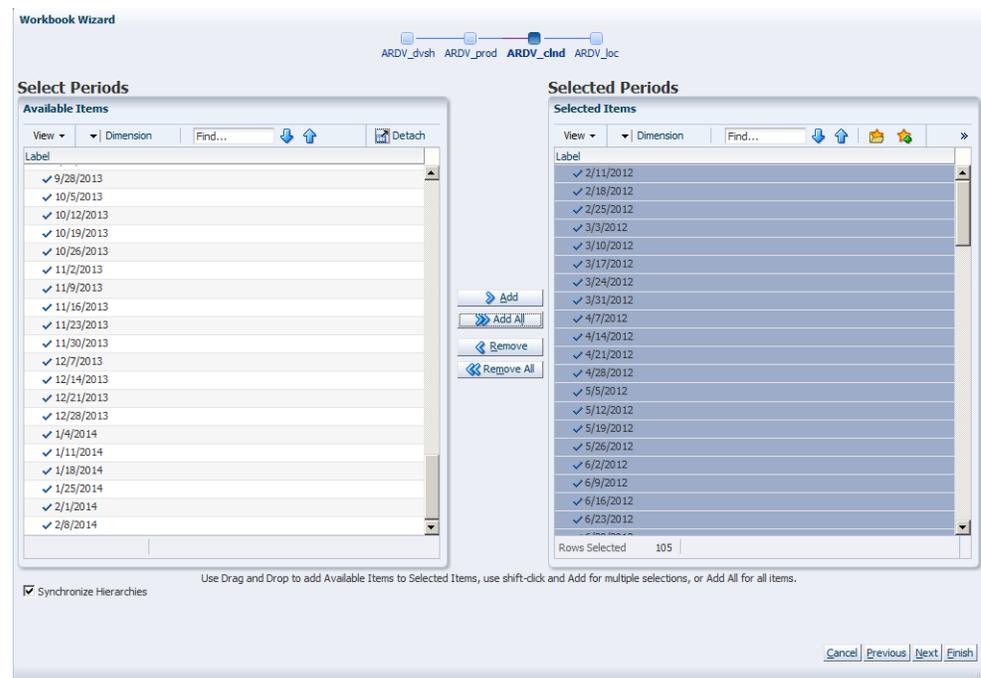
3. Select the products and move them to the Selected Products box. Click **Next**.

**Figure 6–3 Workbook Wizard Select Products Page**



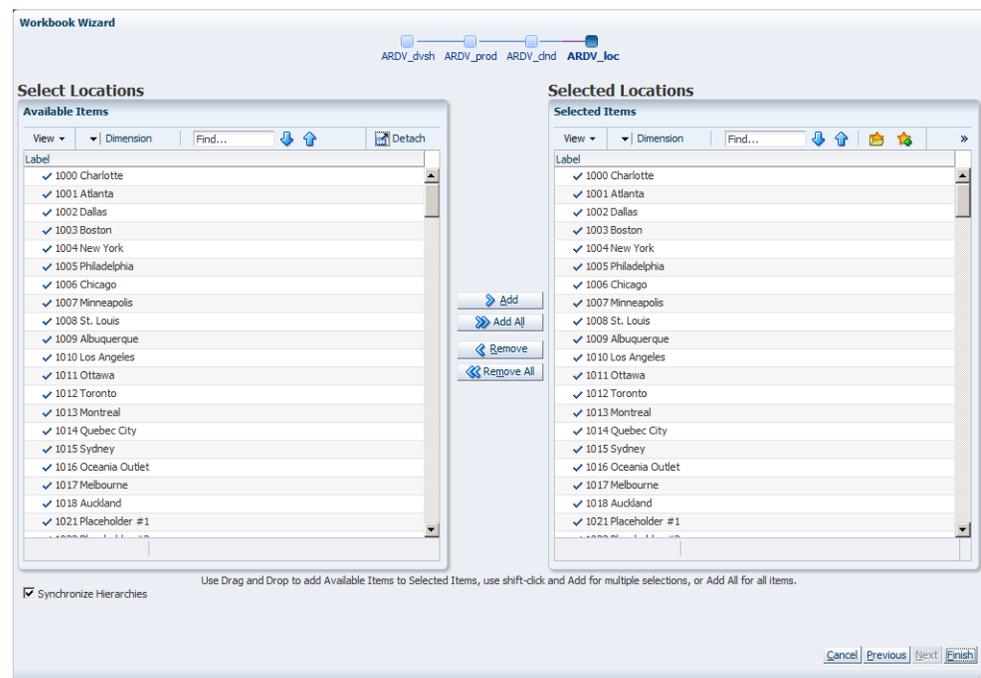
- Select the calendar periods and move them to the Selected Periods box. Click **Next**.

**Figure 6–4 Workbook Wizard Select Periods Page**



- Select the locations and move them to the Selected Locations box. Click **Finish**.

**Figure 6–5 Workbook Wizard Select Locations Page**



The workbook is created.

## Administration Data Step

This step has the following views:

- [Administration Data Class CDT View](#)
- [Administration Data Week View](#)

### Administration Data Class CDT View

Use this view to set the administration data class CDT.

**Figure 6–6 Administration Data Class CDT View**

	2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010	3/20/2010	3/27/2010	4/3/2010	4/10/2010
Consumer Segment Status									
Consumer Segment	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–1 lists the measures available in this view.

**Table 6–1 Administration Data Class CDT Measures**

Label
Consumer Segment Status
Consumer Segment Distribution

## Administration Data Week View

Use this view to set the administration data week.

**Figure 6–7 Administration Data Week View**

	2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010	3/20/2010	3/27/2010	4/3/2010	4/10/2010
Last Year Map - Week	W01_2011	W02_2011	W03_2011	W04_2011	W05_2011	W06_2011	W07_2011	W08_2011	W09_2011
Last-Last year Map	W01_2012	W02_2012	W03_2012	W04_2012	W05_2012	W06_2012	W07_2012	W08_2012	W09_2012

Table 6–2 lists the measures available in this view.

**Table 6–2 Administration Data Week Measures**

Label
Last Year Map - Week
Last-Last Year Map

## Market Data Step

This step has the following views:

- [Market Data View](#)
- [Market Data Quarter Trading Area Category View](#)
- [Market Data Quarter Trading Area Category Consumer Segment View](#)
- [Market Data Quarter Trading Area SubCategory View](#)
- [Market Data Quarter Trading Area SubCategory Consumer Segment View](#)

## Market Data View

Use this view to set the market data.

**Figure 6–8 Market Data View**

	2/19/2011	2/26/2011	3/5/2011	3/12/2011	3/19/2011	3/26/2011	4/2/2011	4/9/2011	4/16/2011
Market Sales Revenue	\$ 10.2K	\$ 10.3K	\$ 10.6K	\$ 9.6K	\$ 10.3K	\$ 10.4K	\$ 11.8K	\$ 10.5K	\$ 11.0K
Market Sales Units	10,200	10,842	11,203	10,043	10,905	10,395	10,895	10,405	11,348

Table 6–3 lists the measures available in this view.

**Table 6–3 Market Data Measures**

Label
Market Sales Revenue
Market Sales Units

## Market Data Quarter Trading Area Category View

Use this view to set the market data for quarter, trading area, and category.

**Figure 6–9 Market Data Quarter Trading Area Category View**

	CEREAL					Computer			
	Trading Area								
Market Inventory Turn	\$ 0.0K	\$ 0.1K	\$ 0.0K	\$ 0.0K	\$ 0.0K				
Market Growth	75.0 %	0.0 %	0.0 %	0.0 %	0.0 %	20.0 %	0.0 %	0.0 %	0.0 %
Market Share	66.0 %	0.0 %	0.0 %	0.0 %	0.0 %	94.0 %	0.0 %	0.0 %	0.0 %

Table 6–4 lists the measures available in this view.

**Table 6–4 Market Data Quarter Trading Area Category Measures**

Label
Market Inventory Turn
Market Growth
Market Share

## Market Data Quarter Trading Area Category Consumer Segment View

Use this view to set the market data for quarter, trading area, category, and consumer segment.

**Figure 6–10 Market Data Quarter Trading Area Category Consumer Segment View**

	Barbies with	Empty Nester	Getting By	Golden Years	Savvy Singles	Soccer Mom	Wealthy Elite	Barbies with	Empty N
# Baskets with Category	10	0	5	25	44	8	60	0	
# Baskets with Category Rank	16	71	3	71	49	94	25	0	
Annual Spend	\$ 0.9K	\$ 0.8K	\$ 0.1K	\$ 0.1K	\$ 0.7K	\$ 0.4K	\$ 0.2K	\$ 0.0K	\$
Annual Spend Rank	94	42	33	45	14	81	3	0	
Transaction Size with Category	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.1K	\$ 0.1K	\$ 0.0K	\$
Transaction Size with Category Rank	39	26	80	17	93	46	68	0	

Table 6–5 lists the measures available in this view.

**Table 6–5 Market Data Quarter Trading Area Category Consumer Segment Measures**

Label
# Baskets with Category
# Baskets with Category Rank
Annual Spend
Annual Spend Rank
Transaction Size with Category
Transaction Size with Category Rank

## Market Data Quarter Trading Area SubCategory View

Use this view to set the market data for quarter, trading area, and sub-category.

**Figure 6–11 Market Data Quarter Trading Area SubCategory View**

	30040 Plasma Flat Panel					30041 LCD Flat Panel			
	Trading Area	Trading Area	Trading Area	Trading Area	Trading Area	Trading Area	Trading Area	Trading Area	Trading Area
Market Average Promotion	\$ 7.21	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 7.56	\$ 0.00	\$ 0.00	\$ 0.00
Market Average Price	\$ 5.25	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 5.20	\$ 0.00	\$ 0.00	\$ 0.00

Table 6–6 lists the measures available in this view.

**Table 6–6 Market Data Quarter Trading Area SubCategory Measures**

Label
Market Average Promotion Price
Market Average Price

## Market Data Quarter Trading Area SubCategory Consumer Segment View

Use this view to set the market data for quarter, trading area, sub-category, and consumer segment.

**Figure 6–12 Market Data Quarter Trading Area SubCategory Consumer Segment View**

	Trading Area 1									
	Barbies with Bills	Empty Nester	Getting By	Golden Years	Savvy Singles	Soccer Mom	Wealthy Elite	Barbies with Bills	Empty Nester	
1st Qtr, FY2010	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
2nd Qtr, FY2010	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.1K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
3rd Qtr, FY2010	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
4th Qtr, FY2010	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.1K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
1st Qtr, FY2011	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.1K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
2nd Qtr, FY2011	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.1K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
3rd Qtr, FY2011	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.1K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
4th Qtr, FY2011	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.1K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
1st Qtr, FY2012	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
2nd Qtr, FY2012	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
3rd Qtr, FY2012	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K

Table 6–7 lists the measure available in this view.

**Table 6–7 Market Data Quarter Trading Area SubCategory Consumer Segment Measure**

Label
Market Sales

## Household Panel Data Step

This step has the following views:

- Household Panel Data Quarter Store SKU Consumer Segment View
- Household Panel Data Quarter Trading Area Category Consumer Profile View
- Household Panel Data Quarter Trading Area Category Consumer Segment View
- Household Panel Data Quarter Trading Area Category Retailer View
- Household Panel Data Quarter Trading Area Consumer Segment View
- Household Panel Data Quarter Trading Area Retailer View
- Household Panel Data Quarter Trading Area SKU Consumer Profile View
- Household Panel Data Quarter Trading Area Style Color Consumer Profile View
- Household Panel Data Quarter Trading Area Style Consumer Profile View
- Household Panel Data Quarter Trading Area SubCategory Consumer Profile View
- Household Panel Data Quarter Trading Area SubCategory Consumer Segment View
- Household Panel Data Quarter Trading Area SubCategory Retailer Consumer Segment View
- Household Panel Data Store Category View
- Household Panel Data Store Category Consumer Profile View
- Household Panel Data Store Category Retailer Type View
- Household Panel Data Store Consumer Profile View
- Household Panel Data Store SKU View
- Household Panel Data Store SKU Consumer Profile View
- Household Panel Data Store SKU Retailer Type View
- Household Panel Data Store Style View
- Household Panel Data Store Style Consumer Profile View
- Household Panel Data Store Style Retailer Type View
- Household Panel Data Store Style Color View
- Household Panel Data Store StyleColor Consumer Profile View
- Household Panel Data Store StyleColor Retailer Type View
- Household Panel Data Store SubCategory View
- Household Panel Data Store SubCategory Consumer Profile View
- Household Panel Data Store SubCategory Retailer View
- Household Panel Data Store SubCategory Retailer Type View

- Household Panel Data Trading Area Category View
- Household Panel Data Trading Area Category Retailer Type View
- Household Panel Data Trading Area Consumer Profile View
- Household Panel Data Trading Area SKU View
- Household Panel Data Trading Area SKU Retailer Type View
- Household Panel Data Trading Area Style View
- Household Panel Data Trading Area Style Retailer Type View
- Household Panel Data Trading Area StyleColor View
- Household Panel Data Trading Area StyleColor Retailer Type View
- Household Panel Data Trading Area SubCategory View
- Household Panel Data Trading Area SubCategory Retailer Type View

### Household Panel Data Quarter Store SKU Consumer Segment View

Use this view to set the data for quarter, store, SKU, and consumer segment.

**Figure 6–13 Household Panel Data Quarter Store SKU Consumer Segment View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
Exclusivity Index (Str)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loyalty Index (Str)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Consumer Worth Index (Str)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Switching Index (Str)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Table 6–8 lists the measures available in this view.

**Table 6–8 Household Panel Data Quarter Store SKU Consumer Segment Measures**

Label
Exclusivity Index (Str)
Loyalty Index (Str)
Consumer Worth Index (Str)
Switching Index (Str)

## Household Panel Data Quarter Trading Area Category Consumer Profile View

Use this view to set the data for quarter, trading area, category, and consumer profile.

**Figure 6–14 Household Panel Data Quarter Trading Area Category Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
Market Trading Area Spend % @ CLSS	1.0 %	57.0 %	28.0 %	69.0 %	38.0 %	84.0 %	81.0 %	37.0 %	
Retailer Trading Area HH % @ CLSS	62.0 %	90.0 %	87.0 %	26.0 %	59.0 %	3.0 %	67.0 %	85.0 %	
Retailer Trading Area Spend % @ CLSS	79.0 %	5.0 %	65.0 %	39.0 %	22.0 %	68.0 %	64.0 %	12.0 %	
Market Trading Area HH % @ CLSS	94.0 %	14.0 %	64.0 %	86.0 %	88.0 %	63.0 %	15.0 %	11.0 %	

Table 6–9 lists the measures available in this view.

**Table 6–9 Household Panel Data Quarter Trading Area Category Consumer Profile Measures**

Label
Market Trading Area Spend % @ CLSS
Retailer Trading Area HH % @ CLSS
Retailer Trading Area Spend % @ CLSS
Market Trading Area HH % @ CLSS

## Household Panel Data Quarter Trading Area Category Consumer Segment View

Use this view to set the data for quarter, trading area, category, and consumer segment.

**Figure 6–15 Household Panel Data Quarter Trading Area Category Consumer Segment View**

	Trading Area 1								
	Barbies with Bills	Empty Nester	Getting By	Golden Years	Savvy Singles	Soccer Mom	Wealthy Elite	Barbies with Bills	Empty Nester
1st Qtr, FY2010	92.0 %	69.0 %	63.0 %	82.0 %	6.0 %	27.0 %	63.0 %	0.0 %	0.0 %
2nd Qtr, FY2010	27.0 %	48.0 %	85.0 %	27.0 %	35.0 %	63.0 %	68.0 %	0.0 %	0.0 %
3rd Qtr, FY2010	81.0 %	61.0 %	83.0 %	65.0 %	64.0 %	54.0 %	6.0 %	0.0 %	0.0 %
4th Qtr, FY2010	39.0 %	27.0 %	33.0 %	48.0 %	24.0 %	65.0 %	25.0 %	0.0 %	0.0 %
1st Qtr, FY2011	77.0 %	34.0 %	10.0 %	74.0 %	56.0 %	72.0 %	87.0 %	0.0 %	0.0 %
2nd Qtr, FY2011	21.0 %	80.0 %	85.0 %	61.0 %	39.0 %	18.0 %	46.0 %	0.0 %	0.0 %
3rd Qtr, FY2011	48.0 %	55.0 %	86.0 %	86.0 %	7.0 %	47.0 %	86.0 %	0.0 %	0.0 %
4th Qtr, FY2011	98.0 %	14.0 %	21.0 %	79.0 %	28.0 %	7.0 %	21.0 %	0.0 %	0.0 %
1st Qtr, FY2012	17.0 %	8.0 %	83.0 %	48.0 %	57.0 %	6.0 %	9.0 %	0.0 %	0.0 %
2nd Qtr, FY2012	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
3rd Qtr, FY2012	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–10 lists the measure available in this view.

**Table 6–10 Household Panel Data Quarter Trading Area Category Consumer Segment Measure**

Label
Purchase Frequency

## Household Panel Data Quarter Trading Area Category Retailer View

Use this view to set the data for quarter, trading area, category, and retailer.

**Figure 6–16 Household Panel Data Quarter Trading Area Category Retailer View**

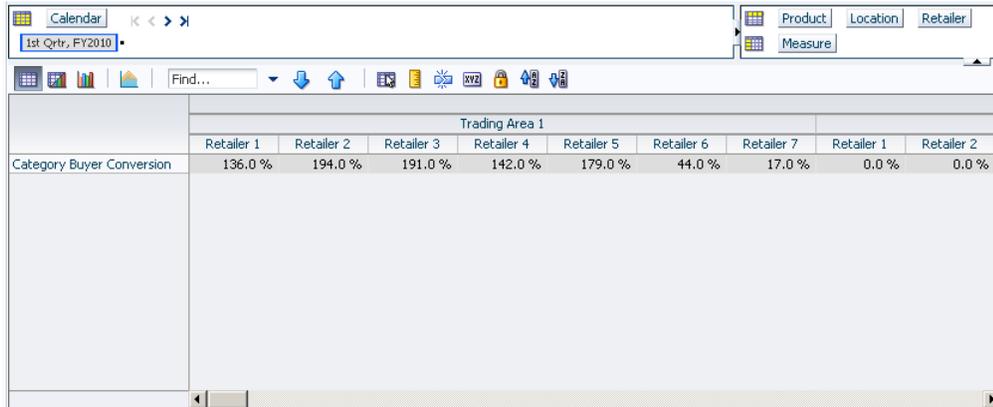


Table 6–11 lists the measure available in this view.

**Table 6–11 Household Panel Data Quarter Trading Area Category Retailer Measure**

Label
Category Buyer Conversion

## Household Panel Data Quarter Trading Area Consumer Segment View

Use this view to set the data for quarter, trading area, and consumer segment.

**Figure 6–17 Household Panel Data Quarter Trading Area Consumer Segment View**

	Barbies with Bills	Empty Nester	Getting By	Golden Years	Savvy Singles	Soccer Mom	Wealthy Elite	Barbies with Bills	Empty Nester
1st Qtr, FY2010	152.88	131.63	191.23	30.72	74.31	87.39	79.74	0.00	0.00
2nd Qtr, FY2010	56.19	126.44	151.41	56.42	60.97	171.61	128.83	0.00	0.00
3rd Qtr, FY2010	165.75	181.90	139.85	115.14	113.88	68.85	40.83	0.00	0.00
4th Qtr, FY2010	38.31	67.57	121.18	60.94	106.98	116.29	192.20	0.00	0.00
1st Qtr, FY2011	139.90	52.35	35.18	127.20	54.29	74.63	35.43	0.00	0.00
2nd Qtr, FY2011	186.81	85.78	182.19	138.97	179.38	164.17	165.65	0.00	0.00
3rd Qtr, FY2011	151.93	36.42	36.15	106.98	178.49	133.88	62.28	0.00	0.00
4th Qtr, FY2011	123.34	42.92	146.79	101.58	193.65	173.88	161.52	0.00	0.00
1st Qtr, FY2012	107.55	89.95	57.79	149.34	179.34	85.86	189.34	0.00	0.00
2nd Qtr, FY2012	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3rd Qtr, FY2012	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4th Qtr, FY2012	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Table 6–12 lists the measures available in this view.

**Table 6–12 Household Panel Data Quarter Trading Area Consumer Segment Measures**

Label
Avg. Basket Value
# of Categories in Basket
Shopping Frequency
Opportunity
Total Shoppers Index

## Household Panel Data Quarter Trading Area Retailer View

Use this view to set the data for quarter, trading area, and retailer.

**Figure 6–18 Household Panel Data Quarter Trading Area Retailer View**

Loyalty (% of Buyer Spend at Retailer)	Penetration (% Buying at Retailer)	Spend Index (Buyer Spend Compared to Average Spend)
5.2 %	5.9 %	11

Table 6–13 lists the measures available in this view.

**Table 6–13 Household Panel Data Quarter Trading Area Retailer Measures**

Label
Loyalty (% of Buyer Spend at Retailer)
Penetration (% Buying at Retailer)
Spend Index (Buyer Spend Compared to Average Spend)

## Household Panel Data Quarter Trading Area SKU Consumer Profile View

Use this view to set the data for quarter, trading area, SKU, and consumer profile.

**Figure 6–19 Household Panel Data Quarter Trading Area SKU Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
Market Trading Area Spend % @ SKU	20.0 %	8.0 %	83.0 %	85.0 %	37.0 %	51.0 %	50.0 %	86.0 %	
Retailer Trading Area HH % @ SKU	69.0 %	40.0 %	15.0 %	37.0 %	19.0 %	11.0 %	88.0 %	72.0 %	
Retailer Trading Area Spend % @ SKU	29.0 %	81.0 %	69.0 %	38.0 %	53.0 %	22.0 %	7.0 %	85.0 %	
Market Trading Area HH % @ SKU	38.0 %	40.0 %	79.0 %	21.0 %	98.0 %	37.0 %	65.0 %	77.0 %	

Table 6–14 lists the measures available in this view.

**Table 6–14 Household Panel Data Quarter Trading Area SKU Consumer Profile Measures**

Label
Market Trading Area Spend % @ SKU
Retailer Trading Area HH % @ SKU
Retailer Trading Area Spend % @ SKU
Market Trading Area HH % @ SKU

## Household Panel Data Quarter Trading Area Style Color Consumer Profile View

Use this view to set the data for quarter, trading area, style/color, and consumer profile.

**Figure 6–20 Household Panel Data Quarter Trading Area Style Color Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011
Market Trading Area Spend % @ STCO	15.0 %	68.0 %	59.0 %	74.0 %	37.0 %	57.0 %	44.0 %	62.0 %
Retailer Trading Area HH % @ STCO	12.0 %	81.0 %	31.0 %	77.0 %	84.0 %	19.0 %	39.0 %	39.0 %
Retailer Trading Area Spend % @ STCO	59.0 %	53.0 %	68.0 %	51.0 %	45.0 %	6.0 %	80.0 %	28.0 %
Market Trading Area HH % @ STCO	52.0 %	95.0 %	48.0 %	13.0 %	27.0 %	9.0 %	91.0 %	91.0 %

Table 6–15 lists the measures available in this view.

**Table 6–15 Household Panel Data Quarter Trading Area Style Color Consumer Profile Measures**

Label
Market Trading Area Spend % @ STCO
Retailer Trading Area HH % @ STCO
Retailer Trading Area Spend % @ STCO
Market Trading Area HH % @ STCO

## Household Panel Data Quarter Trading Area Style Consumer Profile View

Use this view to set the data for quarter, trading area, style, and consumer profile.

**Figure 6–21 Household Panel Data Quarter Trading Area Style Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011
Market Trading Area Spend % @ STYL	74.0 %	88.0 %	4.0 %	88.0 %	11.0 %	24.0 %	63.0 %	45.0 %
Retailer Trading Area HH % @ STYL	49.0 %	22.0 %	28.0 %	43.0 %	5.0 %	26.0 %	3.0 %	30.0 %
Retailer Trading Area Spend % @ STYL	46.0 %	15.0 %	7.0 %	13.0 %	58.0 %	58.0 %	60.0 %	43.0 %
Market Trading Area HH % @ STYL	4.0 %	24.0 %	63.0 %	59.0 %	3.0 %	18.0 %	41.0 %	93.0 %

Table 6–16 lists the measures available in this view.

**Table 6–16 Household Panel Data Quarter Trading Area Style Consumer Profile Measures**

Label
Market Trading Area Spend % @ STYL
Retailer Trading Area HH % @ STYL
Retailer Trading Area Spend % @ STYL
Market Trading Area HH % @ STYL

### Household Panel Data Quarter Trading Area SubCategory Consumer Profile View

Use this view to set the data for quarter, trading area, sub-category, and consumer profile.

**Figure 6–22 Household Panel Data Quarter Trading Area SubCategory Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Fy
Market Trading Area Spend % @ SCLS	21.0 %	27.0 %	17.0 %	94.0 %	86.0 %	88.0 %	4.0 %	96.0 %	
Retailer Trading Area HH % @ SCLS	63.0 %	59.0 %	93.0 %	61.0 %	13.0 %	76.0 %	66.0 %	36.0 %	
Retailer Trading Area Spend % @ SCLS	44.0 %	30.0 %	76.0 %	51.0 %	48.0 %	76.0 %	34.0 %	23.0 %	
Market Trading Area HH % @ SCLS	60.0 %	74.0 %	12.0 %	13.0 %	79.0 %	30.0 %	76.0 %	73.0 %	

Table 6–17 lists the measures available in this view.

**Table 6–17 Household Panel Data Quarter Trading Area SubCategory Consumer Profile Measures**

Label
Market Trading Area Spend % @ SCLS
Retailer Trading Area HH % @ SCLS
Retailer Trading Area Spend % @ SCLS
Market Trading Area HH % @ SCLS

## Household Panel Data Quarter Trading Area SubCategory Consumer Segment View

Use this view to set the data for quarter, trading area, sub-category, and consumer segment.

**Figure 6–23 Household Panel Data Quarter Trading Area SubCategory Consumer Segment View**

	Consumer Purchase Frequency for Sub-Category percentage
1st Qtr, FY2010	127.0 %
2nd Qtr, FY2010	28.0 %
3rd Qtr, FY2010	86.0 %
4th Qtr, FY2010	45.0 %
1st Qtr, FY2011	58.0 %
2nd Qtr, FY2011	183.0 %
3rd Qtr, FY2011	27.0 %
4th Qtr, FY2011	59.0 %
1st Qtr, FY2012	106.0 %
2nd Qtr, FY2012	0.0 %
3rd Qtr, FY2012	0.0 %
4th Qtr, FY2012	0.0 %

Table 6–18 lists the measure available in this view.

**Table 6–18 Household Panel Data Quarter Trading Area SubCategory Consumer Segment Measure**

Label
Consumer Purchase Frequency for Sub-Category percentage

## Household Panel Data Quarter Trading Area SubCategory Retailer Consumer Segment View

Use this view to set the data for quarter, trading area, sub-category, retailer, and consumer segment.

**Figure 6–24 Household Panel Data Quarter Trading Area SubCategory Retailer Consumer Segment View**

	Buyer Conversion Rate
1st Qtr, FY2010	84.0 %
2nd Qtr, FY2010	80.0 %
3rd Qtr, FY2010	175.0 %
4th Qtr, FY2010	144.0 %
1st Qtr, FY2011	20.0 %
2nd Qtr, FY2011	56.0 %
3rd Qtr, FY2011	164.0 %
4th Qtr, FY2011	142.0 %
1st Qtr, FY2012	126.0 %
2nd Qtr, FY2012	0.0 %
3rd Qtr, FY2012	0.0 %
4th Qtr, FY2012	0.0 %
1st Qtr, FY2013	0.0 %
2nd Qtr, FY2013	0.0 %

Table 6–19 lists the measure available in this view.

**Table 6–19 Household Panel Data Quarter Trading Area SubCategory Retailer Consumer Segment Measure**

Label
Buyer Conversion Rate

## Household Panel Data Store Category View

Use this view to set the data for store and category.

**Figure 6–25 Household Panel Data Store Category View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011
Item \$ per Item Buyer @ Category (Str)	\$ 0.0K							
% Item \$ on Deal @ Category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Item Penetration @ Category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Item \$ per Item Trip @ Category (Str)	\$ 0.0K							
Item Trips per Item Buyer @ Category (Str)	0.00K							

Table 6–20 lists the measures available in this view.

**Table 6–20 Household Panel Data Store Category Measures**

Label
Item \$ per Item Buyer @ Category (Str)
% Item \$ on Deal @ Category (Str)
Item Penetration @ Category (Str)
Item \$ per Item Trip @ Category (Str)
Item Trips per Item Buyer @ Category (Str)

## Household Panel Data Store Category Consumer Profile View

Use this view to set the data for store, category, and consumer profile.

**Figure 6–26 Household Panel Data Store Category Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011
% of Segment Turnover @ Category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% of Segment Buyer @ Category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–21 lists the measures available in this view.

**Table 6–21 Household Panel Data Store Category Consumer Profile Measures**

Label
% of Segment Turnover @ Category (Str)
% of Segment Buyer @ Category (Str)

## Household Panel Data Store Category Retailer Type View

Use this view to set the data for store, category, and retailer type.

**Figure 6–27 Household Panel Data Store Category Retailer Type View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
% Buyers @ Category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% Dollars @ Category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–22 lists the measures available in this view.

**Table 6–22 Household Panel Data Store Category Retailer Type Measures**

Label
% Buyers @ Category (Str)
% Dollars @ Category (Str)

## Household Panel Data Store Consumer Profile View

Use this view to set the data for store and consumer profile.

**Figure 6–28 Household Panel Data Store Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011
Working Plan (Str) % of Retailer Turnover Store Level	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% of Retail Shoppers at store level (Raw)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Retailer Spend %								
Market Spend %								
Market HH %								
Retailer HH %								

Table 6–23 lists the measures available in this view.

**Table 6–23 Household Panel Data Store Consumer Profile Measures**

Label
Working Plan (Str) % of Retailer Turnover Store Level
% of Retail Shoppers at store level (Raw)
Retail Spend %
Market Spend %
Market HH %
Retailer HH %

## Household Panel Data Store SKU View

Use this view to set the data for store and SKU.

**Figure 6–29 Household Panel Data Store SKU View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2011
Item \$ per Item Buyer @ SKU (Str)	\$ 0.0K								
% Item \$ on Deal @ SKU (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Item Penetration @ SKU (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Item \$ per Item Trip @ SKU (Str)	\$ 0.0K								
Item Trips per Item Buyer @ SKU (Str)	0.00K								

Table 6–24 lists the measures available in this view.

**Table 6–24 Household Panel Data Store SKU Measures**

Label
Item \$ per Item Buyer @ SKU (Str)
% Item \$ on Deal @ SKU (Str)
Item Penetration @ SKU (Str)
Item \$ per Item Trip @ SKU (Str)
Item Trips per Item Buyer @ SKU (Str)

## Household Panel Data Store SKU Consumer Profile View

Use this view to set the data for store, SKU, and consumer profile.

**Figure 6–30 Household Panel Data Store SKU Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2011
% of Segment Turnover @ SKU (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% of Segment Buyer @ SKU (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–25 lists the measures available in this view.

**Table 6–25 Household Panel Data Store SKU Consumer Profile Measures**

Label
% of Segment Turnover @ SKU (Str)
% of Segment Buyer @ SKU (Str)

## Household Panel Data Store SKU Retailer Type View

Use this view to set the data for store, SKU, and retailer type.

**Figure 6–31 Household Panel Data Store SKU Retailer Type View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
% Buyers @ SKU (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% Dollars @ SKU (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–26 lists the measures available in this view.

**Table 6–26 Household Panel Data Store SKU Retailer Type Measures**

Label
% Buyers @ SKU (Str)
% Dollars @ SKU (Str)

## Household Panel Data Store Style View

Use this view to set the data for store and style.

**Figure 6–32 Household Panel Data Store Style View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st FY
Item \$ per Item Buyer @ Style (Str)	\$ 0.0K	\$ 0.0K							
% Item \$ on Deal @ Style (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Item Penetration @ Style (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Item \$ per Item Trip @ Style (Str)	\$ 0.0K	\$ 0.0K							
Item Trips per Item Buyer @ Style (Str)	0.00K	0.00K							

Table 6–27 lists the measures available in this view.

**Table 6–27 Household Panel Data Store Style Measures**

Label
Item \$ per Item Buyer @ Style (Str)
% Item \$ on Deal @ Style (Str)
Item Penetration @ Style (Str)
Item \$ per Item Trip @ Style (Str)
Item Trips per Item Buyer @ Style (Str)

## Household Panel Data Store Style Consumer Profile View

Use this view to set the data for store, style, and consumer profile.

**Figure 6–33 Household Panel Data Store Style Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st FY
% of Segment Turnover @ Style (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% of Segment Buyer @ Style (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–28 lists the measures available in this view.

**Table 6–28 Household Panel Data Style Consumer Profile Measures**

Label
% of Segment Turnover @ Style (Str)
% of Segment Buyer @ Style (Str)

## Household Panel Data Store Style Retailer Type View

Use this view to set the data for store, style, and retailer type.

**Figure 6–34 Household Panel Data Store Style Retailer Type View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
% Buyers @ Style (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% Dollars @ Style (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–29 lists the measures available in this view.

**Table 6–29 Household Panel Data Style Retailer Type Measures**

Label
% Buyers @ Style (Str)
% Dollars @ Style (Str)

## Household Panel Data Store Style Color View

Use this view to set the data for store and style/color.

**Figure 6–35 Household Panel Data Store StyleColor View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011
Item \$ per Item Buyer @ Style/Color (Str)	\$ 0.0K							
% Item \$ on Deal @ Style/Color (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Item Penetration @ Style/Color (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Item \$ per Item Trip @ Style/Color (Str)	\$ 0.0K							
Item Trips per Item Buyer @ Style/Color (Str)	0.00K							

Table 6–30 lists the measures available in this view.

**Table 6–30 Household Panel Data Store StyleColor Measures**

Label
Item \$ per Item Buyer @ Style/Color (Str)
% Item \$ on Deal @ Style/Color (Str)
Item Penetration @ Style/Color (Str)
Item \$ per Item Trip @ Style/Color (Str)
Item Trips per Item Buyer @ Style/Color (Str)

## Household Panel Data Store StyleColor Consumer Profile View

Use this view to set the data for store, style/color, and consumer profile.

**Figure 6–36 Household Panel Data Store StyleColor Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011
% of Segment Turnover @ Style/Color (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% of Segment Buyer @ Style/Color (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–31 lists the measures available in this view.

**Table 6–31 Household Panel Data Store StyleColor Consumer Profile Measures**

Label
% of Segment Turnover @ Style/Color (Str)
% of Segment Buyer @ Style/Color (Str)

## Household Panel Data Store StyleColor Retailer Type View

Use this view to set the data for store, style/color, and retailer type.

**Figure 6–37 Household Panel Data Store StyleColor Retailer Type View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
% Buyers @ Style/Color (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% Dollars @ Style/Color (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–32 lists the measures available in this view.

**Table 6–32 Household Panel Data Store StyleColor Retailer Type Measures**

Label
% Buyers @ Style/Color (Str)
% Dollars @ Style/Color (Str)

## Household Panel Data Store SubCategory View

Use this view to set the data for store and sub-category.

**Figure 6–38 Household Panel Data Store SubCategory View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011
Item \$ per Item Buyer @ Sub-Category (Str)	\$ 0.0K							
% Item \$ on Deal @ Sub-Category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Item Penetration @ Sub-Category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Item \$ per Item Trip @ Sub-Category (Str)	\$ 0.0K							
Item Trips per Item Buyer @ Sub-Category (Str)	0.00K							

Table 6–33 lists the measures available in this view.

**Table 6–33 Household Panel Data Store SubCategory Measures**

Label
Item \$ per Item Buyer @ Sub-Category (Str)
% Item \$ on Deal @ Sub-Category (Str)
Item Penetration @ Sub-Category (Str)
Item \$ per Item Trip @ Sub-Category (Str)
Item Trips per Item Buyer @ Sub-Category (Str)

## Household Panel Data Store SubCategory Consumer Profile View

Use this view to set the data for store, sub-category, and consumer profile.

**Figure 6–39 Household Panel Data Store SubCategory Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011
% of Segment Turnover @ Sub-Category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% of Segment Buyer @ Sub-Category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–34 lists the measures available in this view.

**Table 6–34 Household Panel Data Store SubCategory Consumer Profile Measures**

Label
% of Segment Turnover @ Sub-Category (Str)
% of Segment Buyer @ Sub-Category (Str)

## Household Panel Data Store SubCategory Retailer View

Use this view to set data for store, sub-category, and retailer.

**Figure 6–40 Household Panel Data Store SubCategory Retailer View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
Buyer Conversion Rate	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Top Shopper Index	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–35 lists the measures available in this view.

**Table 6–35 Household Panel Data Store SubCategory Retailer Measures**

Label
Buyer Conversion Rate
Top Shopper Index

## Household Panel Data Store SubCategory Retailer Type View

Use this view to set the data for store, sub-category, and retailer type.

**Figure 6–41 Household Panel Data Store SubCategory Retailer Type View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
% Buyers @ Sub-category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% Dollars @ Sub-category (Str)	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–36 lists the measures available in this view.

**Table 6–36 Household Panel Data Store SubCategory Retailer Type Measures**

Label
% Buyers @ Sub-category (Str)
% Dollars @ Sub-category (Str)

## Household Panel Data Trading Area Category View

Use this view to set the data for trading area and category.

**Figure 6–42 Household Panel Data Trading Area Category View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
Average HH Spend	\$ 4.83	\$ 2.69	\$ 61.26	\$ 44.40	\$ 55.28	\$ 9.66	\$ 9.54	\$ 100.52	\$ 31.
% Item \$ on Deal @ Category	66.0 %	47.0 %	92.0 %	91.0 %	23.0 %	96.0 %	25.0 %	17.0 %	39.0
Item Penetration @ Category	75.0 %	74.0 %	24.0 %	27.0 %	54.0 %	87.0 %	83.0 %	68.0 %	87.0
Item \$ per Item Trip @ Category	\$ 1.6K	\$ 1.6K	\$ 1.2K	\$ 2.0K	\$ 1.9K	\$ 1.6K	\$ 1.0K	\$ 1.5K	\$ 1.1
# Trips per Buyer	13.06K	12.60K	18.70K	10.49K	12.89K	18.59K	16.04K	16.50K	13.5

Table 6–37 lists the measures available in this view.

**Table 6–37 Household Panel Data Trading Area Category Measures**

Label
Average Household Spend

**Table 6–37 (Cont.) Household Panel Data Trading Area Category Measures**

Label
% Item \$ on Deal @ Category
Item Penetration @ Category
Item \$ per Item Trip @ Category
# Trips per Buyer

## Household Panel Data Trading Area Category Retailer Type View

Use this view to set the data for trading area, category, and retailer type.

**Figure 6–43 Household Panel Data Trading Area Category Retailer Type View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
% Buyers @ Category	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% Dollars @ Category	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–38 lists the measures available in this view.

**Table 6–38 Household Panel Data Trading Area Category Retailer Type Measures**

Label
% Buyers @ Category
% Dollars @ Category

## Household Panel Data Trading Area Consumer Profile View

Use this view to set the data for trading area and consumer profile.

**Figure 6–44 Household Panel Data Trading Area Consumer Profile View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011
Working Plan (Str) % of Retailer Turnover Trading Area Level	80.0 %	50.0 %	63.0 %	35.0 %	24.0 %	69.0 %	25.0 %
% of Retail Shoppers at trading area Level (Raw)	33.0 %	86.0 %	67.0 %	95.0 %	83.0 %	62.0 %	38.0 %

Table 6–39 lists the measures available in this view.

**Table 6–39 Household Panel Data Trading Area Consumer Profile Measures**

Label
Working Plan (Str) % of Retailer Turnover Trading Area Level
% of Retail Shoppers at Trading Area Level (Raw)

## Household Panel Data Trading Area SKU View

Use this view to set the data for trading area and SKU.

**Figure 6–45 Household Panel Data Trading Area SKU View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
Item \$ per Item Buyer @ SKU	\$ 0.1K	\$ 0.0K	\$ 0.1K	\$ 0.1K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0
% Item \$ on Deal @ SKU	88.0 %	21.0 %	28.0 %	51.0 %	83.0 %	61.0 %	24.0 %	87.0 %	57.0
Item Penetration @ SKU	9.0 %	22.0 %	88.0 %	50.0 %	69.0 %	8.0 %	73.0 %	50.0 %	60.0
Item \$ per Item Trip @ SKU	\$ 0.0K	\$ 0							
Item Trips per Item Buyer @ SKU	0.06K	0.15K	0.18K	0.11K	0.05K	0.19K	0.15K	0.16K	0.2

Table 6–40 lists the measures available in this view.

**Table 6–40 Household Panel Data Trading Area SKU Measures**

Label
Item \$ per Item Buyer @ SKU
% Item \$ on Deal @ SKU
Item Penetration @ SKU
Item \$ per Item Trip @ SKU
Item Trips per Item Buyer @ SKU

### Household Panel Data Trading Area SKU Retailer Type View

Use this view to set the data for trading area, SKU, and retailer type.

**Figure 6–46 Household Panel Data Trading Area SKU Retailer Type View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
% Buyers @ SKU	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% Dollars @ SKU	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–41 lists the measures available in this view.

**Table 6–41 Household Panel Data Trading Area SKU Retailer Type Measures**

Label
% Buyers @ SKU
% Dollars @ SKU

## Household Panel Data Trading Area Style View

Use this view to set the data for trading area and style.

**Figure 6–47 Household Panel Data Trading Area Style View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
Item \$ per Item Buyer @ Style	\$ 0.1K	\$ 0.0K	\$ 0.1K	\$ 0.1K	\$ 0.1K				
% Item \$ on Deal @ Style	61.0 %	54.0 %	32.0 %	99.0 %	19.0 %	59.0 %	55.0 %	73.0 %	10.0 %
Item Penetration @ Style	87.0 %	35.0 %	28.0 %	7.0 %	13.0 %	34.0 %	33.0 %	26.0 %	53.0 %
Item \$ per Item Trip @ Style	\$ 0.2K	\$ 0.2K	\$ 0.1K	\$ 0.2K					
Item Trips per Item Buyer @ Style	2.38K	2.67K	2.22K	3.56K	3.87K	2.90K	2.79K	3.39K	3.39K

Table 6–42 lists the measures available in this view.

**Table 6–42 Household Panel Data Trading Area Style Measures**

Label
Item \$ per Item Buyer @ Style
% Item \$ on Deal @ Style
Item Penetration @ Style
Item \$ per Item Trip @ Style
Item Trips per Item Buyer @ Style

## Household Panel Data Trading Area Style Retailer Type View

Use this view to set the data for trading area, style, and retailer type.

**Figure 6–48 Household Panel Data Trading Area Style Retailer Type View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
% Buyers @ Style	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% Dollars @ Style	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–43 lists the measures available in this view.

**Table 6–43 Household Panel Data Trading Area Style Retailer Type Measures**

Label
% Buyers @ Style (Str)
% Dollars @ Style (Str)

## Household Panel Data Trading Area StyleColor View

Use this view to set the data for trading area and style/color.

**Figure 6–49 Household Panel Data Trading Area StyleColor View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st FY
Item \$ per Item Buyer @ Style/Color	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.1K	\$ 0.1K	\$ 0.1K	\$ 0.0K	
% Item \$ on Deal @ Style/Color	10.0 %	52.0 %	42.0 %	48.0 %	83.0 %	25.0 %	15.0 %	74.0 %	
Item Penetration @ Style/Color	45.0 %	60.0 %	72.0 %	92.0 %	10.0 %	91.0 %	51.0 %	77.0 %	
Item \$ per Item Trip @ Style/Color	\$ 0.1K	\$ 0.0K							
Item Trips per Item Buyer @ Style/Color	0.23K	0.55K	0.98K	0.22K	0.42K	0.69K	0.77K	0.57K	

Table 6–44 lists the measures available in this view.

**Table 6–44 Household Panel Data Trading Area StyleColor Measures**

Label
Item \$ per Item Buyer @ Style/Color
% Item \$ on Deal @ Style/Color
Item Penetration @ Style/Color
Item \$ per Item Trip @ Style/Color
Item Trips per Item Buyer @ Style/Color

## Household Panel Data Trading Area StyleColor Retailer Type View

Use this view to set the data for trading area, style/color, and retailer type.

**Figure 6–50 Household Panel Data Trading Area StyleColor Retailer Type View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
% Buyers @ Style/Color	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% Dollars @ Style/Color	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–45 lists the measures available in this view.

**Table 6–45 Household Panel Data Trading Area StyleColor Retailer Type Measures**

Label
% Buyers @ Style/Color (Str)
% Dollars @ Style/Color (Str)

## Household Panel Data Trading Area SubCategory View

Use this view to set the data for trading area and sub-category.

**Figure 6–51 Household Panel Data Trading Area SubCategory View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011
Item \$ per Item Buyer @ Sub-Category	\$ 0.0K	\$ 0.1K	\$ 0.0K	\$ 0.1K				
% Item \$ on Deal @ Sub-Category	29.0 %	93.0 %	81.0 %	3.0 %	44.0 %	61.0 %	3.0 %	41.0 %
Item Penetration @ Sub-category	46.0 %	47.0 %	46.0 %	73.0 %	8.0 %	44.0 %	22.0 %	43.0 %
Item \$ per Item Trip @ Sub-Category	\$ 0.2K	\$ 0.4K	\$ 0.2K	\$ 0.4K	\$ 0.3K	\$ 0.2K	\$ 0.4K	\$ 0.3K
Item Trips per Item Buyer @ Sub-Category	6.74K	7.37K	4.22K	4.52K	6.38K	5.01K	7.64K	5.92K

Table 6–46 lists the measures available in this view.

**Table 6–46 Household Panel Data Trading Area SubCategory Measures**

Label
Item \$ per Item Buyer @ Sub-Category

**Table 6–46 (Cont.) Household Panel Data Trading Area SubCategory Measures**

Label
% Item \$ on Deal @ Sub-Category
Item Penetration @ Sub-Category
Item \$ per Item Trip @ Sub-Category
Item Trips per Item Buyer @ Sub-Category

## Household Panel Data Trading Area SubCategory Retailer Type View

Use this view to set the data for trading area, sub-category, and retail type.

**Figure 6–52 Household Panel Data Trading Area SubCategory Retailer Type View**

	1st Qtr, FY2010	2nd Qtr, FY2010	3rd Qtr, FY2010	4th Qtr, FY2010	1st Qtr, FY2011	2nd Qtr, FY2011	3rd Qtr, FY2011	4th Qtr, FY2011	1st Qtr, FY2012
% Buyers @ Sub-category	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
% Dollars @ Sub-category	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 6–47 lists the measures available in this view.

**Table 6–47 Household Panel Data Trading Area SubCategory Retailer Type Measures**

Label
% Buyers @ Sub-Category
% Dollars @ Sub-Category

## Acutals-Sourced Data Step

This step has the following view:

- [Acutals-Sourced Data View](#)

## Actuals-Sourced Data View

Use this view to set the actuals-sourced data.

**Figure 6–53 Actuals-Sourced Data View**

	2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010	3/20/2010	3/27/2010	4/3/2010	4/10/2010
TY Sales Units	0	0	0	0	0	0	0	0	0
TY Sales Retail	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
TY End of Period Inventory Retail	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
TY Cost Retail	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
TY Price Retail	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Sales for Sub-Category Retail									
Promotional Sales	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Sales	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Sales Units	0	0	0	0	0	0	0	0	0
Promotional Sales Retail	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Promotional Sales Units	0	0	0	0	0	0	0	0	0
Sales Revenue	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Sales Units	0	0	0	0	0	0	0	0	0
Cost Retail	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K

Table 6–48 lists the measures available in this view.

**Table 6–48 Actuals-Sourced Data Measures**

Label
TY Sales Units
TY Sales Retail
TY End of Period Inventory Retail
TY Cost Retail
TY Price Retail
Sales for Sub-Category Retail
Promotional Sales
Sales
Sales Units
Promotional Sales Retail
Promotional Sales Units
Sales Revenue
Sales Units
Cost Retail

## Space Data Step

This step has the following view:

- [Space Data SKU Store Week View](#)

## Space Data SKU Store Week View

Use this view to set the space data for SKU, store, and week.

**Figure 6–54** Space Data SKU Store Week View

	2/13/2010	2/20/2010	2/27/2010	3/6/2010	3/13/2010	3/20/2010	3/27/2010	4/3/2010	4/10/2010
Total Cubic Feet	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
# of Facings	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Shelf Space	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equivalent Sales Retail	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K

Table 6–49 lists the measures available in this view.

**Table 6–49** Space Data SKU Store Week Measures

Label
Total Cubic Feet
# of Facings
Total Shelf Space
Equivalent Sales Retail

## Next Steps

After completing all of the data validation and seeding steps, commit the workbook. Continue to the [Category Planning Task](#).

---

## Category Planning Task

This task has eight steps. The steps cover all the activities related to Category Planning. Each of the defined steps is one of the significant steps in the Category Planning process. The objective is to view and analyze information from diverse sources and use the information to drive the creation, approval, and review of category plans.

This task has the following steps:

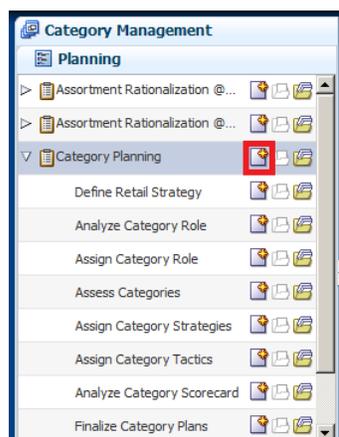
- [Define Retail Strategy Step](#)
- [Analyze Category Role Step](#)
- [Assign Category Role Step](#)
- [Assess Categories Step](#)
- [Assign Category Strategies Step](#)
- [Assign Category Tactics Step](#)
- [Analyze Category Scorecard Step](#)
- [Finalize Category Plans Step](#)

### Create the Category Planning Workbook

To create the workbook:

1. Select the **New Workbook** icon in the Category Planning task.

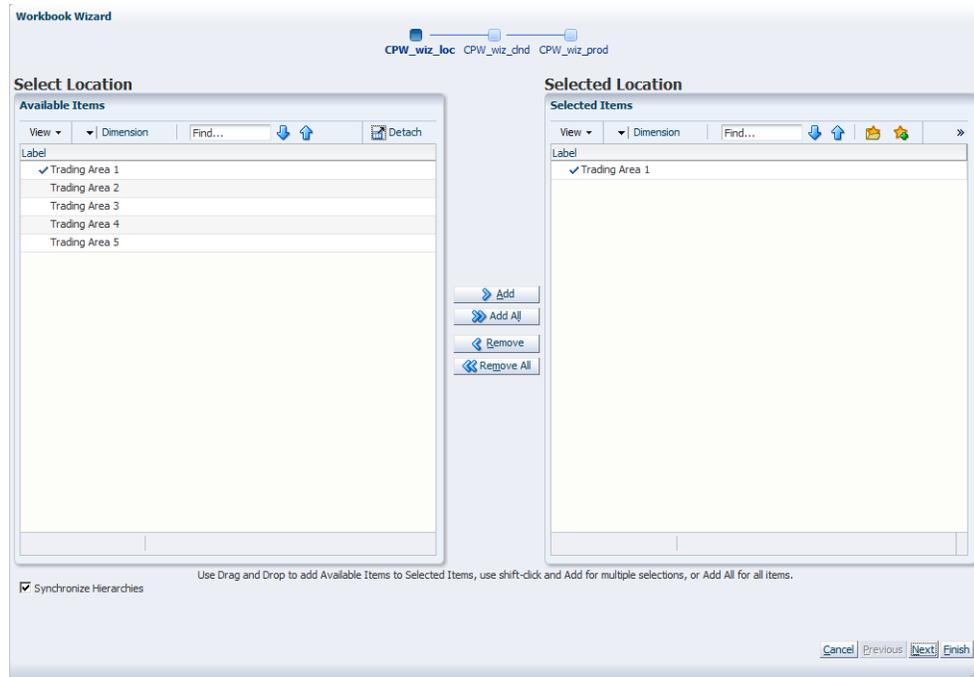
**Figure 7-1** Category Planning Task



The workbook wizard opens.

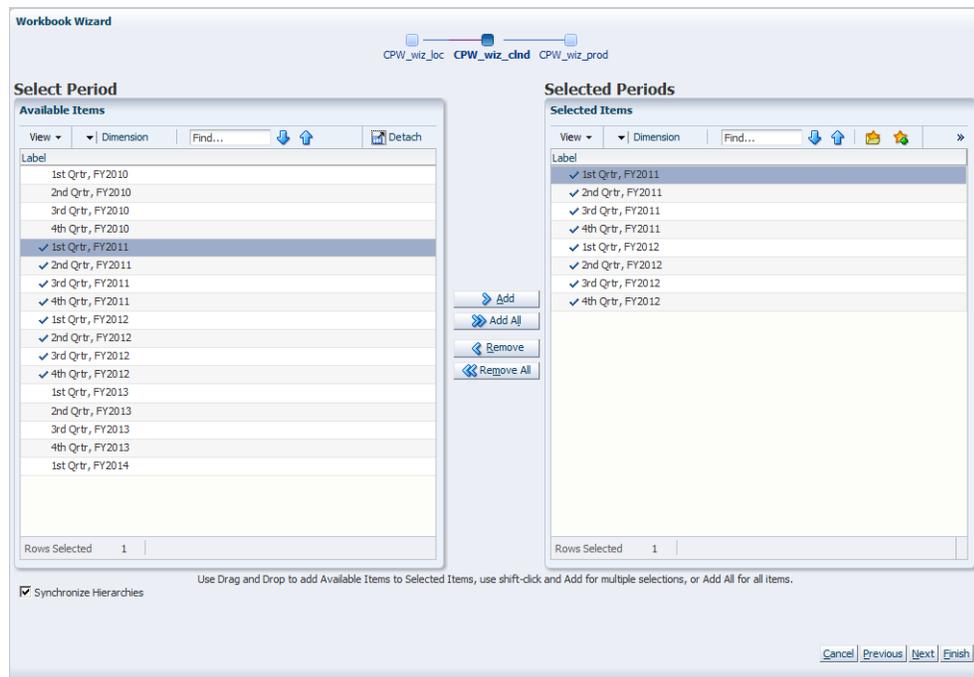
2. Select one location and move it to the Selected Location box. Click **Next**.

**Figure 7–2 Workbook Wizard Select Location Page**



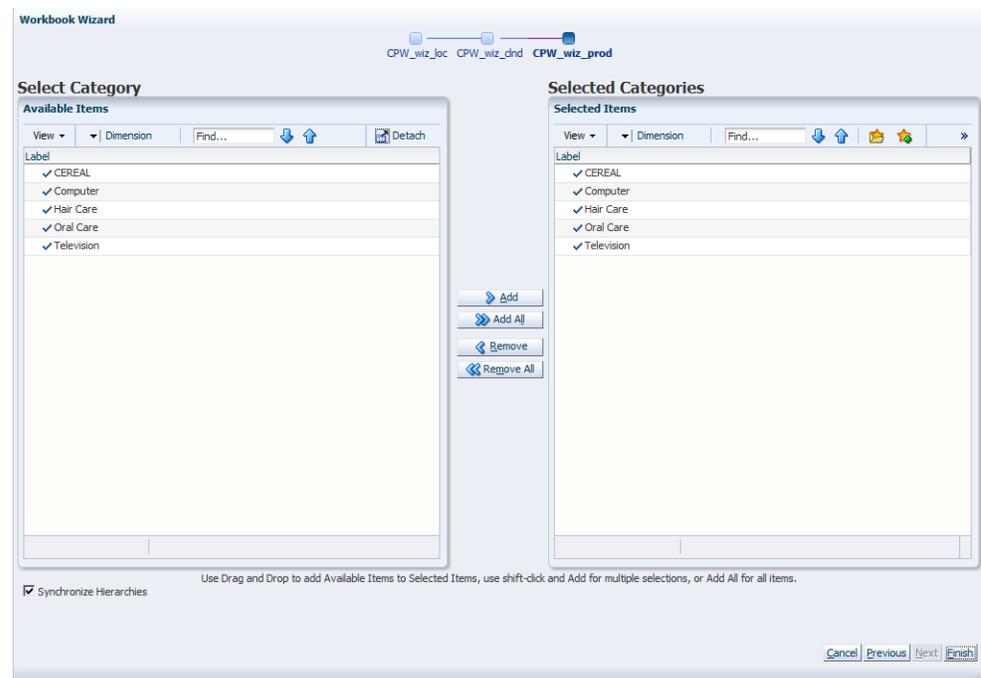
3. Select the calendar periods and move them to the Selected Periods box. Click **Next**.

**Figure 7–3 Workbook Wizard Select Periods Page**



4. Select the categories and move them to the Selected Categories box. Click **Finish**.

**Figure 7–4 Workbook Wizard Select Category Page**



The workbook is created.

## Define Retail Strategy Step

Retailers need to view and analyze information from diverse sources and use the information to analyze target shoppers, trading area opportunities, and the competition. Category planning is used to define the retailer's strategy and determine how to allocate category roles while aligning resources to opportunities. The retail strategy should answer the following questions:

- Who are the retailer's target shoppers and is the retailer reaching them?
- Why are the target shoppers a total store opportunity for the retailer?
- Who are the retailer's competitors for the target shopper?
- What opportunities exist to improve the retailer's competitive position?
- Which categories are most strategic in the market and for the retailer?
- How should the retailer allocate category roles and resources while aligning resources to opportunities?

The following data is required for this task:

- Store clusters.
- Predefined consumer segments.
- Predefine trading areas.
- Imported consumer decision trees in XML format.
- Imported forecast from Oracle Retail Demand Forecasting (RDF).

- Imported POS data from the retailer.
- Analysis based on Household Panel data received from external sources, such as Nielsen or Symphony IRI.
- All external data precomputed or aggregated and not required to be recomputed within Category Planning.

This step has the following views:

- [Analyze Target Shoppers View](#)
- [Analyze Trading Area Opportunity View](#)
- [Analyze Competition View](#)
- [Define Retail Strategy - Key Take Aways View](#)

## Analyze Target Shoppers View

Use this view to analyze target shoppers. This analytic provides insight into whether the retailer is stronger compared to the total market with respect to a particular consumer demographic group:

- Composition of the consumers shopping at the retailer as compared to the overall market.
- What percentage of the total spend in that market is from each of the demographic groups.

The view exists at the following levels:

- Consumer Profile (the base level in the Consumer Profile dimension) such as household income or number of children
- Trading Area (a level in the Location dimension) such as Chicago or Atlanta
- Category (a level in the Product dimension) such as cereal or coffee

**Figure 7–5 Analyze Target Shoppers View**

	Market Trading Area HH %	Retailer Trading Area HH %	Retailer HH % Diff Market HH %	Market Trading Area Spend %	Retailer Trading Area Spend %	Retailer Spend % Diff Market Spend %
\$0 - \$19,999	24.0 %	24.0 %	0.0 %	24.0 %	24.0 %	0.0 %
\$20,000 - \$29,999	33.0 %	33.0 %	0.0 %	33.0 %	33.0 %	0.0 %
\$30,000 - \$39,999	92.0 %	92.0 %	0.0 %	92.0 %	92.0 %	0.0 %
\$40,000 - \$49,999	15.0 %	15.0 %	0.0 %	15.0 %	15.0 %	0.0 %
\$50,000 - \$69,999	78.0 %	78.0 %	0.0 %	78.0 %	78.0 %	0.0 %
\$70,000 - \$89,999	20.0 %	20.0 %	0.0 %	20.0 %	20.0 %	0.0 %
\$90,000 - \$109,999	76.0 %	76.0 %	0.0 %	76.0 %	76.0 %	0.0 %
\$110,000 - \$149,999	82.0 %	82.0 %	0.0 %	82.0 %	82.0 %	0.0 %
\$150,000+	68.0 %	68.0 %	0.0 %	68.0 %	68.0 %	0.0 %
1	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
2	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
3-4	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
5-6	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 7–1 lists the measures available in this view. The data is loaded from Household Panel data.

**Table 7–1 Analyze Target Shoppers Measures**

Label
Market Trading Area HH %
Retailer Trading Area HH %
Retailer HH % Diff Market HH %
Market Trading Area Spend %
Retailer Trading Area Spend %
Retailer Spend % Diff Market Spend %

## Analyze Trading Area Opportunity View

Use this view to see the analytics that identify if target shoppers offer a total store opportunity by comparing selected metrics against national (or total market).

This view exists at the following levels:

- Consumer Segment (a level in the Location dimension), such as Soccer Mom or Empty Nester
- Trading Area (a level in the Location dimension)
- Category (a level in the Product dimension)

**Figure 7–6 Analyze Trading Area Opportunity View**

	Opportunity	Total Shoppers Index	Shopping Frequency	Shopping Frequency Index	# of Categories in Basket	# of Categories in Basket Index	Avg. Basket Value	Avg. Basket Value Index
Barbies with Bills	NA	50	47.0 %	108	4	60	139.90	188
Empty Nester	NA	77	8.0 %	18	4	60	52.35	70
Getting By	NA	54	72.0 %	166	13	197	35.18	47
Golden Years	NA	123	30.0 %	69	7	106	127.20	171
Savvy Singles	NA	50	58.0 %	134	12	182	54.29	73
Soccer Mom	NA	132	1.0 %	2	3	45	74.63	100
Wealthy Elite	NA	104	86.0 %	199	3	45	35.43	47

Table 7–2 lists the measures available in this view. The measures are loaded from Household Panel data.

**Table 7–2 Analyze Trading Area Opportunity Measures**

Label
Opportunity
Total Shoppers Index
Shopping Frequency

**Table 7–2 (Cont.) Analyze Trading Area Opportunity Measures**

Label
Shopping Frequency Index
# of Categories in Basket
# of Categories in Basket Index
Avg. Basket Value
Avg. Basket Value Index

## Analyze Competition View

Use this view to determine who are the retailer's strongest competitors and if opportunities exist to improve the retailer's position.

This view exists at the following levels:

- Company (a level in the Company dimension)
- Trading Area (a level in the Location dimension)
- Category (a level the Product dimension)

**Figure 7–7 Analyze Competition View**

	Value Share	Penetration (% Buying at Retailer)	Loyalty (% of Buyer Spend at Retailer)	Spend Index (Buyer Spend Compared to Average Spend)
Retailer 1	1.98	5.0 %	49.0 %	81
Retailer 2	66.83	90.0 %	79.0 %	94
Retailer 3	11.09	21.0 %	48.0 %	110
Retailer 4	1.21	11.0 %	9.0 %	122
Retailer 5	15.94	83.0 %	17.0 %	113
Retailer 6	6.22	76.0 %	9.0 %	91
Retailer 7	16.56	46.0 %	45.0 %	80

Table 7–3 lists the measures available in this view. The measures are loaded from Household Panel data.

**Table 7–3 Analyze Competition Measures**

Label
Value Share
Penetration (% Buying at Retailer)
Loyalty (% of Buyer Spend at Retailer)
Spending Index (Buyer Spend Compared to Average Spend)

## Define Retail Strategy - Key Take Aways View

Use this view to enter any pertinent notes for the Define Retail Strategy task.

**Figure 7–8 Define Retail Strategy - Key Take Aways View**

Key Take Away - Define Retail Strategy	
1st Qtr, FY2011	
2nd Qtr, FY2011	
3rd Qtr, FY2011	
4th Qtr, FY2011	
1st Qtr, FY2012	
2nd Qtr, FY2012	
3rd Qtr, FY2012	
4th Qtr, FY2012	

Table 7–4 lists the measure available in this view.

**Table 7–4 Define Retail Strategy - Key Take Aways Measure**

Label
Key Take Away - Define Retail Strategy

## Analyze Category Role Step

The retailer needs to view and analyze information from diverse sources and use the information to determine what role each category plays for the retailer. Category planning provides the ability to analyze category roles by providing insights into which categories are most strategic in the market as well as for the retailers target shoppers. This analysis sets the foundation for understanding which categories should be assigned which roles within the retailer's portfolio.

The following data is required for this step:

- Retailer's loyalty data
- Market scan data
- Household Panel data

This step has the following views:

- [Analyze Cross Category Spending View](#)
- [Analyze Value Share View](#)
- [Analyze Consumer Segment Cross-Category Spending View](#)
- [Analyze Market Share and Growth View](#)
- [Analyze Profit Contribution View](#)
- [Analyze Spend Versus Frequency View](#)
- [Analyze Buyer Conversion View](#)

- [Analyze Consumer Purchase Behavior View](#)
- [Analyze Sales Trends View](#)
- [Analyze Category Role - Key Take Aways View](#)

## Analyze Cross Category Spending View

Use this view to analyze which of the categories are shopped more frequently, have a higher market share, or represent higher market growth compared to other categories for the retailer. This information is best viewed as a bubble chart.

The view exists at the following levels:

- Trading Area (a level in the Location dimension)
- Category (a level in the Product dimension)

**Figure 7–9 Analyze Cross Category Spending View**

	# Trips per Buyer	Market Growth	Market Share	Average Household Spend
CEREAL	12.89K	54.0 %	23.0 %	\$ 55.28
Computer	10.19K	70.0 %	11.0 %	\$ 98.28
Hair Care	12.56K	38.0 %	12.0 %	\$ 67.32
Oral Care	13.34K	69.0 %	65.0 %	\$ 44.93
Television	16.29K	58.0 %	10.0 %	\$ 7.65

Table 7–5 lists the measures available in this view. The measures are loaded from Household Panel data.

**Table 7–5 Analyze Cross Category Spending Measures**

Label
# Trips per Buyer
Market Growth
Market Share
Average Household Spend

## Analyze Value Share View

Use this view to analyze the value share. This information is best viewed as a bubble chart.

**Figure 7–10 Analyze Value Share View**

	Spend Index (All Retailers)	Target Purchase Frequency	Value Share (All Retailers)
CEREAL	107	17.0 %	\$ 0.0K
Computer	107	36.0 %	\$ 0.0K
Hair Care	107	19.0 %	\$ 0.0K
Oral Care	107	31.0 %	\$ 0.0K
Television	107	35.0 %	\$ 0.0K

Table 7–6 lists the measures available in this view.

**Table 7–6 Analyze Value Share Measures**

Label
Spend Index (All Retailers)
Target Purchase Frequency
Value Share (All Retailers)

## Analyze Consumer Segment Cross-Category Spending View

Use this view to determine what is more important for spending to each of the consumer segments. This can be based on market data and retailer data.

The view exists at the following levels:

- Category (a level in the Product dimension)
- Market (a level in the Location dimension)

**Figure 7–11 Analyze Consumer Segment Cross-Category Spending View**

	# Baskets with Category	# Baskets with Category Rank	Transaction Size with Category	Transaction Size with Category Rank	Annual Spend	Annual Spend Rank
CEREAL	93	90	\$ 0.0K	0	\$ 0.4K	65
Computer	94	70	\$ 0.1K	61	\$ 0.0K	84
Hair Care	43	32	\$ 0.1K	68	\$ 0.9K	34
Oral Care	26	61	\$ 0.0K	14	\$ 0.8K	50
Television	36	30	\$ 0.0K	54	\$ 0.1K	86

Table 7-7 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 7-7 Analyze Consumer Segment Cross-Category Spending Measures**

Label
# Baskets with Category
# Baskets with Category Rank
Transaction Size with Category
Transaction Size with Category Rank
Annual Spend
Annual Spend Rank

### Analyze Market Share and Growth View

Use this view to analyze which categories are growing fastest in the market and which of the categories are the strongest for the retailer as compared to all competitors across all consumer segments.

This view exists at the following levels:

- Category (a level in the Product dimension)
- Market (a level in the Location dimension)

**Figure 7-12 Analyze Market Share and Growth View**

	Market Share	Market Share Rank	Market Inventory Turn	Market Inventory Turn Rank	Market Growth	Retailer Growth	Retailer share of growth	Market Sales	Sales Revenue
CEREAL	23.0 %	18	\$ 0.0K	11	54.0 %	56.1 %	10156676..	\$ 0.3K	\$ 7,097.1K
Computer	11.0 %	24	\$ 0.0K	20	70.0 %	100.0 %	0.0 %	\$ 0.1K	\$ 0.0K
Hair Care	12.0 %	23	\$ 0.0K	22	38.0 %	100.0 %	0.0 %	\$ 0.1K	\$ 0.0K
Oral Care	65.0 %	6	\$ 0.1K	8	69.0 %	100.0 %	0.0 %	\$ 0.1K	\$ 0.0K
Television	10.0 %	25	\$ 0.1K	4	58.0 %	100.0 %	0.0 %	\$ 0.2K	\$ 0.0K

Table 7-8 lists the measures available in this view. The measures are loaded from market scan competitive data.

**Table 7-8 Analyze Market Share and Growth Measures**

Label
Market Share
Market Share Rank
Market Inventory Turn
Market Inventory Turn Rank
Market Growth

**Table 7–8 (Cont.) Analyze Market Share and Growth Measures**

Label
Retailer Growth
Retailer Share of Growth
Market Sales
Sales Revenue

## Quadrant Analysis - Mkt Share / Growth / Category Size View

Use this view to analyze market share, growth, and category size. This information is best viewed as a bubble chart.

**Figure 7–13 Quadrant Analysis - Mkt Share / Growth / Category Size View**

The screenshot shows a software window titled "4. Quadrant Analysis - Mkt Share / Growth / Category Size". The interface includes a navigation bar with "Location" and "Calendar" tabs, and a "Trading Area 1" dropdown set to "1st Qtr, FY2011". A toolbar with various icons is visible above the data table. The table has three columns: "Market Share", "Market Share", and "Market Sales". The data rows are as follows:

	Market Share	Market Share	Market Sales
CEREAL	23.0 %	38.0 %	\$ 0.3K
Computer	11.0 %	11.3 %	\$ 0.1K
Hair Care	12.0 %	9.9 %	\$ 0.1K
Oral Care	65.0 %	11.6 %	\$ 0.1K
Television	10.0 %	29.2 %	\$ 0.2K

Table 7–9 lists the measure available in this view. The measure is loaded from market scan and retailer data.

**Table 7–9 Quadrant Analysis - Mkt Share / Growth / Category Size Measure**

Label
Market Share

## Quadrant Analysis - Mkt Share / Growth / Sales View

Use this view to analyze market share, growth, and sales. This information is best viewed as a bubble chart.

**Figure 7-14 Quadrant Analysis - Mkt Share / Growth / Sales View**

	Market Share	Market Share	Sales Revenue
CEREAL	23.0 %	38.0 %	\$ 7,097.1K
Computer	11.0 %	11.3 %	\$ 0.0K
Hair Care	12.0 %	9.9 %	\$ 0.0K
Oral Care	65.0 %	11.6 %	\$ 0.0K
Television	10.0 %	29.2 %	\$ 0.0K

Table 7-10 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 7-10 Quadrant Analysis - Mkt Share / Growth / Sales Measures**

Label
Market Share
Market Growth
Sales Revenue

## Quadrant Analysis - Retailer Share / Growth / Category Size View

Use this view to analyze retailer share, growth, and category size. This information is best viewed as a bubble chart.

**Figure 7-15 Quadrant Analysis - Retailer Share / Growth / Category Size View**

	Retailer share of growth	Retailer Growth	Market Sales
CEREAL	10156676...	56.1 %	\$ 0.3K
Computer	0.0 %	100.0 %	\$ 0.1K
Hair Care	0.0 %	100.0 %	\$ 0.1K
Oral Care	0.0 %	100.0 %	\$ 0.1K
Television	0.0 %	100.0 %	\$ 0.2K

Table 7–11 lists the measures available in this view. The measures are loaded from market scan and retailer data.

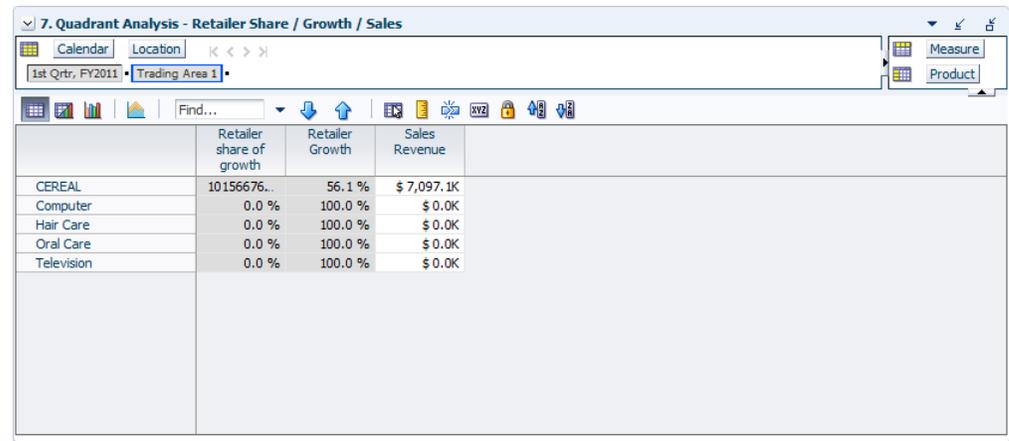
**Table 7–11 Quadrant Analysis - Retailer Share / Growth / Category Size Measures**

Label
Retailer Share of Growth
Retailer Growth
Market Sales

## Quadrant Analysis - Retailer Share / Growth / Sales Step

Use this view to analyze retailer share, growth, and sales. This information is best viewed as a bubble chart.

**Figure 7–16 Quadrant Analysis - Retailer Share / Growth / Sales View**



	Retailer share of growth	Retailer Growth	Sales Revenue
CEREAL	10156676..	56.1 %	\$ 7,097.1K
Computer	0.0 %	100.0 %	\$ 0.0K
Hair Care	0.0 %	100.0 %	\$ 0.0K
Oral Care	0.0 %	100.0 %	\$ 0.0K
Television	0.0 %	100.0 %	\$ 0.0K

Table 7–12 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 7–12 Quadrant Analysis - Retailer Share / Growth / Sales Measures**

Label
Retailer Share of Growth
Retailer Growth
Sales Revenue

## Analyze Profit Contribution View

Use this view to determine how each category contributes to margin and profit across all consumer segments. This information is best viewed as a scatter chart.

This view exists at the following levels:

- Market (a level in the Location dimension)
- Category (a level in the Product dimension)

**Figure 7–17 Analyze Profit Contribution View**

	Sales Revenue	Gross Margin
CEREAL	\$ 7,097.1K	-63.5 %
Computer	\$ 0.0K	0.0 %
Hair Care	\$ 0.0K	0.0 %
Oral Care	\$ 0.0K	0.0 %
Television	\$ 0.0K	0.0 %

Table 7–13 lists the measures available in this view.

**Table 7–13 Analyze Profit Contribution Measures**

Label
Sales Revenue
Gross Margin

### Analyze Spend Versus Frequency View

Use this view to identify which categories are important for those customers who shop at the retailer. This information is best viewed as a scatter chart.

This view exists at the following levels:

- Consumer Segment (a level in the Location dimension)
- Market (a level in the Location dimension)
- Category (a level in the Product dimension)

**Figure 7–18 Analyze Spend Vs. Frequency View**

	Average HH Spend	# Trips per Buyer
CEREAL	\$ 55.28	12.89K
Computer	\$ 98.28	10.19K
Hair Care	\$ 67.32	12.56K
Oral Care	\$ 44.93	13.34K
Television	\$ 7.65	16.29K

Table 7–14 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 7–14 Analyze Spend Vs. Frequency Measures**

Label
Average HH Spend
# Trips per Buyer

## Analyze Buyer Conversion View

Use this view to compare the percentage of buyer conversion of the retailer with that of named competitors.

This view exists at the following levels:

- Category (a level in the Product dimension)
- Retailer (a level in the Retailer dimension)
- Consumer Segment (a level in the Location dimension)

**Figure 7–19 Analyze Buyer Conversion View**

Retailer	Category Buyer Conversion
Retailer 1	57.0 %
Retailer 2	16.0 %
Retailer 3	115.0 %
Retailer 4	42.0 %
Retailer 5	175.0 %
Retailer 6	175.0 %
Retailer 7	103.0 %

Table 7–15 lists the measure available in this view.

**Table 7–15 Analyze Buyer Conversion Measure**

Label
Category Buyer Conversion

## Analyze Consumer Purchase Behavior View

Use this view to analyze consumer purchase behavior across categories.

This view exists at the following levels:

- Category (a level in the Product dimension)
- Consumer Segment (a level in the Location dimension)

**Figure 7–20 Analyze Consumer Purchase Behavior View**

	Average Household Spend	% Item \$ on Deal @ Category	Item Penetration @ Category	# Trips per Buyer	Item \$ per Item Trip @ Category
CEREAL	\$ 55.28	23.0 %	54.0 %	12.89K	\$ 1.9K
Computer	\$ 98.28	11.0 %	70.0 %	10.19K	\$ 0.7K
Hair Care	\$ 67.32	12.0 %	38.0 %	12.56K	\$ 1.6K
Oral Care	\$ 44.93	65.0 %	69.0 %	13.34K	\$ 1.8K
Television	\$ 7.65	10.0 %	58.0 %	16.29K	\$ 0.8K

Table 7–16 lists the measures available in this view.

**Table 7–16 Analyze Consumer Purchase Behavior Measures**

Label
Average Household Spend
% Items \$ on Deal @ Category
Item Penetration @ Category
# Trips per Buyer
Item \$ per Item Trip @ Category

### Analyze Sales Trends View

Use this view to determine the category role between seasonal and convenience. Using the chart, you can infer which of the categories exhibit seasonal behavior. This information is best viewed as a column chart.

This view exists at the following levels:

- Month (a level in the Calendar dimension)
- Category (a level in the Product dimension)

**Figure 7–21 Analyze Sales Trends View**

	Sales Revenue	LY Sales Retail	Forecast Sales
CEREAL	\$ 7,097.1K	\$ 3,117.8K	\$ 0.0K
Computer	\$ 0.0K	\$ 0.0K	\$ 0.0K
Hair Care	\$ 0.0K	\$ 0.0K	\$ 0.0K
Oral Care	\$ 0.0K	\$ 0.0K	\$ 0.0K
Television	\$ 0.0K	\$ 0.0K	\$ 0.0K

Table 7–17 lists the measures available in this view.

**Table 7–17 Analyze Sales Trends Measures**

Label
Sales Revenue
LY Sales Retail
Forecast Sales

## Analyze Category Role - Key Take Aways View

Use this view to enter any pertinent notes for the Analyze Category Role step.

**Figure 7–22 Analyze Category Role - Key Take Aways View**

Key Take Away - Analyze Category Role
CEREAL
Computer
Hair Care
Oral Care
Television

Table 7–18 lists the measure available in this view.

**Table 7–18 Analyze Category Role - Key Take Away Measure**

Label
Key Take Away - Analyze Category Role

## Assign Category Role Step

Use this step to analyze and assign the role of each category based on different Category Management frameworks and capability. There are two frameworks available as part of the base GA solution. These frameworks draw from industry standard best practices. However, it is possible to configure or customize the framework to meet your individual currently used best practice if there is one, leveraging the configuration framework in RPAS. It is important to understand that the role assignment is based on market and consumer focused analysis combined with industry standard frameworks for automated role assignment. The expectation is that the user leverages insights from upstream analysis, retailer strategies, as well as recommendations from industry standard frameworks to override and approve category roles.

The data required for this analysis comes from the retailer's POS data and does not have details broken down by consumer segment. However, this data can be aggregated on the product hierarchy. The following data is required:

- Retailer's POS data
- Retailer's forecast data
- Household Panel data
- Category roles pre-defined:
  - Industry Model A:
    - \* Flagship
    - \* Cash Machine
    - \* Maintain
    - \* Core Traffic
    - \* Under Fire
    - \* Rehab
  - Industry Model B:
    - \* Destination
    - \* Routine
    - \* Seasonal
    - \* Convenience

This step has the following views. You see either four or seven views.

If four views are available, the following are displayed:

- [Analyze Historic Performance using Industry Model A View](#)
- [Analyze Forecasted Performance Using Industry Model A View](#)
- [Assign Roles as per Industry Model A View](#)
- [Assign Category Role - Key Take Aways View](#)

If seven views are available, the following are displayed:

- [Analyze Historic Performance using Industry Model A View](#)
- [Analyze Forecasted Performance Using Industry Model A View](#)
- [Assign Roles as per Industry Model A View](#)

- Analyze Forecasted Performance using Industry Model B View
- Analyze Historic Performance using Industry Model B View
- Assign Roles as per Industry Model B View
- Assign Category Role - Key Take Aways View

## Analyze Historic Performance using Industry Model A View

Use this view to analyze historic performance for determining category roles, such as the following:

- Flagship
- Cash Machine
- Maintain
- Core Traffic
- Under Fire
- Rehab

This information is best viewed as a bubble chart.

**Figure 7–23 Analyze Historic Performance using Industry Model A View**

	LY Sales Retail	LY Gross Margin
CEREAL	\$ 0.0K	0.0 %
Computer	\$ 0.0K	0.0 %
Hair Care	\$ 0.0K	0.0 %
Oral Care	\$ 0.0K	0.0 %
Television	\$ 0.0K	0.0 %

Table 7–19 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 7–19 Analyze Historic Performance using Industry Model A Measures**

Label
LY Sales Retail
LY Gross Margin

## Analyze Forecasted Performance Using Industry Model A View

Use this view to analyze forecasted performance for determining category roles.

This view exists at the following levels:

- Market (a level in the Location dimension)

- Consumer Segment (a level in the Location dimension)
- Category (a level in the Product dimension)

**Figure 7–24 Analyze Forecasted Performance Using Industry Model A View**

	Forecast Sales	Forecast Gross Margin percentage
CEREAL	\$ 0.0K	0.0 %
Computer	\$ 0.0K	0.0 %
Hair Care	\$ 0.0K	0.0 %
Oral Care	\$ 0.0K	0.0 %
Television	\$ 0.0K	0.0 %

Table 7–20 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 7–20 Analyze Forecasted Performance Using Industry Model A Measures**

Label
Forecast Sales
Forecast Growth Margin Percentage

### Assign Roles as per Industry Model A View

Use this view to assign category roles based on historic and forecasted performance.

This view exists at the following level:

- Category (a level in the Product dimension)

**Figure 7–25 Assign Roles as per Industry Model A View**

	Historic Role Assigned (Model A)	Recommended Role - Historical (Model A)	Recommended Role - Forecasted (Model A)	Working Plan Override Role (Model A)
CEREAL		Maintain	Maintain	
Computer		Flagship	Flagship	
Hair Care		Flagship	Flagship	
Oral Care		Flagship	Flagship	
Television		Flagship	Flagship	

Table 7–21 lists the measures available in this view.

**Table 7–21 Assign Roles as per Industry Model A Measures**

Label
Historic Role Assigned (Model A)
Recommended Role - Historical (Model A)
Recommended Role - Forecasted (Model A)
Working Plan Override Role (Model A)

## Analyze Historic Performance using Industry Model B View

Industry Model B is used to determine such roles as the following:

- Destination
- Routine
- Seasonal
- Convenience

Use this view to analyze historic performance for determining category roles. This information is best viewed as a bubble chart.

**Figure 7–26 Analyze Historic Performance using Industry Model B View**

	LY Purchase Frequency	LY Consumer Penetration	LY Sales Retail
CEREAL	0.00	0.0 %	\$ 0.0K
Computer	0.00	0.0 %	\$ 0.0K
Hair Care	0.00	0.0 %	\$ 0.0K
Oral Care	0.00	0.0 %	\$ 0.0K
Television	0.00	0.0 %	\$ 0.0K

Table 7–22 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 7–22 Analyze Historic Performance using Industry Model B Measures**

Label
LY Purchase Frequency
LY Consumer Penetration
LY Sales Retail

## Analyze Forecasted Performance using Industry Model B View

Use this view to analyze forecasted performance for determining category roles.

This view exists at the following levels:

- Market (a level in the Location dimension)
- Consumer Segment (a level in the Location dimension)
- Category (a level in the Product dimension)

**Figure 7–27 Analyze Forecasted Performance Using Industry Model B View**

	Target Purchase Frequency	Item Penetration @ Category	Forecast Sales
CEREAL	66.0 %	75.0 %	\$ 0.0K
Computer	94.0 %	20.0 %	\$ 0.0K
Hair Care	31.0 %	61.0 %	\$ 0.0K
Oral Care	77.0 %	85.0 %	\$ 0.0K
Television	76.0 %	74.0 %	\$ 0.0K

Table 7–23 lists the measures available in this view. The measures are loaded from market scan and retailer data.

**Table 7–23 Analyze Forecasted Performance Using Industry Model B Measures**

Label
Target Purchase Frequency
Item Penetration @ Category
Forecast Sales

## Assign Roles as per Industry Model B View

Use this view to assign category roles based on historic and forecasted performance.

This view is a standard table at the following levels:

- Category (a level in the Product dimension)
- Market (a level in the Location dimension)

**Figure 7–28 Assign Roles as per Industry Model B View**

	Historic Role Assigned (Model B)	Recommended Role - Historical (Model B)	Recommended Role - Forecasted (Model B)	Working Plan Override Role (Model B)
CEREAL		Convenience/S	Unassigned	
Computer		Unassigned	Unassigned	
Hair Care		Unassigned	Unassigned	
Oral Care		Unassigned	Destination	
Television		Unassigned	Destination	

Table 7–24 lists the measures available in this view.

**Table 7–24 Assign Roles as per Industry Model B Measures**

Label
Historic Role Assigned (Model B)
Recommended Role - Historical (Model B)
Recommended Role - Forecasted (Model B)
Working Plan Override Role (Model B)

## Assign Category Role - Key Take Aways View

Use this view to enter any pertinent notes for the Assign Category Role step.

**Figure 7–29 Assign Category Role - Key Take Aways View**

Key Take Away - Assign Category Role
CEREAL
Computer
Hair Care
Oral Care
Television

Table 7–18 lists the measure available in this view.

**Table 7–25 Key Take Away - Assign Category Role Measure**

Label
Key Take Away - Assign Category Roles

## Assess Categories Step

Use this step to perform deeper assessments within the category for assortment, space, price, promotion, and supply chain. The analytics within this step enable retailers to identify and prioritize opportunities.

This step contains the majority of the analytics and answers key questions such as the following:

- Consumer:
  - Who buys the category?
  - What percentage buys the category?
  - How frequently do they purchase?
  - How much do they spend?
  - When do they buy the category?
  - What drives their purchases?
  - What else is in their basket?
  - How loyal are they to the category?
- Retailer:
  - How productive are overall sales and profit trends?
  - How productive is the current assortment?
  - How productive is the current pricing?
  - How effective are current promotions?
  - What are the inventory turns and days of supply?
  - What are the profit margins, velocity, and inventory levels?
- Market/Competitor:
  - What are the sales trends of the category in the market?
  - What is the retailer’s share?
  - What are the opportunities?
  - How does pricing compare to the competition?
  - How does the assortment compare?
  - How does promotional activity compare?
- Supplier/Brand:
  - What are the sales trends for specific brands?
  - How efficient are profitable are each supplier’s brand?

- How does the retailer’s private label contribute to the category and add to their image?
- How does the retailer’s private label compare to national brands?
- How powerful is the supplier’s brand development?

The following data is required for this task:

- Market scan data
- Micro and macro space data
- Pricing data

This step has the following views:

- [Review Assortment Performance View](#)
- [Review Pricing Effectiveness View](#)
- [Review Price Effectiveness at SKU View](#)
- [Review Promotional Effectiveness View](#)
- [Review Average Movement View](#)
- [Review Space Effectiveness View](#)
- [Assess Categories - Key Take Aways View](#)

## Review Assortment Performance View

Use this view to review the performance of the assortment.

**Figure 7–30 Review Assortment Performance View**

	LY Sales Retail	Sales Revenue	LY Sales Units	LY Gross Profit	Profit	LY Gross Margin	Gross Margin
1000537 Epson Stylus	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000538 HP 42" Plasma	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000539 HP 50" Plasma	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000540 Hitachi	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000541 Hitachi	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000542 Insignia 42"	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000543 LG 42" Plasma	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000544 LG 42" Plasma	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000545 LG 50" Plasma	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000546 LG 50" Plasma	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000547 LG 60" Flat Panel	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000548 Maxent 42" HD	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000549 Maxent 50"	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %
1000550 Panasonic 37"	\$ 0.0K	\$ 0.0K	0	\$ 0.0K	\$ 0.0K	0.0 %	0.0 %

Table 7–26 lists the measures available in this view.

**Table 7–26 Review Assortment Performance Measures**

Label
LY Sales Retail
Sales Revenue
LY Sales Units

**Table 7–26 (Cont.) Review Assortment Performance Measures**

<b>Label</b>
LY Gross Profit
Profit
LY Gross Margin
Gross Margin

## Review Pricing Effectiveness View

Use this view to determine how base pricing compares to promotional pricing for the retailer and market. This helps identify if the retailer spread is comparable to or different from the market.

The view exists at the following levels:

- Category/Sub-category (a level in the Product dimension)
- Market (a level in the Location dimension)

**Figure 7–31 Review Pricing Effectiveness View**

	LY Avg. Price	Average Price	LY Market Average Price	Market Average Price	Price Index to Market	LY Promotional Sales	Promotional Sales Avg. Price	LY Market Average Promotional Price	Market Average Promotion Price
30040 Plasma Flat Panel	\$ 0.00	\$ 0.00	\$ 5.25	\$ 5.15	0	\$ 0.00	\$ 0.00	\$ 7.21	\$ 7.63
30041 LCD Flat Panel	\$ 0.00	\$ 0.00	\$ 5.20	\$ 5.50	0	\$ 0.00	\$ 0.00	\$ 7.56	\$ 7.63
30042 Projection	\$ 0.00	\$ 0.00	\$ 5.15	\$ 5.55	0	\$ 0.00	\$ 0.00	\$ 7.42	\$ 7.56
30043 Printers	\$ 0.00	\$ 0.00	\$ 5.05	\$ 5.40	0	\$ 0.00	\$ 0.00	\$ 7.56	\$ 7.70
30045 Toothpaste	\$ 0.00	\$ 0.00	\$ 5.15	\$ 5.35	0	\$ 0.00	\$ 0.00	\$ 7.70	\$ 7.70
30046 Floss Accessories	\$ 0.00	\$ 0.00	\$ 5.45	\$ 5.30	0	\$ 0.00	\$ 0.00	\$ 7.56	\$ 7.70
30047 Shampoo	\$ 0.00	\$ 0.00	\$ 5.50	\$ 5.40	0	\$ 0.00	\$ 0.00	\$ 7.35	\$ 7.70
BAG	\$ 1.00	\$ 1.00	\$ 5.30	\$ 5.60	18	\$ 5.13	\$ 5.17	\$ 7.35	\$ 7.56
BOX	\$ 1.00	\$ 1.00	\$ 5.45	\$ 5.35	19	\$ 5.05	\$ 5.07	\$ 7.07	\$ 7.35
CONVENIENCE	\$ 1.01	\$ 0.99	\$ 5.25	\$ 5.35	19	\$ 4.78	\$ 4.76	\$ 7.14	\$ 7.56

Table 7–27 lists the measures available in this view.

**Table 7–27 Review Pricing Effectiveness Measures**

<b>Label</b>
LY Avg. Price
Average Price
LY Market Average Price
Market Average Price
Price Index to Market
LY Promotional Sales
Promotional Sales Avg. Price
LY Market Average Promotional Price
Market Average Promotion Price

**Table 7–27 (Cont.) Review Pricing Effectiveness Measures**

Label
Promotion Price Index to Market

## Review Price Effectiveness at SKU View

Use this view to compare price levels with the competition. The retailer can then understand which products are contributing to margin and identify opportunities.

The view exists at the following level:

- SKU (a level in the Product dimension)

**Figure 7–32 Review Price Effectiveness at SKU View**

	% Sales	Gross Margin	Market Average Price	Average Price	Gross Margin Contribution
1000537 Epson Stylus	0.0 %	0.0 %		\$ 0.00	0.0 %
1000538 HP 42" Plasma	0.0 %	0.0 %		\$ 0.00	0.0 %
1000539 HP 50" Plasma	0.0 %	0.0 %		\$ 0.00	0.0 %
1000540 Hitachi	0.0 %	0.0 %		\$ 0.00	0.0 %
1000541 Hitachi	0.0 %	0.0 %		\$ 0.00	0.0 %
1000542 Insignia 42"	0.0 %	0.0 %		\$ 0.00	0.0 %
1000543 LG 42" Plasma	0.0 %	0.0 %		\$ 0.00	0.0 %
1000544 LG 42" Plasma	0.0 %	0.0 %		\$ 0.00	0.0 %
1000545 LG 50" Plasma	0.0 %	0.0 %		\$ 0.00	0.0 %
1000546 LG 50" Plasma	0.0 %	0.0 %		\$ 0.00	0.0 %
1000547 LG 60" Flat Panel	0.0 %	0.0 %		\$ 0.00	0.0 %
1000548 Maxent 42" HD	0.0 %	0.0 %		\$ 0.00	0.0 %
1000549 Maxent 50"	0.0 %	0.0 %		\$ 0.00	0.0 %
1000550 Panasonic 37"	0.0 %	0.0 %		\$ 0.00	0.0 %

Table 7–28 lists the measures available in this view.

**Table 7–28 Review Price Effectiveness at SKU Measures**

Label
% Sales
Gross Margin
Market Average Price
Average Price
Gross Margin Contribution

## Review Promotional Effectiveness View

Use this view to understand if the category is general real revenue or whether it relies on promotional volume to maintain share. This information is best viewed as a stacked area chart.

The view exists at the following levels:

- Variable - quarter/month/year/etc (a level in the Calendar dimension)
- Sales Units (from the retailer's POS data)

**Figure 7–33 Review Promotional Effectiveness View**

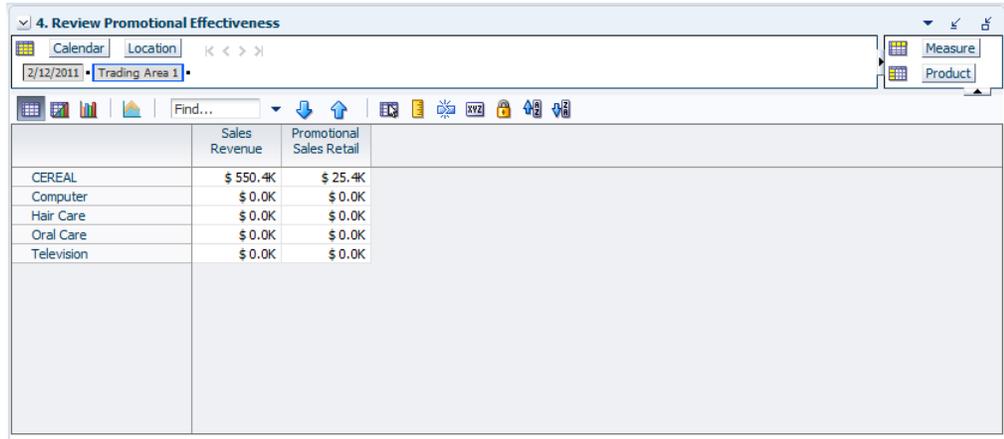


Table 7–29 lists the measures available in this view.

**Table 7–29 Review Promotional Effectiveness Measures**

Label
Sales Revenue
Promotional Sales Retail

## Review Average Movement View

This view is related to promotional effectiveness and shows the sales units for a category over time. This information is best displayed as a line chart.

**Figure 7–34 Review Average Movement View**

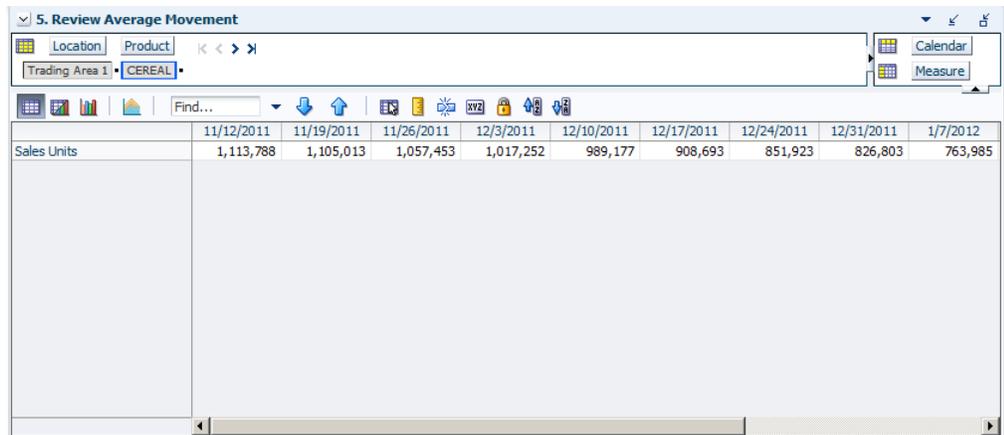


Table 7–30 lists the measure available in this view.

**Table 7–30 Review Average Movement Measure**

Label
Sales Revenue

## Review Space Effectiveness View

Use this view to review the effectiveness of the planned space. All measures are optional and based on whether the retailer has the space planning data available.

**Figure 7–35 Review Space Effectiveness View**

	Total Cubic Feet	# of Facings	Total Shelf Space	Sales Dollars per Cubic Feet	Sales Units per Cubic Feet	Profit per Cubic Feet	% Sales	Gross Margin Contribution
1000537 Epson Stylus	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000538 HP 42" Plasma	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000539 HP 50" Plasma	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000540 Hitachi	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000541 Hitachi	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000542 Insignia 42"	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000543 LG 42" Plasma	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000544 LG 42" Plasma	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000545 LG 50" Plasma	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000546 LG 50" Plasma	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000547 LG 60" Flat Panel	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000548 Maxent 42" HD	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %
1000549 Maxent 50"	0.00	0.00	0.00	0.00	0.00	0.00	0.0 %	0.0 %

Table 7–31 lists the measures available in this view.

**Table 7–31 Review Space Effectiveness Measures**

Label
Total Cubic Feet
#of Facings
Total Shelf Space
Sales Dollars per Cubic Feet
Sales Units per Cubic Feet
Profit per Cubic Feet
% Sales
Gross Margin Contribution

## Assess Categories - Key Take Aways View

Use this view to enter any pertinent notes for the Assess Categories task.

**Figure 7–36** *Asses Categories - Key Take Aways View*

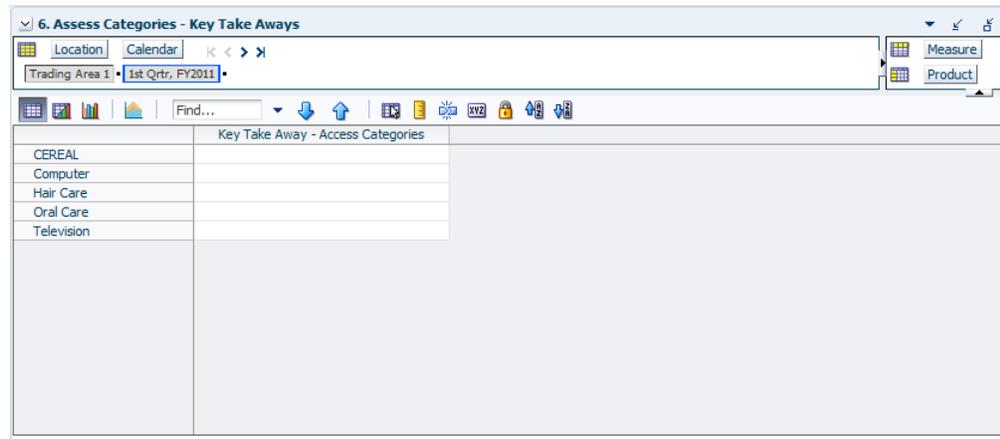


Table 7–32 lists the measure available in this view.

**Table 7–32** *Asses Categories - Key Take Aways Measure*

Label
Key Take Away - Assess Categories

## Assign Category Strategies Step

Use this step to evaluate category purchase dynamics and assign appropriate strategies to sub-category/brand. Based on different metrics, you define the role and strategies for each sub-category for each consumer segment.

The following data is required for defining the Assign Category Strategies task:

- Retailer’s POS data
- Pre-defined category strategies

This step has the following views:

- [Identify Traffic Building Sub-Categories View](#)
- [Identify Transaction Building Categories View](#)
- [Identify Cash Building Sub-Categories View](#)
- [Identify Profit Generating Sub-Categories View](#)
- [Identify Excitement Generating Sub-Categories View](#)
- [Identify Image Enhancing Sub-Categories View](#)
- [Identify Turf-Defending Sub-Categories View](#)
- [Assign Strategies View](#)
- [Assign Category Strategies - Key Take Aways View](#)

## Identify Traffic Building Sub-Categories View

Use this view to create a bubble chart to plot market share versus frequency:

- Sub-categories in the top-right segment and large bubble are considered ideally suited.
- Based on fit, categories are classified as excellent, possible, or poor.

This information is best viewed as a bubble chart.

This view exists at the following level:

- Any static or dynamic level in the Product dimension

**Figure 7–37 Identify Traffic Building Sub-Categories View**

	Market Share	Consumer Purchase Frequency for Sub-Category percentage	Sales for Sub-Category Retail
30040 Plasma Flat Panel	0.0 %	58.0 %	\$ 0.0K
30041 LCD Flat Panel	0.0 %	99.0 %	\$ 0.0K
30042 Projection	0.0 %	104.0 %	\$ 0.0K
30043 Printers	0.0 %	86.0 %	\$ 0.0K
30045 Toothpaste	0.0 %	74.0 %	\$ 0.0K
30046 Floss Accessories	0.0 %	89.0 %	\$ 0.0K
30047 Shampoo	0.0 %	55.0 %	\$ 0.0K
BAG	0.0 %	80.0 %	\$ 0.0K
BOX	0.0 %	2.0 %	\$ 0.0K
CONVENIENCE	0.0 %	9.0 %	\$ 0.0K

Table 7–33 lists the measures available in this view.

**Table 7–33 Identify Traffic Building Sub-Categories Measures**

Label
Market Share
Consumer Purchase Frequency for Sub-Category Percentage
Sales for Sub-Category Retail

## Identify Transaction Building Categories View

Use this view to create a bubble chart to plot shopping frequency versus basket value. Sub-categories, with a large bubble in the top right corner, qualify for this strategy. This information is best viewed as a scatter chart.

This view exists at the following level:

- Any static or dynamic level in the Product dimension

**Figure 7–38 Identify Transaction Building Categories View**

	Purchase Frequency	Transaction Size with Category
CEREAL	77.0 %	\$ 0.0K
Computer	37.0 %	\$ 0.1K
Hair Care	95.0 %	\$ 0.1K
Oral Care	14.0 %	\$ 0.0K
Television	79.0 %	\$ 0.0K

Table 7–34 lists the measures available in this view.

**Table 7–34 Identify Transaction Building Categories Measures**

Label
Purchase Frequency
Transaction Size with Category

### Identify Cash Building Sub-Categories View

Use this view to plot shopping frequency versus market turns (sales units). Sub-categories, with a large bubble in the top right corner on the bubble chart, qualify for this strategy. This information is best viewed as a bubble chart.

This view exists at the following level:

- Any static or dynamic level in the Product dimension

**Figure 7–39 Identify Cash Building Sub-Categories View**

	Sales Units	Purchase Frequency
30040 Plasma Flat Panel	0	
30041 LCD Flat Panel	0	
30042 Projection	0	
30043 Printers	0	
30045 Toothpaste	0	
30046 Floss Accessories	0	
30047 Shampoo	0	
BAG	2,503	
BOX	61,620	
CONVENIENCE	1,351	

Table 7–35 lists the measures available in this view.

**Table 7–35 Identify Cash Building Sub-Categories Measures**

Label
Sales Units
Purchase Frequency

## Identify Profit Generating Sub-Categories View

Use this view to plot histograms for the profit (or GM) percentage of each sub-category. Excellent versus possible versus poor are based on predefined thresholds. This information is best viewed as a column chart.

This view exists at the following level:

- Any static or dynamic level in the Product dimension

**Figure 7–40 Identify Profit Generating Sub-Categories View**

	Profit
30040 Plasma Flat Panel	\$ 0.0K
30041 LCD Flat Panel	\$ 0.0K
30042 Projection	\$ 0.0K
30043 Printers	\$ 0.0K
30045 Toothpaste	\$ 0.0K
30046 Floss Accessories	\$ 0.0K
30047 Shampoo	\$ 0.0K
BAG	\$ 8.5K
BOX	\$ 207.1K
CONVENIENCE	\$ 4.9K

Table 7–36 lists the measures available in this view.

**Table 7–36 Identify Profit Generating Sub-Categories Measures**

Label
Profit

## Identify Excitement Generating Sub-Categories View

Use this view to plot sales dollars as a trend:

- Any sub-category that demonstrates seasonal purchases and is high-impulse and lifestyle-oriented, is flagged as excitement-generating on a scale of excellent versus possible versus poor.
- These attributes are not determined systematically. They are left to the interpretation of the business users.

This information is best viewed as a line chart.

This view exists at the following levels:

- Any static or dynamic level in the Product dimension
- Any level in the Calendar dimension

**Figure 7–41 Identify Excitement Generating Sub-Categories View**

Product	Sales
30040 Plasma Flat Panel	\$ 0.0K
30041 LCD Flat Panel	\$ 0.0K
30042 Projection	\$ 0.0K
30043 Printers	\$ 0.0K
30045 Toothpaste	\$ 0.0K
30046 Floss Accessories	\$ 0.0K
30047 Shampoo	\$ 0.0K
BAG	\$ 12.5K
BOX	\$ 308.1K
CONVENIENCE	\$ 7.0K

Table 7–37 lists the measure available in this view.

**Table 7–37 Identify Excitement Generating Stub-Categories Measure**

Label
Sales

### Identify Image Enhancing Sub-Categories View

Use this view to use quadrant analysis to plot purchase-frequency against Promo % (percentage bought on promotion). Sub-categories, in the top right corner, are flagged as an *excellent* fit and so on. This information is best viewed as a bubble chart.

This view exists at the following level:

- Any static or dynamic level in the Product dimension

**Figure 7–42 Identify Image Enhancing Sub-Categories View**

Product	Purchase Frequency	Promotional Sales	Sales
30040 Plasma Flat Panel		\$ 0.0K	\$ 0.0K
30041 LCD Flat Panel		\$ 0.0K	\$ 0.0K
30042 Projection		\$ 0.0K	\$ 0.0K
30043 Printers		\$ 0.0K	\$ 0.0K
30045 Toothpaste		\$ 0.0K	\$ 0.0K
30046 Floss Accessories		\$ 0.0K	\$ 0.0K
30047 Shampoo		\$ 0.0K	\$ 0.0K
BAG		\$ 13.0K	\$ 12.5K
BOX		\$ 311.2K	\$ 308.1K
CONVENIENCE		\$ 6.6K	\$ 7.0K

Table 7–38 lists the measures available in this view.

**Table 7–38 Identify Image Generating Sub-Categories Measures**

Label
Purchase Frequency
Promotional Sales
Sales

## Identify Turf-Defending Sub-Categories View

Use this view to plot the retailer’s buyer conversion rates against that of the competition. Any sub-categories where the retailer is lagging may be flagged as potentially turf-defending. This information is best viewed as a column chart.

This view exists at the following level:

- Any static or dynamic level in the Product dimension
- Retailer (a level in the Retailer dimension)
- Consumer Segment (a level in the Location dimension)

**Figure 7–43 Identify Turf-Defending Sub-Categories View**

	Retailer 1	Retailer 2	Retailer 3	Retailer 4	Retailer 5	Retailer 6	Retailer 7
30040 Plasma Flat Panel	20.0 %	168.0 %	94.0 %	84.0 %	122.0 %	79.0 %	103.0 %
30041 LCD Flat Panel	14.0 %	15.0 %	1.0 %	60.0 %	115.0 %	102.0 %	88.0 %
30042 Projection	57.0 %	189.0 %	74.0 %	165.0 %	17.0 %	19.0 %	26.0 %
30043 Printers	155.0 %	193.0 %	109.0 %	103.0 %	111.0 %	56.0 %	35.0 %
30045 Toothpaste	6.0 %	122.0 %	62.0 %	160.0 %	195.0 %	53.0 %	113.0 %
30046 Floss Accessories	154.0 %	56.0 %	162.0 %	133.0 %	93.0 %	73.0 %	166.0 %
30047 Shampoo	197.0 %	148.0 %	10.0 %	65.0 %	144.0 %	116.0 %	56.0 %
BAG	124.0 %	25.0 %	5.0 %	164.0 %	70.0 %	84.0 %	195.0 %
BOX	141.0 %	164.0 %	86.0 %	132.0 %	94.0 %	21.0 %	181.0 %
CONVENIENCE	139.0 %	114.0 %	179.0 %	65.0 %	81.0 %	71.0 %	11.0 %

Table 7–39 lists the measure available in this view.

**Table 7–39 Identify Turf-Defending Sub-Categories Measure**

Label
Buyer Conversion Rate

## Assign Strategies View

Use this view to assign strategies based on the preceding analysis. Assigning Strategies is a key component of calculating and working with IPis in Assortment Rationalization.

**Figure 7–44 Assign Strategies View**

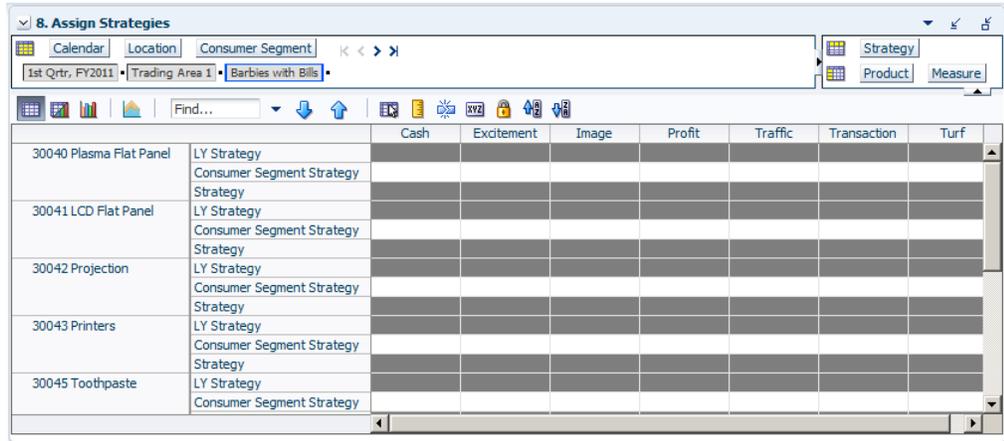


Table 7–40 lists the measures available in this view.

**Table 7–40 Assign Strategies Measures**

Label
LY Strategy
Consumer Segment Strategy
Strategy

### Assign Category Strategies - Key Take Aways View

Use this view to enter any pertinent notes for the Assign Category Strategies task.

**Figure 7–45 Assign Category Strategies - Key Take Aways View**

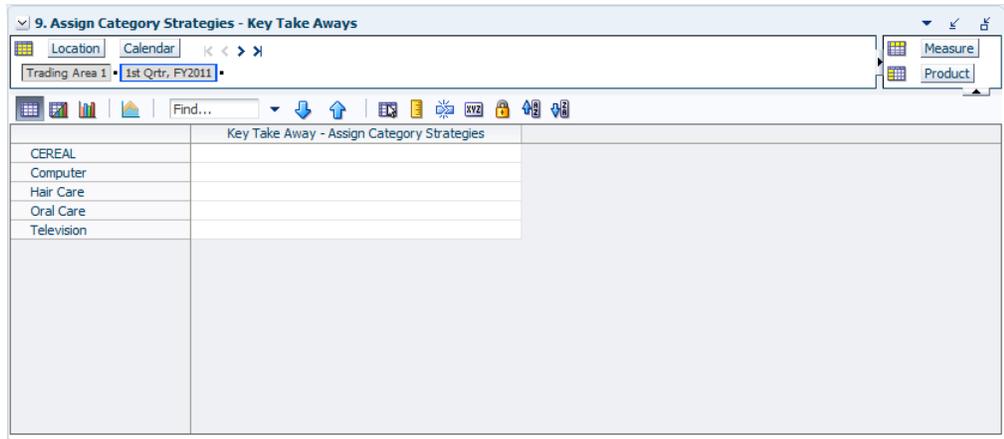


Table 7–41 lists the measure available in this view.

**Table 7–41 Assign Category Strategies - Key Take Aways Measure**

Label
Key Take Aways - Assign Category Strategies

# Assign Category Tactics Step

Use this step to assign tactics, view historical tactics, and seed tactics from historical views. Tactics are assigned for each of the tactical areas per category, trading area, and consumer segment. There are five tactical areas:

- Assortment
- Pricing
- Promotion
- Space
- Inventory

This step has the following views:

- [Assign Category Tactics View](#)
- [Assign Category Tactics - Key Take Aways View](#)

## Assign Category Tactics View

Use this view to assign tactics for each of the tactical areas per category, market, and consumer segment.

Figure 7-46 Assign Category Tactics View

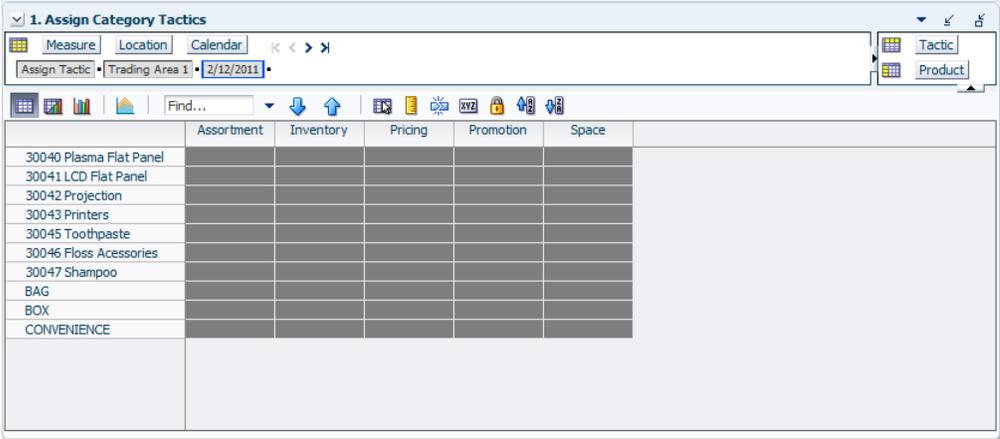


Table 7-42 lists the measure available in this view.

Table 7-42 Assign Category Tactic Measure

<b>Label</b>
Assign Tactic

## Assign Category Tactics - Key Take Aways View

Use this view to enter any pertinent notes for the Assign Category Tactics task.

**Figure 7–47 Assign Category Tactics - Key Take Aways View**

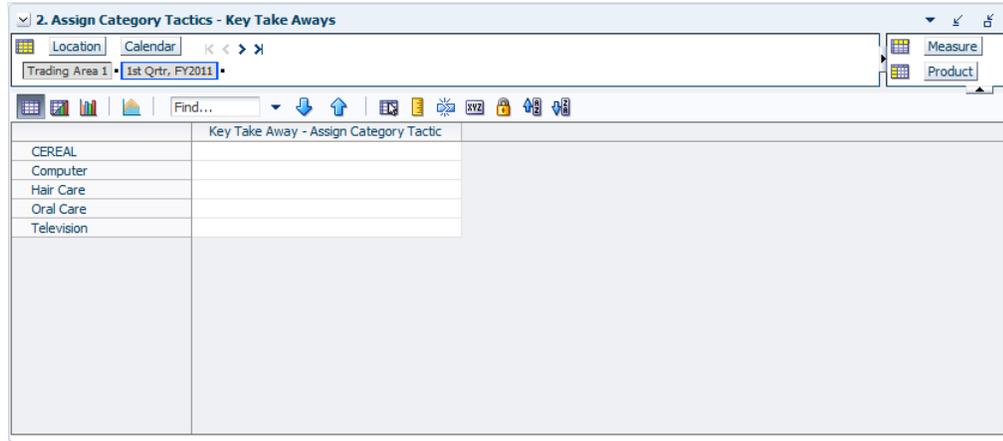


Table 7–43 lists the measure available in this view.

**Table 7–43 Assign Category Tactics - Key Take Aways Measure**

Label
Key Take Away - Assign Category Tactics

## Analyze Category Scorecard Step

Use this view to establish robust, aggressive, and realistic performance targets for a single category across store clusters within a trading area. The scorecard has a number of performance metrics that can be assigned as targets for each of the categories being planned.

- Milestones can be set by a user-defined time period. Quarterly milestones are the default.
- Different metrics can be determined or selected for each category.

The scorecard consists of the following components:

- Metric
- Prior year total
- Target (to be determined by user)
- Percent increase or decrease from the prior year
- Variance to target (to be populated during in-season)

The following data is required for analyzing the category scorecard:

- Retailer loyalty data

This step has the following views:

- [Set Customer Scorecard Targets View](#)
- [Set Share Targets View](#)

- [Set Sales Targets View](#)
- [Set Profit Targets View](#)
- [Set Private Label Targets View](#)
- [Set Inventory Scorecard Targets View](#)
- [Analyze Category Scorecard - Key Take Aways View](#)

## Set Customer Scorecard Targets View

Use this view to set the scorecard targets for customer.

**Figure 7–48 Set Customer Scorecard Targets View**

	Retention Level	LY Consumer Retention Level	CP Consumer Retention Level var LY	Target Purchase Frequency	LY Purchase Frequency	Target Purchase Frequency var LY	Item Penetration @ Category	LY Consumer Penetration	Target Loyalty
CEREAL	54.0 %	75.0 %	-28.0 %	23.0 %	0.66	-65.2 %	54.0 %	75.0 %	54.0 %
Computer	70.0 %	20.0 %	250.0 %	11.0 %	0.94	-88.3 %	70.0 %	20.0 %	70.0 %
Hair Care	38.0 %	61.0 %	-37.7 %	12.0 %	0.31	-61.3 %	38.0 %	61.0 %	38.0 %
Oral Care	69.0 %	85.0 %	-18.8 %	65.0 %	0.77	-15.6 %	69.0 %	85.0 %	69.0 %
Television	58.0 %	74.0 %	-21.6 %	10.0 %	0.76	-86.8 %	58.0 %	74.0 %	58.0 %

Table 7–44 lists the measures available in this view.

**Table 7–44 Set Customer Scorecard Targets Measures**

Label
Retention Level
LY Consumer Retention Level
CP Consumer Retention Level var LY
Target Purchase Frequency
LY Purchase Frequency
Target Purchase Frequency var LY
Item Penetration @ Category
LY Consumer Penetration
Target Loyalty
LY Consumer Loyalty
CP Consumer Penetration var LY

## Set Share Targets View

Use this view to set the share targets.

**Figure 7–49 Set Share Targets View**

	WP Sls contrib Dept Retail	LY Sales Contribution of Department	CP Sales Contribution of Dept var LY	WP Sls contrib Trading Area	LY Sales Contribution of Trading Area	CP Sales Contribution of Trading Area var LY
CEREAL	100.0 %	1.0 %	9900.0 %	100.0 %	100.0 %	-100.0 %
Computer	0.0 %	0.0 %	-100.0 %	0.0 %	0.0 %	-100.0 %
Hair Care	0.0 %	0.0 %	-100.0 %	0.0 %	0.0 %	-100.0 %
Oral Care	0.0 %	0.0 %	-100.0 %	0.0 %	0.0 %	-100.0 %
Television	0.0 %	0.0 %	-100.0 %	0.0 %	0.0 %	-100.0 %

Table 7–45 lists the measures available in this view.

**Table 7–45 Set Share Targets Measures**

Label
WP Sls Contrib Dept Retail
LY Sales Contribution of Department
CP Sales Contribution of Dept var LY
WP Sls Contrib Trading Area
LY Sales Contribution of Trading Area
CP Sales Trading Area var LY

## Set Sales Targets View

Use this view to set the sales targets. This view has a custom menu associated with it named Seed Sales. To use it, set the Seed Source for the products to be seeded. The available options are Forecast and Last Year. Once this is done, click **Seed Source**. The custom menu copies the appropriate value (Forecast or Last Year) into the Sales Revenue and Sales Units columns.

Forecast values are populated by running the forecast batch operation. See the *Oracle Retail Category Management Implementation Guide* for more information on this operation.

**Figure 7–50 Set Sales Targets View**

	Seed Source	Forecast Sales	Sales Revenue	LY Sales Retail	CP Category Dollars var LY	Forecast Sales Units	Sales Units	LY Sales Units	CP Category Units var LY
1000537 Epson Stylus	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000538 HP 42" Plasma	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000539 HP 50" Plasma	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000540 Hitachi	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000541 Hitachi	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000542 Insignia 42"	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000543 LG 42" Plasma	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000544 LG 42" Plasma	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000545 LG 50" Plasma	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000546 LG 50" Plasma	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000547 LG 60" Flat Panel	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000548 Maxent 42" HD	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	
1000549 Maxent 50"	No Action	\$ 0.0K	\$ 0.0K	\$ 0.0K		0	0	0	

Table 7–46 lists the measures available in this view.

**Table 7–46 Set Sales Targets Measures**

Label
Seed Source
Forecast Sales
Sales Revenue
LY Sales Retail
CP Category Dollars var LY
Forecast Sales Units
Sales Units
LY Sales Units
CP Category Units var LY
WP Sales Growth
LY Sales Growth
CP Growth var LY
Sls/sq. ft/week Retail
LY Sales per Square Foot per Week
CP Sales per sq. ft per Week var LY

## Set Profit Targets View

Use this view to set the profit targets.

**Figure 7–51 Set Profit Targets View**

	Profit	LY Gross Profit	CP Gross Profit var LY	Gross Margin	LY Gross Margin	CP Gross Margin var LY	WP Gross Profit per Square Foot per Week	LY Profit per Square Foot per Week	CP Gross Profit per Square Foot per Week var LY
CEREAL	\$ -4,504.0K	\$ -1,657.7K	37.3 %	-63.5 %	-53.2 %	-99.9 %	\$ 0.0K	\$ 0.0K	-100.0 %
Computer	\$ 0.0K	\$ 0.0K	-100.0 %	0.0 %	0.0 %	-100.0 %	\$ 0.0K	\$ 0.0K	-100.0 %
Hair Care	\$ 0.0K	\$ 0.0K	-100.0 %	0.0 %	0.0 %	-100.0 %	\$ 0.0K	\$ 0.0K	-100.0 %
Oral Care	\$ 0.0K	\$ 0.0K	-100.0 %	0.0 %	0.0 %	-100.0 %	\$ 0.0K	\$ 0.0K	-100.0 %
Television	\$ 0.0K	\$ 0.0K	-100.0 %	0.0 %	0.0 %	-100.0 %	\$ 0.0K	\$ 0.0K	-100.0 %

Table 7–47 lists the measures available in this view.

**Table 7–47 Set Profit Targets Measures**

Label
Profit
LY Gross Profit
CP Growth var LY
Gross Margin
LY Gross Margin
CP Gross Margin var LY
WP Gross Profit per Square Foot per Week
LY Profit per Square Foot per Week
CP Gross Profit per Square Foot per Week var LY

## Set Private Label Targets View

Use this view to set the targets for the private label.

**Figure 7–52 Set Private Label Targets View**

	Private Label Sales Retail	LY Private Label Sales	Private Label Sales var LY	Private Label Sales Units	LY Private Label Sales Units	Private Label Sales Units var LY	WP Private Label Gross Margin percentage	LY Private Label Gross Margin	CP Private Label Gross Margin var LY
1000537 Epson Stylus	\$ 0.0K		-100.0 %	0		-100.0 %			
1000538 HP 42" Plasma	\$ 0.0K		-100.0 %	0		-100.0 %			
1000539 HP 50" Plasma	\$ 0.0K		-100.0 %	0		-100.0 %			
1000540 Hitachi	\$ 0.0K		-100.0 %	0		-100.0 %			
1000541 Hitachi	\$ 0.0K		-100.0 %	0		-100.0 %			
1000542 Insignia 42"	\$ 0.0K		-100.0 %	0		-100.0 %			
1000543 LG 42" Plasma	\$ 0.0K		-100.0 %	0		-100.0 %			
1000544 LG 42" Plasma	\$ 0.0K		-100.0 %	0		-100.0 %			
1000545 LG 50" Plasma	\$ 0.0K		-100.0 %	0		-100.0 %			
1000546 LG 50" Plasma	\$ 0.0K		-100.0 %	0		-100.0 %			
1000547 LG 60" Flat Panel	\$ 0.0K		-100.0 %	0		-100.0 %			
1000548 Mowat 42" LED	\$ 0.0K		-100.0 %	0		-100.0 %			

Table 7–48 lists the measures available in this view.

**Table 7–48 Set Private Label Targets Measures**

Label
Private Label Sales Retail
LY Private Label Sales
Private Label Sales var LY
Private Label Sales Units
LY Private Label Sales Units
Private Label Sales Units var LY
WP Private Label Gross Margin Percentage
LY Private Label Gross Margin
CP Private Label Gross Margin var LY
Private Label Percent of Gross Profit
LY Private Label Percent of Gross Profit
LY Sales per Square Foot per Week
CP Private Label Percent of Gross Margin var LY

## Set Inventory Scorecard Targets View

Use this view to set the scorecard targets for inventory.

**Figure 7–53 Set Inventory Scorecard Targets View**

	Wp CP Inventory Days of Supply	LY Inventory Days of Supply	CP Days of Supply var LY	Inventory Dollars	LY Inventory Dollars	CP Inventory Dollars var LY	Inventory Turns	LY Inventory Turns	CP Inventory Turns var LY
CEREAL	0	0	-100.0 %	\$ 54,506.2K	\$ 0.0K	-100.0 %	10	0	-100.0 %
Computer	0	0	-100.0 %	\$ 54,497.6K	\$ 0.0K	-100.0 %	9	0	-100.0 %
Hair Care	0	0	-100.0 %	\$ 54,499.7K	\$ 0.0K	-100.0 %	10	0	-100.0 %
Oral Care	0	0	-100.0 %	\$ 54,515.1K	\$ 0.0K	-100.0 %	7	0	-100.0 %
Television	0	0	-100.0 %	\$ 54,506.5K	\$ 0.0K	-100.0 %	8	0	-100.0 %

Table 7–49 lists the measures available in this view.

**Table 7–49 Set Inventory Scorecard Targets Measures**

Label
WP CP Inventory Days of Supply
LY Inventory Days of Supply
CP Days of Supply var LY
Inventory Dollars
LY Inventory Dollars
CP Inventory Dollars var LY
Inventory Turns
LY Inventory Turns
CP Inventory Turns var LY
Inventory Gross Margin Return on Investment
LY Inventory Gross Margin Return on Investment
CP Inventory Gross Margin Return on Investment var LY
Inventory Gross Margin Return on Space
LY Inventory Gross Margin Return on Space
CP Gross Margin Return on Space var LY
Inventory Service Levels
LY Inventory Service Levels
CP Service Levels var LY

## Analyze Category Scorecard - Key Take Aways View

Use this view to enter any pertinent notes for the Analyze Category Scorecard task.

**Figure 7–54 Analyze Category Scorecard - Key Take Aways View**

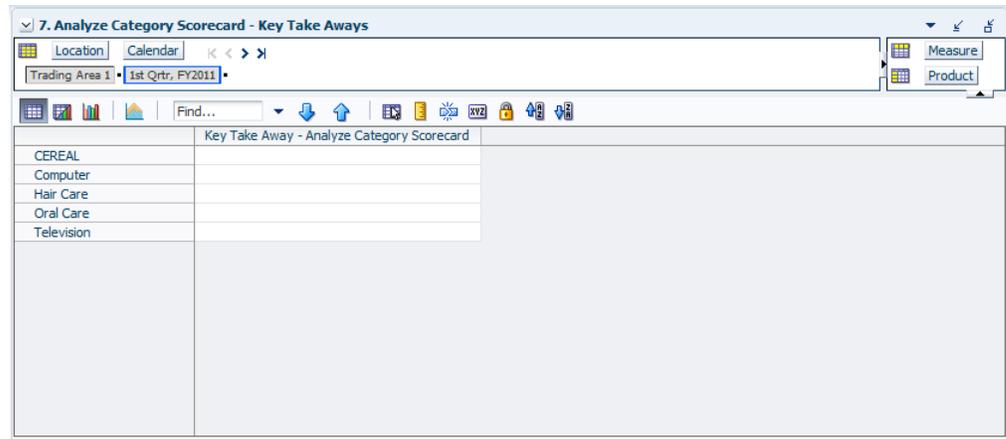


Table 7–50 lists the measure available in this view.

**Table 7–50 Analyze Category Scorecard - Key Take Aways Measure**

Label
Key Take Aways - Analyze Category Scorecard

## Finalize Category Plans Step

Use this step to review the financial goals and approve the assortment strategies, tactics, and scorecard.

This step has the following view:

- [Approve Assortment Strategies, Tactics, and Scorecard View](#)

### Approve Assortment Strategies, Tactics, and Scorecard View

Use this view to approve the assortment. Approval is the trigger that makes category roles, strategies, and tactics available to downstream solutions (for example, Assortment Rationalization). The Working Plan is transferred into the Current Plan, which is transferred to Assortment Rationalization. The plan is time-stamped and includes user information.

This view exists at the following level:

- Sub-Category (a level in the Product dimension)
- Trading Area (a level in the Location dimension)

To approve the strategies, tactics, and scorecard, check the box next to the desired category. Enter approval comments, if desired. Click the Approve custom menu to approve. Commit the workbook changes.

**Figure 7–55 Approve Assortment Strategies, Tactics, and Scorecard View**

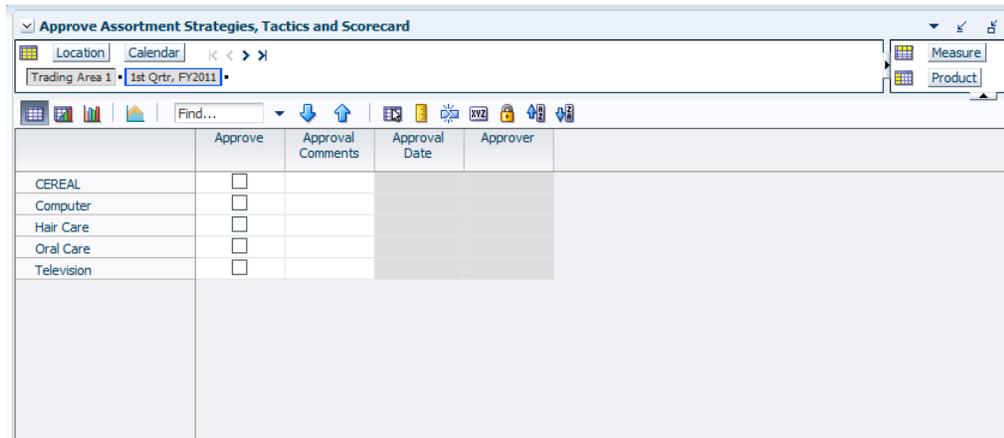


Table 7–51 lists the measures available in this view.

**Table 7–51 Approve Assortment Strategies, Tactics, and Scorecard Measures**

Label
Approve
Approval Comments
Approval Date
Approver

## Next Steps

After completing category planning, continue to the [Assortment Rationalization @ Cluster Task](#).

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## Assortment Rationalization @ Cluster Task

This task enables a retailer to analyze their assortment, assign weights to attributes, and calculate a score (ranking) that is systematically used to suggest additions and deletions to the assortment.

Consumer insights are core to this task utilizing external market and consumer data. This task also includes visibility to the retailer's category versus competitors versus the market place as a whole. (Examples of external market data providers include Nielsen, Symphony IRI, Axiom, and FICO.)

The task assists users in analyzing their current assortments, determining the appropriate market coverage, rationalizing (validation of necessary add, drop, and keep) the assortment, and quantifying the assortment decision.

The task utilizes clustering (completed outside of the Category Management solution) to ensure assortments are tailored to specific markets and primary consumer segments. Stores are pre-clustered based upon similarity in target consumer profiles or any other selected parameters. Clustering needs to be space-aware. Category Management uses the space-aware clusters. Clusters need to have the relatively same size planograms (POGs). Assortments are developed, rationalized, and finalized across each store cluster, based on consumer segment or other attributes that drove the store clustering. The following requirements at the cluster level:

- Assortment Rationalization is performed for a category of merchandise for one or more clusters within one trading area.
- The workbook can be built for one or multiple categories for one trading area.
- All of the store-level key performance indicators (KPIs) are pre-aggregated to cluster for the purpose of rationalization, so that each store within the cluster is considered identical to the others.

Store-level visibility to metrics and store-level overrides of assortment decisions are not allowed within this workbook.

The application takes advantage of a feed of category planning data to make category role, strategies, tactics, and financial objectives visible to ensure the assortment aligns back to the overall category-level objectives.

The application exports assortment data, including an item's final performance index (FPI), that differs by store cluster and can be leveraged in downstream planning and supply chain applications.

This task has the following steps:

- [Getting Started Step](#)
- [Like Item Mapping Step](#)

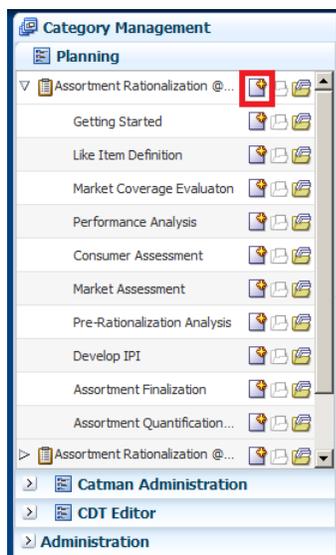
- [Market Coverage Evaluation Step](#)
- [Performance Analysis Step](#)
- [Consumer Assessment Step](#)
- [Market Assessment Step](#)
- [Pre-Rationalization Analysis Step](#)
- [Develop IPI Step](#)
- [Assortment Finalization Step](#)
- [Assortment Quantification and Approval Step](#)

## Create the Assortment Rationalization @ Cluster Workbook

To create the workbook:

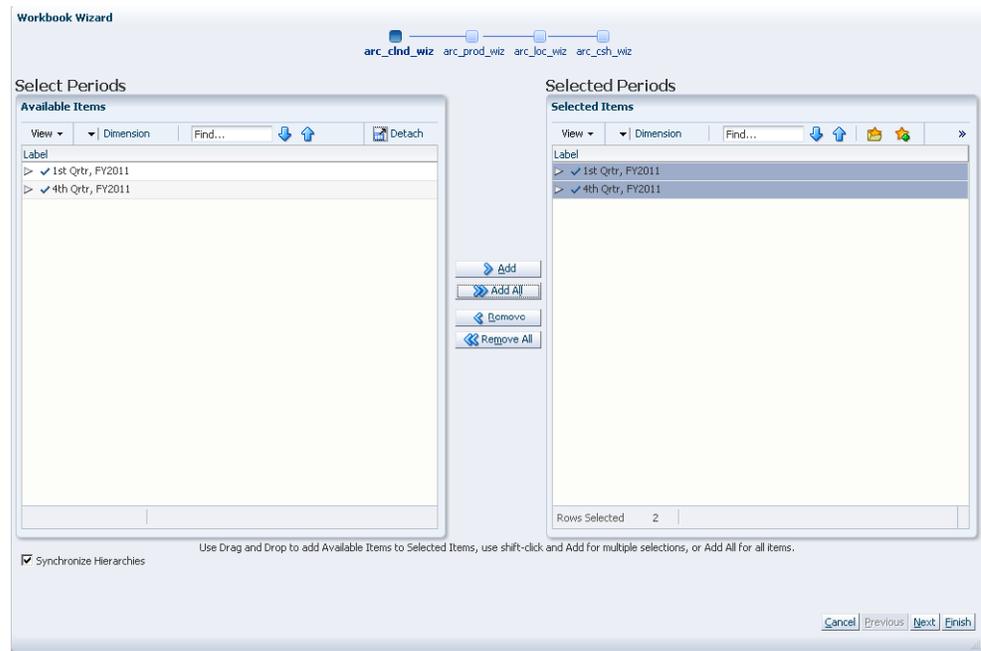
1. Select the **New Workbook** icon in the Assortment Rationalization @ Cluster activity.

**Figure 8–1 Assortment Rationalization @ Cluster Task**



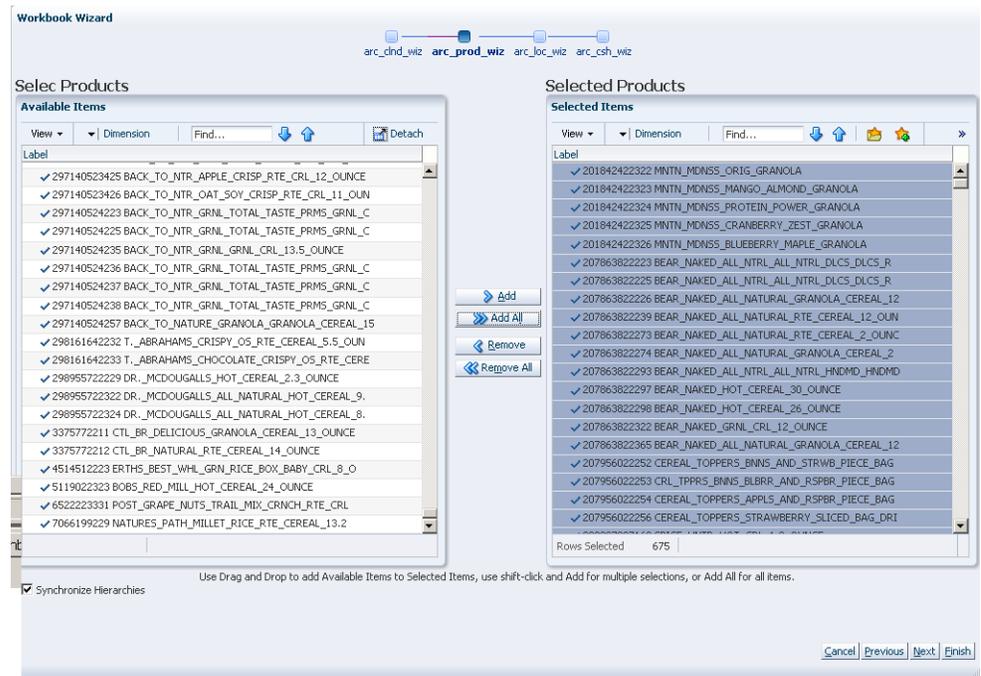
2. Select the calendar periods and move them to the Selected Periods box. Click Next.

**Figure 8–2 Workbook Wizard Select Periods Page**



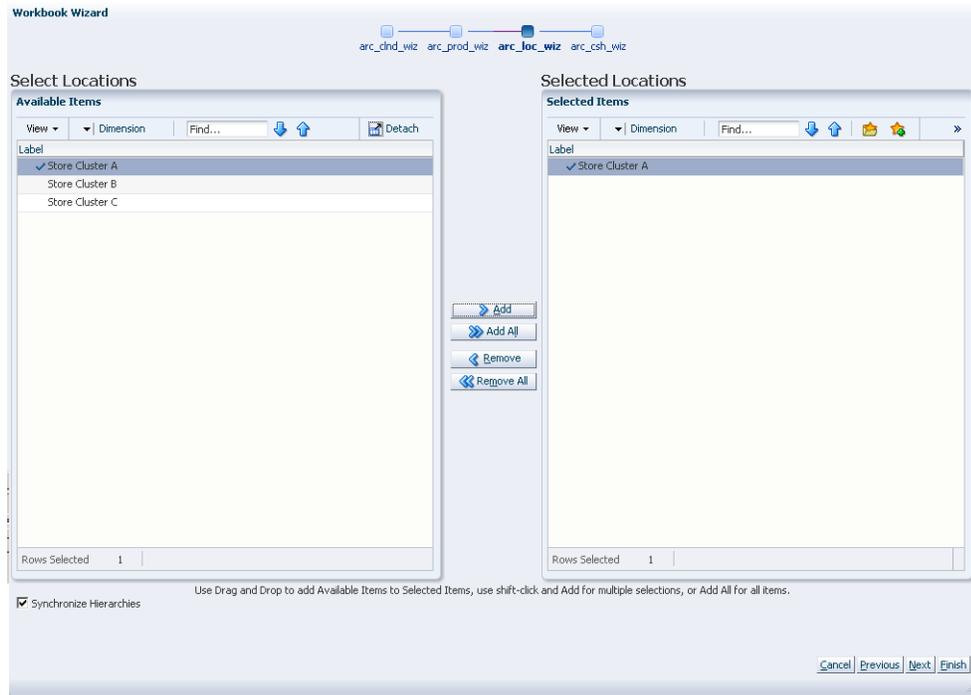
3. Select the products and move them to the Selected Products box. Click Next.

**Figure 8–3 Workbook Wizard Select Products Page**



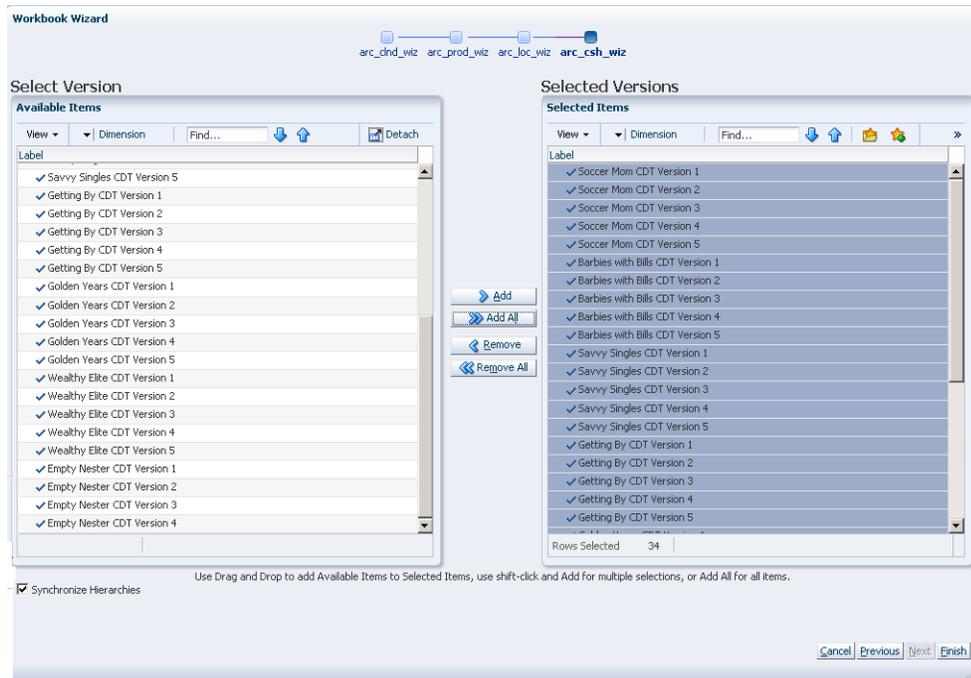
- Select the locations and move them to the Selected Locations box. Click **Next**.

**Figure 8–4 Workbook Wizard Select Locations Page**



- Select the versions and move them to the Selected Versions box. Click **Finish**.

**Figure 8–5 Workbook Wizard Select Version Page**



The workbook is created.

## Getting Started Step

This step has the following views:

- Review Category Roles View
- Category Scorecard View
- Sub-Category Strategies View
- Sub-Category Tactics View
- Review Consumer Segments View
- Decision Trees View
- Review and Plan Sales View
- Getting Started - Key Take Aways View

## Review Category Roles View

Use this view to review the approved roles of a category in a trading area as defined in category planning.

**Figure 8–6 Review Category Roles View**

	Historic Role Assigned (Model A)	Approved Override Role (Model A)	Historic Role Assigned (Model B)	Approved Override Role (Model B)
CEREAL				

Table 8–1 lists the measures available in this view.

**Table 8–1 Review Category Roles Measures**

Label
Historic Role Assigned (Model A)
Approved Override Role (Model A)
Historic Role Assigned (Model B)
Approved Override Role (Model B)

## Category Scorecard View

Use this view to review a summary of the key measures that determine the go-forward category strategy.

**Figure 8–7 Category Scorecard View**

	LY	Target	Variance
Retention Level	0.0 %	0.0 %	-100.0 %
Purchase Frequency	0.0 %	0.0 %	-100.0 %
Penetration	0.0 %	0.0 %	-100.0 %
Loyalty	0.0 %	0.0 %	-100.0 %
Percent Share of Department	0.0 %	0.0 %	-100.0 %
Percent Share of Trading Area	0.0 %	0.0 %	-100.0 %
Category Dollars	10,167.26K	0.00K	-0.10K
Category Units	0	0	-100
Growth	0.0 %	0.0 %	-100.0 %
Sales per Square Foot per Week	0.00K	0.00K	-1.30K
Gross Profit	10,167.26K	10,100.86K	-0.06K
Gross Margin percentage	100.0 %	0.0 %	-100.0 %
Gross Profit per Square Foot per Week	0.00K	0.00K	-1.30K
Sales	0.00K	0.00K	-1.30K
Sales Units	0	0	-1,300

Table 8–2 lists the measures available in this view.

**Table 8–2 Category Scorecard Measures**

Label
Retention Level
Purchase Frequency
Penetration
Loyalty
Percent Share of Department
Percent Share of Trading Area
Category Dollars
Category Units
Growth
Sales per Square Foot per Week
Gross Profit
Gross Profit percentage
Gross Profit per Square Foot per Week
Sales
Sales Units
Percent of Gross Profit
Days of Supply
Inventory Dollars
Inventory Turns
Gross Profit Return on Investment

**Table 8–2 (Cont.) Category Scorecard Measures**

Label
Gross Profit Return on Space
Service Levels

## Sub-Category Strategies View

Use this view to review the approved overall strategy for a sub-category as defined in Category Planning.

**Figure 8–8 Sub-Category Strategies View**

	Assigned Role	WP Strategy
BAG	Rehab	
BOX	Rehab	
CONVENIENCE	Rehab	

Table 8–3 lists the measures available in this view.

**Table 8–3 Sub-Category Strategies Measures**

Label
Assigned Role
WP Strategy

## Sub-Category Tactics View

Use this view to review the approved sub-category tactics as defined in Category Planning.

**Figure 8–9 Sub-Category Tactics View**

	Assortment	Inventory	Pricing	Promotion	Space
01	95% market	95% service	Match	Avoid low	Place more
02	Wide variety	Improve	Do not	Avoid	Allocate
03	High	Ensure	Maintain or	Select items	Avoid stock
04	Quality PL	Back haul to		Feature	Maintain 95%
05	Driver items				Ensure
06	Increase #				
07					
08					
09					
10					

Table 8–4 lists the measure available in this view.

**Table 8–4 Sub-Category Tactics Measure**

Label
Current Plan Tactic

## Review Consumer Segments View

Use this view to review the customer segments.

**Figure 8–10 Review Consumer Segments View**

	Consumer Segment Distribution	Consumer Segment Status
Soccer Mom	0.0 %	

Table 8–5 lists the measures available in this view.

**Table 8–5 Consumer Segments Measures**

Label
Consumer Segment Distribution
Consumer Segment Status

## Decision Trees View

Use this view to view the available CDT version.

**Figure 8–11 Decision Trees View**

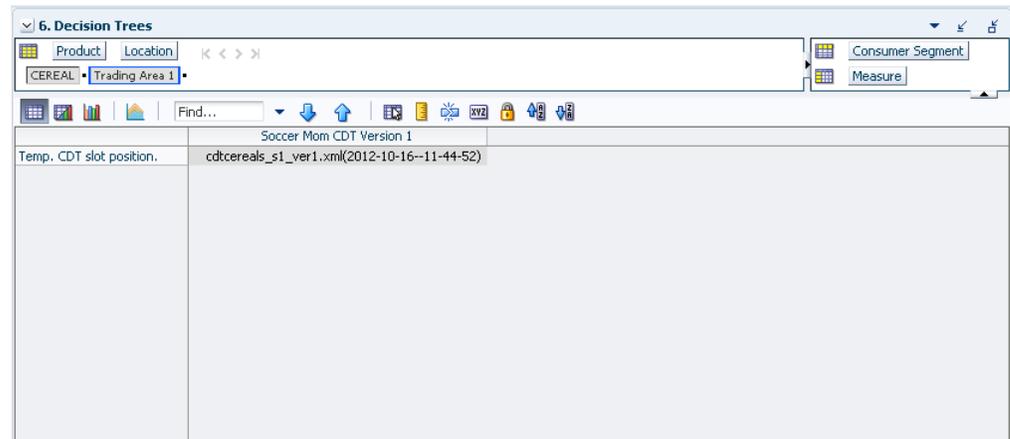


Table 8–6 lists the measure available in this view.

**Table 8–6 Decision Trees Measure**

Label
Current CDT Version

## Review and Plan Sales View

Use this view to review and plan sales. There is a custom menu available called Seed Sales. It works much the same as the Seed Sales custom menu in Category Planning. To use, select the desired data source in the Seed Source column. The choices are No Action, Forecast, and Last Year. Use the Seed Sales custom menu. The appropriate values are copied into the Sales and Sales Units columns.

Populating the Forecast Sales and Forecast Sales Units measures is done by running the embedded forecast. See the *Oracle Retail Category Management Implementation Guide* for more information on this batch operation.

**Figure 8–12 Review and Plan Sales View**

Week [ Label ]	Forecast Sales	Forecast Sales Units	LY Sales Retail	LY Sales Units	Seed Source	Sales Revenue	Sales Units	Gross Margin	Profit
11/12/2011	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
11/19/2011	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
11/26/2011	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
12/3/2011	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
12/10/2011	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
12/17/2011	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
12/24/2011	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
12/31/2011	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
1/7/2012	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
1/14/2012	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
1/21/2012	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
1/28/2012	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K
2/4/2012	\$ 0.0K	0	\$ 0.0K	0	No Action	\$ 0.0K	0	0.0 %	\$ 0.0K

Table 8–7 lists the measures available in this view.

**Table 8–7 Review and Plan Sales Measures**

Label
Forecast Sales
Forecast Sales Units
LY Sales Retail
LY Sales Units
Seed Source
Sales Revenue
Sales Units
Gross Profit
Profit

## Getting Started - Key Take Aways View

Use this view to enter any pertinent notes for the Getting Started task.

**Figure 8–13 Key Take Aways - Getting Started View**

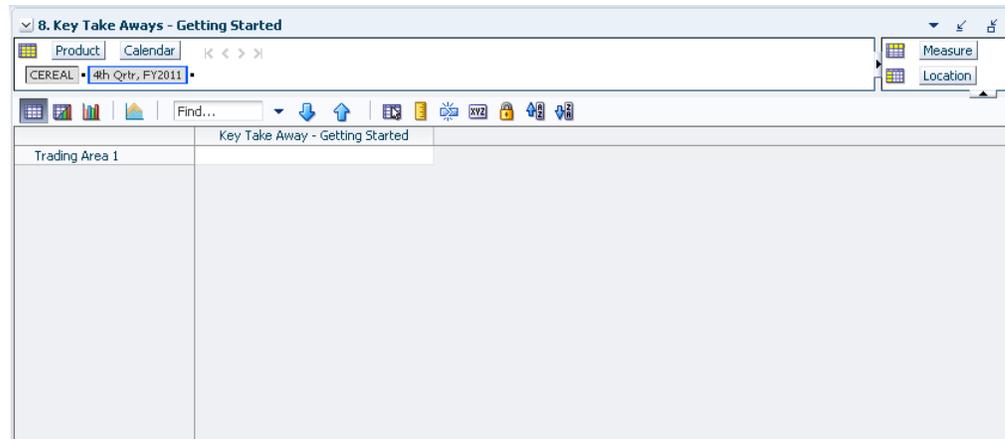


Table 8–8 lists the measure available in this view.

**Table 8–8 Key Take Aways - Getting Started Measure**

Label
Key Take Away - Getting Started

## Like Item Mapping Step

Occasionally, new items may need to be included in the rationalization and optimization routines. These placeholder items may be identified by using this workbook. For a forecast to be generated, the workbook also facilitates the mapping history from one item to another. After identified and mapped to a like item, a new item may be included in the assortment rationalization and optimization routines.

The category manager can define which existing items have the most similar sales characteristics.

This step has the following views:

- [Retail Like Item Mapping View](#)
- [Market Like Item Mapping View](#)
- [Attribute Like Item Mapping View](#)
- [Key Take Aways - Like Item Mapping View](#)

At any point in this step, you can calculate the like item effects. Use the Seeding Likeitems custom menu. This copies sales, sales units, profit, and attribute information from the item's like items to the item itself.

## Retail Like Item Mapping View

Use this view to define like items for the retailer.

**Figure 8–14 Retail Like Item Mapping View**

	Retail History Likeitem Product	Retail History Likeitem Product Adjustment Ratio	Retail History Likeitem Mask
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>

Table 8–9 lists the measures available in this view.

**Table 8–9 Retail Like Item Mapping Measures**

Label
Retail History Likeitem Product
Retail History Likeitem Product Adjustment Ratio
Retail History Likeitem Mask

## Market Like Item Mapping View

Use this view to define like items for the market.

**Figure 8–15 Market Like Item Mapping View**

	Market History Likeitem Product	Market History Likeitem Product Adjustment Ratio	Market History Likeitem Mask
		50.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>
		100.0 %	<input type="checkbox"/>

Table 8–10 lists the measures available in this view.

**Table 8–10 Market Like Item Mapping Measures**

Label
Market History Likeitem Product
Market History Likeitem Product Adjustment Ratio
Market History Likeitem Mask

## Attribute Like Item Mapping View

Use this view to define attributes for like items.

**Figure 8–16 Attribute Like Item Mapping View**

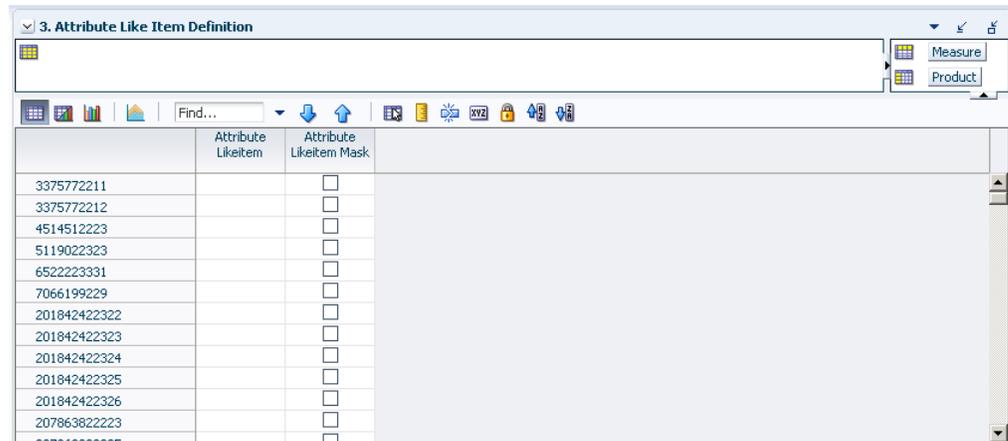


Table 8–11 lists the measures available in this view.

**Table 8–11 Attribute Like Item Mapping Measures**

Label
Attribute Likeitem
Attribute Likeitem Mask

## Key Take Aways - Like Item Mapping View

Use this view to enter any pertinent notes for the Like Item task.

**Figure 8–17 Key Take Aways - Like Item Mapping View**

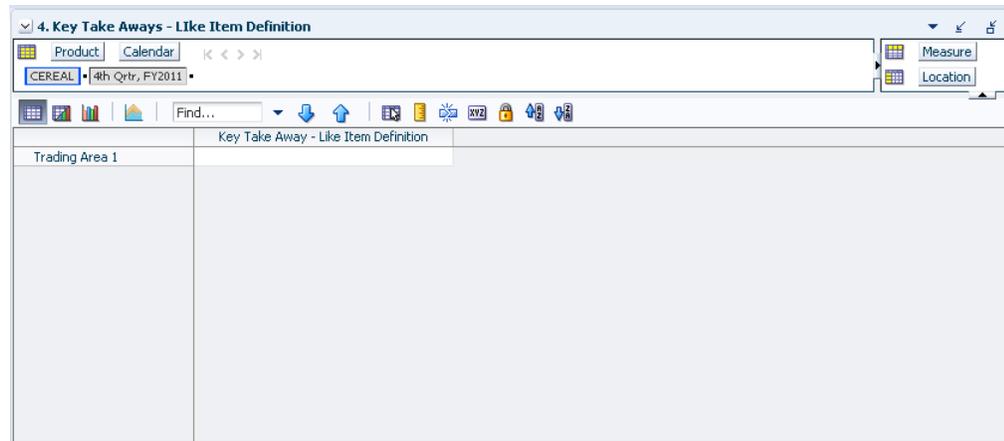


Table 8–12 lists the measure available in this view.

**Table 8–12 Key Take Aways - Like Item Mapping Measure**

Label
Key Take Away - Like Item Definition

## Market Coverage Evaluation Step

Use this step to evaluate market coverage for each category by store cluster based on the standard hierarchy and/or by CDTs.

This step has the following views:

- [Set Category Breakpoints View](#)
- [Set Sub-Category Breakpoints View](#)
- [Select Key Metric View](#)
- [Fragmentation Analysis \(Retailer\) View](#)
- [Contribution Analysis \(Retailer\) View](#)
- [Proliferation Analysis \(Retailer\) View](#)
- [Fragmentation Analysis \(Market\) View](#)
- [Contribution Analysis \(Market\) View](#)
- [Proliferation Analysis \(Market\) View](#)
- [Accumulation Ranking Report \(Market\) View](#)
- [Key Take Aways - Market Coverage View](#)

The first three views provide the ability to set parameters used in fragmentation analysis. At any point after the information in these first three views are set, you can perform fragmentation analysis. This is done by using the Fragmentation Analysis custom menu.

The results of the fragmentation analysis populate the measures available in the following views: Fragmentation Analysis (both Market and Retailer), Contribution Analysis (Market and Retailer), Proliferation Analysis (Market and Retailer), and Accumulative Ranking Report (Market and Retailer).

## Set Category Breakpoints View

Use this view to set the category breakpoints.

**Figure 8–18 Set Category Breakpoints View**

	Fragmentation Analysis Breakpoints	Contribution Analysis Breakpoints
50%	50.0 %	50.0 %
75%	75.0 %	75.0 %
80%	80.0 %	80.0 %
85%	85.0 %	85.0 %
90%	90.0 %	90.0 %
95%	95.0 %	95.0 %
99%	99.0 %	99.0 %
Wif_1	100.0 %	100.0 %
Wif_2	100.0 %	100.0 %
Wif_3	100.0 %	100.0 %

Table 8–13 lists the measures available in this view.

**Table 8–13 Set Category Breakpoints Measures**

Label
Fragmentation Analysis Breakpoints
Contribution Analysis Breakpoints

## Set Sub-Category Breakpoints View

Use this view to set the sub-category breakpoints.

**Figure 8–19 Set Sub-Category Breakpoints View**

	Fragmentation Analysis Breakpoints	Contribution Analysis Breakpoints
50%	50.0 %	50.0 %
75%	75.0 %	75.0 %
80%	80.0 %	80.0 %
85%	85.0 %	85.0 %
90%	90.0 %	90.0 %
95%	95.0 %	95.0 %
99%	99.0 %	99.0 %
Wif_1	100.0 %	100.0 %
Wif_2	100.0 %	100.0 %
Wif_3	100.0 %	100.0 %

Table 8–14 lists the measures available in this view.

**Table 8–14 Set Sub-Category Breakpoints Measures**

Label
Fragmentation Analysis Breakpoints
Contribution Analysis Breakpoints

## Select Key Metric View

Use this view to set the key metrics for retailer and market data analysis. Selections made here are used in fragmentation analysis as the basis of its calculation.

**Figure 8–20 Select Key Metric View**

Key Metric (Retailer Data Analysis)	Key Metric (Market Data Analysis)

Table 8–15 lists the measures available in this view.

**Table 8–15 Select Key Metric Measures**

Label
Key Metric (Retailer Data Analysis)
Key Metric (Market Data Analysis)

### Fragmentation Analysis (Retailer) View

Use this view to analyze the percentage of the SKUs that represent certain pre-defined breakpoints of sales dollars of the retailer’s sales data.

**Figure 8–21 Fragmentation Analysis (Retailer) View**

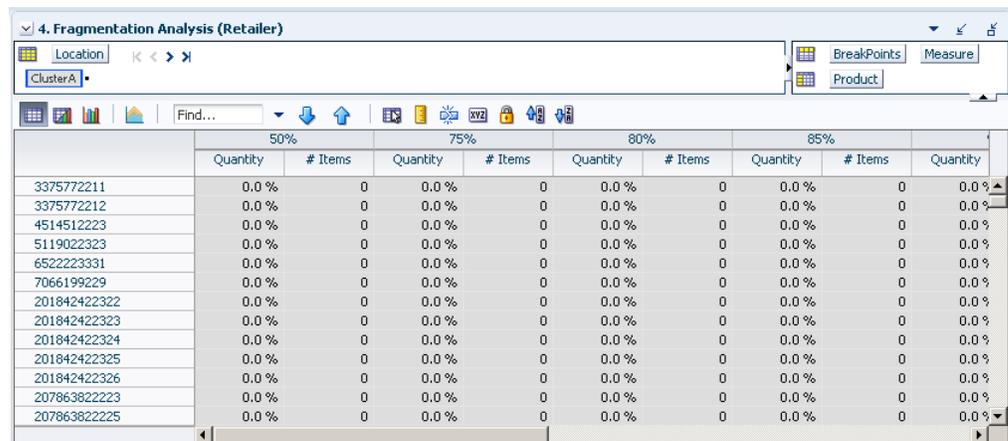


Table 8–16 lists the measures available in this view.

**Table 8–16 Fragmentation Analysis (Retailer) Measures**

Label
Quantity
# Items

## Contribution Analysis (Retailer) View

Use this view to analyze the ranked list of SKUs within each level of aggregation that represent breakpoints based on SKU-count instead of sales dollars.

**Figure 8–22 Contribution Analysis (Retailer) View**

	50%		75%		80%		85%		Sales
	Sales	# Items							
3375772211	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
3375772212	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
4514512223	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
5119022323	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
6522223331	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
7066199229	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422322	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422323	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422324	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422325	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422326	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
207863822223	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
207863822225	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %

Table 8–17 lists the measures available in this view.

**Table 8–17 Contribution Analysis (Retailer) Measures**

Label
Sales
# Items

## Proliferation Analysis (Retailer) View

Use this view to analyze the cumulative contribution for the retailer. This information is best displayed as a pareto chart.

**Figure 8–23 Proliferation Analysis (Retailer) View**

	Cumulative Quantity @ Category	Cumulative Quantity @ Sub-Category
3375772211	0.00	0.00
3375772212	0.00	0.00
4514512223	0.00	0.00
5119022323	0.00	0.00
6522223331	0.00	0.00
7066199229	0.00	0.00
201842422322	0.00	0.00
201842422323	0.00	0.00
201842422324	0.00	0.00
201842422325	0.00	0.00
201842422326	0.00	0.00
207863822223	0.00	0.00
207863822225	0.00	0.00

Table 8–18 lists the measures available in this view.

**Table 8–18 Proliferation Analysis (Retailer) Measures**

Label
Cumulative Quantity @ Category
Cumulative Quantity @ Sub-Category

## Accumulation Ranking Report (Retailer) View

Use this view to create an accumulation ranking report for the retailer.

**Figure 8–24 Accumulation Ranking Report (Retailer) View**

	Sales Revenue	Rank @ Sub-Category	Rank @ Category	Cumulative Quantity @ Sub-Category	Cumulative Quantity @ Category
3375772211	\$ 0.0K	0	0	0.00	0.00
3375772212	\$ 0.0K	0	0	0.00	0.00
4514512223	\$ 0.0K	0	0	0.00	0.00
5119022323	\$ 0.0K	0	0	0.00	0.00
6522223331	\$ 0.0K	0	0	0.00	0.00
7066199229	\$ 0.0K	0	0	0.00	0.00
201842422322	\$ 0.0K	0	0	0.00	0.00
201842422323	\$ 0.0K	0	0	0.00	0.00
201842422324	\$ 0.0K	0	0	0.00	0.00
201842422325	\$ 0.0K	0	0	0.00	0.00
201842422326	\$ 0.0K	0	0	0.00	0.00
207863822223	\$ 0.0K	0	0	0.00	0.00
207863822225	\$ 0.0K	0	0	0.00	0.00

Table 8–19 lists the measures available in this view.

**Table 8–19 Accumulation Ranking Report (Retailer) Measures**

Label
Sales Revenue
Rank @ Sub-Category
Rank @ Category
Cumulative Quantity @ Category
Cumulative Quantity @ Sub-Category

## Fragmentation Analysis (Market) View

Use this view to analyze the percentage of the SKUs that represent certain pre-defined breakpoints of sales dollars of the market sales data.

**Figure 8–25** Fragmentation Analysis (Market) View

	50%		75%		80%		85%		Market Sales
	Market Sales	# Items							
3375772211	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
3375772212	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
4514512223	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
5119022323	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
6522223331	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
7066199229	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422322	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422323	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422324	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422325	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422326	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
207863822223	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
207863822225	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %

Table 8–20 lists the measures available in this view.

**Table 8–20** Fragmentation Analysis (Market) Measures

Label
Market Sales
# Items

## Contribution Analysis (Market) View

Use this view to analyze the ranked list of SKUs within each level of aggregation that represent breakpoints based on SKU-count instead of sales dollars, but using market data.

**Figure 8–26** Contribution Analysis (Market) View

	50%		75%		80%		85%		Market Sales
	Market Sales	# Items							
3375772211	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
3375772212	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
4514512223	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
5119022323	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
6522223331	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
7066199229	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422322	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422323	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422324	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422325	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
201842422326	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
207863822223	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %
207863822225	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %	0	0.0 %

Table 8–21 lists the measures available in this view.

**Table 8–21 Contribution Analysis (Market) Measures**

Label
Market Sales
# Items

## Proliferation Analysis (Market) View

Use this view to analyze the cumulative contribution for the retailer. A forecast is not available. This information is best displayed as a pareto chart.

**Figure 8–27 Proliferation Analysis (Market) View**

	Cumulative Market Quantity @ Sub-Category	Cumulative Market Quantity @ Category
3375772211	0.00	0.00
3375772212	0.00	0.00
4514512223	0.00	0.00
5119022323	0.00	0.00
6522223331	0.00	0.00
7066199229	0.00	0.00
201842422322	0.00	0.00
201842422323	0.00	0.00
201842422324	0.00	0.00
201842422325	0.00	0.00
201842422326	0.00	0.00
207863822223	0.00	0.00

Table 8–22 lists the measures available in this view.

**Table 8–22 Proliferation Analysis (Market) Measures**

Label
Cumulative Market Quantity @ Sub-Category
Cumulative Market Quantity @ Category

## Accumulation Ranking Report (Market) View

Use this view to create an accumulation ranking report for the market.

**Figure 8–28 Accumulation Ranking Report (Market) View**

	Rank (Market) @ Sub-Category	Rank (Market) @ Category	Cumulative Market Quantity @ Sub-Category	Cumulative Market Quantity @ Category
3375772211	0	0	0.00	0.00
3375772212	0	0	0.00	0.00
4514512223	0	0	0.00	0.00
5119022323	0	0	0.00	0.00
6522223331	0	0	0.00	0.00
7066199229	0	0	0.00	0.00
201842422322	0	0	0.00	0.00
201842422323	0	0	0.00	0.00
201842422324	0	0	0.00	0.00
201842422325	0	0	0.00	0.00
201842422326	0	0	0.00	0.00
207863822223	0	0	0.00	0.00

Table 8–23 lists the measures available in this view.

**Table 8–23 Accumulation Ranking Report (Market) Measures**

Label
Rank (Market) @ Sub-Category
Rank (Market) @ Category
Cumulative Market Quantity @ Sub-Category
Cumulative Market Quantity @ Category

## Key Take Aways - Market Coverage View

Use this view to enter any pertinent notes for the Market Coverage task.

**Figure 8–29 Key Take Aways - Market Coverage View**

Trading Area 1	Key Take Away - Market Coverage Evaluation

Table 8–24 lists the measure available in this view.

**Table 8–24 Key Take Aways - Market Coverage Measure**

Label
Key Take Away - Market Coverage Evaluation

## Performance Analysis Step

Use this step to analyze the performance of the category based on historical sales and forecast, if available.

This step has the following views:

- [Segment Sales & Product Productivity Analysis View](#)
- [Net Margin Analysis View](#)
- [Quadrant Analysis - Sales \\$ / Units View](#)
- [Quadrant Analysis - Profit / Sales Sq. Ft. View](#)
- [Quadrant Analysis - GM% / Turns View](#)
- [Quadrant Analysis - GM% / Sales View](#)
- [Key Take Aways - Performance Analysis View](#)

## Segment Sales & Product Productivity Analysis View

Use this view to analyze the contribution of sales and profits from each sub-category to the category total.

**Figure 8–30 Segment Sales & Product Productivity View**

	Current Plan Strategy	Segment % Share of Category Items	Segment % Share of Category Sales	Avg. Sales per Item	Segment % Share of Category Profit	Sales Productivity Index	Avg. Profit per Item	Profit Productivity Index
3375772211								
3375772212								
4514512223								
5119022323								
6522223331								
7066199229								
201842422322								
201842422323								
201842422324								
201842422325								
201842422326								
207863822223								
207863822225								

Table 8–25 lists the measures available in this view.

**Table 8–25 Segment Sales & Product Productivity Measures**

Label
Current Plan Strategy
Segment % Share of Category Items

**Table 8–25 (Cont.) Segment Sales & Product Productivity Measures**

Label
Segment % Share of Category Sales
Avg. Sales per Item
Segment % Share of Category Profit
Sales Revenue
Sales Productivity Index
Avg. Profit per Item
Profit Productivity Index

## Net Margin Analysis View

Use this view to analyze the performance of the net margin based on historical sales and forecast.

**Figure 8–31 Net Margin Analysis View**

	Gross Profit	Gross Profit %	LY Sales Retail	Promotional Sales	Payment Terms	Markdown Allowance	Markdowns	Freight Costs	Net Margin Notes
3375772211	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
3375772212	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
4514512223	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
5119022323	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
6522223331	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
7066199229	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
201842422322	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
201842422323	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
201842422324	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
201842422325	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
201842422326	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
207863822223	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
207863822225	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	

Table 8–26 lists the measures available in this view.

**Table 8–26 Net Margin Analysis Measures**

Label
Gross Profit
Gross Profit %
LY Sales Retail
Promotional Sales
Payment Terms
Markdown Allowance
Markdowns
Freight Cost
Net Margin Notes

## Quadrant Analysis - Sales \$ / Units View

Use this view to analyze sales dollars and units. This information is best displayed as a bubble chart.

**Figure 8–32** Quadrant Analysis - Sales \$ / Units View

	Sales Revenue	Sales Units	Gross Margin
3375772211	\$ 0.0K	0	0.0 %
3375772212	\$ 0.0K	0	0.0 %
4514512223	\$ 0.0K	0	0.0 %
5119022323	\$ 0.0K	0	0.0 %
6522223331	\$ 0.0K	0	0.0 %
7066199229	\$ 0.0K	0	0.0 %
201842422322	\$ 0.0K	0	0.0 %
201842422323	\$ 0.0K	0	0.0 %
201842422324	\$ 0.0K	0	0.0 %
201842422325	\$ 0.0K	0	0.0 %
201842422326	\$ 0.0K	0	0.0 %
207863822223	\$ 0.0K	0	0.0 %
207863822225	\$ 0.0K	0	0.0 %
207863822226	\$ 0.0K	0	0.0 %

Table 8–27 lists the measures available in this view.

**Table 8–27** Quadrant Analysis - Sales \$ / Units Measures

Label
Sales Revenue
Sales Units
Gross Profit

## Quadrant Analysis - Profit / Sales Sq. Ft. View

Use this view to analyze profit and sales per square foot. This information is best displayed as a bubble chart.

**Figure 8–33** Quadrant Analysis - Profit / Sales Sq. Ft View

	Profit	Sls / sq. ft. / week Retail	Sales Units
CEREAL	\$ -762.4K	\$ 0.6K	1,113,788

Table 8–28 lists the measures available in this view.

**Table 8–28 Quadrant Analysis - Profit / Sales Sq. Ft Measures**

Label
Profit
Sls/sq. ft /week Retail
Sales Units

### Quadrant Analysis - GM% / Turns View

Use this view to analyze gross margin percent and turns. This information is best displayed as a bubble chart.

**Figure 8–34 Quadrant Analysis - GM% / Turns View**

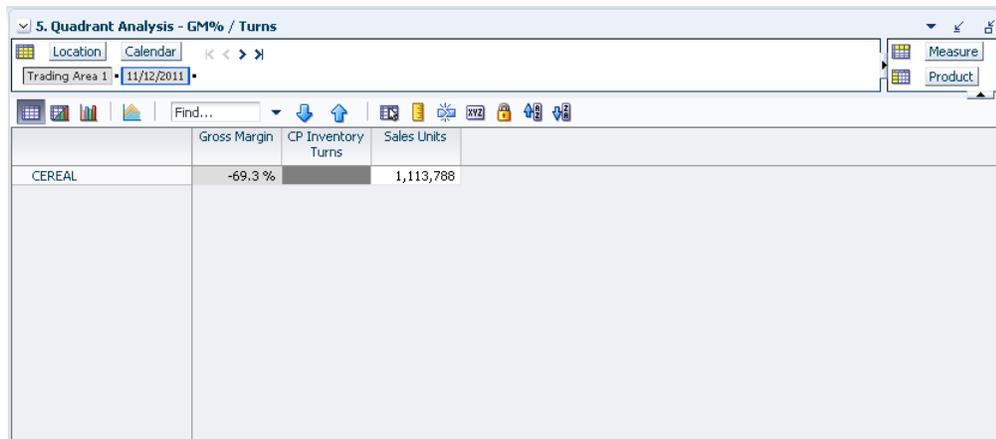


Table 8–29 lists the measures available in this view.

**Table 8–29 Quadrant Analysis - GM% / Turns Measures**

Label
Gross Margin
CP Inventory Turns
Sales Units

## Quadrant Analysis - GM% / Sales View

Use this view to analyze gross profit percent and sales. This information is best displayed as a bubble chart.

**Figure 8–35** Quadrant Analysis - GM% / Sales View

	Gross Margin	Sales Units	Sales Revenue
3375772211	0.0 %	0	\$ 0.0K
3375772212	0.0 %	0	\$ 0.0K
4514512223	0.0 %	0	\$ 0.0K
5119022323	0.0 %	0	\$ 0.0K
6522223331	0.0 %	0	\$ 0.0K
7066199229	0.0 %	0	\$ 0.0K
201842422322	0.0 %	0	\$ 0.0K
201842422323	0.0 %	0	\$ 0.0K
201842422324	0.0 %	0	\$ 0.0K
201842422325	0.0 %	0	\$ 0.0K
201842422326	0.0 %	0	\$ 0.0K
207863822223	0.0 %	0	\$ 0.0K
207863822225	0.0 %	0	\$ 0.0K
207863822226	0.0 %	0	\$ 0.0K

Table 8–30 lists the measures available in this view.

**Table 8–30** Quadrant Analysis - GM% / Sales Measures

Label
Gross Profit
Sales Units
Sales Revenue

## Key Take Aways - Performance Analysis View

Use this view to enter any pertinent notes for the Performance Analysis task.

**Figure 8–36 Key Take Aways - Performance Analysis View**

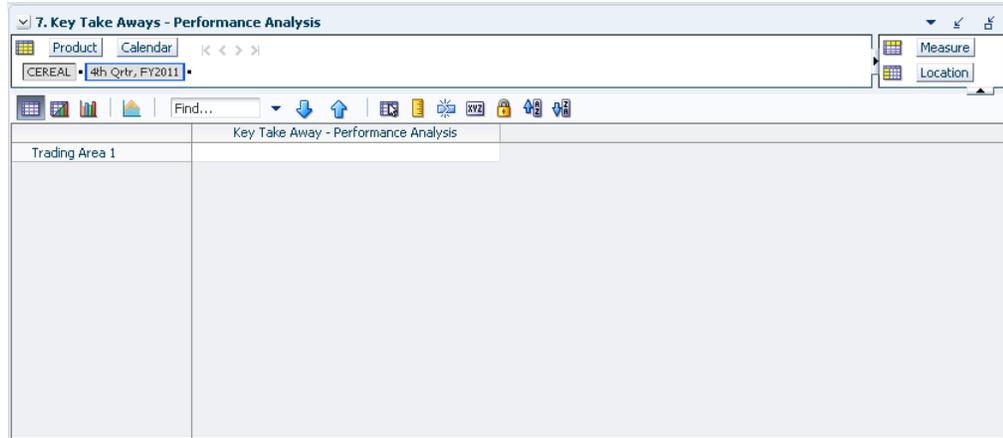


Table 8–31 lists the measure available in this view.

**Table 8–31 Key Take Aways - Performance Analysis Measure**

Label
Key Take Away - Performance Analysis

## Consumer Assessment Step

Use this step to analyze the category with respect to consumer behavior. The data source for this analysis is Household Panel data.

This step has the following views:

- [Purchase Behavior Analysis View](#)
- [Retail Channel Share Analysis View](#)
- [Target Consumer Segment Analysis View](#)
- [Buyer Conversion Analysis view](#)
- [Top Shopper Analysis View](#)
- [Consumer Loyalty Analytics View](#)
- [Key Take Aways - Consumer Assessment View](#)

## Purchase Behavior Analysis View

Use this view to analyze the contribution of sales and profits from each sub-category to the category total.

**Figure 8–37 Purchase Behavior Analysis View**

	Item Penetration	Item \$ per Item Buyer	Item Trips per Item Buyer	Item \$ per Item Trip	% Item \$ on Deal
3375772211	90.0 %	2.13	182.5	32.97	47.0 %
3375772212	63.0 %	55.75	110.6	22.72	44.0 %
4514512223	93.0 %	77.42	75.9	27.74	39.0 %
5119022323	70.0 %	24.21	150.3	32.59	81.0 %
6522223331	49.0 %	42.14	162.4	21.70	80.0 %
7066199229	77.0 %	38.40	60.1	37.55	17.0 %
201842422322	11.0 %	32.57	84.2	33.63	45.0 %
201842422323	50.0 %	34.75	68.4	27.21	61.0 %
201842422324	62.0 %	11.84	172.0	29.10	83.0 %
201842422325	19.0 %	77.13	49.0	34.71	43.0 %
201842422326	32.0 %	99.58	85.9	27.79	38.0 %
207863822223	60.0 %	73.97	157.7	30.76	73.0 %
207863822225	79.0 %	19.39	51.7	35.96	52.0 %

Table 8–32 lists the measures available in this view.

**Table 8–32 Purchase Behavior Analysis Measures**

Label
Item Penetration
Item \$ per Item Buyer
Item Trips per Item Buyer
Item \$ per Item Trip
% Item \$ on Deal

## Retail Channel Share Analysis View

Use this view to analyze what percentage of sales happened through the various channels available in the market.

**Figure 8–38 Retail Channel Share Analysis View**

	All Other Channels	Convenience/C	Dollar Stores	Drug	Grocery	Mass Merch Without Supers	Super-Centers	Warehouse Club
3375772211	0.0 %	79.0 %	0.0 %	85.0 %	98.0 %	0.0 %	93.0 %	0.0 %
3375772212	0.0 %	28.0 %	0.0 %	12.0 %	92.0 %	0.0 %	59.0 %	0.0 %
4514512223	0.0 %	65.0 %	0.0 %	96.0 %	27.0 %	0.0 %	6.0 %	0.0 %
5119022323	0.0 %	42.0 %	0.0 %	95.0 %	73.0 %	0.0 %	26.0 %	0.0 %
652223331	0.0 %	50.0 %	0.0 %	12.0 %	93.0 %	0.0 %	68.0 %	0.0 %
7066199229	0.0 %	98.0 %	0.0 %	59.0 %	35.0 %	0.0 %	50.0 %	0.0 %
201842422322	0.0 %	30.0 %	0.0 %	34.0 %	19.0 %	0.0 %	6.0 %	0.0 %
201842422323	0.0 %	17.0 %	0.0 %	66.0 %	10.0 %	0.0 %	90.0 %	0.0 %
201842422324	0.0 %	11.0 %	0.0 %	18.0 %	78.0 %	0.0 %	93.0 %	0.0 %
201842422325	0.0 %	36.0 %	0.0 %	48.0 %	76.0 %	0.0 %	60.0 %	0.0 %
201842422326	0.0 %	43.0 %	0.0 %	28.0 %	71.0 %	0.0 %	11.0 %	0.0 %
207863822223	0.0 %	8.0 %	0.0 %	59.0 %	60.0 %	0.0 %	61.0 %	0.0 %
207863822225	0.0 %	96.0 %	0.0 %	6.0 %	25.0 %	0.0 %	20.0 %	0.0 %

Table 8–33 lists the measures available in this view.

**Table 8–33 Retail Channel Share Analysis Measures**

Label
% Buyers
% Dollars

## Target Consumer Segment Analysis View

Use this view to choose the highest market coverage for those categories and segments within the category that are most closely aligned with the retailer’s target consumer.

**Figure 8–39 Target Consumer Segment Analysis View**

	\$20,000 - \$29,999	\$30,000 - \$39,999	\$40,000 - \$49,999	\$50,000 - \$69,999	\$70,000 - \$89,999	\$90,000 - \$109,999	\$110,000 - \$149,999	\$150,000+	<\$20,000
3375772211	32.0 %	76.0 %	54.0 %	30.0 %	97.0 %	66.0 %	49.0 %	52.0 %	97.0 %
3375772212	5.0 %	48.0 %	43.0 %	95.0 %	31.0 %	82.0 %	81.0 %	39.0 %	42.0 %
4514512223	7.0 %	40.0 %	28.0 %	3.0 %	2.0 %	61.0 %	97.0 %	1.0 %	19.0 %
5119022323	83.0 %	69.0 %	56.0 %	63.0 %	4.0 %	62.0 %	95.0 %	4.0 %	78.0 %
652223331	76.0 %	22.0 %	23.0 %	64.0 %	4.0 %	68.0 %	31.0 %	12.0 %	94.0 %
7066199229	76.0 %	65.0 %	68.0 %	43.0 %	58.0 %	80.0 %	64.0 %	38.0 %	67.0 %
201842422322	95.0 %	34.0 %	36.0 %	96.0 %	4.0 %	24.0 %	94.0 %	5.0 %	32.0 %
201842422323	71.0 %	17.0 %	64.0 %	77.0 %	27.0 %	87.0 %	21.0 %	66.0 %	94.0 %
201842422324	97.0 %	11.0 %	94.0 %	46.0 %	36.0 %	92.0 %	90.0 %	38.0 %	36.0 %
201842422325	97.0 %	43.0 %	13.0 %	45.0 %	41.0 %	61.0 %	5.0 %	98.0 %	16.0 %
201842422326	94.0 %	94.0 %	88.0 %	66.0 %	17.0 %	18.0 %	17.0 %	28.0 %	8.0 %
207863822223	99.0 %	96.0 %	40.0 %	16.0 %	99.0 %	39.0 %	51.0 %	96.0 %	62.0 %
207863822225	55.0 %	79.0 %	18.0 %	12.0 %	49.0 %	48.0 %	52.0 %	9.0 %	61.0 %

Table 8–34 lists the measures available in this view.

**Table 8–34 Target Consumer Segment Analysis Measures**

Label
Market Trading Area HH %
Retailer Trading Area HH %
Market Trading Area Spend %
Retailer Trading Area Spend %

## Buyer Conversion Analysis view

Use this view to compare the buyer conversion rates of the retailer with selected competitors.

**Figure 8–40 Buyer Conversion Analysis View**

	BlueTooth Fairyland	Double RainBow Ties	Noodle Nexus	Oracle Store	Others	Swag Central	Swayed Shoestore
BAG	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
BOX	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
CONVENIENCE	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 8–35 lists the measure available in this view.

**Table 8–35 Buyer Conversion Analysis Measure**

Label
Buyer Conversion Rate

## Top Shopper Analysis View

Use this view to compare the top shopper index of the retailer at each of the clusters.

**Figure 8–41 Top Shopper Analysis View**

	BlueTooth Fairyland	Double RainBow Ties	Noodle Nexus	Oracle Store	Others	Swag Central	Swayed Shoestore
BAG	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
BOX	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
CONVENIENCE	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 8–36 lists the measure available in this view.

**Table 8–36 Top Shopper Analysis Measure**

Label
Top Shopper Index

## Consumer Loyalty Analytics View

Use this view to identify the level of loyalty the consumers within the trading area have to product segments, brands, and individual SKUs.

**Figure 8–42 Consumer Loyalty Analytics View**

		Loyalty Index	Consumer Worth Index	Exclusivity Index	Switching Index
3375772211	Soccer Mom	0	0	0	0
3375772212	Soccer Mom	0	0	0	0
4514512223	Soccer Mom	0	0	0	0
5119022323	Soccer Mom	0	0	0	0
6522223331	Soccer Mom	0	0	0	0
7066199229	Soccer Mom	0	0	0	0
201842422322	Soccer Mom	0	0	0	0
201842422323	Soccer Mom	0	0	0	0
201842422324	Soccer Mom	0	0	0	0
201842422325	Soccer Mom	0	0	0	0
201842422326	Soccer Mom	0	0	0	0
207863822223	Soccer Mom	0	0	0	0
207863822225	Soccer Mom	0	0	0	0
207863822226	Soccer Mom	0	0	0	0
207863822228	Soccer Mom	0	0	0	0

Table 8–37 lists the measures available in this view.

**Table 8–37 Consumer Loyalty Analytics Measures**

Label
Loyalty Index
Consumer Worth Index
Exclusivity Index
Switching Index

## Key Take Aways - Consumer Assessment View

Use this view to enter any pertinent notes for the Consumer Assessment task.

**Figure 8–43 Key Take Aways - Consumer Assessment View**

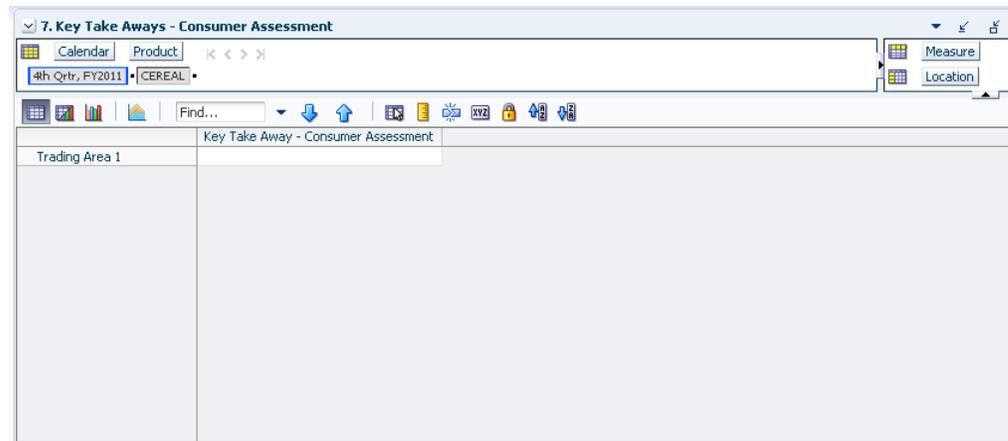


Table 8–38 lists the measure available in this view.

**Table 8–38 Key Take Aways - Consumer Assessment Measure**

Label
Key Take Away - Consumer Assessment

## Market Assessment Step

Use this step to compare the market coverage of the retailer with that of key competitors (if available individually) and the market as a whole.

This step has the following views:

- [Current Market Coverage Assessment View](#)
- [Market Sales Trend Analysis View](#)
- [Growth and Market Share Trends View](#)
- [Market Sales Trends View](#)
- [Quadrant Analysis - Sls \\$ / Sls Units / Mkt Share View](#)
- [Quadrant Analysis - Mkt Share / Mkt Growth / Sls Units View](#)

- [Assortment Tactogram View](#)
- [Key Take Aways - Market Assessment View](#)

### Current Market Coverage Assessment View

Use this view to compare the market coverage of the retailer to key competitors and the market.

**Figure 8–44 Current Market Coverage Assessment View**

	Market Sales Revenue	Market Share	Market Share Index
3375772211	\$ 0.0K	0.0 %	0.0 %
3375772212	\$ 0.0K	0.0 %	0.0 %
4514512223	\$ 0.0K	0.0 %	0.0 %
5119022323	\$ 0.0K	0.0 %	0.0 %
6522223331	\$ 0.0K	0.0 %	0.0 %
7066199229	\$ 0.0K	0.0 %	0.0 %
201842422322	\$ 0.0K	0.0 %	0.0 %
201842422323	\$ 0.0K	0.0 %	0.0 %
201842422324	\$ 0.0K	0.0 %	0.0 %
201842422325	\$ 0.0K	0.0 %	0.0 %
201842422326	\$ 0.0K	0.0 %	0.0 %
207863822223	\$ 0.0K	0.0 %	0.0 %
207863822225	\$ 0.0K	0.0 %	0.0 %
207863822226	\$ 0.0K	0.0 %	0.0 %

Table 8–39 lists the measures available in this view.

**Table 8–39 Current Market Coverage Assessment Measures**

Label
Market Sales Revenue
Market Share
Market Share Index

## Market Sales Trend Analysis View

Use this view to compare last year's retail performance numbers to the prior year and trend multiple time periods. This information is best displayed as a column chart.

**Figure 8–45 Market Sales Trend Analysis View**

	11/12/2011	11/19/2011	11/26/2011	12/3/2011	12/10/2011	12/17/2011	12/24/2011	12/31/2011	1/7/2012	1/
Market Sales Revenue	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
LY Market Sales Retail	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Market Sales var LY	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Market Sales Units	0	0	0	0	0	0	0	0	0	0
LY Market Sales Units	0	0	0	0	0	0	0	0	0	0
Market Sales Units var LY	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %

Table 8–40 lists the measures available in this view.

**Table 8–40 Market Sales Trend Analysis Measures**

Label
Market Sales Revenue
LY Market Sales Retail
Market Sales var LY
Market Sales Units
LY Market Sales Units
Market Sales Units var LY

## Growth and Market Share Trends View

Use this view to create a time-series graph of the following metrics:

- Market growth
- Retailer's market share

This information is best displayed as a column chart.

**Figure 8–46 Growth and Market Share Trends View**

	Market Growth	Market Share
3375772211	-100.0 %	0.0 %
3375772212	-100.0 %	0.0 %
4514512223	-100.0 %	0.0 %
5119022323	-100.0 %	0.0 %
6522223331	-100.0 %	0.0 %
7066199229	-100.0 %	0.0 %
201842422322	-100.0 %	0.0 %
201842422323	-100.0 %	0.0 %
201842422324	-100.0 %	0.0 %
201842422325	-100.0 %	0.0 %
201842422326	-100.0 %	0.0 %
207863822223	-100.0 %	0.0 %
207863822225	-100.0 %	0.0 %
207863822226	-100.0 %	0.0 %

Table 8–41 lists the measures available in this view.

**Table 8–41 Growth and Market Share Trends Measures**

Label
Market Share
Market Growth

### Market Sales Trends View

Use this view to compare last year’s market performance numbers to the prior year. This information is best displayed as a column chart.

**Figure 8–47 Market Sales Trends View**

	11/12/2011	11/19/2011	11/26/2011	12/3/2011	12/10/2011	12/17/2011	12/24/2011	12/31/2011	1/7/2012
3375772211	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
3375772212	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
4514512223	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
5119022323	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
6522223331	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
7066199229	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
201842422322	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
201842422323	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
201842422324	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
201842422325	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
201842422326	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
207863822223	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
207863822225	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
207863822226	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K

Table 8–42 lists the measure available in this view.

**Table 8–42 Market Sales Trends Measure**

Label
Market Sales Revenue

## Quadrant Analysis - Sls \$ / Sls Units / Mkt Share View

Use this view to analyze sales dollars, sales units, and market share for retailers. This information is best displayed as a bubble chart.

**Figure 8–48** Quadrant Analysis - Sls \$ / Sls Units / Mkt Share View

	Market Sales Revenue	Market Sales Units	Market Share
BlueTooth Fairyland	\$ 0.0K	0	0.0 %
Double RainBow Ties	\$ 0.0K	0	0.0 %
Noodle Nexus	\$ 0.0K	0	0.0 %
Oracle Store	\$ 21.8K	21,248	0.1 %
Others	\$ 21.4K	20,100	0.1 %
Swag Central	\$ 0.0K	0	0.0 %
Swayed Shoestore	\$ 0.0K	0	0.0 %

Table 8–43 lists the measures available in this view.

**Table 8–43** Quadrant Analysis - Sls \$ / Sls Units / Mkt Share Measures

Label
Market Sales Revenue
Market Share
Market Sales Units

## Quadrant Analysis - Mkt Share / Mkt Growth / Sls Units View

Use this view to analyze market share, market growth, and sales units for retailers. This information is best displayed as a bubble chart.

**Figure 8–49** Quadrant Analysis - Mkt Share / Mkt Growth / Sls Units View

	Market Share	Market Growth	Market Sales Units
BlueTooth Fairyland	0.0 %	-100.0 %	0
Double RainBow Ties	0.0 %	-100.0 %	0
Noodle Nexus	0.0 %	-100.0 %	0
Oracle Store	0.1 %	0.0 %	21,248
Others	0.1 %	0.0 %	20,100
Swag Central	0.0 %	-100.0 %	0
Swayed Shoestore	0.0 %	-100.0 %	0

Table 8–44 lists the measures available in this view.

**Table 8–44 Quadrant Analysis - Mkt Share / Mkt Growth / Sls Units Measures**

Label
Market Sales Revenue
Market Sales Units
Market Growth

## Assortment Tactogram View

Use this view to see the assortment tactogram. It can be viewed by category, sub-category, and segment for the purpose of setting the market coverage target.

This view supports two custom menus. The first, Seed Assortment, copies last year's assortment items forward to this year.

The second, Create Assortment, creates an assortment matching as many constraints as possible. Constraints are entered on this screen in the Min Tgt Core Coverage Constraint, Min Core + Optional Coverage Constraint, Min Core Unit Constraint, Min Core + Optional Units Constraint, Max Core Units Constraint, and Max Core + Optional Units Constraint. In addition, a user can specify whether an item should be excluded from a potential assortment with the Item Eligibility checkbox, or if an item is required in the assortment, with the Mandatory Item checkbox.

Once constraints are set, use the Create Assortment custom menu to attempt to satisfy as many criteria as possible while constructing an assortment. Criteria are evaluated from bottom up, meaning that the custom menu attempts to satisfy a sub-category level constraint before a category level one.

Once the algorithm has run, items selected for core and optional inclusion in the assortment are shown in the Core and Optional checkbox columns. The Success Indicator Value column contains information about whether or not the custom menu was able to satisfy a particular constraint.

**Figure 8–50 Assortment Tactogram View**

	Sales Revenue	Min Tgt: Core Coverage Constraint	Min Core + Optional Coverage Constraint	Min Core Unit Constraint	Min Core + Optional Units Constraint	Max Core Units Constraint	Max Core + Optional Units Constraint	Core	Optional
3375772211	\$ 0.0K	0.0 %	0.0 %	0	0	-1	-1	<input type="checkbox"/>	<input type="checkbox"/>
3375772212	\$ 0.0K	0.0 %	0.0 %	0	0	-1	-1	<input type="checkbox"/>	<input type="checkbox"/>
4514512223	\$ 0.0K	0.0 %	0.0 %	0	0	-1	-1	<input type="checkbox"/>	<input type="checkbox"/>
5119022323	\$ 0.0K	0.0 %	0.0 %	0	0	-1	-1	<input type="checkbox"/>	<input type="checkbox"/>
6522223331	\$ 0.0K	0.0 %	0.0 %	0	0	-1	-1	<input type="checkbox"/>	<input type="checkbox"/>
7066199229	\$ 0.0K	0.0 %	0.0 %	0	0	-1	-1	<input type="checkbox"/>	<input type="checkbox"/>
201842422322	\$ 0.0K	0.0 %	0.0 %	0	0	-1	-1	<input type="checkbox"/>	<input type="checkbox"/>
201842422323	\$ 0.0K	0.0 %	0.0 %	0	0	-1	-1	<input type="checkbox"/>	<input type="checkbox"/>
201842422324	\$ 0.0K	0.0 %	0.0 %	0	0	-1	-1	<input type="checkbox"/>	<input type="checkbox"/>
201842422325	\$ 0.0K	0.0 %	0.0 %	0	0	-1	-1	<input type="checkbox"/>	<input type="checkbox"/>

Table 8–45 lists the measures available in this view.

**Table 8–45 Assortment Tactogram Measures**

Label
Sales Revenue
Min Tgt Core Coverage Constraint
Min Core + Optional Coverage Constraint
Min Core Unit Constraint
Min Core + Optional Units Constraint
Max Core Units Constraint
Max Core + Optional Units Constraint
Core
Optional
Item Eligibility
Mandatory Item
Pre-Rationalization - Total Core Units
Pre-Rationalization - Total Optional Units
Success Indicator Value

## Key Take Aways - Market Assessment View

Use this view to enter any pertinent notes for the Market Assessment step.

**Figure 8–51 Key Take Aways - Market Assessment View**

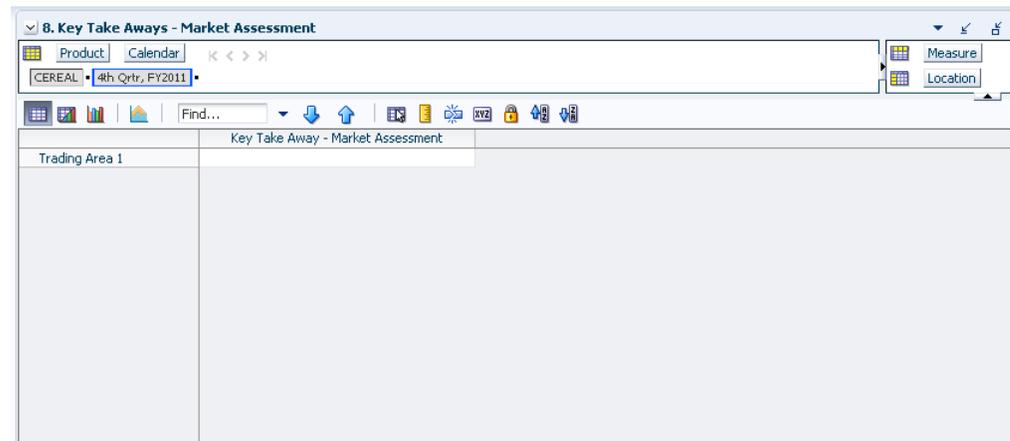


Table 8–46 lists the measure available in this view.

**Table 8–46 Key Take Aways - Market Assessment Measure**

Label
Key Take Away - Market Assessment

## Pre-Rationalization Analysis Step

Use this view to analyze the keep, add, and delete potential recommendations based on pre-rationalization analysis.

This step has the following views:

- [Pre-Rationalization Assortment View](#)
- [Key Take Aways - Pre-Rationalization Analysis View](#)

### Pre-Rationalization Assortment View

Use this view to see the pre-rationalization assortment for the SKUs for all the clusters.

**Figure 8–52 Pre-Rationalization Assortment View**

	Pre - Rationalization - Compare to Last Year Assortment	Pre-Rationalization - Compare to Latest Assortment.
3375772211		
3375772212		
4514512223		
5119022323		
6522223331		
7066199229		
201842422322		
201842422323		
201842422324		
201842422325		
201842422326		
207863822223		

Table 8–47 lists the measures available in this view.

**Table 8–47 Pre-Rationalization Assortment Measures**

Label
Pre - Rationalization - Compare to Last Year Assortment
Pre-Rationalization - Compare to Latest Assortment

## Key Take Aways - Pre-Rationalization Analysis View

Use this view to enter any pertinent notes for the Pre-Rationalization Analysis task.

**Figure 8–53** Key Take Aways - Pre-Rationalization Analysis View

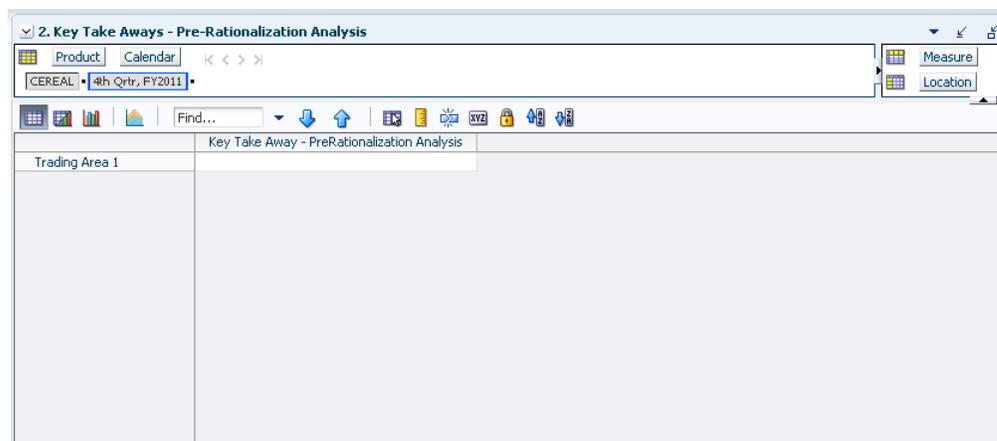


Table 8–48 lists the measure available in this view.

**Table 8–48** Key Take Aways - Pre-Rationalization Analysis Measure

Label
Key Take Away - PreRationalization Analysis

## Develop IPI Step

Use this step to compute the IPI of each SKU for each of the clusters.

This step has the following views:

- [Review Focus Area Weights View](#)
- [Review Metric Weights and Groupings View](#)
- [Focus Area Scores View](#)
- [Consumer Segment Scores View](#)
- [IPI Scores View](#)
- [Administer IPI Thresholds View](#)
- [Sub-Category Scores View](#)
- [Key Take Aways - Develop IPIs View](#)

## Review Focus Area Weights View

Use this view to review each strategy/focus area. A weight is assigned to each metric. In addition to these values being editable here, they can also be seeded with values set in IPI Setup (See [Chapter 5](#).) and assignments made in Category Planning (See "[Assign Strategies View](#)" in [Chapter 7](#)) To seed the values, use the custom menu Seed IPI Weights from Strategy.

**Figure 8–54 Review Focus Area Weights View**

Attributes	Brand	Demand Transference	Loyalty	Market Basket	Performance
BAG	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
BOX	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
CONVENIENCE	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 8–49 lists the measure available in this view.

**Table 8–49 Review Focus Area Weights Measure**

Label
Focus Area Weights

## Review Metric Weights and Groupings View

Use this view to review the metric weights and groupings.

**Figure 8–55 Review Metric Weights and Groupings View**

Sales Revenue Grouping	Sales Weightage	Gross Margin Grouping	Gross Margin Weightage	Sales Units Grouping	Sales Unit Weight
All Product	0.0 %	All Product	0.0 %	All Product	0.0 %
All Product	0.0 %	All Product	0.0 %	All Product	0.0 %
All Product	0.0 %	All Product	0.0 %	All Product	0.0 %

Table 8–50 lists the measures available in this view.

**Table 8–50 Review Metric Weights and Groupings Measures**

Label
Sales Revenue Grouping
Sales Weightage
Gross Margin Grouping

**Table 8–50 (Cont.) Review Metric Weights and Groupings Measures**

Label
Gross Margin Weightage
Sales Units Grouping
Sales Unit Weight

### Focus Area Scores View

Use this view to see the focus area scores:

- Within each of the focus areas, a score is computed for each assigned assortment metric. This IPI score is based on the assortment metric value as a ratio of the mean value.
- The focus area score, for each of the focus areas, is an IPI computed as a composite IPI based on the relative weight of the metrics.

At this point, you can use the custom menu Calculate IPIs to populate values in the next few screens.

**Figure 8–56 Focus Area Scores View**

	Attributes	Brand	Demand Transference	Loyalty	Market Basket	Performance
3375772211	0.00	0.00	0.00	0.00	0.00	0.00
3375772212	0.00	0.00	0.00	0.00	0.00	0.00
4514512223	0.00	0.00	0.00	0.00	0.00	0.00
5119022323	0.00	0.00	0.00	0.00	0.00	0.00
6522223331	0.00	0.00	0.00	0.00	0.00	0.00
7066199229	0.00	0.00	0.00	0.00	0.00	0.00
201842422322	0.00	0.00	0.00	0.00	0.00	0.00
201842422323	0.00	0.00	0.00	0.00	0.00	0.00
201842422324	0.00	0.00	0.00	0.00	0.00	0.00
201842422325	0.00	0.00	0.00	0.00	0.00	0.00
201842422326	0.00	0.00	0.00	0.00	0.00	0.00
207863822223	0.00	0.00	0.00	0.00	0.00	0.00
207863822225	0.00	0.00	0.00	0.00	0.00	0.00
207863822226	0.00	0.00	0.00	0.00	0.00	0.00

Table 8–51 lists the measure available in this view.

**Table 8–51 Focus Area Scores Measure**

Label
Focus Area Score

### Consumer Segment Scores View

Use this view to see the consumer segment scores. Each consumer segment score is computed per the consumer segment/trading area based on the weights of the focus areas. A cluster score is then computed based on the relative weight of the consumer segments in each cluster.

**Figure 8–57 Consumer Segment Scores View**

	Soccer Mom	Consumer Segment Score
3375772211	0.00	
3375772212	0.00	
4514512223	0.00	
5119022323	0.00	
6522223331	0.00	
7066199229	0.00	
201842422322	0.00	
201842422323	0.00	
201842422324	0.00	
201842422325	0.00	
201842422326	0.00	
207863822223	0.00	
207863822225	0.00	
207863822226	0.00	
207863822239	0.00	
207863822239	0.00	

Table 8–52 lists the measure available in this view.

**Table 8–52 Consumer Segment Scores Measure**

Label
Consumer Segment Score

## IPI Scores View

Use this view to review the IPI calculation for each SKU within the category for each of the clusters in the workbook.

**Figure 8–58 IPI Scores View**

	IPI Score
3375772211	0.00
3375772212	0.00
4514512223	0.00
5119022323	0.00
6522223331	0.00
7066199229	0.00
201842422322	0.00
201842422323	0.00
201842422324	0.00
201842422325	0.00
201842422326	0.00
207863822223	0.00
207863822225	0.00
207863822226	0.00
207863822239	0.00

Table 8–53 lists the measure available in this view.

**Table 8–53 IPI Scores Measure**

Label
IPI Score

## Administer IPI Thresholds View

Use this view to define thresholds for each sub-category and cluster. This screen is similar in function to the Assortment Tactogram screen in the Market Assessment step. Here, the thresholds are set for IPIs. These thresholds determine which items are included or excluded from the assortment calculated based on IPI scores.

**Figure 8–59 Administer IPI Thresholds View**

	IPI Optional Cutoff Index	IPI Core Cutoff Index
BAG	0.00	0.00
BOX	0.00	0.00
CONVENIENCE	0.00	0.00

Table 8–54 lists the measures available in this view.

**Table 8–54 Administer IPI Thresholds Measures**

Label
IPI Optional Cutoff Index
IPI Core Cutoff Index

## Sub-Category Scores View

Use this view to set the sub-category scores.

**Figure 8–60 Sub-Category Scores View**

	IPI percentage
BAG	0.00
BOX	0.00
CONVENIENCE	0.00

Table 8–55 lists the measure available in this view.

**Table 8–55 Sub-Category Scores Measure**

Label
IPI Percentage

## Key Take Aways - Develop IPIs View

Use this view to enter any pertinent notes for the Develop IPIs task.

**Figure 8–61 Key Take Aways - Develop IPIs View**

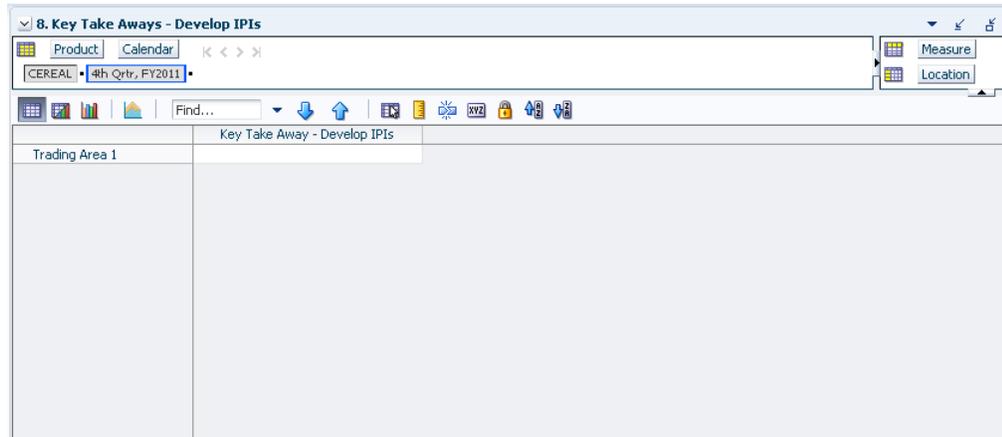


Table 8–56 lists the measure available in this view.

**Table 8–56 Key Take Aways - Develop IPIs Measure**

Label
Key Take Away - Develop IPIs

## Assortment Finalization Step

Use this step to finalize the assortment by reflecting the various recommendations (such as adds/deletes/keeps) from prior steps and overriding and finalizing the decisions. The output is the recommended assortment that reflects previous decisions made regarding market coverage, consumer, and retailer measurements.

This step has the following views:

- [Assortment Finalization Detail View](#)
- [Assortment Finalization Summary View](#)
- [Delete Validation View](#)
- [Add Validation View](#)
- [Retention Validation View](#)
- [Key Take Aways - Assortment Finalization Step](#)

## Assortment Finalization Detail View

Use this view to see the system *recommended* assortment. This is represented by a measure at SKU/Cluster level.

Figure 8–62 Assortment Finalization Detail View

1. Assortment Finalization Detail								IPI Core	IPI Mandatory	IPI Optional	IPI Rationalization - Compare to Latest Assortment	IPI Rationalization - Compare to Last Year Assortment		
▼ dss_cereal	▼ BAG	▼ ADULT	▼ BACK TO NATURE	▼ COLD	▼ OTHER	▼ GRANOLA	▼ 12 OZ	297140524237	BACK_TO_NTR_GRNL_TOTAL_TASTE_FRMS_GRI				NA	NA
			▼ BARBARAS	▼ COLD	▼ OTHER	▼ WHEAT	▼ 10 OZ	229583922828	BARBARAS_SHREDDED_WHEAT_100_PRCNT_NJ				NA	NA
			▼ BOBS RED MILL	▼ COLD	▼ OTHER	▼ OTHER	▼ 18 OZ	225119022325	BOBS_RED_MILL_MUESLI_NATURAL_CEREAL_16				NA	NA
				▼ HOT	▼ OTHER	▼ OTHER	▼ 16 OZ	225119022327	BOBS_RED_MILL_HOT_CEREAL_16_OUNCE				NA	NA
							▼ 18 OZ	225119022365	BOBS_RED_MILL_ALL_NATURAL_HOT_CEREAL_18				NA	NA
							▼ 25 OZ	225119022332	BOBS_RED_MILL_HOT_CEREAL_25_OUNCE				NA	NA
			▼ GENERAL MILLS	▼ COLD	▼ OTHER	▼ MULTIGRAIN	▼ 12 OZ	223822287072	TOTAL_WHL_GRN RTE_CRL_12_OUNCE				NA	NA
			▼ KELLOGGS	▼ COLD	▼ RAISIN	▼ WHEAT	▼ 15 OZ	2250222111	KELLOGGS_RAISIN_BRAN RTE_CEREAL_15_OU				NA	NA
						▼ WHEAT	▼ 20 OZ	22502222042	KELLOGGS_RAISIN_BRAN RTE_CEREAL_20_OU				NA	NA
			▼ POST	▼ COLD	▼ APPLE	▼ OTHER	▼ 12 OZ	22652223998	POST_SELECTS_APPLE_CINNAMON_HARVEST_C				NA	NA
			▼ QUAKER	▼ COLD	▼ OTHER	▼ RICE	▼ 7 OZ	22522228312	QUAKER_ESSENTIALS_PUFFED_RICE RTE_CER				NA	NA
						▼ WHEAT	▼ 5.3 OZ	22522228332	QUAKER_ESSENTIALS_PUFFED_WHEAT RTE_CE				NA	NA
			▼ SUNBELT	▼ COLD	▼ OTHER	▼ GRANOLA	▼ 16 OZ	22465225387	SUNBELT_GRANOLA_GRANOLA_CEREAL_16_OU				NA	NA
						▼ MULTIGRAIN	▼ 12 OZ	22465225377	SUNBELT_BERRY_BASIC_WHOLE_GRAIN_FLAKE				NA	NA
		▼ FAMILY	▼ COLD	▼ BEAR NAKED	▼ OTHER	▼ OTHER	▼ 13 OZ	207863822225	BEAR_NAKED_ALL_NTRL_ALL_NTRL_DLCS_DLCS				NA	NA
				▼ CEREAL TOPPERS	▼ OTHER	▼ 2 OZ	▼ 2 OZ	207956022252	CEREAL_TOPPERS_BRNS_AND_STRWB_PIECE_8				NA	NA
								207956022253	CRL_TPKRS_BRNS_AND_STRWB_PIECE_J				NA	NA
								207956022254	CEREAL_TOPPERS_APPLS_AND_RSPER_PIECE_J				NA	NA
			▼ GALAXY	▼ GRANOLA	▼ OTHER	▼ 14 OZ	▼ 14 OZ	289047056789	GALAXY_GRANOLA_ALL_NATURAL_GRANOLA_C				NA	NA
			▼ GENERAL MILLS	▼ OTHER	▼ 13.5 OZ	▼ 13.5 OZ	▼ 13.5 OZ	223822262980	GNRL_MILLS_FIBER_ONE_FRSTD_SHRDO_WHT				NA	NA
						▼ 14 OZ	▼ 14 OZ	223822249769	NSTL_LA_LCHR_FLKS_12_VTMS_AND_MNRLS_J				NA	NA
			▼ KASHI	▼ GRANOLA	▼ 13.5 OZ	▼ 13.5 OZ	▼ 13.5 OZ	223084905022	KASHI_ORCHARD_SPICE_GRANOLA_GRANOLA				NA	NA
								223084905022	KASHI_MOUNTAIN_REDLEY_GRANOLA_CRL_GR				NA	NA
			▼ KELLOGGS	▼ RICE	▼ 13.8 OZ	▼ 13.8 OZ	▼ 13.8 OZ	225022241473	KELLOGGS_EGGO_CRUNCHY RTE_CEREAL_13.8				NA	NA
				▼ WHEAT	▼ 14 OZ	▼ 14 OZ	▼ 14 OZ	22502223041	KELLOGGS_FROSTED_MINI_WHEATS RTE_CERE				NA	NA
			▼ KOZY	▼ MULTIGRAIN	▼ 14 OZ	▼ 14 OZ	▼ 14 OZ	229561333462	KOZY_SHACK_READY_GRNS RTE_CRL_2PK_14				NA	NA
			▼ MALT O MEAL	▼ OAT	▼ 33 OZ	▼ 33 OZ	▼ 33 OZ	22646221981	MALT_O_MEAL_HONEY_OAT_BUNDR RTE_CRL				NA	NA
				▼ OTHER	▼ 25.10 OZ	▼ 25.10 OZ	▼ 25.10 OZ	22646224921	MALT_O_MEAL_VANILLA_CREAM_MINI_SPOONE				NA	NA
					▼ 33 OZ	▼ 33 OZ	▼ 33 OZ	22646221490	MALT_O_MEAL_FROSTED_MINI_SPOONERS_CR				NA	NA
								226462215190	MALT_O_MEAL_CINNAMON_TOASTERS RTE_CE				NA	NA
								22646222062	MALT_O_MEAL_MPL_BRWN_SGR_MINI_SPNRS_J				NA	NA
			▼ MNTN MDNSS	▼ GRANOLA	▼ 12 OZ	▼ 12 OZ	▼ 12 OZ	20184242232	MNTN_MDNSS_ORIG_GRANOLA				NA	NA
								201842422324	MNTN_MDNSS_PROTEIN_POWER_GRANOLA				NA	NA
								201842422325	MNTN_MDNSS_CRANBERRY_ZEST_GRANOLA				NA	NA
								201842422326	MNTN_MDNSS_BLUEBERRY_MAPLE_GRANOLA				NA	NA
			▼ NUTRITIOUS LIVING	▼ OTHER	▼ 11 OZ	▼ 11 OZ	▼ 11 OZ	229310023505	NUTRITIOUS_LIVING_HI_LO RTE_CEREAL_10_0				NA	NA
					▼ 12 OZ	▼ 12 OZ	▼ 12 OZ	229310023503	NUTRITIOUS_LIVING_HI_LO_NATURAL RTE_CE				NA	NA
					▼ 13 OZ	▼ 13 OZ	▼ 13 OZ	229310023506	NUTRITIOUS_LIVING_HI_LO RTE_CEREAL_10_0				NA	NA

Table 8–57 lists the measures available in this view.

Table 8–57 Assortment Finalization Detail Measures

Label
IPI Core
IPI Rationalization - Compare to Latest Assortment
IPI Rationalization - Compare to Last Year Assortment
IPI Mandatory
IPI Optional

## Assortment Finalization Summary View

Use this view to see a summary of the assortment decisions, including the overrides.

**Figure 8–63 Assortment Finalization Summary View**

	Actual Core Coverage	IPI Core Coverage	Temporary Core	IPI Core Units	Pre-Rationalization - Total Core Units	Temporary Optional	IPI Optional Units	Temporary Optional Units	Pre-Rationalization - Total Optional Units
3375772211	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
3375772212	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
4514512223	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
5119022323	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
6522223331	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
7066199229	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
201842422322	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
201842422323	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
201842422324	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
201842422325	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
201842422326	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	

Table 8–58 lists the measures available in this view.

**Table 8–58 Assortment Finalization Summary Measures**

Label
Actual Core Coverage
IPI Core Coverage
Temporary Core
IPI Core Units
Pre-Rationalization - Total Core Units
Temporary Optional
IPI Optional Units
Temporary Optional Units
Pre-Rationalization - Total Optional Units
IPI Optional Coverage
Temporary Core Units
Actual Optional Coverage
Pre-Rationalization - Compare to Latest Assortment
IPI Rationalization - Compare to Latest Assortment

## Delete Validation View

Use this view to assign a disposition to the items that have been recommended for deletion for at least one cluster. The recommendations are based on the IPI-based calculation.

**Figure 8–64** Delete Validation View

	IPI Rationalization - Compare to Latest Assortment	Pre-Rationalization - Compare to Latest Assortment.	Override
3375772211			
3375772212			
4514512223			
5119022323			
6522223331			
7066199229			
201842422322			
201842422323			
201842422324			
201842422325			
201842422326			
207863822223			

Table 8–59 lists the measures available in this view.

**Table 8–59** Delete Validation Measures

Label
IPI Rationalization - Compare to Latest Assortment
Pre-Rationalization - Compare to Latest Assortment
Override

## Add Validation View

Use this view to assign a disposition to the items that have been recommended for addition for at least one cluster. The recommendations are based on the IPI-based calculation.

**Figure 8–65 Add Validation View**

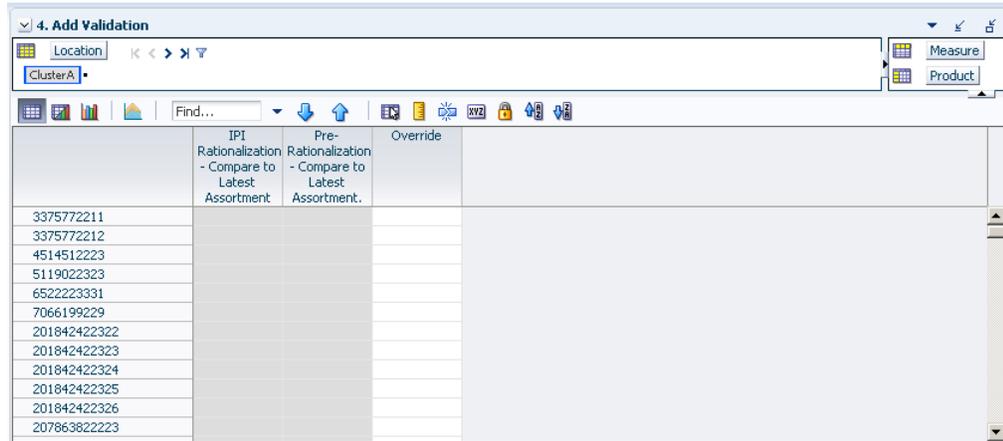


Table 8–60 lists the measures available in this view.

**Table 8–60 Add Validation Measures**

Label
IPI Rationalization - Compare to Latest Assortment
Pre-Rationalization - Compare to Latest Assortment
Override

## Retention Validation View

Use this view to assign a disposition to the items that have been recommended for retention for at least one cluster. The recommendations are based on the IPI-based calculation.

**Figure 8–66** *Retention Validation View*

	IPI Rationalization - Compare to Latest Assortment	Pre-Rationalization - Compare to Latest Assortment.	Override
3375772211			
3375772212			
4514512223			
5119022323			
6522223331			
7066199229			
201842422322			
201842422323			
201842422324			
201842422325			
201842422326			
207863822223			

Table 8–61 lists the measures available in this view.

**Table 8–61** *Retention Validation Measures*

Label
IPI Rationalization - Compare to Latest Assortment
Pre-Rationalization - Compare to Latest Assortment
Override

## Key Take Aways - Assortment Finalization Step

Use this view to enter any pertinent notes for the Assortment Finalization task.

**Figure 8–67 Key Take Aways - Assortment Finalization View**

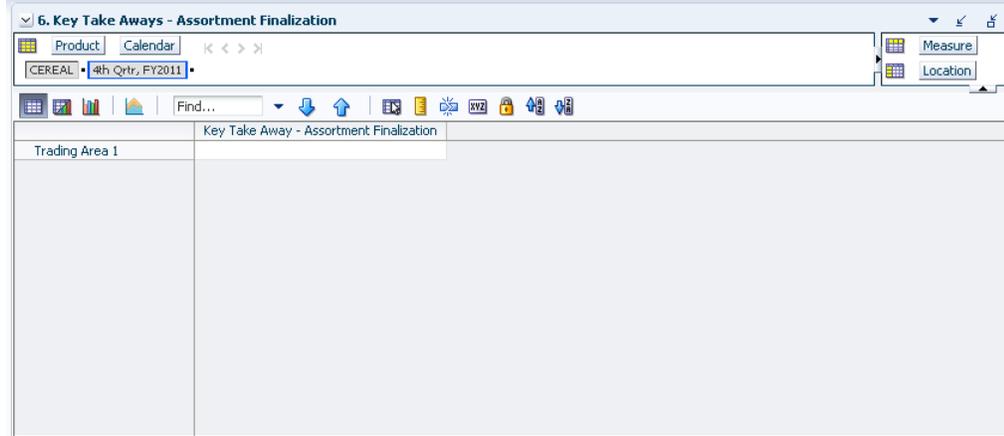


Table 8–62 lists the measure available in this view.

**Table 8–62 Key Take Aways - Assortment Finalization Measure**

Label
Key Take Away - Assortment Finalization

## Assortment Quantification and Approval Step

Use this step to quantify the decisions made by comparing the current and proposed assortments on a variety of performance measurements. The output is a quantified final assortment ready from recommendation to management as part of the category business plan. This assortment recommendation is then used as the basis for the development of related tactics in pricing, space, promotion, and product supply/logistics.

This step has the following views:

- [Assortment Quantification View](#)
- [Assortment Approval View](#)
- [Review Key Take Aways View](#)

## Assortment Quantification View

Use this view to review the assortment quantification.

**Figure 8–68 Assortment Quantification View**

	1000 Charlotte	1001 Atlanta	1003 Boston	1009 Albuquerque	1010 Los Angeles	1011 Ottawa	1012 Toronto	1013 Montreal
Current Asst Sales U	0	0	0	0	0	0	0	0
New Asst Sales U	0	0	0	0	0	0	0	0
Variance - New Asst to Current - Sales U	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
New Asst Sales \$	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Current Asst Sales \$	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Variance - New Asst to Current - Sales \$	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Current Asst Sales Eqvt-Units	0	0	0	0	0	0	0	0
New Asst Sales Eqvt-Units	0	0	0	0	0	0	0	0
Variance - New Asst to Current - Sales Eqvt	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Current Asst GM \$	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
New Asst GM \$	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Variance - New Asst to Current - GM \$	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Current Asst GM %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 8–63 lists the measures available in this view.

**Table 8–63 Assortment Quantification Measures**

Label
Current Asst Sales U
New Asst Sales U
Variance - New Asst to Current - Sales U
New Asst Sales \$
Current Asst Sales \$
Variance - New Asst to Current - Sales \$
Current Asst Sales Eqvt-Units
New Asst Sales Eqvt-Units
Variance - New Asst to Current - Sales Eqvt-Units
Current Asst Sales GM \$
New Asst Sales GM \$
Variance - New Asst to Current - Sales GM \$
Current Asst Sales GM %
New Asst Sales GM %
Variance - New Asst to Current - Sales GM %

## Assortment Approval View

Use this view to approve the cluster-level assortment.

**Figure 8–69 Assortment Approval View**

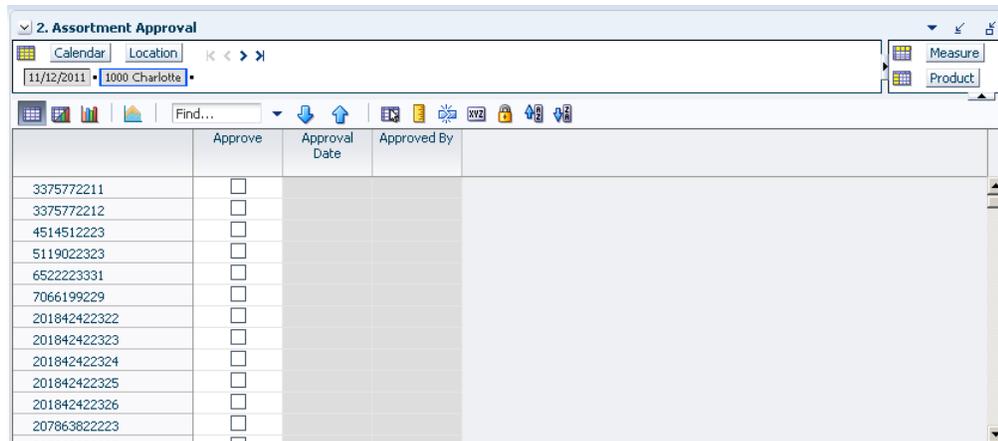


Table 8–64 lists the measures available in this view.

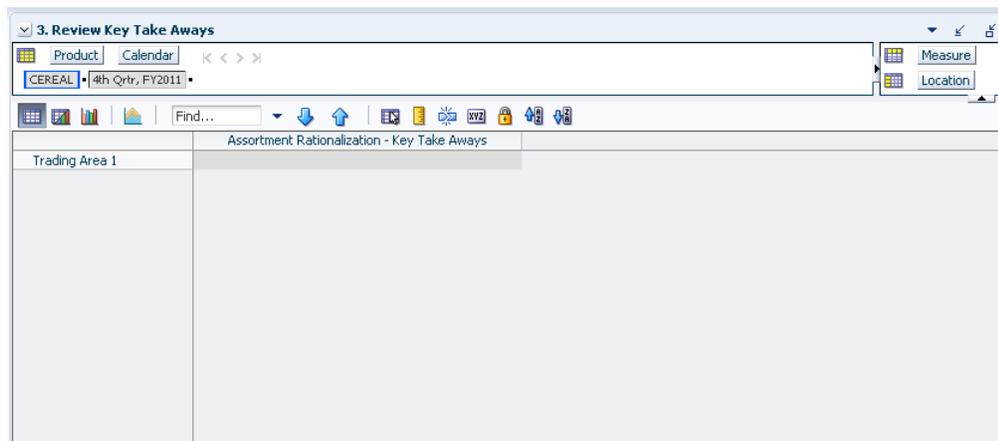
**Table 8–64 Assortment Approval Measures**

Label
Approve
Approval Date
Approved By

## Review Key Take Aways View

Use this view to enter any pertinent notes for the Assortment Rationalization task.

**Figure 8–70 Review Key Take Aways View**



[Table 8–65](#) lists the measure available in this view.

**Table 8–65 Review Key Take Aways Measure**

Label
Assortment Rationalization - Key Take Aways

## Next Steps

After completing Assortment Rationalization at the cluster, continue to the [Assortment Rationalization @ Store Task](#).



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## Assortment Rationalization @ Store Task

This task enables a retailer to analyze their assortment, assign weights to attributes, and calculate a score (ranking) that is systematically used to suggest additions and deletions to the assortment at a store.

Consumer insights are core to this application utilizing external market and consumer data. This also includes visibility to the retailer's category versus competitors versus the market place as a whole. (Examples of external market data providers includes Nielsen, Symphony IRI, Axiom, and FICO.)

The application assists users in analyzing their current assortments, determining the appropriate market coverage, rationalizing (validation of necessary add, drop and keep) the assortment, and quantifying the assortment decision.

The application takes advantage of a feed of category planning data to make category role, strategies, tactics, and financial objectives visible to ensure assortment align back to the overall category-level objectives.

This task has the following steps:

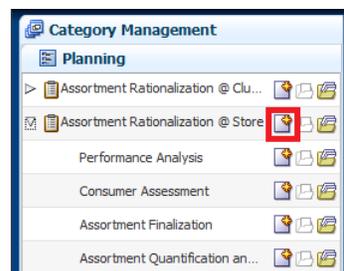
- [Performance Analysis Step](#)
- [Consumer Assessment Step](#)
- [Assortment Finalization Step](#)
- [Assortment Quantification and Approval Step](#)

### Create the Assortment Rationalization @ Store Workbook

To create the workbook:

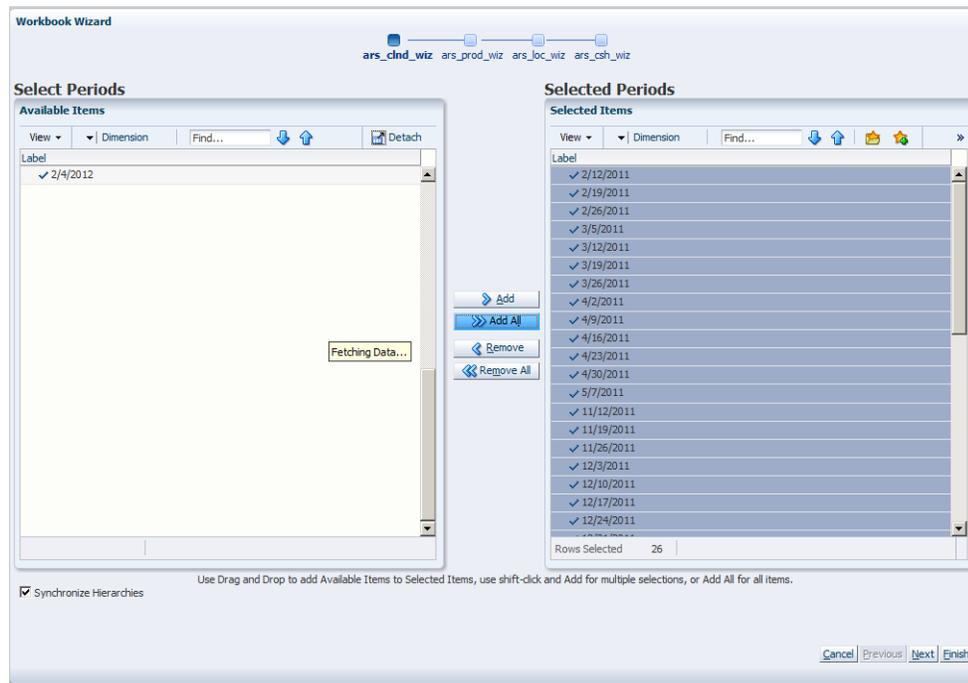
1. Select the **New Workbook** icon in the Assortment Rationalization @ Store activity.

**Figure 9–1 Assortment Rationalization @ Store Activity**



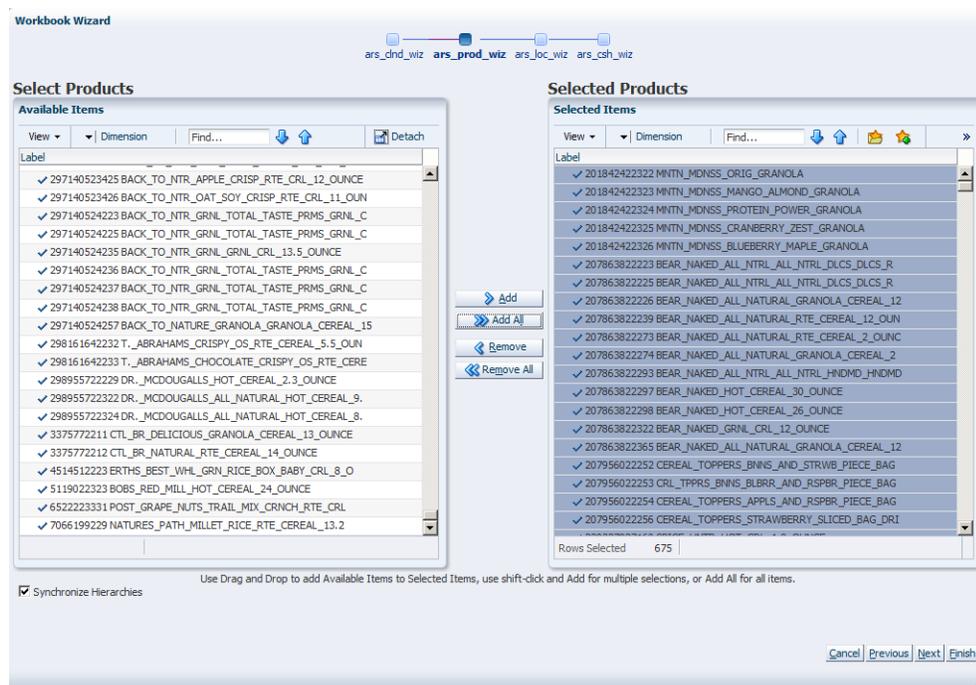
2. Select the calendar periods and move them to the Selected Periods box. Click Next.

**Figure 9–2 Workbook Wizard Select Periods Page**



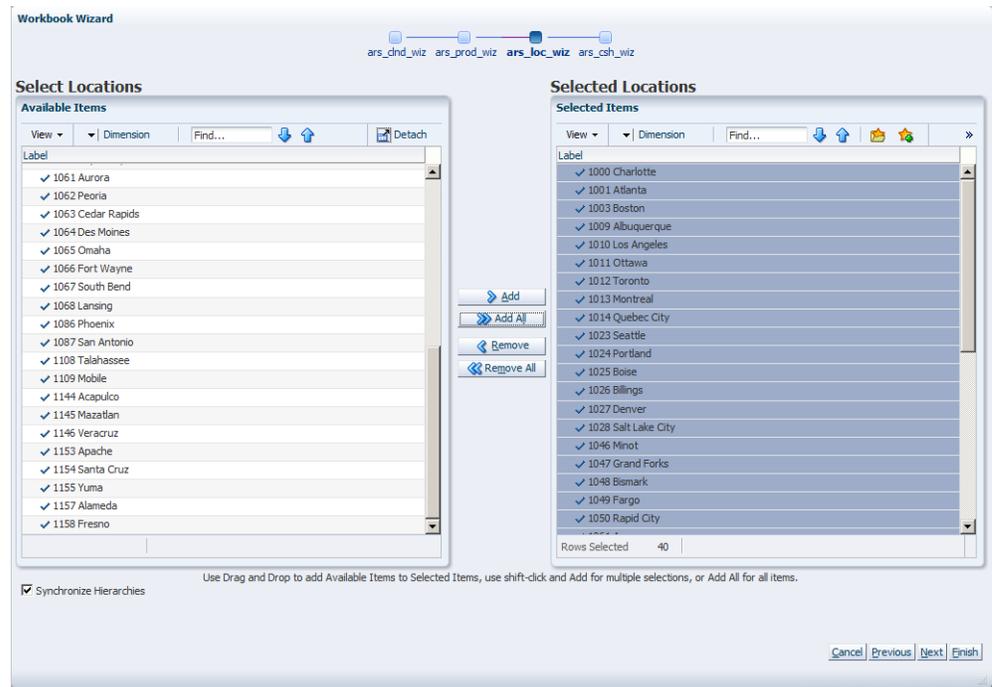
3. Select the products and move them to the Selected Products box. Click Next.

**Figure 9–3 Workbook Wizard Select Products Page**



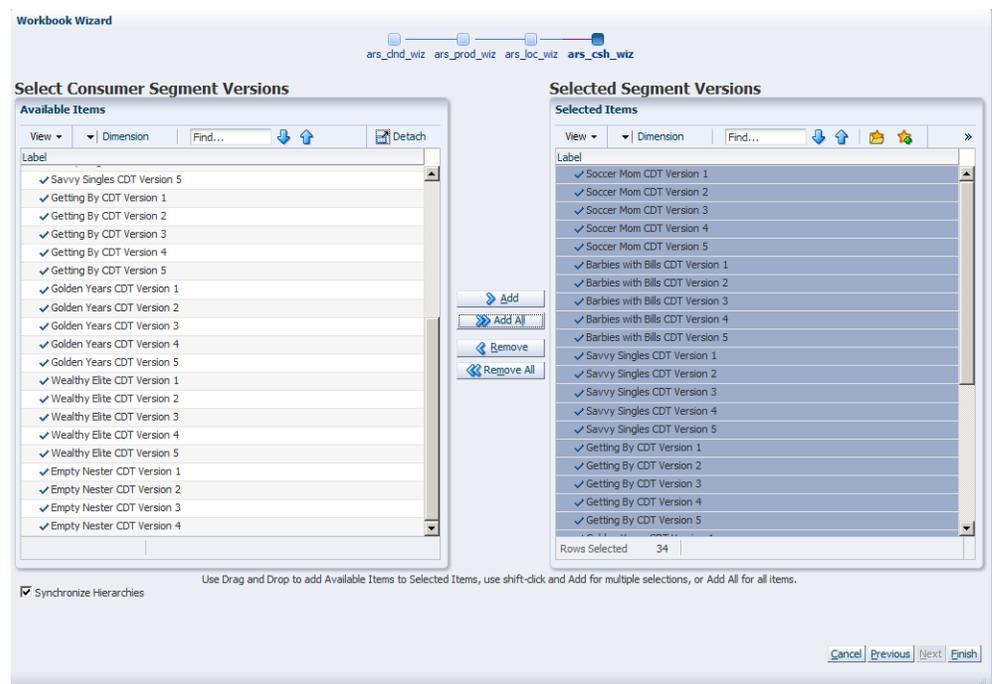
- Select the locations and move them to the Selected Locations box. Click **Next**.

**Figure 9–4 Workbook Wizard Select Locations Page**



- Select the consumer segment versions and move them to the Selected Segment Versions box. Click **Finish**.

**Figure 9–5 Workbook Wizard Select Consumer Segment Versions Page**



The workbook is created.

## Performance Analysis Step

Use this view to analyze performance based on historical sales and forecast, if available. This step is the same as the Performance Analysis step at the cluster level, except for the following:

- The base intersection of the worksheets is per store, not cluster.
- Only the single cluster relevant to the workbook is visible.
- For net margin analysis, metrics such as Markdown Allowance, Markdowns, and Freight Costs are available at the store level.

This step has the following views:

- [Segment Sales & Product Productivity Analysis View](#)
- [Net Margin Analysis View](#)
- [Quadrant Analysis - Sales \\$ / Units View](#)
- [Quadrant Analysis - GM% / Sales View](#)
- [Quadrant Analysis - GM% / Turns View](#)
- [Quadrant Analysis - Profit / Sales Sq Ft View](#)

## Segment Sales & Product Productivity Analysis View

Use this view to analyze the contribution of sales and profits from each sub-category to the category total.

**Figure 9–6 Segment Sales & Product Productivity Analysis View**

	Current Plan Strategy	Segment % Share of Category Items	Segment % Share of Category Sales	Avg. Sales per Item	Segment % Share of Category Profit	Sales Productivity Index	Avg. Profit per Item	Profit Productivity Index
3375772211								
3375772212								
4514512223								
5119022323								
6522223331								
7066199229								
201842422322								
201842422323								
201842422324								
201842422325								
201842422326								
207863822223								
207863822225								

Table 9–1 lists the measures available in this view.

**Table 9–1 Segment Sales & Product Productivity Analysis Measures**

Label
Current Plan Strategy
Segment % Share of Category Items

**Table 9–1 (Cont.) Segment Sales & Product Productivity Analysis Measures**

Label
Segment % Share of Category Sales
Avg. Sales per Item
Segment % Share of Category Profit
Sales Productivity Index
Avg. Profit per Item
Profit Productivity Index

## Net Margin Analysis View

Use this view to analyze performance based on historical sales and forecast.

**Figure 9–7 Net Margin Analysis View**

	Gross Profit	Gross Profit %	LY Sales Retail	Promotional Sales	Payment Terms	Markdown Allowance	Markdowns	Freight Costs	Net Margin Notes
3375772211	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
3375772212	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
4514512223	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
5119022323	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
6522223331	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
7066199229	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
201842422322	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
201842422323	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
201842422324	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
201842422325	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
201842422326	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
207863822223	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	
207863822225	\$ 0.0K	0.0 %	\$ 0.0K	\$ 0.0K		\$ 0.0K	\$ 0.0K	\$ 0.0K	

Table 9–2 lists the measures available in this view.

**Table 9–2 Net Margin Analysis Measures**

Label
Gross Profit
Gross Profit %
Historical Sales
Promotional Sales
Payment Terms
Markdown Allowance
Markdowns
Freight Costs
Net Margin Notes

## Quadrant Analysis - Sales \$ / Units View

Use this view to analyze performance based on sales per units. This information is best displayed as a bubble chart.

**Figure 9–8 Quadrant Analysis - Sales \$ / Units View**

	Sales Revenue	Sales Units	Gross Margin
3375772211	\$ 0.0K	0	0.0 %
3375772212	\$ 0.0K	0	0.0 %
4514512223	\$ 0.0K	0	0.0 %
5119022323	\$ 0.0K	0	0.0 %
6522223331	\$ 0.0K	0	0.0 %
7066199229	\$ 0.0K	0	0.0 %
201842422322	\$ 0.0K	0	0.0 %
201842422323	\$ 0.0K	0	0.0 %
201842422324	\$ 0.0K	0	0.0 %
201842422325	\$ 0.0K	0	0.0 %
201842422326	\$ 0.0K	0	0.0 %
207863822223	\$ 0.0K	0	0.0 %
207863822225	\$ 0.0K	0	0.0 %
207863822226	\$ 0.0K	0	0.0 %
207863822228	\$ 0.0K	0	0.0 %

Table 9–3 lists the measures available in this view.

**Table 9–3 Quadrant Analysis - Sales \$ / Units Measures**

Label
Sales Revenue
Sales Units
Gross Profit

## Quadrant Analysis - Profit / Sales Sq Ft View

Use this view to analyze performance based on profit and sales per square foot. This information is best displayed as a bubble chart.

**Figure 9–9 Quadrant Analysis - Profit / Sales Sq Ft View**

	Profit	Sls / sq. ft / week Retail	Sales Units
3375772211	\$ 0.0K	\$ 0.0K	0
3375772212	\$ 0.0K	\$ 0.0K	0
4514512223	\$ 0.0K	\$ 0.0K	0
5119022323	\$ 0.0K	\$ 0.0K	0
6522223331	\$ 0.0K	\$ 0.0K	0
7066199229	\$ 0.0K	\$ 0.0K	0
201842422322	\$ 0.0K	\$ 0.0K	0
201842422323	\$ 0.0K	\$ 0.0K	0
201842422324	\$ 0.0K	\$ 0.0K	0
201842422325	\$ 0.0K	\$ 0.0K	0
201842422326	\$ 0.0K	\$ 0.0K	0
207863822223	\$ 0.0K	\$ 0.0K	0
207863822225	\$ 0.0K	\$ 0.0K	0
207863822226	\$ 0.0K	\$ 0.0K	0
207863822228	\$ 0.0K	\$ 0.0K	0

Table 9–4 lists the measures available in this view.

**Table 9–4 Quadrant Analysis - Profit / Sales Sq Ft Measures**

Label
Profit
Sales per sq. ft per week Retail
Sales Units

## Quadrant Analysis - GM% / Turns View

Use this view to analyze performance based on gross profit and turns. This information is best displayed as a bubble chart.

**Figure 9–10 Quadrant Analysis - GM% / Turns View**

	Gross Margin	Inventory Turns	Sales Units
3375772211	0.0 %		0
3375772212	0.0 %		0
4514512223	0.0 %		0
5119022323	0.0 %		0
6522223331	0.0 %		0
7066199229	0.0 %		0
201842422322	0.0 %		0
201842422323	0.0 %		0
201842422324	0.0 %		0
201842422325	0.0 %		0
201842422326	0.0 %		0
207863822223	0.0 %		0
207863822225	0.0 %		0
207863822226	0.0 %		0
207863822230	0.0 %		0

Table 9–5 lists the measures available in this view.

**Table 9–5 Quadrant Analysis - GM% / Turns Measures**

Label
Gross Profit
Inventory Turns
Sales Units

## Quadrant Analysis - GM% / Sales View

Use this view to analyze performance based on gross profit percent and sales. This information is best displayed as a bubble chart.

**Figure 9–11 Quadrant Analysis - GM% / Sales View**

	Gross Margin	Sales Units	Sales Revenue
3375772211	0.0 %	0	\$ 0.0K
3375772212	0.0 %	0	\$ 0.0K
4514512223	0.0 %	0	\$ 0.0K
5119022323	0.0 %	0	\$ 0.0K
6522223331	0.0 %	0	\$ 0.0K
7066199229	0.0 %	0	\$ 0.0K
201842422322	0.0 %	0	\$ 0.0K
201842422323	0.0 %	0	\$ 0.0K
201842422324	0.0 %	0	\$ 0.0K
201842422325	0.0 %	0	\$ 0.0K
201842422326	0.0 %	0	\$ 0.0K
207863822223	0.0 %	0	\$ 0.0K
207863822225	0.0 %	0	\$ 0.0K
207863822226	0.0 %	0	\$ 0.0K
207863822229	0.0 %	0	\$ 0.0K

Table 9–6 lists the measures available in this view.

**Table 9–6 Quadrant Analysis - GM% / Sales Measures**

Label
Gross Profit
Sales Units
Sales Revenue

## Consumer Assessment Step

Use this step to analyze the category with respect to consumer behavior. The data source for this analysis is Household Panel data. This step is the same as the Consumer Assessment step at the cluster level, except for the following:

- The base intersection of the worksheets is per store, not cluster.
- Only the single cluster relevant to the workbook is visible.

This step has the following views:

- [Buyer Conversion Analysis View](#)
- [Consumer Loyalty Analytics View](#)
- [Purchase Behavior Analysis View](#)
- [Retail Channel Share Analysis View](#)
- [Target Consumer Segment Analysis View](#)
- [Top Shopper Analysis View](#)

## Purchase Behavior Analysis View

Use this view to analyze the contribution of sales and profits from each sub-category to the category total.

**Figure 9–12 Purchase Behavior Analysis View**

	Item Penetration (Str)	Item Trips per Item Buyer (Str)	Item \$ per Item Trip (Str)	Item \$ per Item Buyer (Str)	% Item \$ on Deal (Str)
3375772211	0.0 %	0.0	0.00	0.00	0.0 %
3375772212	0.0 %	0.0	0.00	0.00	0.0 %
4514512223	0.0 %	0.0	0.00	0.00	0.0 %
5119022323	0.0 %	0.0	0.00	0.00	0.0 %
6522223331	0.0 %	0.0	0.00	0.00	0.0 %
7066199229	0.0 %	0.0	0.00	0.00	0.0 %
201842422322	0.0 %	0.0	0.00	0.00	0.0 %
201842422323	0.0 %	0.0	0.00	0.00	0.0 %
201842422324	0.0 %	0.0	0.00	0.00	0.0 %
201842422325	0.0 %	0.0	0.00	0.00	0.0 %
201842422326	0.0 %	0.0	0.00	0.00	0.0 %
207863822223	0.0 %	0.0	0.00	0.00	0.0 %
207863822225	0.0 %	0.0	0.00	0.00	0.0 %

Table 9–7 lists the measures available in this view.

**Table 9–7 Purchase Behavior Analysis Measures**

Label
Item Penetration (Str)
Item Trips per Item Buyer (Str)
Item \$ per Item Trip (Str)
Item \$ per Item Buyer (Str)
% Item \$ on Deal (Str)

## Retail Channel Share Analysis View

Use this view to determine what percentage of sales occurred through the various channels available in the market.

**Figure 9–13 Retail Channel Share Analysis View**

	All Other Channels	Convenience/C	Dollar Stores	Drug	Grocery	Mass Merch Without Supers	Super-Centers	Warehouse Club
3375772211	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
3375772212	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
4514512223	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
5119022323	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
6522223331	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
7066199229	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
201842422322	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
201842422323	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
201842422324	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
201842422325	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
201842422326	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
207863822223	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
207863822225	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 9–8 lists the measures available in this view.

**Table 9–8 Retail Channel Share Analysis Measures**

Label
% Buyers (Str)
% Dollars (Str)

## Target Consumer Segment Analysis View

Use this view to choose the highest market coverage for those categories and segments within the category that are most closely aligned with the retailer’s target consumer.

**Figure 9–14 Target Consumer Segment Analysis View**

	\$20,000 - \$29,999	\$30,000 - \$39,999	\$40,000 - \$49,999	\$50,000 - \$69,999	\$70,000 - \$89,999	\$90,000 - \$109,999	\$110,000 - \$149,999	\$150,000+	<\$20,000
3375772211									
3375772212									
4514512223									
5119022323									
6522223331									
7066199229									
201842422322									
201842422323									
201842422324									
201842422325									
201842422326									
207863822223									
207863822225									

Table 9–9 lists the measures available in this view.

**Table 9–9 Target Consumer Segment Analysis Measures**

Label
% of Retailer Turnover (Str)
% of Segment Buyer (Str)
% of Segment Turnover (Str)
% of Retail Shoppers (Str)

## Buyer Conversion Analysis View

Use this view to analyze the buyer conversion rates of the retailer compared to that of selected competitors.

**Figure 9–15 Buyer Conversion Analysis View**

	BlueTooth Fairyland	Double RainBow Ties	Noodle Nexus	Oracle Store	Others	Swag Central	Swayed Shoestore
BAG	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
BOX	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
CONVENIENCE	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 9–10 lists the measure available in this view.

**Table 9–10 Buyer Conversion Analysis Measure**

Label
Buyer Conversion Rate

## Top Shopper Analysis View

Use this view to compare the top shopper index of the retailer at the store.

**Figure 9–16 Top Shopper Analysis View**

	BlueTooth Fairyland	Double RainBow Ties	Noodle Nexus	Oracle Store	Others	Swag Central	Swayed Shoestore
BAG	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
BOX	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
CONVENIENCE	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 9–11 lists the measure available in this view.

**Table 9–11 Top Shopper Analysis Measure**

Label
Top Shopper Index

## Consumer Loyalty Analytics View

Use this view to analyze the level of loyalty that the consumers within the trading area have to product segments, brands, and individual SKUs.

**Figure 9–17 Consumer Loyalty Analysis View**

		Loyalty Index (Str)	Exclusivity Index (Str)	Consumer Worth Index (Str)	Switching Index (Str)
3375772211	Soccer Mom	0.00	0.00	0.00	0.00
3375772212	Soccer Mom	0.00	0.00	0.00	0.00
4514512223	Soccer Mom	0.00	0.00	0.00	0.00
5119022323	Soccer Mom	0.00	0.00	0.00	0.00
6522223331	Soccer Mom	0.00	0.00	0.00	0.00
7066199229	Soccer Mom	0.00	0.00	0.00	0.00
201842422322	Soccer Mom	0.00	0.00	0.00	0.00
201842422323	Soccer Mom	0.00	0.00	0.00	0.00
201842422324	Soccer Mom	0.00	0.00	0.00	0.00
201842422325	Soccer Mom	0.00	0.00	0.00	0.00
201842422326	Soccer Mom	0.00	0.00	0.00	0.00
207863822223	Soccer Mom	0.00	0.00	0.00	0.00
207863822225	Soccer Mom	0.00	0.00	0.00	0.00
207863822226	Soccer Mom	0.00	0.00	0.00	0.00

Table 9-12 lists the measures available in this view.

**Table 9-12 Consumer Loyalty Analysis Measures**

Label
Loyalty Index (Str)
Exclusivity Index (Str)
Consumer Worth Index (Str)
Switching Index (Str)

## Assortment Finalization Step

Use this step to finalize the assortment at the store level.

This step has the following views:

- [Assortment Finalization Detail View](#)
- [Assortment Finalization Summary View](#)
- [Add Validation View](#)
- [Delete Validation View](#)
- [Retention Validation View](#)

## Assortment Finalization Detail View

Use this view to review the system-recommended assortment.

**Figure 9-18 Assortment Finalization Detail View**

1. Assortment Finalization Detail								IPI Core	IPI Mandatory	IPI Optional	IPI Rationalization - Compare to Latest Assortment	IPI Rationalization - Compare to Last Year Assortment		
▼ class_cereal	▼ BAG	▼ ADULT	▼ BACK TO NATURE	▼ COLD	▼ OTHER	▼ GRANOLA	▼ 12 OZ	297140524237	BACK_TO_NTR_GRNL_TOTAL_TASTE_PRMS_GRI				NA	NA
			▼ BARBARAS	▼ COLD	▼ OTHER	▼ WHEAT	▼ 10 OZ	229283922828	BARBARAS_SHREDDED_WHEAT_100_PRCNT_NI				NA	NA
			▼ BOBS RED MILL	▼ COLD	▼ OTHER	▼ OTHER	▼ 18 OZ	225119022325	BOBS_RED_MILL_MUESLI_NATURAL_CEREAL_16				NA	NA
				▼ HOT	▼ OTHER	▼ OTHER	▼ 16 OZ	225119022327	BOBS_RED_MILL_HOT_CEREAL_16_OUNCE				NA	NA
							▼ 18 OZ	225119022365	BOBS_RED_MILL_ALL_NATURAL_HOT_CEREAL				NA	NA
							▼ 25 OZ	225119022332	BOBS_RED_MILL_HOT_CEREAL_25_OUNCE				NA	NA
			▼ GENERAL MILLS	▼ COLD	▼ OTHER	▼ MULTIGRAIN	▼ 12 OZ	223822287072	TOTAL_WHL_GRN RTE_CRL_12_OUNCE				NA	NA
			▼ KELLOGGS	▼ COLD	▼ RAISIN	▼ MULTIGRAIN	▼ 15 OZ	225022241111	KELLOGGS_RAISIN_BRAN RTE_CEREAL_15_OU				NA	NA
				▼ COLD	▼ OTHER	▼ WHEAT	▼ 20 OZ	225022220942	KELLOGGS_RAISIN_BRAN RTE_CEREAL_20_OU				NA	NA
			▼ POST	▼ COLD	▼ APPLE	▼ OTHER	▼ 12 OZ	226522239989	POST_SELECTS_APPLE_CINNAMON_HARVEST_C				NA	NA
			▼ QUAKER	▼ COLD	▼ OTHER	▼ RICE	▼ 7 OZ	22522228312	QUAKER_ESSENTIALS_PUFFED_RICE RTE_CER				NA	NA
				▼ COLD	▼ OTHER	▼ WHEAT	▼ 5.3 OZ	22522228302	QUAKER_ESSENTIALS_PUFFED_WHEAT RTE_CE				NA	NA
			▼ SUNBELT	▼ COLD	▼ OTHER	▼ GRANOLA	▼ 16 OZ	224652225377	SUNBELT_GRANOLA_GRANOLA_CEREAL_16_OU				NA	NA
				▼ COLD	▼ OTHER	▼ MULTIGRAIN	▼ 12 OZ	224652225377	SUNBELT_BERRY_BASIC_WHOLE_GRAIN_FLAKE				NA	NA
		▼ FAMILY	▼ BEAR NAKED	▼ OTHER	▼ OTHER	▼ 13 OZ	▼ 13 OZ	207963622225	BEAR_NAKED_ALL_NTRL_ALL_NTRL_DLCS_DLCS				NA	NA
			▼ CEREAL TOPPERS	▼ OTHER	▼ OTHER	▼ 2 OZ	▼ 2 OZ	207956022252	CEREAL_TOPPERS_BNNS_AND_STRAWB_PIECE_E				NA	NA
								207956022253	CRL_TPPRS_BNNS_AND_RSFR_PIECE_E				NA	NA
								207956022254	CEREAL_TOPPERS_APPLS_AND_RSFR_PIECE_E				NA	NA
			▼ GALAXY	▼ GRANOLA	▼ 14 OZ	▼ 14 OZ	289047056789	GALAXY_GRANOLA_ALL_NATURAL_GRANOLA_C					NA	NA
			▼ GENERAL MILLS	▼ OTHER	▼ 13.5 OZ	▼ 13.5 OZ	223822262980	GNRL_MILLS_FIBER_ONE_FRSTD_SHRDD_WHT					NA	NA
					▼ 14 OZ	▼ 14 OZ	223822249769	NSTL_LA_1CHR_FLXS_12_VTRNG_AND_HNRLS_J					Rgd	Rgd
			▼ KASHI	▼ GRANOLA	▼ 13.5 OZ	▼ 13.5 OZ	223084968022	KASHI_ORCHARD_SICE_GRANOLA_GRANOLA					NA	NA
							223084969022	KASHI_MOUNTAIN_MEDLEY_GRANOLA_CRL_GR					NA	NA
			▼ KELLOGGS	▼ RICE	▼ 13.8 OZ	▼ 13.8 OZ	225022214743	KELLOGGS_EGGO_CRUNCHY RTE_CEREAL_13.8					NA	NA
				▼ WHEAT	▼ 14 OZ	▼ 14 OZ	225022253041	KELLOGGS_FROSTED_MINI_WHEATS RTE_CERE					NA	NA
			▼ KOZY	▼ MULTIGRAIN	▼ 14 OZ	▼ 14 OZ	229561333462	KOZY_SHACK_READY_GRNS RTE_CRL_2PK_14					NA	NA
			▼ MALT O MEAL	▼ OAT	▼ 33 OZ	▼ 33 OZ	226462211981	MALT_O_MEAL_HONEY_OAT_SUNDR RTE_CRL					NA	NA
				▼ OTHER	▼ 25.10 OZ	▼ 25.10 OZ	226462242921	MALT_O_MEAL_VANILLA_CREAM_MINI_SPOONE					NA	NA
					▼ 33 OZ	▼ 33 OZ	226462214790	MALT_O_MEAL_FROSTED_MINI_SPOONERS_CR					NA	NA
							226462215190	MALT_O_MEAL_CINNAMON_TOASTERS RTE_CE					NA	NA
							226462222062	MALT_O_MEAL_MPL_BRWN_SGR_MINI_SPNRS_J					NA	NA
			▼ MNTN MDNSS	▼ GRANOLA	▼ 12 OZ	▼ 12 OZ	201842422322	MNTN_MDNSS_ORIS_GRANOLA					NA	NA
							201842422324	MNTN_MDNSS_PROTEIN_POWER_GRANOLA					NA	NA
							201842422325	MNTN_MDNSS_CRANBERRY_BEST_GRANOLA					NA	NA
							201842422326	MNTN_MDNSS_BLUEBERRY_MAPLE_GRANOLA					NA	NA
			▼ NUTRITIOUS LIVINGS	▼ OTHER	▼ 11 OZ	▼ 11 OZ	229310023505	NUTRITIOUS_LIVING_HI_LO RTE_CEREAL_10_C					NA	NA
					▼ 12 OZ	▼ 12 OZ	229310023503	NUTRITIOUS_LIVING_HI_LO NATURAL RTE_CE					NA	NA
					▼ 13 OZ	▼ 13 OZ	229310023506	NUTRITIOUS_LIVING_HI_LO RTE_CEREAL_10_C					NA	NA

Table 9-13 lists the measures available in this view.

**Table 9-13 Assortment Finalization Detail Measures**

Label
IPI Core
IPI Rationalization - Compare to Latest Assortment
IPI Rationalization - Compare to Last Year Assortment
IPI Mandatory
IPI Optional

## Assortment Finalization Summary View

Use this view to review the assortment decisions, including the overrides.

**Figure 9-19 Assortment Finalization Summary View**

	Actual Core Coverage	IPI Core Coverage	Temporary Core	IPI Core Units	Pre-Rationalization - Total Core Units	Temporary Optional	IPI Optional Units	Temporary Optional Units	Pre-Rationalization - Total Optional Units
3375772211	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
3375772212	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
4514512223	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
5119022323	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
6522223331	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
7066199229	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
201842422322	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
201842422323	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
201842422324	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	
201842422325	0.0 %	0.0 %	0.0 %	0	0	0.0 %	0	0	

Table 9-14 lists the measures available in this view.

**Table 9-14 Assortment Finalization Summary Measures**

Label
Actual Core Coverage
IPI Core Coverage
Temporary Core
IPI Core Units
Pre-Rationalization - Total Core Units
Temporary Optional
IPI Optional Units
Temporary Optional Units
Pre-Rationalization - Total Optional Units
IPI Optional Coverage
Temporary Core Units

**Table 9–14 (Cont.) Assortment Finalization Summary Measures**

Label
Actual Optional Coverage
Pre-Rationalization - Compare to Latest Assortment
Pre - Rationalization - Compare to Last Year Assortment
IPI Rationalization - Compare to Latest Assortment

## Delete Validation View

Use this view to assign a disposition to the items that have been recommended for deletion for at least one store. The recommendations are based on the IPI-based calculation.

**Figure 9–20 Delete Validation View**

The screenshot shows a software interface titled "3. Delete Validation". At the top, there is a "Location" dropdown menu set to "1000 Charlotte". Below this is a toolbar with various icons and a "Find..." search box. The main area is a table with the following columns: "IPI Rationalization - Compare to Latest Assortment", "Pre-Rationalization - Compare to Latest Assortment", and "Override". The table contains 14 rows of data, each with a unique item ID in the first column and empty cells in the other columns.

	IPI Rationalization - Compare to Latest Assortment	Pre-Rationalization - Compare to Latest Assortment	Override
3375772211			
3375772212			
4514512223			
5119022323			
6522223331			
7066199229			
201842422322			
201842422323			
201842422324			
201842422325			
201842422326			
207863822223			

Table 9–15 lists the measures available in this view.

**Table 9–15 Delete Validation Measures**

Label
IPI Rationalization - Compare to Latest Assortment
Pre-Rationalization - Compare to Latest Assortment
Override

## Add Validation View

Use this view to assign a disposition to the items that have been recommended for addition for at least one store. The recommendations are based on the IPI-based calculation.

**Figure 9–21 Add Validation View**

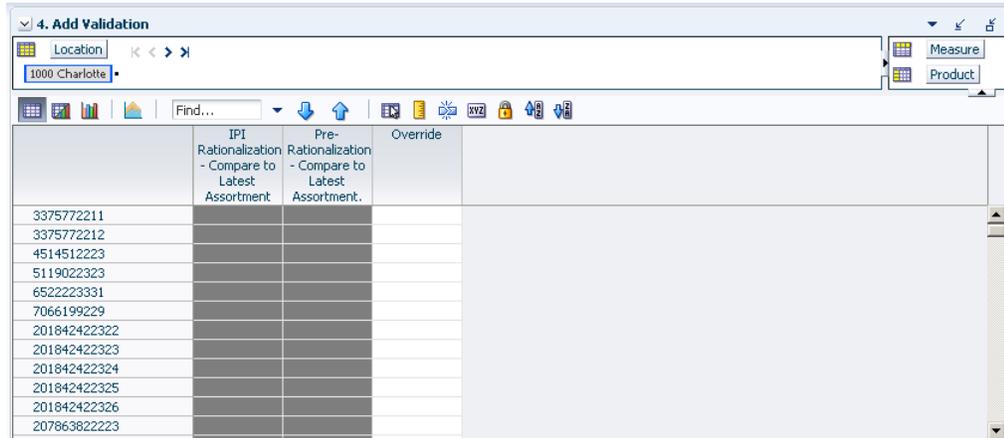


Table 9–16 lists the measures available in this view.

**Table 9–16 Add Validation Measures**

Label
IPI Rationalization - Compare to Latest Assortment
Pre-Rationalization - Compare to Latest Assortment
Override

## Retention Validation View

Use this view to assign a disposition to the items that have been recommended for retention for at least one store. The recommendations are based on the IPI-based calculation.

**Figure 9–22** *Retention Validation View*

	IPI Rationalization - Compare to Latest Assortment	Pre-Rationalization - Compare to Latest Assortment.	Override
3375772211			
3375772212			
4514512223			
5119022323			
6522223331			
7066199229			
201842422322			
201842422323			
201842422324			
201842422325			
201842422326			
207863822223			

Table 9–17 lists the measures available in this view.

**Table 9–17** *Retention Validation Measures*

Label
IPI Rationalization - Compare to Latest Assortment
Pre-Rationalization - Compare to Latest Assortment
Override

## Assortment Quantification and Approval Step

Use this view to review the assortment quantification and approve the assortment at the store level.

This step has the following views:

- [Assortment Quantification View](#)
- [Assortment Approval View](#)

## Assortment Quantification View

Use this view to review the assortment quantification at the store level.

**Figure 9–23 Assortment Quantification View**

	1000 Charlotte	1001 Atlanta	1003 Boston	1009 Albuquerque	1010 Los Angeles	1011 Ottawa	1012 Toronto	1013 Montreal
Current Asst Sales U	0	0	0	0	0	0	0	0
New Asst Sales U	0	0	0	0	0	0	0	0
Variance - New Asst to Current - Sales U	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
New Asst Sales \$	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Current Asst Sales \$	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Variance - New Asst to Current - Sales \$	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Current Asst Sales Eqvt-Units	0	0	0	0	0	0	0	0
New Asst Sales Eqvt-Units	0	0	0	0	0	0	0	0
Variance - New Asst to Current - Sales Eqvt Units	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Current Asst Sales GM \$	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
New Asst Sales GM \$	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K	\$ 0.0K
Variance - New Asst to Current - Sales GM \$	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %	-100.0 %
Current Asst Sales GM %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
New Asst Sales GM %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %

Table 9–18 lists the measures available in this view.

**Table 9–18 Assortment Quantification Measures**

Label
Current Asst Sales U
New Asst Sales U
Variance - New Asst to Current - Sales U
New Asst Sales \$
Current Asst Sales \$
Variance - New Asst to Current - Sales \$
Current Asst Sales Eqvt-Units
New Asst Sales Eqvt-Units
Variance - New Asst to Current - Sales Eqvt-Units
Current Asst Sales GM \$
New Asst Sales GM \$
Variance - New Asst to Current - Sales GM \$
Current Asst Sales GM %
New Asst Sales GM %
Variance - New Asst to Current - Sales GM %

## Assortment Approval View

Use this view to approve the assortment at the store level.

Figure 9–24 Assortment Approval View

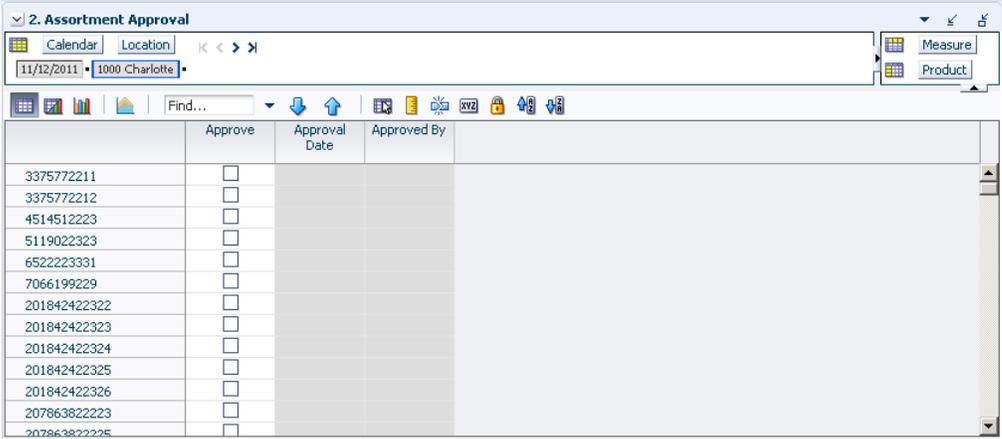


Table 9–19 lists the measures available in this view.

Table 9–19 Assortment Approval Measures

Label
Approve
Approval Date
Approved By



## Appendix: Measure Descriptions

Table A-1 lists descriptions for some of the measures used by Category Management.

**Table A-1 Measure Descriptions**

Measure Label	Description
# Baskets with Category	Number of baskets that contain at least one of the items or product segments.
# Baskets with Category Rank	Number of baskets that contain at least one of the items or product segment calculated as an ordinal ranking.
# of Categories in Basket	Number of categories in the basket by consumer segment.
# of Categories in Basket Index	Number of categories in the basket index by consumer segment.
# Trips per Buyer	Average annual times that the category buyer purchases.
% Buyers	Percent of buyers that purchase the category in each retail segment/channel.
% Dollars	Percent of buyers' dollars that are spent in each retail segment/channel.
% Items \$ on Deal @ Category	Percent of items receiving supplier/vendor funding to drive sales.
% of Retailer Turnover (Str)	The share of turnover that the retailer gets from the given consumer demographic (store level).
% of Segment Turnover (Str)	The share of turnover that the segment gets from the given consumer demographic at the store level.
Approve	Boolean mask measure to control what is approved and not approved.
Approved Override Role (Model A)	Approved Category Role (Industry Model A) for the period.
Approved Override Role (Model B)	Approved Category Role (Industry Model B) for the period.
Attribute Value	Indicates if the attribute value applies to a class.
Average HH Spend	Average dollars spent per household per year or average purchase size.
Average Household Spend	Average dollars spent per household per year or average purchase size.
Avg. Basket Value	Average basket value of various consumer segments.
Avg. Basket Value Index	Average basket value index of various consumer segments.

**Table A-1 (Cont.) Measure Descriptions**

<b>Measure Label</b>	<b>Description</b>
Avg. Profit per Item	Average profit per SKU in this segment.
Avg. Sales per Item	Average sales per SKU in this segment.
Buyer Conversion Rate	Indicates the percentage of buyers who shop the sub-category as compared to all shoppers who shop the store.
Category Buyer Conversion	Of the category customers who shop the store, the percentage that buy the category.
Consumer Segment Distribution	The percentage of consumers who belong to this consumer segment for this store cluster.
Consumer Segment Status	Status of consumer segment. Primary, Secondary, and so on.
Consumer Segment Strategy	Historical strategy assignment associated with the segment.
Consumer Worth Index	The total amount of category purchases by the consumer who purchases a particular brand: size, type, flavor, and so on (consumer worth) divided by the average category spending for all brands.
Conversion (Buyer)	The percent of category buyers who shopped in a certain channel and also purchased the category within that channel.  $\text{Buyer Conversion} = \frac{\text{Category Buyers Purchasing the Category in Channel}}{\text{Category Buyers Shopping the Category in Channel}}$
Conversion (Trip)	The percent of total channel shopping trips by category buyers that included a purchase of the category.  $\text{Trip Conversion} = \frac{\text{Category Buyer Trips in Channel}}{\text{Category Buyer Trips (All Channels)}}$
Destination Role	The role (purpose) designation for categories which are managed to establish the distributor as the dominant store of choice by providing the target consumer with consistent, superior value. The distributor's objective is to be identified as the <i>store of choice</i> for the target consumer's needs pertaining to the category.
Exclusivity Index	The percent of consumers purchasing a particular brand: size, type, flavor, and so on, that fulfill 100% of their category needs exclusively with that brand (exclusivity) divided by the average exclusivity for all brands in the category.
Facing	Product main side on a shelf. By counting the number of facings, it is possible to assess the visibility of a product in a store.
Forecast Sales	Sales forecast from Oracle Retail Demand Forecasting.
Historic Role Assigned (Model A)	Approved Category Role (Industry Model A) last year.
Historic Role Assigned (Model B)	Approved Category Role (Industry Model B) last year.
Household Panel Data	Product purchase behavior data collected from a <i>panel</i> of households which are projected to represent a targeted area (such as, a region, local market, or total U.S.). All purchases are captured at the point of sale, or in-home using handheld scanners. Captured sales conditions may include: pricing, trade channel, display, feature, TPR, and so on.

**Table A-1 (Cont.) Measure Descriptions**

<b>Measure Label</b>	<b>Description</b>
Incremental Sales	Incremental sales are generated by a promotion. Incremental sales are calculated by subtracting baseline sales from the total sales of a product line.
Inventory Turn	<p>The number of times a retailer sells out of its complete inventory in a given period of time. It represents the speed with which inventory is sold. The most common way to compute turns is:</p> <p>Inventory Turns = Sales / Average Inventory</p> <p>If a retailer turns its inventory 22 times a year, it means that on average the retailer purchases and sells a product 22 times a year. Sales and inventory must be in the same units (that is, both at retail or cost or units).</p>
Item \$ per Item Buyer	For a specific market/region, the amount of dollars spent by an average consumer who bought this item.
Item \$ per Item Trip @ Category	Amount of dollars spent per buyer trip.
Item Eligibility	Indicates if an item is eligible to be sold at a location.
Item Penetration	For a specific market/region, the percent of households that purchased a product group at least once within a give time frame. Sometimes called consumption index.
Key Metric (Market Data Analysis)	The market data measure used to do fragmentation and contribution analysis.
Key Metric (Retailer Data Analysis)	The retailer data measure used to do fragmentation and contribution analysis.
Last Year Map - Week	Identifies the week used for mapping as last year.
Loyalty	<p>That share of annual category requirements that the consumer is able to satisfy with a single brand (size, type, flavor, and so on). For example, if a consumer makes 10 purchases annually in a given category, 3 of which are made of Brand A, Brand A would have a 30% loyalty, (3/10 = 30%).</p> <p>This measure enables the distributor to discriminate in favor of those items where targeted consumers have shown a higher loyalty to purchase versus other products within the category. The discontinuation of these products could result in the target consumer leaving the store. Loyalty is converted into an index by comparing (dividing) the loyalty of Brand A by the average loyalty of all brands within the category. Loyalty and the loyalty index can be measured at all levels of data analysis (brand, size, flavor, SKU, and so on).</p>
Loyalty (% of Buyer Spend at Retailer)	Percent of the spending that retail buyers spend at the retailer.

**Table A-1 (Cont.) Measure Descriptions**

<b>Measure Label</b>	<b>Description</b>
Loyalty Index	<p>That share of annual category requirements that the consumer is able to satisfy with a single brand (size, type, flavor, and so on). For example, if a consumer makes 10 purchases annually in a given category, 3 of which are made of Brand A, Brand A would have a 30% loyalty, (3/10 = 30%).</p> <p>This measure enables the distributor to discriminate in favor of those items where targeted consumers have shown a higher loyalty to purchase versus other products within the category. The discontinuation of these products could result in the target consumer leaving the store. Loyalty is converted into an index by comparing (dividing) the loyalty of Brand A by the average loyalty of all brands within the category. Loyalty and the loyalty index can be measured at all levels of data analysis (brand, size, flavor, SKU, and so on).</p>
Mandatory Item	Boolean measure to indicate mandatory items.
Market Basket Analysis	Understanding the value of total market basket relating to a category, sub-category, segment, brand, or SKU. This measure is effective when compared to average market basket.
Market Coverage	That percent of market demand that a distributor chooses to meet with a category's assortment. Using a market level item ranking report, the distributor identifies those items in the market that represent a determined percentage of each segments sales within the category. This percentage (market coverage) is set at levels that enable the distributor to achieve the specific strategies, scorecard, and role performance that have been established for the category.
Market Growth	The percent increase or decrease in sales volume for the entire market from the prior year.
Market Sales	The sales dollars for the market for a given category.
Market Sales Revenue	Sales revenue for the item by retailer, obtained from a third-party. The data is obtained quarterly.
Market Share	That percent of dollar sales in a given category controlled by a distributor in a specific geography. Market share is also captured in terms of a distributor's all commodity volume (ACV) which represents the average weighted market share for all categories within the distributor's operation.
Market Share Index	Index of the retailer's market share in this segment compared to the retailer's market share for all products in the category.
Market Share Rank	Index of the retailer's market share in this segment compared to retailer's market share for all products in the category.
Market Trading Area HH %	Percentage of market households that belong to this profile.
Market Trading Area HH % @ CLSS	Percentage of market shoppers belonging to this profile in this segment.
Market Trading Area HH % @ SKU	Percentage of market shoppers belonging to this profile in this segment.
Market Trading Area HH % @ SCLS	Percentage of market shoppers belonging to this profile in this segment.
Market Trading Area HH % @ STCO	Percentage of market shoppers belonging to this profile in this segment.
Market Trading Area HH % @ STYL	Percentage of market shoppers belonging to this profile in this segment.

**Table A-1 (Cont.) Measure Descriptions**

<b>Measure Label</b>	<b>Description</b>
Market Trading Area Spend %	Share of turnover that this profile gets for the market.
Market Trading Area Spend % @ CLSS	The share of turnover that the segment gets from the given consumer demographic.
Market Trading Area Spend % @ SKU	The share of turnover that the segment gets from the given consumer demographic.
Market Trading Area Spend % @ SCLS	The share of turnover that the segment gets from the given consumer demographic.
Market Trading Area Spend % @ STCO	The share of turnover that the segment gets from the given consumer demographic.
Market Trading Area Spend % @ STYL	The share of turnover that the segment gets from the given consumer demographic.
Max Core Units Constraint	Maximum number of core units targeted at a product dimension level.
Max Core + Optional Units Constraint	Maximum number of core plus optional units targeted at a product dimension level.
Min Core Unit Constraint	Minimum number of core units targeted at a product dimension level.
Min Core + Optional Coverage Constraint	Minimum sales coverage percentage targeted at a product dimension level.
Min Core + Optional Units Constraint	Minimum number of core plus optional units targeted at a product dimension level.
Min Tgt Core Coverage Constraint	Minimum sales coverage percentage targeted at a product dimension level.
Opportunity	Opportunity for the consumer segment. It can be modified by the user.
Penetration (% Buying at Retailer)	Percent of households buying at the retailer.
Penetration (% of HH's Purchasing)	For a specific market/region, the percent of households that purchased a product group at least once within a given time period (usually annual).
Percent of Category \$ Sales	Percent of product dollar sales compared with the total category and/or demographic segment sales.
Percent Sold on Deal	Percent of product purchases on which a consumer perceived that a deal was present (such as features, displays, coupons, or price/bonus packs).
Product Switching	Cumulative percent of the brand's users who buy other brands (size, type, flavor, and so on) divided into the average cumulative percent of users buying other brands (size, type, flavor, and so on) in the segment. This measure enables the distributor to discriminate in favor of those items where targeted consumers have shown an unwillingness to switch to other products within the category.
Profit Productivity Index	Profit dollars per SKU of the segment divided by profit dollars per SKU of the category.
Promotional Effectiveness	Reports the success of a promotion by comparing total sales with baseline sales.

**Table A-1 (Cont.) Measure Descriptions**

<b>Measure Label</b>	<b>Description</b>
Purchase Frequency	The average number of times each buyer purchases an item over a given time period. Purchase Frequency = Total Purchase Occasions # of Buying Households
Retailer Growth	The percent increase or decrease in sales volume for the retailer from the prior year.
Retailer Profit Index	An item's dollar profit, divided by the average profit per item for the retailer's segment.
Retailer Share of Growth	The value or volume sales increase or decrease of the retailer divided by the total universe (that is, market).
Retailer Share Index	Retailer's share of segment, divided by the retailer share of total market (ACV).
Retailer HH % Diff Market HH %	Calculated measure which uses the following formula: Retailer HH % minus Market HH %
Retailer Spend % Diff Market Spend %	Calculated measure which uses the following formula: Retailer Spend % minus Market Spend %
Retailer Trading Area HH %	Percentage of retailer shopper households that belong to this profile.
Retailer Trading Area HH % @ CLSS	Percentage of retailer shoppers belonging to this profile in this segment.
Retailer Trading Area HH % @ SKU	Percentage of retailer shoppers belonging to this profile in this segment.
Retailer Trading Area HH % @ SCLS	Percentage of retailer shoppers belonging to this profile in this segment.
Retailer Trading Area HH % @ STCO	Percentage of retailer shoppers belonging to this profile in this segment.
Retailer Trading Area HH % @ STYL	Percentage of retailer shoppers belonging to this profile in this segment.
Retailer Trading Area Spend %	Share of turnover that this profile gets for the retailer.
Retailer Trading Area Spend % @ CLSS	The share of turnover that the retailer gets from the given consumer demographic.
Retailer Trading Area Spend % @ SKU	The share of turnover that the retailer gets from the given consumer demographic.
Retailer Trading Area Spend % @ SCLS	The share of turnover that the retailer gets from the given consumer demographic.
Retailer Trading Area Spend % @ STCO	The share of turnover that the retailer gets from the given consumer demographic.
Retailer Trading Area Spend % @ STYL	The share of turnover that the retailer gets from the given consumer demographic.
Sales Productivity Index	Sales dollars per SKU of the segment divided by sales dollars per SKU of the category.
Sales Revenue	Sales dollars for the retailer for a given category.
Segment % Share of Category Items	Fraction of category level SKUs that can be attributed to this segment.

**Table A-1 (Cont.) Measure Descriptions**

<b>Measure Label</b>	<b>Description</b>
Segment % Share of Category Profit	Fraction of category level profit that can be attributed to this segment.
Segment % Share of Category Sales	Fraction of category level sales that can be attributed to this segment.
Segment \$ Sales Index	A segment's share of dollar sales that are controlled by a targeted consumer group, divided by the share of ACV dollar sales controlled by that same targeted consumer group. This measure enables the retailer to discriminate in favor of segments having the greatest appeal or importance to their target consumer.
Segment Shopper Index	<p>The percentage of a segment's shoppers represented by a targeted consumer households (demographic), divided by the percentage of shoppers that the same demographic represents of all shoppers in the market place. For example, 3 of 10 households (30%) using olive oil make over \$40,000 annually. In the market place, 2 of 10 households (20%) make over \$40,000. The segment shopper index would equal 150, (30/20).</p> <p>The use of this measure enables the retailer to discriminate in favor of segments having the greatest appeal or importance to their target consumer.</p>
Share	<p>Share is a calculation based on unit, equivalent unit, or dollar volume.</p> <p>Share measures:</p> <p>Share = (product vol/ category vol) * 100</p> <p>EQ share (EQ units = number of equivalent weighted units scanned for a product class or item)</p> <p>Share change vs. year ago (point change)</p> <p>This year's share – last year's share</p> <p>Look at relationship between share changes and category volume changes.</p>
Shopping Frequency	This measure is used for the shopping frequency of various consumer segments.
Shopping Frequency Index	Shopping frequency index of various consumer segments.
Spending Index (Buyer Spend Compared to Average Spend)	Spending of buyers compared to the average spend by retailer.
Switching Index	Cumulative percent of the brand's users who buy other brands (size, type, flavor, and so on) divided into the average cumulative percent of users buying other brands (size, type, flavor, and so on) in the segment. This measure enables the distributor to discriminate in favor of those items where targeted consumers have shown an unwillingness to switch to other products within the category.
Syndicated View	Standard hierarchies of market segments (or product segments) defined by syndicated data suppliers, such as Nielsen or Symphony IRI, based on a standard category to create a common language on the market (and avoid re-inventing/re-processing data for every single client).
Total Shoppers Index	Total shoppers index by consumer segment.
Upload CDT	Pre-range flag that indicates the versions of the CDT that are valid for the trading area and class period.

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**Table A-1 (Cont.) Measure Descriptions**

<b>Measure Label</b>	<b>Description</b>
Value Share	Calculated measure which uses the following formula: Penetration multiplied by Loyalty Index multiplied by Spending Index
LY Strategy	Historical strategy assignment associated with the category.

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# Glossary

## **80/20 rule**

A phrase or rule of thumb used by retailers that typically 20 percent of SKUs typically perform 80 percent of the volume.

## **ACV Weighted Distribution**

The percent of the annual value sales (ACV or All Commodity) represented by the stores where at least one unit of a particular SKU was sold.

## **affinities**

Shows the relationship and impact on demand across products.

## **assortment add**

An item falling within the target market coverage that is carried in the market, but not by the retailer, and that has been validated through the rationalization process.

## **assortment delete**

An item falling below the target market coverage that is carried in the market and by the retailer, and that has been validated through the rationalization process.

## **assortment keep**

An item falling within the target market coverage that is carried in the market and carried by the retailer, and that has been validated through the rationalization process.

## **assortment finalization**

A process that finalizes the assortment by reflecting the various recommendations (such as adds/deletes/keeps) from prior steps and enables the user to override and finalize the decisions. The output is the recommended assortment that reflects previous decisions made regarding market coverage, consumer, and retailer measurements.

## **assortment quantification**

Quantifies the decisions made by comparing the current and proposed assortments on a variety of performance measurements. The output is a quantified final assortment ready for recommendation to management as part of the category business plan. This assortment recommendation is then used as the basis for the development of related tactics in pricing, space, promotion, and product supply/logistics.

## **cannibalization**

Affinity measurement which identifies substitutable products where an item is purchased, but at the expense of another item.

**category**

A distinct, measurable, and manageable group of products and services that consumers perceive to be interrelated and/or substitutable in meeting a consumer need.

**category definition**

Agreement on the category's structure or segmentation. Basically, consumers group brands, types, and individual SKUs together in a way that matters to them and enables them to differentiate between SKUs to meet their needs.

**category growth**

Target growth percent for the category compared to last year as defined in category planning.

**category role**

Role to which the item belongs.

**category share**

Share of a sub-category compared to the category as a whole.

**category strategy**

Strategy of the sub-category to which the items belongs.

**category structure**

See [consumer decision tree](#).

**category tactic**

Represents the various tactics designated to a category.

**consumer decision tree**

The relationship of product segments to one another in terms of perceived consumer importance. Structure implies a hierarchical relationship among the segments. A consumer makes a specific judgment first, proceeds to the second most important decision, proceeds to the third decision, and so on.

**consumer segment**

Represents a type of consumer that has a particular profile, such as female, single, high income.

**cumulative ranking**

Ranking of an item based on cumulative performance within any segment.

**hardline retailer**

A retailer that deals in merchandise such as hardware, housewares, automotive, electronics, sporting goods, health and beauty aids, or toys.

**household panel data**

Data where syndicated data suppliers leverage household panels who scan their purchases. These data suppliers then mine the data to provide insight into consumer purchase behaviors.

**index**

When comparing metrics, the common approach is to express the data as an index versus the average of all SKUs in a segment.

**IPI**

A system calculated metric which determines the item or sub-category's overall relative importance.

**Item Performance Index (IPI)**

See [IPI](#).

**key take away**

User comments that can be saved for each task.

**loyalty card data**

Data captured through loyalty cards for a particular retailer. Retailers mine the data of their loyalty card holders for the purpose of understanding who their profitable customers are, what they buy, how often they buy, and which products and attributes to which they are loyal. Customer loyalty data is a critical component of Assortment Rationalization as retailers need to ensure they are carrying products that appeal to their most profitable customers.

**market basket data**

Data about the total transaction (such as market basket) of which SKUs are a part. This type of information provides insight into the halo and cannibalization effects of items that are purchased, which items are typically found in high basket rings, and so on.

**market coverage**

The number of items representing a certain percentage of the total sales for the market that the retailer currently carries.

**market data**

Retail and consumer data provided to retailers and their suppliers by third-party syndicated data suppliers. This data reflects all retailers as a whole.

**market loyalty data**

Data supplied to retailers by syndicated data suppliers, such as Nielsen or Symphony IRI, that represents loyalty metrics associated with consumers within a particular trading area. Market loyalty represents consumer loyalty within the market.

**market share**

The percent of sales volume (dollars or units) that a particular category, product segment, or item contributes to all the sales volume in the market.

**potential assortment add**

An item falling within the target market coverage, that is carried in the market but not the retailer, with no rationalization having taken place (such as add/keep/delete validation process).

**potential assortment delete**

An item falling below the target market coverage that is carried in the market and carried by the retailer with no rationalization having taken place (such as add/keep/delete validation process).

**potential assortment keep**

An item falling within the target market coverage that is carried in the market and carried by the retailer with no rationalization having taken place (such as add/keep/delete validation process).

**product segment**

Individual groups of products. Consumers segregate products into grouping. For example, in the pet care category, consumers tend to segregate between dog, cat, aquatic, and so on.

**sales volume**

Represents the amount of sales. This can be described in number of units sold or dollar sales.

**SKU contribution**

The amount a particular SKU contributes to the overall performance of the product segment or category as a whole.

**SKU fragmentation**

Comparison of segments to ascertain how many SKUs are required to reach a specific market coverage. The focus is on sales contribution. Product segments which differ in the characteristic are referred to as fragmentation.

**SKU proliferation**

Comparison of segments to ascertain how many SKUs are required to reach a specific market coverage. The focus is on market coverage. Product segments which differ in the characteristic are referred to as fragmentation.

**store cluster**

Grouping of stores based on things like trading area, category, or consumer segment.

**target market coverage**

The number of items representing a certain percentage of the total sales for the market that the retailer wants to carry.

**top shopper index**

Represents the tier-1 of loyalty customers as determined in the retailers' loyalty solutions.

**total market share**

See [ACV Weighted Distribution](#).

**trading area**

The area around a store in which the store derives most of its business as defined by syndicated data suppliers, such as Nielsen or Symphony IRI.

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