



# Category Strategy and Planning

**A proprietary framework to deliver highly impactful category planning, linking category importance and what matters in categories to define meaningful strategies and identify the actions to deliver growth.**

Every year retailers' and suppliers' commercial and marketing teams spend hundreds and potentially thousands of man days on category reviews and planning category activities (e.g. promo, price and assortment changes as well as private label planning and sourcing) to maximise sales and ROI.

Our Category Strategy and Planning consulting offering drives category management excellence and category uplift by

- ensuring the business strategy through category roles and levers is embedded into every day decision making
- providing a simple, powerful approach to generating actionable insights where it matters, to drive a step change in the quality of category planning
- establishing a clear and consistent basis for supplier collaboration focussed on insight demands for the category

**For retailers / CPGs, Category Management: Retail Insights**



## How it helps you

Category Strategy and Planning provides category teams with a logical and powerful connected approach to category planning, linking category importance (category roles) and what matters in categories (category levers) to define meaningful strategies to implement in every category. It then defines the relevant analyses to efficiently determine the actions required to deliver against the category strategies. Without Category Strategy and Planning, retailers struggle to make effective priority calls and execute them across categories and across levers to drive truly differentiated offerings for Customers.

Category Strategy and Planning consists of 4 stages, from a strategic level through to tactical planning. With a consistent focus on the customer it ensures category plans are connected from strategy to execution to drive category growth.

- **CATEGORY ROLES:** A segmentation of all categories that supports downstream work on investment optimization across categories
- **CATEGORY LEVERS' IMPORTANCE:** Determines which levers matter most in each category using unique customer data science analyses.
- **CATEGORY LEVERS' STRATEGIES:** Identify the relevant strategies for each lever in every category
- **CATEGORY ASSESSMENT PLANNING:** A proprietary dunnhumby approach to prioritise and plan analyses in line with Lever Strategies to generate actionable insights and drive effective category planning.



## Key questions answered

- Which categories are important and why?
- How do I better meet the expectations of my Customers in every category?
- How do I differentiate my category strategies from the competition?
- How do I start to make better, informed, cross-category investment choices, based on how Customers choose and shop my stores?
- What really matters to my Customers in each category?
- How should I use the category levers to create impactful category strategies?
- Which analysis should I prioritise to efficiently identify the actions I should take in my category?



## Key benefits

- Truly joined up category management approach, linking overall business and customer strategy to category prioritisation and planning to drive total business alignment
- Action oriented category roles reflecting the balance of retailer and Customer needs, built to enable winning category strategies that differentiate a retailer from the competition (i.e. Win, Traffic, Profit, Control)
- Improved re-investment of margin into activities that will deliver the biggest benefits
- More robust, rapid and cost-effective than traditional research-based approach to understanding category lever importance
- Ensures the creation of the most relevant category assessments, efficiently and at pace by focusing on prioritised analysis to drive category plans
- Leverage supplier resources to deliver actionable insight aligned to categories priorities reducing work for your team

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THE WORLD'S FIRST  
CUSTOMER DATA SCIENCE PLATFORM

dunnhumby is the global leader in Customer Data Science, empowering businesses everywhere to compete and thrive in the modern data-driven economy. We always put the Customer First. Our mission: to enable businesses to grow and reimagine themselves by becoming advocates and champions for their Customers.

With deep heritage and expertise in retail – one of the world's most competitive markets, with a deluge of multi-dimensional data – dunnhumby today enables businesses all over the world, across industries, to be Customer First.

The dunnhumby Customer Science Platform is our unique mix of technology, software and consulting enabling businesses to increase revenue and profits by delivering exceptional experiences for their Customers – in-store, offline and online. dunnhumby employs over 2,000 experts in offices throughout Europe, Asia, Africa, and the Americas working for transformative, iconic brands such as Tesco, Coca-Cola, Meijer, Procter & Gamble, Raley's, L'Oreal and Monoprix.



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