



Retail Category Management and Space Planning Course: Assortment, Planograms and Category Reviews



Retail Category Management and Space Planning Course: Assortment, Planograms and Category Reviews

Introduction:

Retail category management and space planning, covering assortment, planograms and category reviews, is a 5-day course for retailer category, buying and space planning staff and supplier category teams, ending with a Category Review and Space Plan. Retailers that list and delist products through negotiation rather than shopper evidence carry slow lines, starve strong sellers of shelf space and hold category reviews that suppliers cannot support with data. Nominees already manage a category, a range or a key account and learn through case studies on scan, loyalty and shelf data. CoreConcept Training Center delivers this retail category management course.

Course Objectives:

- Apply the eight-step category management process to define a category, its boundaries and its consumer decision tree
- Assign a role and a strategy to each category and convert them into measurable sales, margin and share targets
- Rationalise an assortment using SKU productivity, incrementality and transferable demand evidence before any delisting
- Allocate shelf space with space-to-sales ratios, days of supply and space elasticity, then design a planogram to agreed rules
- Run a category review with a category captain or supplier, agree a joint business plan and track it with a category scorecard
- Produce a Category Review and Space Plan for a case retailer category ready for the trading director

Target Audience:

- Staff responsible for the sales, margin and range decisions of one or more retail categories
 - Staff responsible for buying, listing negotiations and supplier terms within a category
 - Staff responsible for shelf space allocation, planogram production and fixture plans across store clusters
 - Supplier staff responsible for category advice, category captaincy or retailer category reviews
 - Staff responsible for category analytics, scan data and range performance reporting
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Course Outline:

Day 1: Category Management Foundations and the Current Category Baseline

- Eight-Step Category Management Process From Definition to Review
- Category Definition Using Shopper Need and Substitutability Tests
- Consumer Decision Tree Built From Shopper Observation Data
- Category Run as a Business Unit With Its Own P&L
- Current Category Baseline From Sales, Margin and Share Data

Day 2: Category Roles, Strategies and Target Setting

- Destination, Routine, Convenience and Seasonal Category Role Assignment
- Category Role Scoring Matrix Across Shopper and Retailer Measures
- Traffic Building, Transaction Building and Profit Generating Strategy Choices
- Cash Generating, Image Enhancing and Turf Defending Strategy Choices
- SMART Category Targets Linked to Role and Strategy

Day 3: Assortment Rationalisation and Space-to-Sales Allocation

- SKU Productivity Ranking by Sales, Margin and Rate of Sale
- Incrementality and Transferable Demand Tests Before Any Delisting
- Assortment Breadth and Depth Decisions by Store Cluster
- Space-to-Sales and Space-to-Margin Ratio Allocation Worksheet
- Days of Supply and Case Pack Shelf Capacity Rules

Day 4: Planogram Design, Supplier Collaboration and Category Scorecards

- Planogram Design Rules for Brand Blocking, Eye Level and Facings
- Space Elasticity Curves and Diminishing Returns on Added Facings
- Category Captain Role With Category Validator Checks and Data Safeguards
- Joint Business Plan With Suppliers Covering Category Growth Levers
- Category Scorecard Design With Leading and Lagging Measures

Day 5: Case Study Work on the Category Review and Space Plan

- Case Retailer Category Brief With Scan and Loyalty Data
 - Case Category Role, Strategy and Target Setting Exercise
 - Case Assortment Delist and New Listing Recommendation Table
 - Case Planogram Redraw With Space-to-Sales Justification
 - Category Review and Space Plan Panel Presentation
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Skills You Will Gain:

- Category Definition
- Consumer Decision Tree Mapping
- Category Role Assignment
- SKU Rationalisation
- Shelf Space Allocation
- Planogram Design
- Supplier Category Collaboration
- Category Scorecard Reporting

Why Attend This Course:

- Deliver a Category Review and Space Plan to the trading director or category steering group for sign-off
- Decide which products to keep, add or delist and how much shelf each one earns, backed by transferable demand evidence
- Avoid lost sales from delisting lines shoppers cannot replace and wasted shelf on products that do not earn their space
- Coach buying, space planning and supplier colleagues using the role matrix, space-to-sales worksheet and category scorecard

Conclusion:

Back at work, the participant hands the Category Review and Space Plan to the trading director or category steering group, who use it to approve the category role, the assortment changes and the new shelf allocation before planograms are released to stores. Suppliers receive the agreed targets through the joint business plan. After the first review cycle, the unit should compare category sales, margin, availability and shopper penetration on the scorecard with the plan targets, then adjust facings, listings and supplier actions.

Frequently Asked Questions FAQ:

What should participants know before a retail category management and space planning course?

Participants should already manage a category, a range, a buying portfolio or a retailer account and be able to read basic sales and margin reports. Spreadsheet skills help with the space-to-sales and SKU ranking worksheets, but no planogram software experience is needed.

How does a retail category management and space planning course differ from a store operations course?

This course decides which products a category carries, what role it plays and how much shelf each product earns, at head office level. Store operations courses cover running a single shop: staffing, replenishment, shrink and audits against plans already set centrally.

Why does retail category management use a consumer decision tree?

A consumer decision tree shows the order in which shoppers choose within a category, such as type, then size, then brand. It tells the category manager which products substitute for one another, how to block the shelf and which lines can be delisted safely.

What do participants take back from the retail category management and space planning course?

Each participant takes back a Category Review and Space Plan for a case retailer category, with the category definition, role and strategy, targets, assortment changes, a redrawn planogram justified by space-to-sales data and a category scorecard adaptable to their own category.