



The Future of Online Category Management

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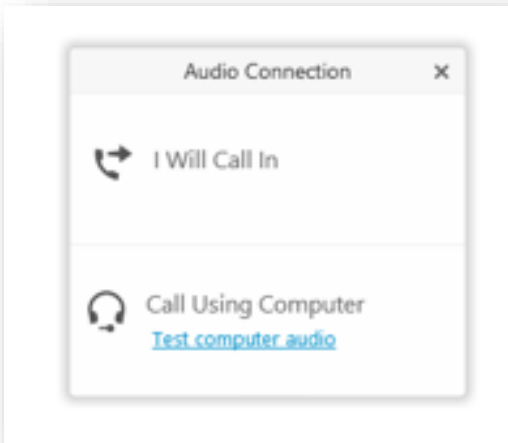
Danny Silverman
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Clavis Insight



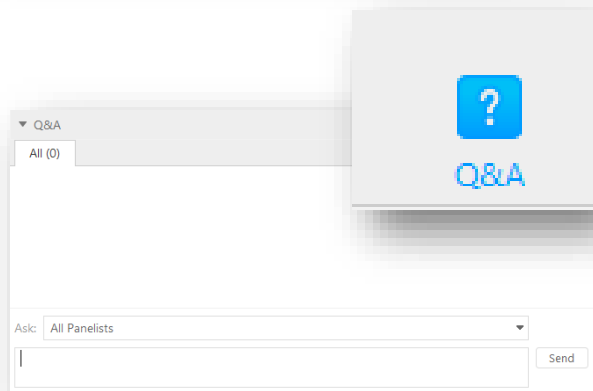
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Housekeeping



You can listen to the audio via telephone or through your computer speakers. Select “I Will Call In” to listen to the audio via your telephone. Select “Call Using Computer” to listen to the audio via your computer speakers



All attendees are on mute. To ask a question, click the Q&A icon on the top of your screen, then enter your question on the Q&A box



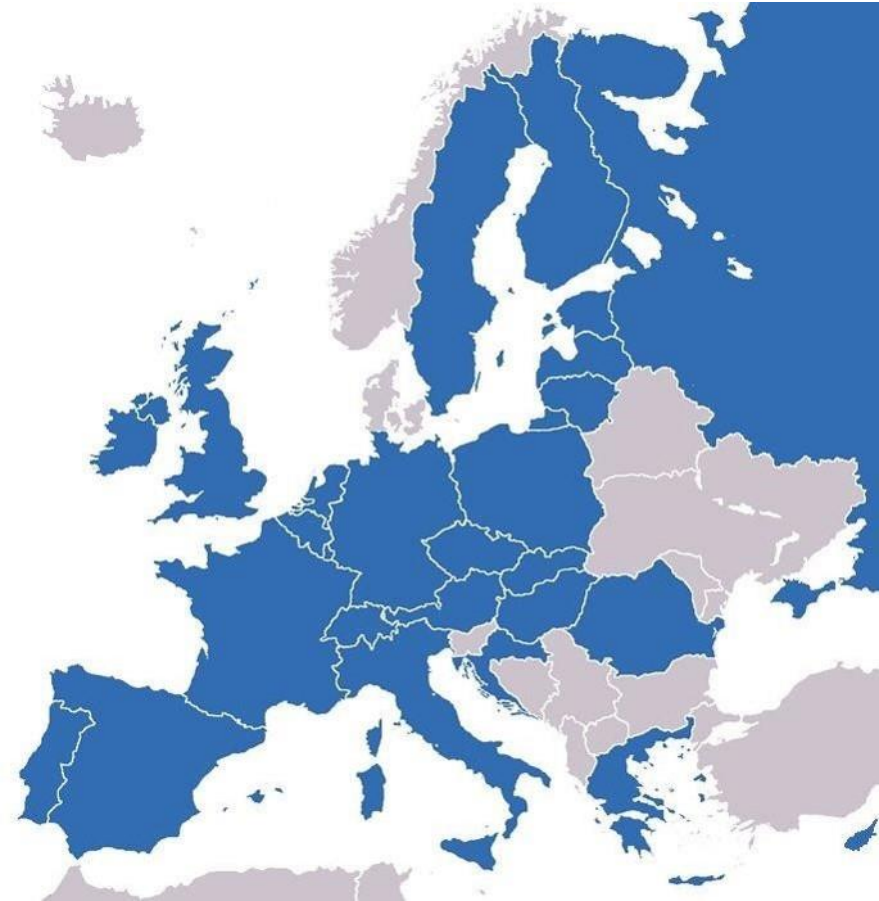
Agenda

- ECR Community Introduction
- From Outdated Analog, to Harnessing the Digital Growth Agenda
- Considerations for Online Category Management
- The 6Ps Framework for the Digital Channel
- Q&A

What is Efficient Consumer Response?

*“Transforming the way we
work together to fulfil
consumer wishes better, faster
and at less cost”*

ECR VISION



ECR & Category Management



**The Essential Guide to
Day-to-Day Category Management**



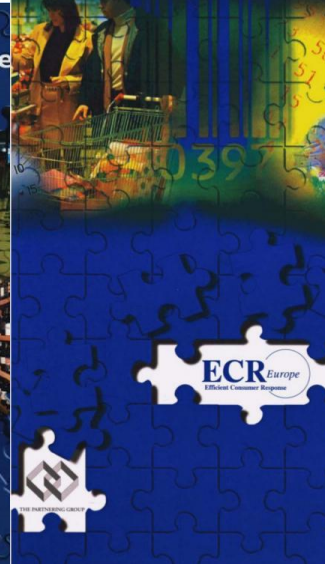
ECR Europe
Efficient Consumer Response

Andersen
Consulting

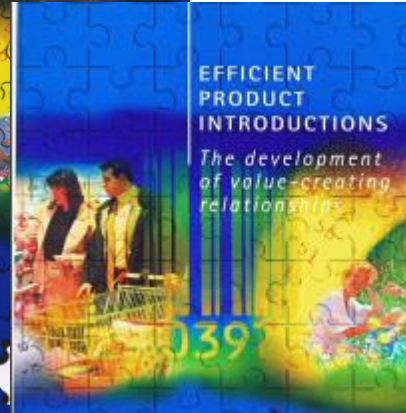


EFFICIENT ASSORTMENT

Best Practices Report



ECR Europe
Efficient Consumer Response



**EFFICIENT
PRODUCT
INTRODUCTIONS**

*The development
of value-creating
relationships*

ECR Europe
Efficient Consumer Response

ERNST & YOUNG
Ernst & Young Consulting
AC Nielsen

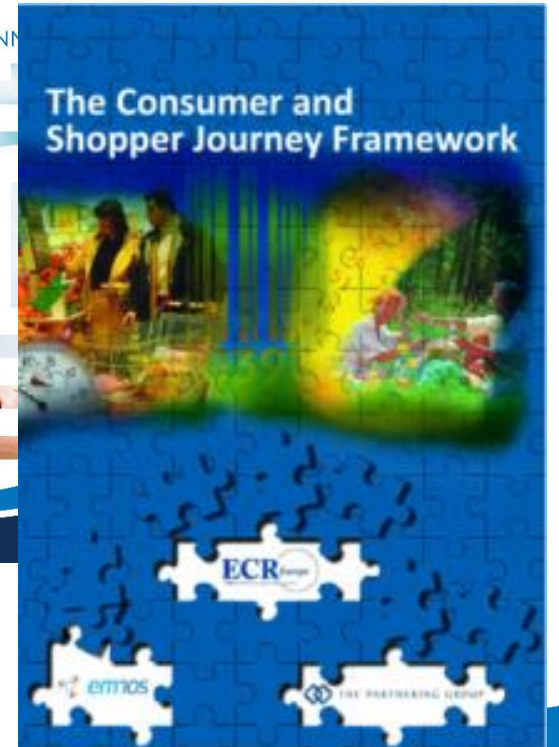


HOW TO LAYOUT A RETAIL STORE

A PRACTICAL GUIDE
TO MACRO SPACE PLANNING



www.ecrireland.ie



**The Consumer and
Shopper Journey Framework**

ECR Europe
Efficient Consumer Response

ENTROS

THE PARTNERING GROUP

ECR Community Webinar Series 2017



The Future of Category Management



1. Tomorrow's Category Management Today:
How do Brands Achieve their Goals in a World Without Planograms and Shelves



2. Availability in the Online Channel:
The influence of Online out of Stocks on Consumer Behaviour and Sales



3. Content, Consideration and Online Customers:
How to drive the conversation online



The Future of Online Category Management



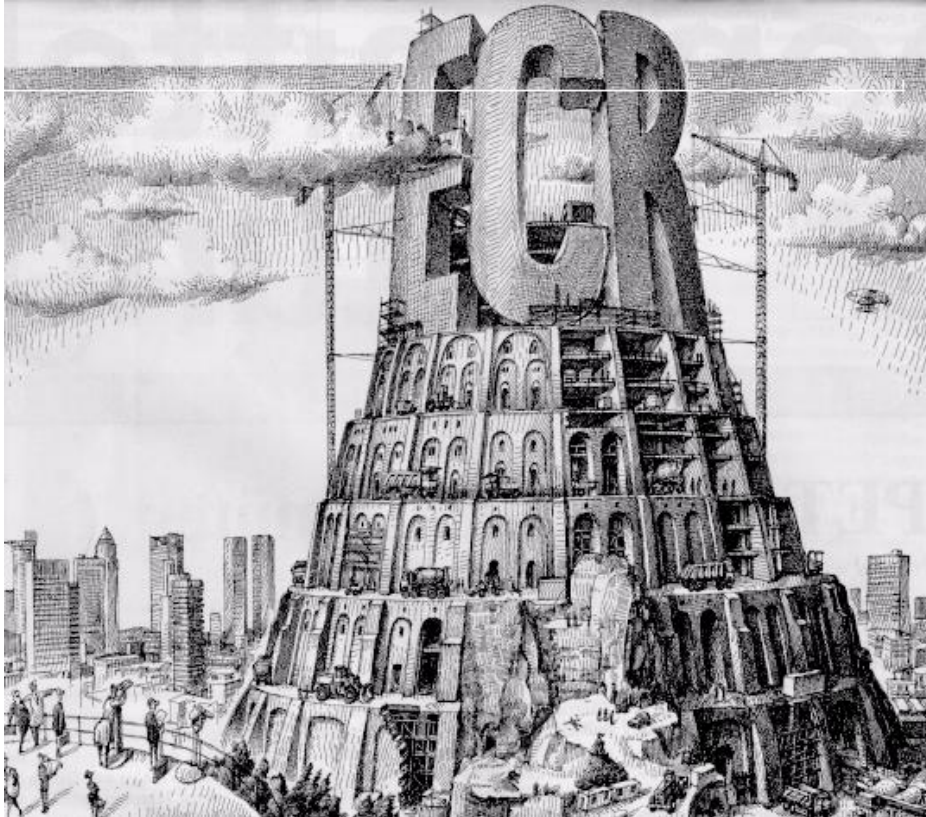
Daniel Corsten, Professor at
IE Business School



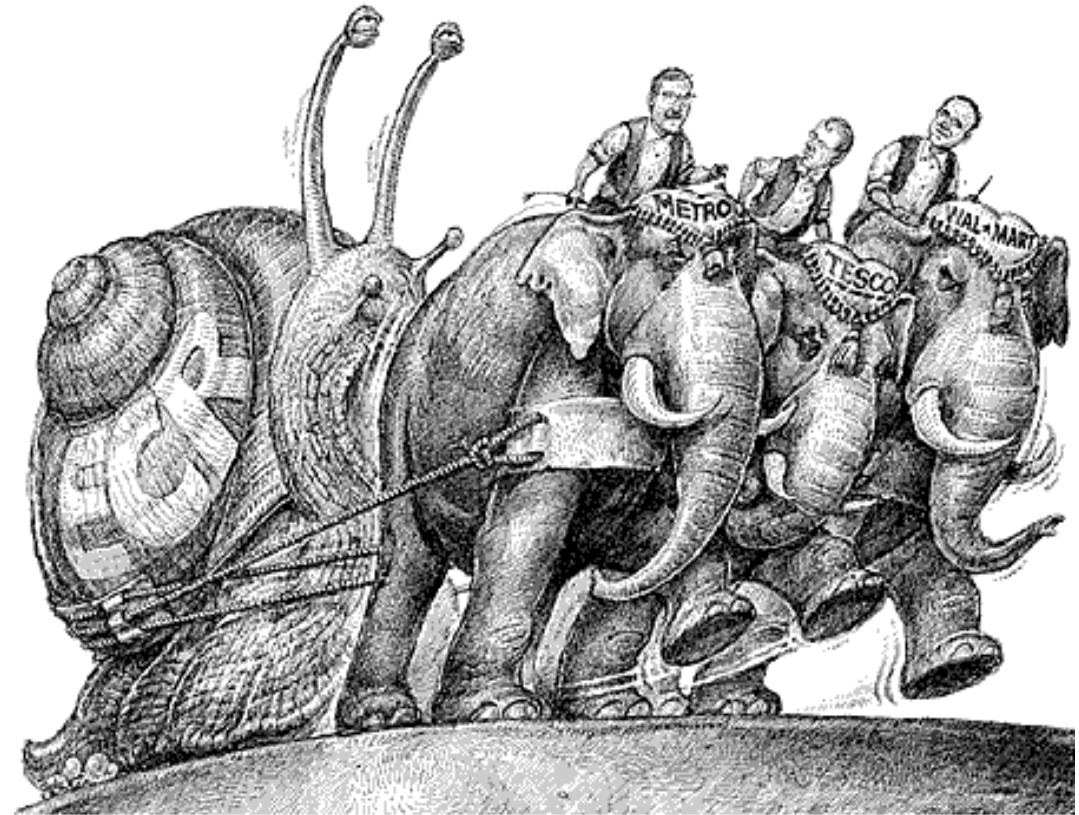
Danny Silverman, Head of
Product and Corporate
Marketing, Clavis Insight

Tomorrow's Category Management Today: How do Brands Achieve their Goals in eCommerce, a World Without Planograms and Shelves?

ECR History: Collaborative tools worked but were developed for an analog world.

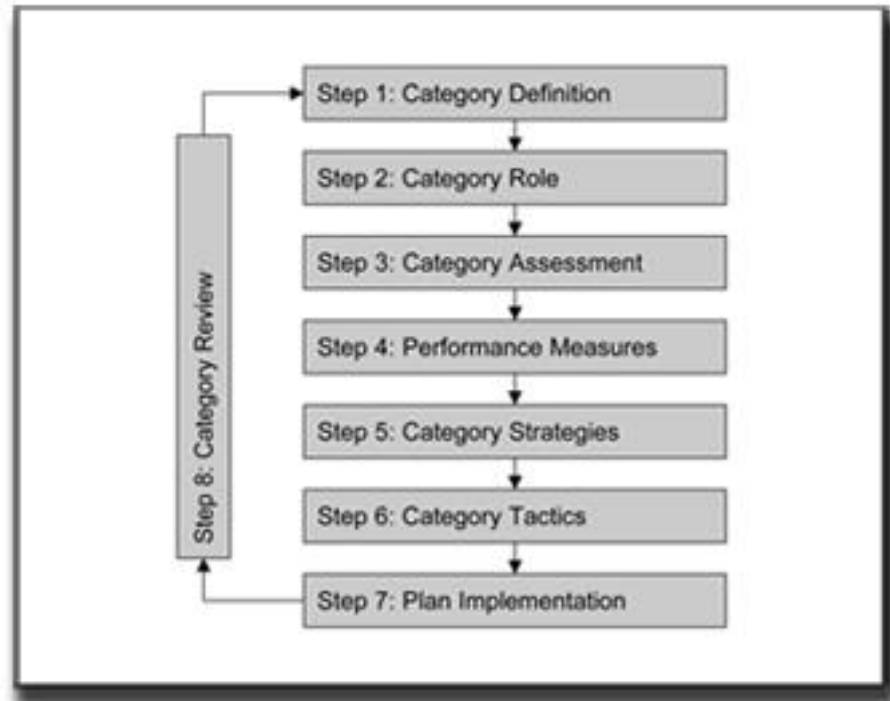


Working together to fulfil consumer wishes
better, faster and at less cost.



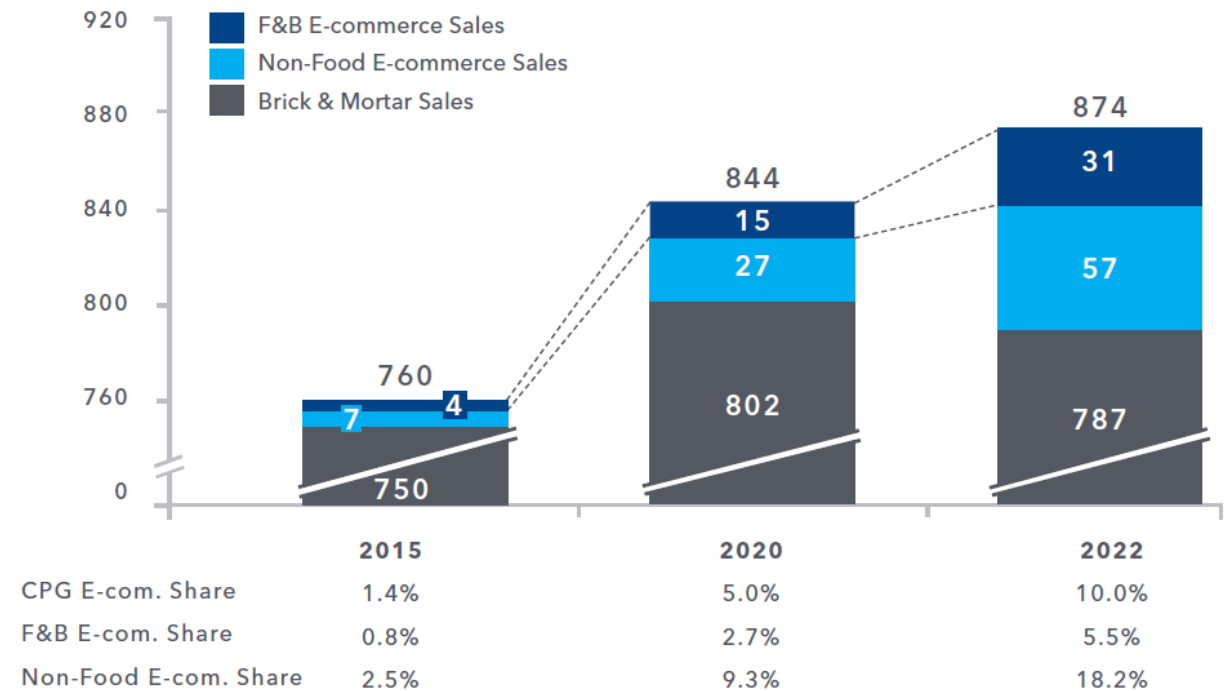
ECR Europe: Fortschritt als mühsames Geschäft.

Category Management: The analog tools are outdated and eCommerce is growing fast.



CPG Growth 2015-2022

U.S. CPG Sales (\$ Billion)



Digital Growth Agenda

1. Intent - From shrinking-to-glory to managing-for-growth
2. Category - From category management to item profitability
3. Direct - From product supply to consumer direct
4. Outlook - From packaged goods to consumer ecosystems

1. Intent: From Shrinking-to-Glory to Managing-for-Growth

Changing Shoppers

- Millennials
- Mobile First
- Omni-Channel



Retail Meltdown

- Amazon Rise
- B&M Fall
- Daily Innovation

Amazon Working on Several Grocery-Store Formats, Could Open More Than 2,000 Locations

Amazon Go is just one of at least three formats the online retailer is exploring, sources say



Amazon unveiled its first small-format grocery store, Amazon Go, in Seattle. It's one of at least three formats of brick-and-mortar stores the online giant is exploring. Photo: Amazon.com

Shine Comes Off Big Consumer-Product Companies

An unusual mix of big challenges, including currency swings, delivers a blow to normally solid sector



Newcomer Brands

- Digital Native
- Vertical Direct
- Private Labels

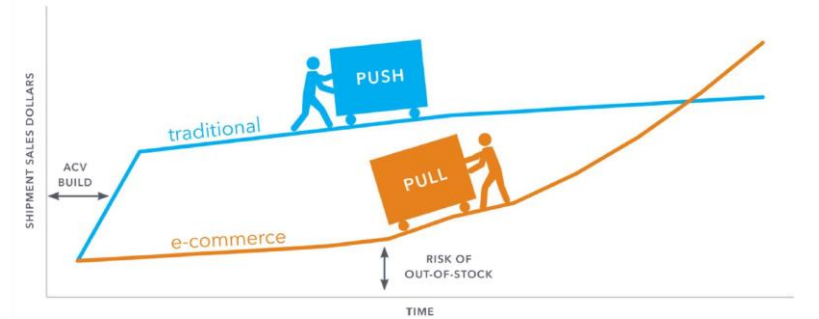


Consumer Products Crisis

- Slow (Growth)
- Cost Cutting
- Earnings Management

2. Assortment: From Category Management to Item Profitability

- From Supply Push to Demand Pull



- From Category Management to Item Profitability



- From Online Retail to Marketplace Platforms



3. Direct: From Product Supply to Consumer Direct

BUSINESS

Unilever Buys Dollar Shave Club

European giant to pay \$1 billion for startup in challenge to P&G



The founder of Dollar Shave Club, Michael Dubin, poses for a portrait in company offices in 2012. PHOTO: DAN KRAUSS FOR THE WALL STREET JOURNAL

Problem

- Dominant Player
- Expensive Blades

Solution

- Direct-to-Consumer Sales
- Simpler blades
- Subscription model
- Club-like followership

BUSINESS

Coty Buys Younique, Valuing Cosmetics Startup at \$1 Billion

Company sells makeup ranging from \$19 lipsticks to \$39 moisturizers, often through social-media platforms such as Facebook



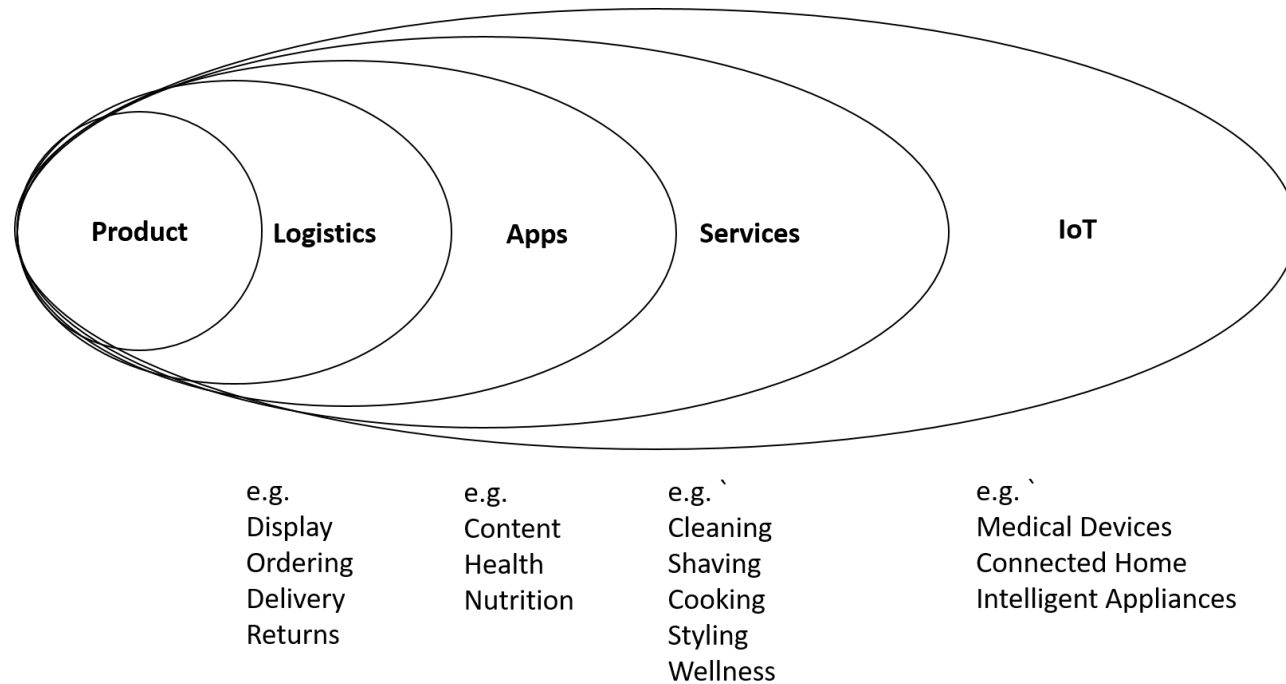
Problem

- Direct sales common for beauty (e.g. Avon)
- Homes parties costly and small

Solution

- Virtual parties with multi-day selling periods
- Sales outreach via social media and smart phone
- Purchases are linked back to host
- Hosts earn 20-30 % of sales

4. Outlook: From Packaged Goods to Consumer Ecosystems



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Considerations for Online Category Management

Danny Silverman

Boston | Dublin | London | Paris | Shanghai

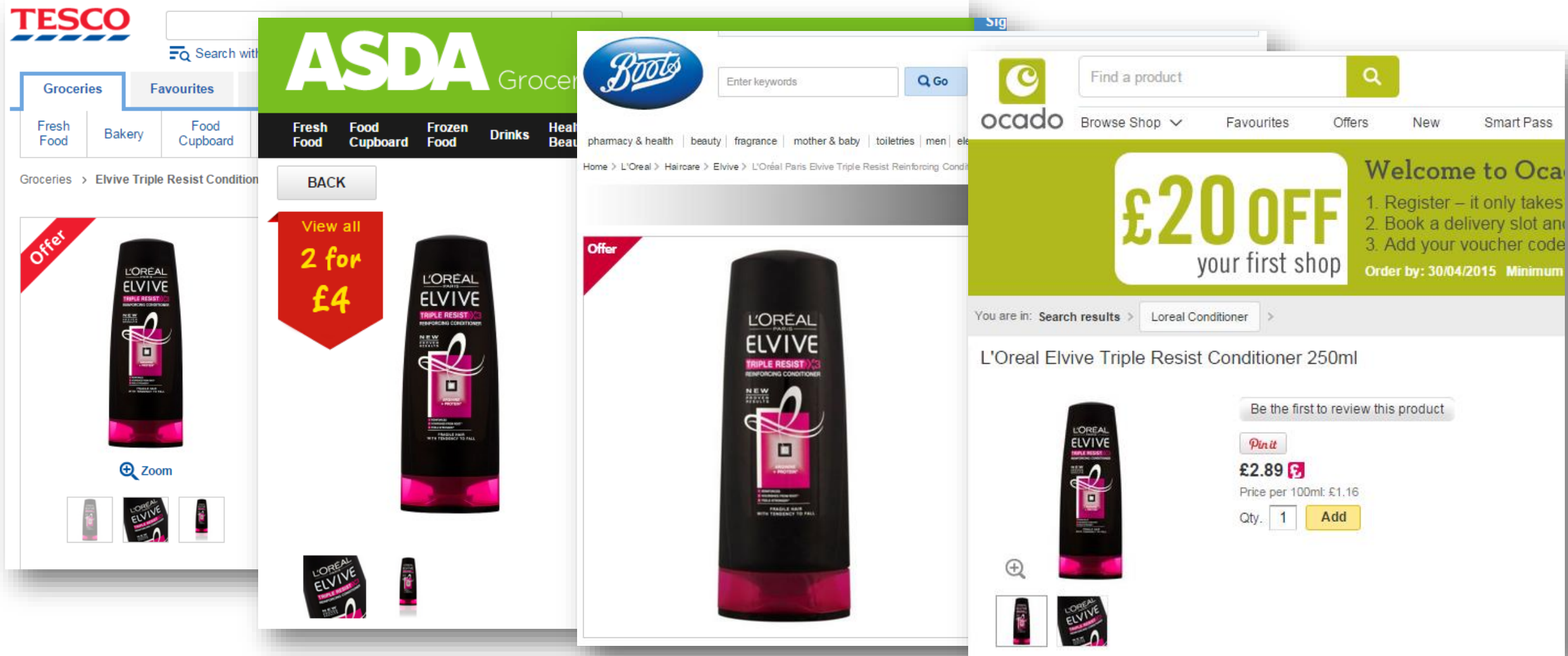


THIS IS WHERE WE
USED TO LOOK FOR
SALES AND SHARE
GROWTH

Brick and Mortar 'old way': Push Digital, mobile, and eCommerce 'new way': Pull



Implication: eCommerce is shopped one item at a time; every Product Detail Page must stand on its own



eCommerce is the easiest ‘store check’ to conduct, which means eCommerce owners are more likely to be questioned

“Are we winning online?”

Are we growing share?

How are our competitors performing?

What’s our category position?

Do we have the right assortment?

Are we winning on promotion?

“What are all these metrics and what are the RIGHT KPIs?”

“Why is our best offline product not coming up in search online?”

Is it in stock?

Is the product image and title correct?

Is the copy eComm optimized for search?

How many reviews should it have?

How is the product priced?

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If this were Bricks and Mortar, we would measure the 4Ps



To organize and prioritize eCommerce intelligence and actions, we have pioneered a familiar, yet powerful framework

Clavis 6Ps eCommerce Intelligence™

Here's how it works:

5 Ps are within your direct control

- Product
- Placement
- Price
- Promotion
- Perfect Page

These 5 Ps drive the 6th P:

- Performance: Search, Sales, Share





Product: Availability

- First set targets for the top 20 percent of revenue generating products per retailer
- Root cause pervasive stocking issues – is it your own supply chain or is the retailer not carrying enough inventory?
- Share the data with retailers and partners to drive change
- Use data ahead of anchor events such as holidays and retailer promotions to proactively provide forecasts
- Begin experience testing the processes with key products, set achievable targets early on and dial up the intensity as you learn

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The collage includes several examples of product availability messages:

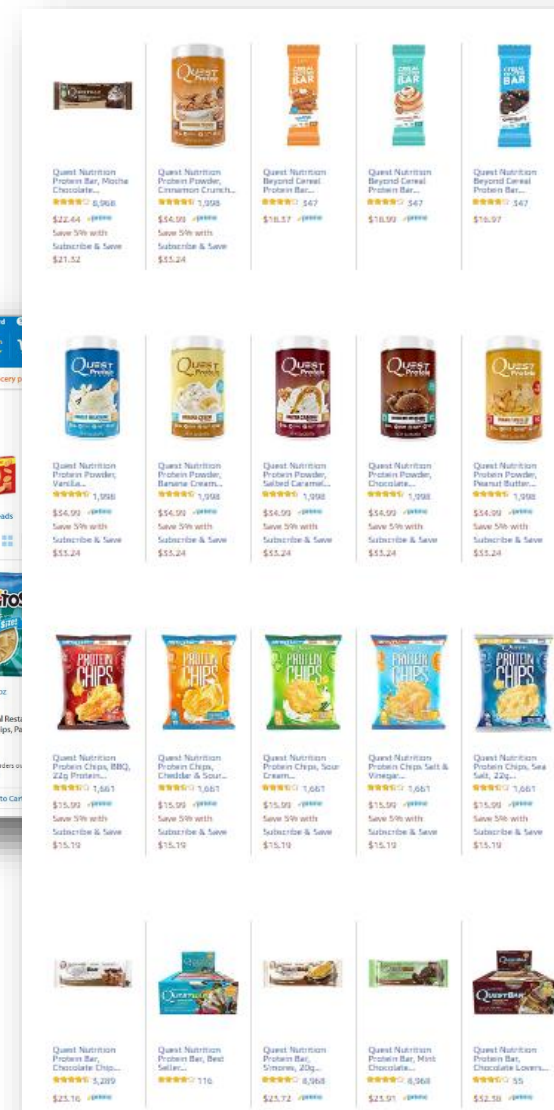
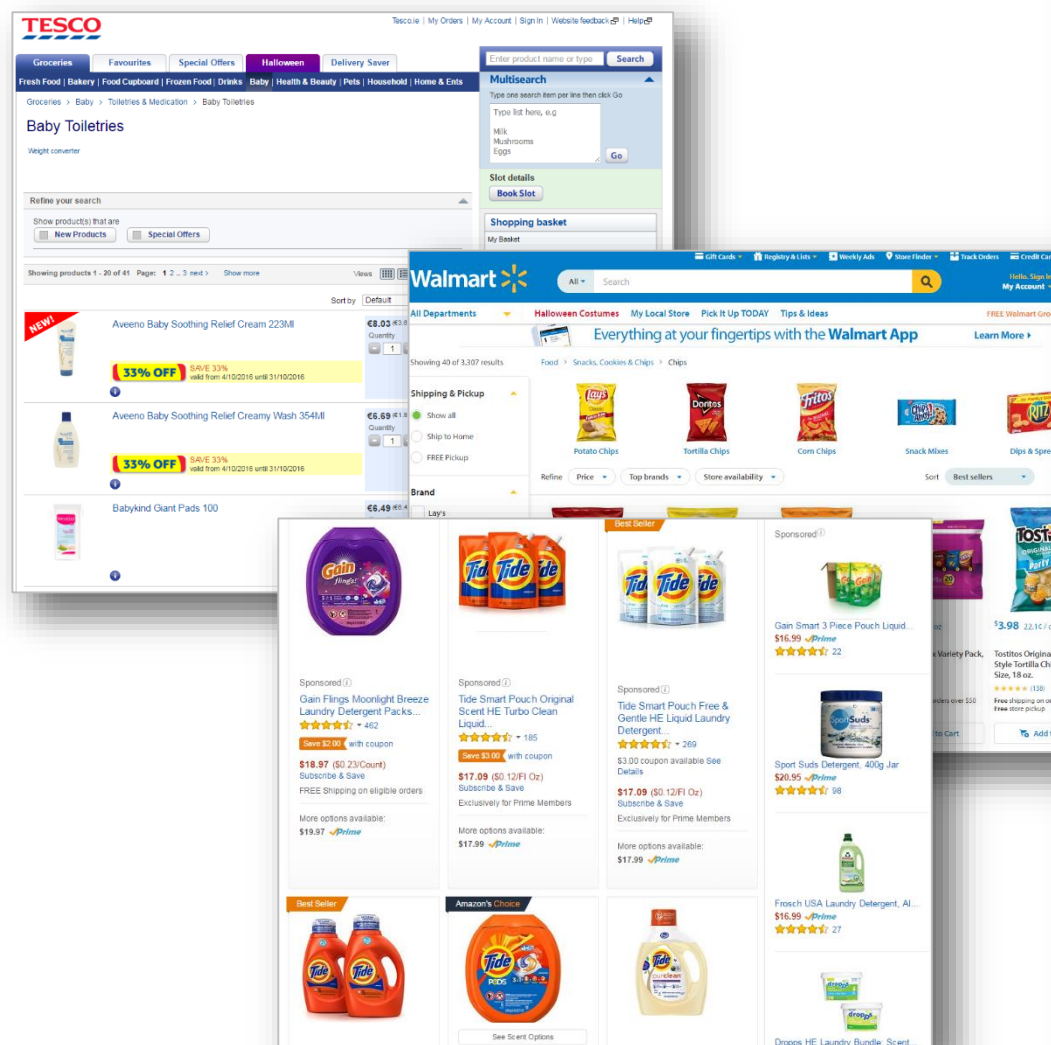
- Walmart.com:** A product priced at \$2.69 is marked "Out of stock". It shows a quantity selector set to 1, a "Get In-Stock Alert" button, and an "Add to List" button. Shipping is "Not available" and free pickup is also "Not available".
- Amazon:** A notification to "Sign up to get notified when this product is in stock." with a text input field for an email address and a large orange "to subscribe" button.
- Amazon (Other Sellers):** A section titled "Other Sellers on Amazon" showing two alternative offers: one for \$24.99 and another for \$27.24, both with free shipping and "Add to Cart" buttons.
- Unavailability Message:** A message stating "Currently Unavailable" with a subtext "Want us to email you when this item becomes available" and a yellow button.
- Spanish Interface:** A button labeled "AÑADIR FAVORITO" (Add Favorite) with a heart icon, and a greyed-out button labeled "NO DISPONIBLE" (Not Available).
- Tesco:** A screenshot of the Tesco website showing a "This product is not available" message with navigation links for Groceries, Favourites, and Special Offers.
- Delivery Options:** Two side-by-side options: "DOMICILIO" (Home Delivery) with a truck icon and the text "Sin envío a domicilio" (No home delivery), and "CLICK & COLLECT" with a box icon and the text "No disponible para recogida" (Not available for pickup).
- Uh-oh Message:** A message with the text "uh-oh." and an image of a spaghetti box, followed by an apology: "Well, this is awkward. We're sorry. There are no products available." and contact information for customer care.



Product: Assortment

- Analyze best sellers by online retailer, not by what sells well offline
- Identify if packaging solutions, such as eCommerce-ready, or 'Ships In Own Container' will create a better proposition for the retailer and for shoppers.
- Study 3rd party sellers to see if they are creating unique bundles that are highly ranked.
- Develop strategies for niche items and first-to-market NPd
- Work with your Finance and Supply Chain teams to build a test and learn plan that will scale to a multi-year, P&L model that is a win for everyone

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Placement: Distribution and Categorization

- Monitor your own and competitive product placements; test and learn for optimal placements
- Understand the overall location count and menu rank of your products
- Analyze category insights supporting placement strategy to maximize ease of navigation

The collage illustrates various product placement and categorization strategies on a retail website. Key elements include:

- Navigation Paths:** Multiple paths leading to 'Face' products, such as 'Skin Care > Sensitive Skin > Face', 'Skin Care > Scar & Fade Therapy > Face', 'Skin Care > Healthy Skin Care > Face', 'Skin Care > Face', 'Clearance > Skin Care > Face', and 'Clearance > Beauty > Skin Care > Face'.
- Category Menus:** A 'Health & Beauty' menu with sub-categories like 'All Health & Beauty', 'Oral Care', 'Shower, Bath & Soap', 'Haircare', 'Mens Toiletries', 'Feminine Care', 'Sensitive Bladder & Incontinence', 'Female Deodorants & Body Sprays', and 'Facial & Body Skincare'.
- Product Listings:** A 'Sainsbury's' page showing 'Healthier cereal bars (44 products available)' with filters for 'Options' and 'Top Brands'.
- Quick Finds:** A 'Browse by category' section with 'MakeUp Quick Finds' (Mascara, Nail Art, Primers, Foundation, Nail Polish, Lipstick, False Eyelashes) and 'Skincare Quick Finds' (BB Cream, CC Cream, Lip Balm, Concealer, Anti-Wrinkle, Serums, Face Mask, Skincare Brands).
- Top Picks:** A 'Top Picks' section with 'New', 'All Offers', 'Meal Deals', and 'Bundle Offers'.
- Selected Shops:** A 'Selected shops' section listing various shops and their product counts, such as 'Beauty Gift Ideas (38)', 'Beauty Boutique (1406)', 'Skin Care (941)', 'Bath & Shower (137)', 'Nail Bar (252)', 'Make Up (403)', 'Electricals (78)', 'Gifts (114)', 'Hats / Scarves / Gloves (1)', 'Hosiery / Socks / Underwear (71)', 'Hair Care (200)', and 'Men's Grooming (84)'.



Price

- Analyze pricing, particularly for Priority SKUs at key retailers
- Review how pricing fluctuates over time
- Work with retailers on SKUs where profitability is at-risk
- Schedule email alerts for daily pricing updates to proactively identify changes

Kellogg's Cracklin' Oat Bran, 17 Oz by Kellogg's
\$3.59
\$3.80 (\$0.22/Ounce)
PrimePantry
Exclusively for Prime Members
€1.25 (€1.25/l)

Clorox Disinfecting Wipes Value Pack Scent...
\$1.47 19.6¢ / fl oz
Only £1.00: Save 55p
\$2.99
£1.50/unit £2.63/100ml
\$5.09 was \$5.47 save \$0.38
\$8.99 reg \$9.99
\$5.49 reg \$5.89
Clorox Disinfecting Wipes Value Pack Scent...
★★★★★ 17694
buy 3, get a 4th free
\$4.49 reg \$4.99
SAVE 1.95 Was 3.95 Now 2.00 valid from 21/9/2016 until 18/10/2016

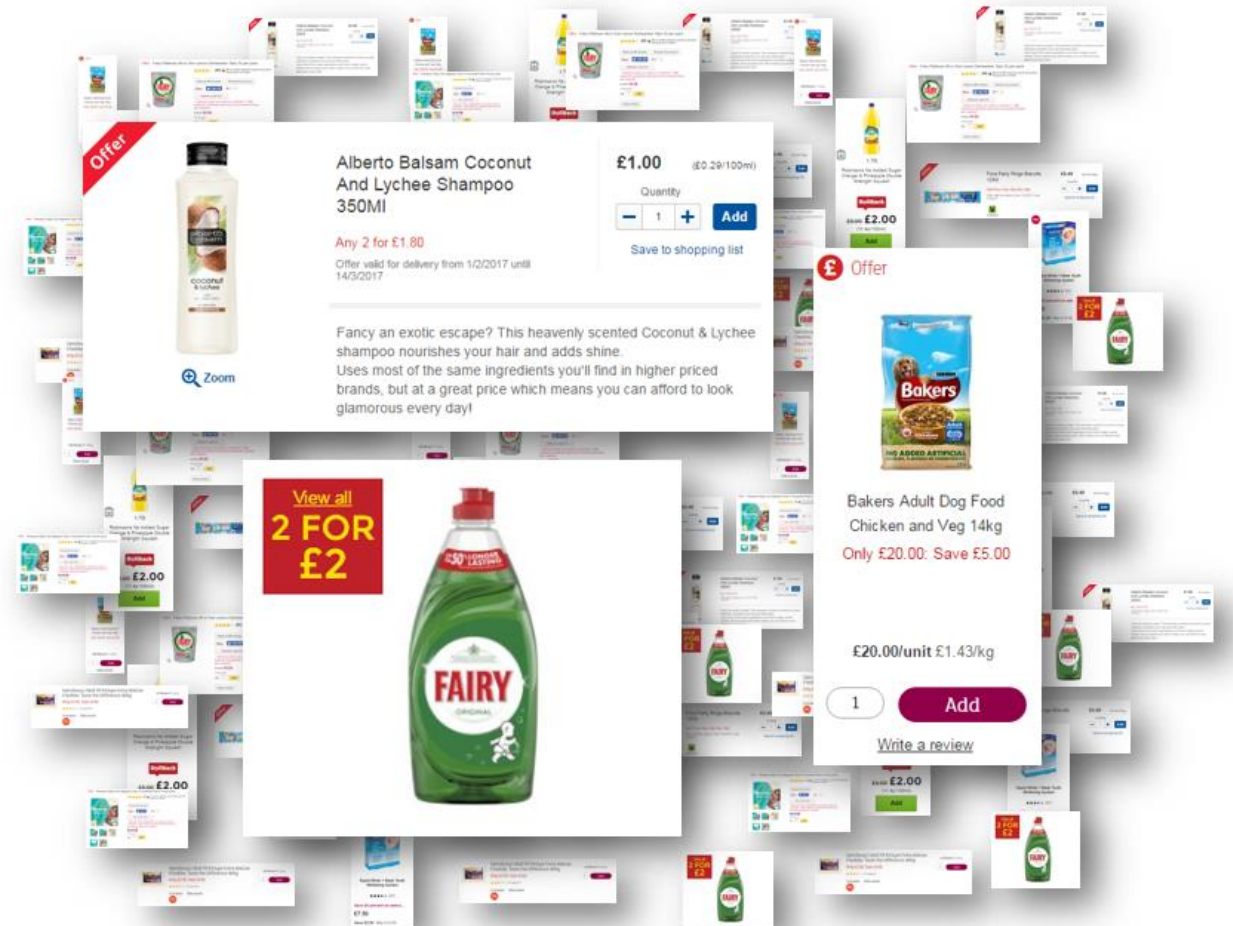
Neutrogena Light Therapy Acne Spot Treatment by Neutrogena
\$19.97 \$22.78
prime
FREE Shipping on eligible orders
More options available:
\$19.12 Other Sellers
amazon Try Prime

Neutrogena Light Therapy Acne Spot Treatment
\$19.97
★★★★★ (382)
Walmart



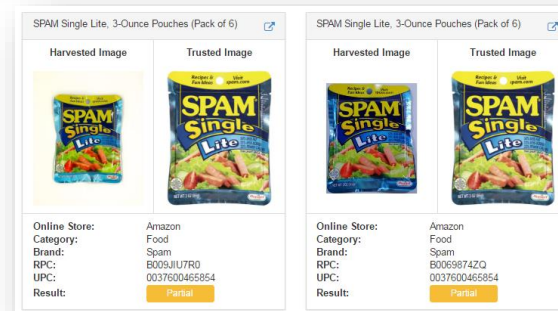
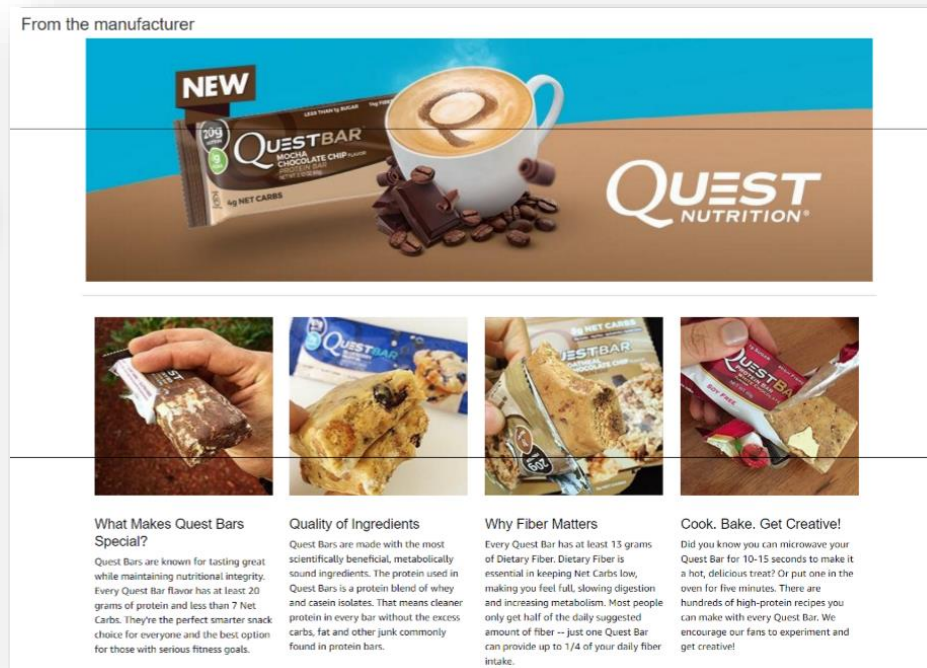
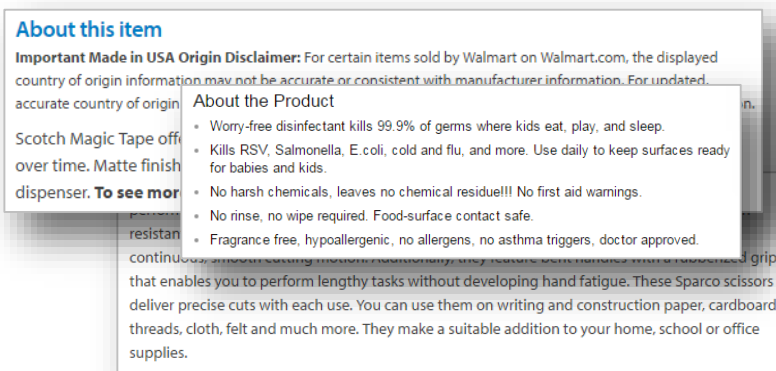
Promotions: Merchandising

- Gain a Greater understanding & control of your promotions strategy
- Understand what promotions types are most prevalent in your category
- Analyze promotions effectiveness, given competitive landscape
- Use Calendar View of competitive promotions landscape in promotions planning
- Impact of Competitor Activity: Is the frequency and depth of competitor promotions negatively affecting your brands (and the category)?
- Apply insights to annual promotional plans
- Test, learn and utilize traffic driving solutions such as paid search, or Add to Cart from owned digital properties





- Pampers Baby Wipes Tub, Sensitive - 64 Wipes/Tub
- Galaxy Chocolate Bar 4 Pack 168G
- Tostitos Simply Natural Blue Corn Organic
- Walkers Cheese & Onion Crisps 14X25g
- Scotch Magic Tape & Refillable Dispenser, 3/4" X 300", 1" Core, 4/pack



Perfect Page: Engaging Content (example)



K + S Salon Quality Men's Shampoo – Tea Tree Oil Infused To Eliminate Dandruff, Dry Scalp, and Prevent Hair Loss – Professional Stylist Recommended (16 oz...

★★★★★ 1,406 customer reviews | 38 answered questions kriegler + söhne





About the product

- ⌘ THE WARRIORS PLANT – Tea tree oil has been used for hundreds of years for it's medicinal benefits.
- ⌘ SHARPEN THE SAW – Everyday is a new challenge, and we want you to be prepared for it.
- ⌘ THE BEST SMELLING SHAMPOO FOR MEN – Stay fresh and battle ready no matter who, or where you are!
- ⌘ HEAL YOUR HAIR – Rinse away the past w/ the potent power of tea tree oil, and bask in the healing!
- ⌘ SATISFACTION OR YOUR MONEY BACK – If you're like us, you don't take guff from anyone, and the last thing we want to do is give you any trouble. We're so confident in this shampoo, that we'll give you a 100% SATISFACTION GUARANTEE. No hassles from us. If you don't like it, you don't have to pay for it. Just send it back our way and we'll refund your money, no questions asked.



- ★★★★★ Five Stars**, March 9, 2015
By [ddgh](#) - See all my reviews
Verified Purchase ([What's this?](#))
This review is from: [Coca-Cola Zero, 24 ct, 7.5 FL OZ Mini-Can \(Grocery\)](#)
Excellent value for the price, ships well, arrives timely n undamaged

Help other customers find the most helpful reviews | [Report abuse](#) | [Permalink](#)

Was this review helpful to you? ☒ Yes ☐ No ☐ Comment

★★★★☆
Simply am...
404 days ago
I am on a p...
years. Not s...
using stand...
and it is like...
Without any...
read full rev...



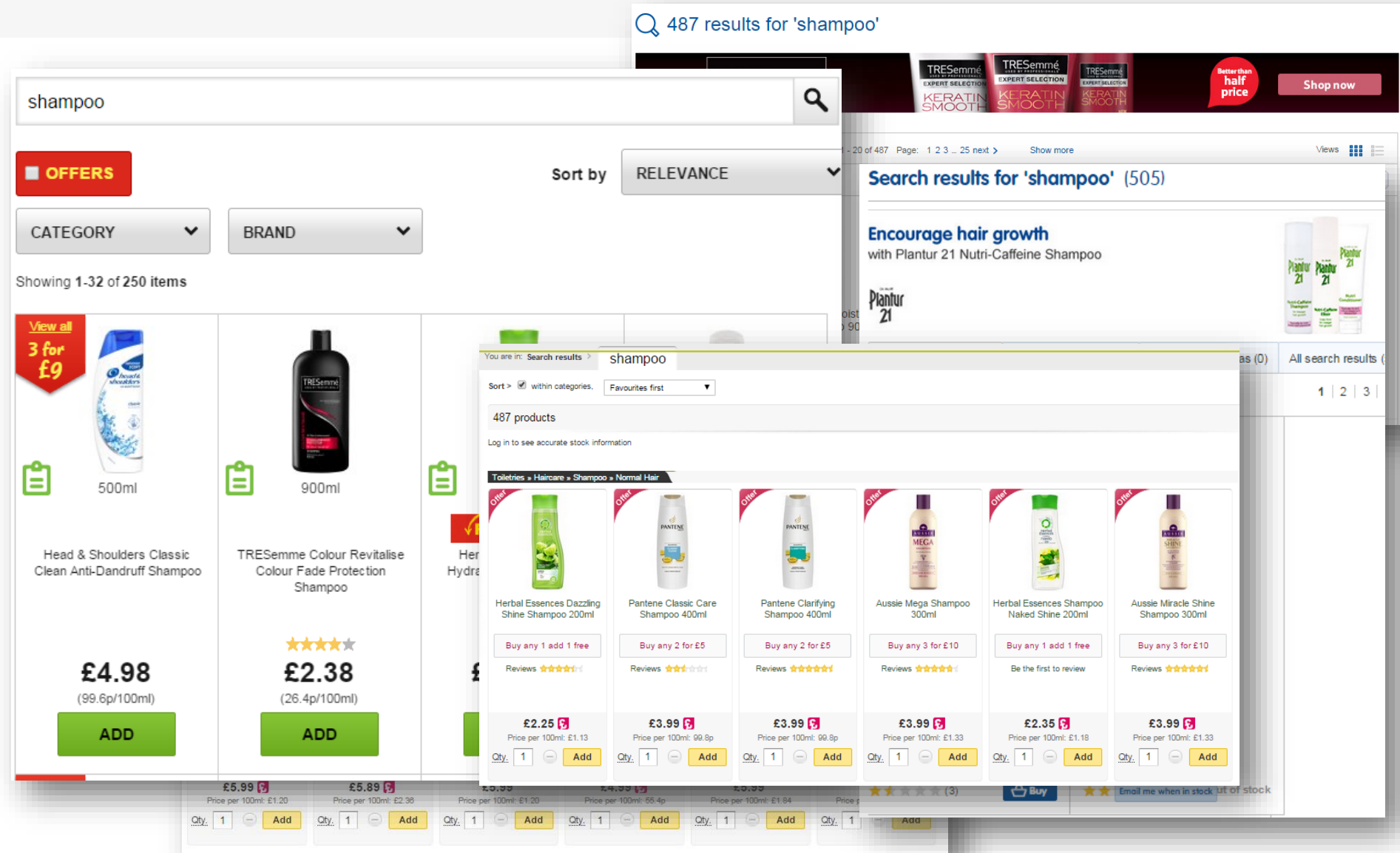
[See Size & Unit Count Options](#)

Huggies Snug and Dry Diapers, Size 1, 112 Count
★★★★★ ▾ 5,810
\$1.00 coupon available [See Details](#)
FREE Shipping on eligible orders [See Details](#)
\$18.83 (\$0.17/Count)
✓Prime
Get it by **Monday, Oct 17**
[Add to Cart](#)

★★★★★ New v...
By [Chris M Mast](#)
Verified Purchase ([What's this?](#))
This review is from: [Huggies Natural Care One and Done Baby Wipes, Unscented, Soft Cloth-like Texture, 100% Recycled Paper, 100% Biodegradable, 100% Plant-based Formula, 100% Fragrance-free, 100% Hypoallergenic, 100% Dermatologist-tested, 100% Pediatrician-recommended, 100% Baby-safe, 100% Gentle, 100% Soft, 100% Clean, 100% Safe, 100% Effective, 100% Reliable, 100% Durable, 100% Long-lasting, 100% Convenient, 100% Easy-to-use, 100% Affordable, 100% Value-for-money, 100% Satisfying, 100% Recommended, 100% Loved, 100% Admired, 100% Respected, 100% Honored, 100% Celebrated, 100% Praised, 100% Appreciated, 100% Valued, 100% Cherished, 100% Treasured, 100% Beloved, 100% Dear, 100% Precious, 100% Priceless, 100% Irreplaceable, 100% Unique, 100% Special, 100% Wonderful, 100% Amazing, 100% Incredible, 100% Unbelievable, 100% Astonishing, 100% Breathtaking, 100% Stunning, 100% Spectacular, 100% Magnificent, 100% Marvellous, 100% Fantastic, 100% Excellent, 100% Outstanding, 100% Superb, 100% 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strongest, 100% Least most strongest, 100% Most least strongest, 100% Least least strongest, 100% Most most weakest, 100% Least most weakest, 100% Most least weakest, 100% Least least weakest, 100% Most most hardest, 100% Least most hardest, 100% Most least hardest, 100% Least least hardest, 100% Most most softest, 100% Least most softest, 100% Most least softest, 100% Least least softest, 100% Most most coolest, 100% Least most coolest, 100% Most least coolest, 100% Least least coolest, 100% Most most warmest, 100% Least most warmest, 100% Most least warmest, 100% Least least warmest, 100% Most most quietest, 100% Least most quietest, 100% Most least quietest, 100% Least least quietest, 100% Most most loudest, 100% Least most loudest, 100% Most least loudest, 100% Least least loudest, 100% Most most slowest, 100% Least most slowest, 100% Most least slowest, 100% Least least slowest, 100% Most most fastest, 100% Least most fastest, 100% Most least fastest, 100% Least least fastest, 100% Most most easiest, 100% Least most easiest, 100% Most least easiest, 100% Least least easiest, 100% Most most hardest, 100% Least most hardest, 100](#)

Performance: Search

- Identify category and brand keywords that shoppers use to search for your products
- Establish search rank and page one Share of Search goals; constantly raise the bar as you achieve these goals
- Ensure keywords appear in titles; recommended in feature bullets, descriptions, and A+ content as well
- Benchmark online share of search to offline market share for the same categories





Performance: Sales and Share

How is my
business
trending?

How are sales vs. goals?

What are my best
sellers?

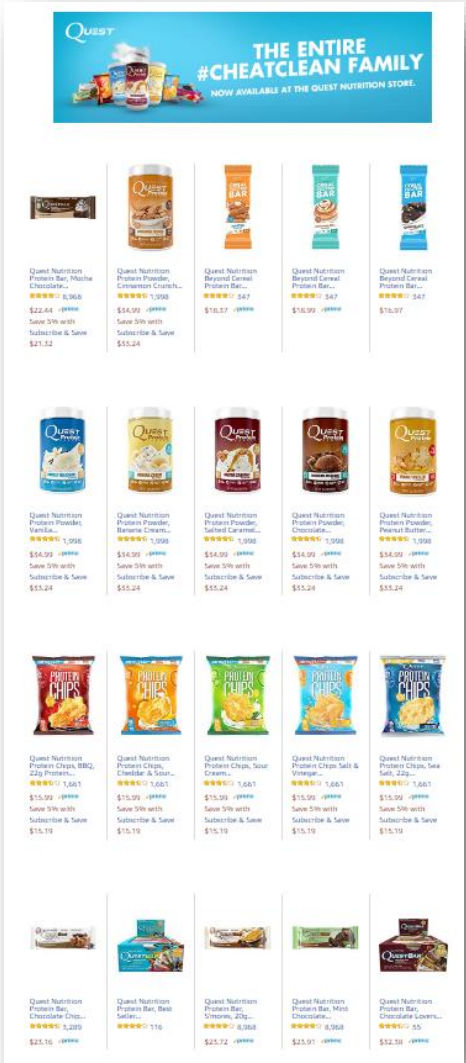
What's my category
share?

Getting Started: Adopt a Crawl → Walk → Run Approach



*Is my assortment optimised by the online retailer?
Is my product consistently in stock?*

	CRAWL	WALK	RUN
Assortment			
In-Stock			



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