

CATMAN TRAINING CASE STUDIES: CONSUMER PACKAGED GOODS, WHOLESALE, RETAIL, HARDWARE

CatMan Capability Assessment Tool - Screen Shots

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Microsoft Excel - CatMan Master Content and PDs.xlsx © Harrison Consulting 2011

CATEGORY MANAGEMENT MASTER MAP OF COVERAGE
LINKED TO JOB COMPETENCIES OF CHANNEL MANAGER AND REPRESENTATIVE (SHEET 2)

Rest mouse on red flags for help

CatMan Topics Covered	Click Link for Detail	Client Use	Client Comments
What is Category Mgt?			
The Rationale and the Promise			
Definition, Philosophy, Process			
Retail and Category Strategy			
Structure, Systems, People, Data			
The Original FMI Model			
Four Phase Category Management Cycle			
Importance of Consumer Insight	Marketing		
Consumer Buying Behaviour	Marketing		
The Marketing Dimension	Marketing		
Defining the Category with Insight	Marketing		
Real Category definitions			
Consumer Frameworks			
Home Improvement Insights			
Success Factors in Retailing	Finance		
Useful Retail Financial "Metrics"	Finance		
The retailing wheel	Finance		
Markups, margins and stock turn	Finance		
Channel differences	Finance		
Improving retail profitability	Finance		
ROI, GMROI, GMROS, PL, stock density	Finance		

The links in this column will jump to the following sheet which cross references the critical job competencies needed to implement effectively in each aspect of the CatMan process.

Links to Competencies

71	Strategic Account Planning Cycle	Account Planning
72	Step-Wise through the Account Planning Process	Account Planning
73	Account Profiling	Account Planning
74	The Retailer's World	Finance
75	Retail Finance Revisited	Finance
76	Paradigms Around Negotiation	Negotiation
77	Negotiating Skills	Negotiation

CatMan Content Key Competencies

Microsoft Excel - Job Competencies of Channel Manager and Representative.xlsx © Harrison Consulting 2011

JOB COMPETENCIES OF CHANNEL MANAGER AND REPRESENTATIVE
WITH LINKS FROM CATEGORY MANAGEMENT MASTER MAP OF COVERAGE (SHEET 1)

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Key Results Areas (Specific Tasks and Accountabilities)	Job competencies	Priority	Need
Account Planning and Management			
Understand the role & hierarchy of Account Mgt or strategic business process			
Know the Account Management cycle and its driver			
Maintain & improve the content of Account Profiler, database or CRM			
Monitor relevant external trends and changes <i>see red flag</i>			
Understand and use SWOT to challenge trends and strategic choices <i>see red flag</i>			
Prepare Account Development Plan, monitor its order & cost control methods			
Construct and commit to a plan which places importance on SMART objectives			
Establish the specific of implementation and communicate to activities			
Submit plans to formal review on regular basis			
Involve other members of the role force in Key Account Planning and research or review			
Communicate plan to their efforts, and those who must support implementation			
Set benchmarks but ensure to monitor the progress of plan			
Four planning or an ongoing process, which is part of the			
Learn effectively from this - what to repeat, what to change			
Conduct rolling quarterly review - track and update the plan (time, what to plan)			
Communicate quarterly Business Review and Development ("BRAD") Meeting			
Partner business review and special meeting management ability			
Leveraging Marketing and Strategic Inputs			
Write marketing and Sales Plan document to provide strategic leadership to sales			
Monitor internal and external factors, sales and product structure and Customer potential			
Understand the value of various market channels (e.g. B2B, On-Line, Channel Partners, etc)			
Apply portfolio management to Channel Management, as appropriate			
Forecast volume, profit and market share effectively			
Keep up to date on technology change as it impacts on Customer and Channel			
Understand consumer and shopper behaviour and can "speak" to the consumer framework			
Take on board inputs from Customer Marketing and Brand Management			
Know how to relate "STP" (segmentation, targeting and positioning) to Channel Partners			

Drop down help boxes