

# HOW TO CONDUCT A MERCHANDISING REVIEW



**CATEGORY  
HACKS**  
LESS WORK,  
MORE WINS!



**Shopper  
Intelligence**  
Understand. Influence. Lead.

# On the agenda for 2025



1. How to **Manage the Price Discussion** ✓
2. How to **Build a Category Strategy** ✓
3. How to **Prepare for a Range Review** ✓
4. How to **Conduct a Merchandising Review**

## NEXT: How to **Maximise Promo Effectiveness**

6. How to **Get the Most out of Shopper Marketing**
7. How to **Get Your Product Listed**
8. How to **Balance Your Data & Insights Needs**
9. How to **Give Category a Voice with Leadership**
10. How to **Talk to Your Buyer**



## Did you know?



### Exotic Fruit Shoppers are:

- More likely to buy more to try new and different products
- More likely to buy on impulse (#23)
- But more likely to walk away and buy from another category

# Our experts...



Chris Adkins



20+ Years FMCG Experience



Martin Baptie



25+ Years FMCG Experience



CATEGORY  
**HACKS**  
LESS WORK,  
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# Remember last time we talked about the Range Review..



## PLAN

- Clear objective for review
- Understanding your stakeholders (shopper/retailer/internal) and align
- Prepare for all possible risks
- Know your data sources – not just market performance!
- Consider trends to help predict
- Gap analysis and the shopper view

## ANALYSE AND REVIEW

## DECIDE AND IMPLEMENT

- Prioritise and set targets
- Align to retailer processes and strategy
- Consider the mix of PL and brand
- Track what matters – sales and shopper satisfaction
- Create a category scorecard
- Set scheduled reviews and tweak if needed

## MONITOR, TRACK AND ADJUST



**The next step is the  
merchandising review**



It's all about  
space baby..!



Get the right  
products in the  
right places...at  
the right time

It's as much about potential as it is about what's happened before



Big sellers

Established  
segments



Emerging  
segments

Developing  
consumer  
trends

Occasion  
opportunities

Usage norms

## It's also of course a key opportunity



- Get space right
- Get on more plans and improve distribution

**BUT**

- We have to balance this with remaining objective
- Be aware you need to prepare – if ROS is not up to scratch you may lose SKU's and distribution

# Things to consider

# Key question – will you be involved?

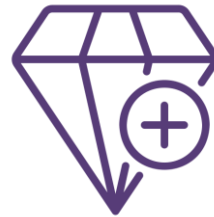
## Are you a trusted advisor and if not, how do you get there?



It takes time!



You need to  
build credibility  
with objectivity



You need to add  
value to your  
retailer



Focus on the  
shopper and the  
category, not  
your brand



Give them a fresh  
perspective that  
they don't get  
anywhere else

Two aspects we need to look at:



# Physical shopper and category considerations..



## ROLE

What role does the category play for shoppers



## DECISION

How do shoppers make their purchase decisions when buying the category



## PRIORITIES

Which factors are most important for shoppers when looking for the category



## OCCASION

What are the key needs and usage occasions that the category satisfies



## SATISFACTION

Are there shopper satisfaction issues that need to be addressed

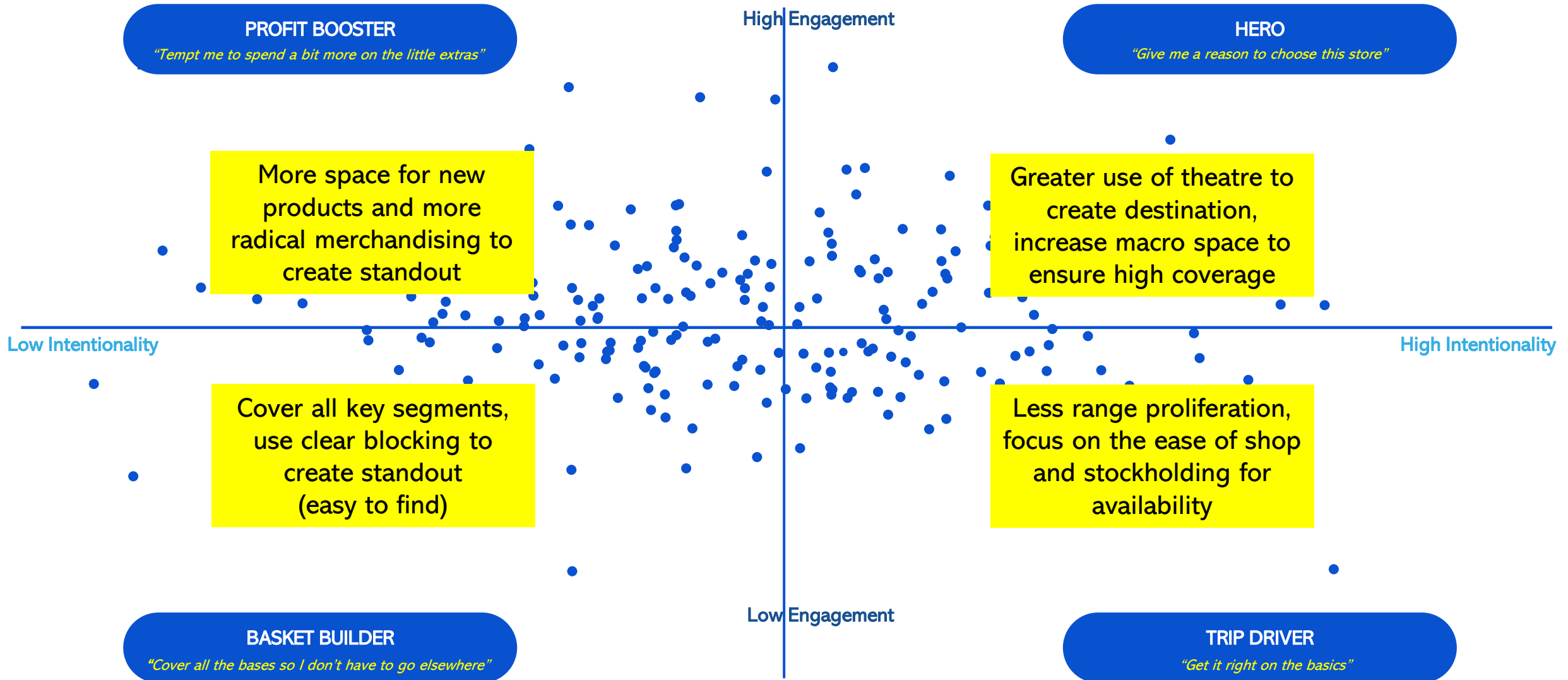


## TRENDS

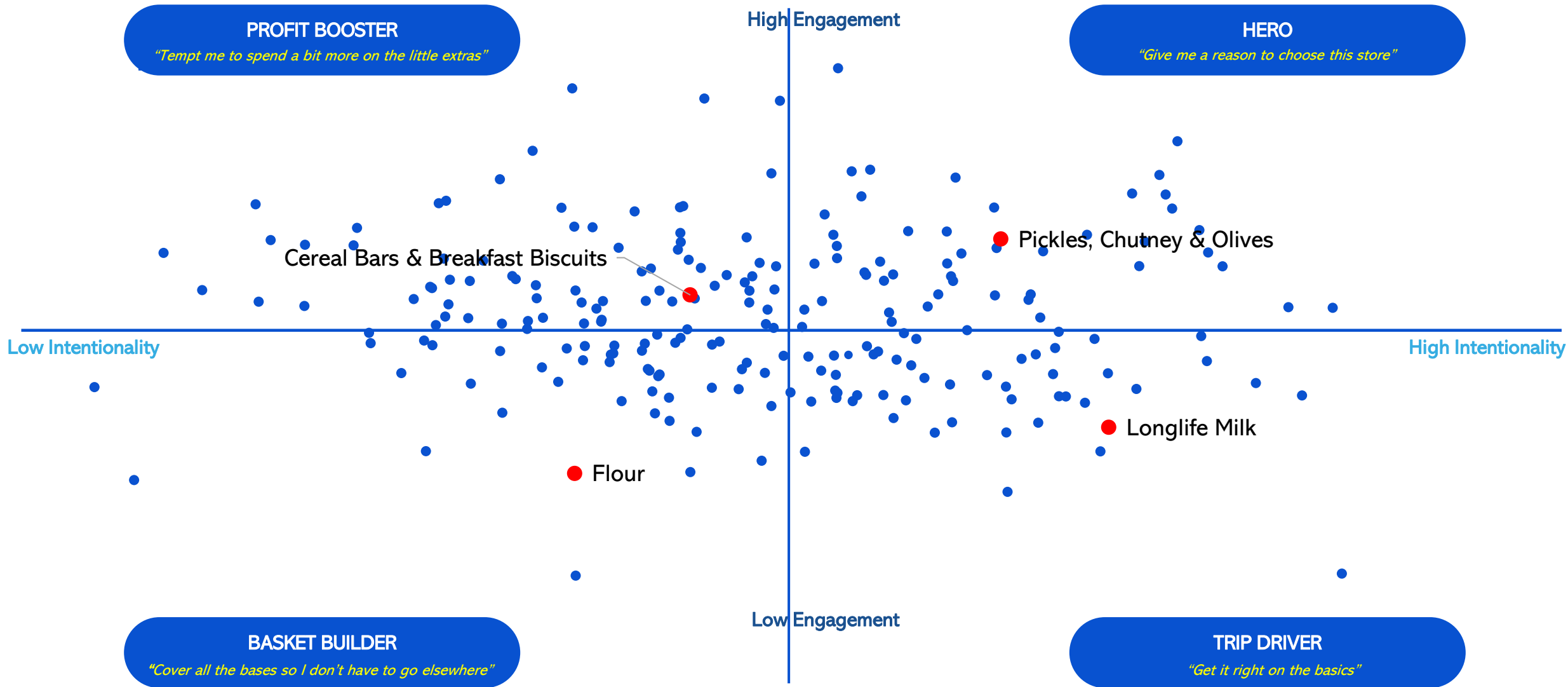
What new trends are emerging and what declining aspects should we be aware of

How do these aspects affect the way the fixture should be merchandised

# Category role does have merchandising implications



# Across any one department, things will be different



## The decision hierarchy – two main aspects..

What's the risk if we get merchandising wrong – will shoppers walk away



What are the typical decisions shopper make pre-store and at the shelf



# Decisions aren't just about brand..



Plan to buy the category

AVERAGE  
CATEGORY

76%



76%



Plan to buy a specific  
brand

31%

55%



Actual % of shoppers  
that therefore plan to  
buy a specific brand

24%

41%

Even in such a strong branded category, yes, it's key – but type is the first merchandising split:

Diet



Max/Zero



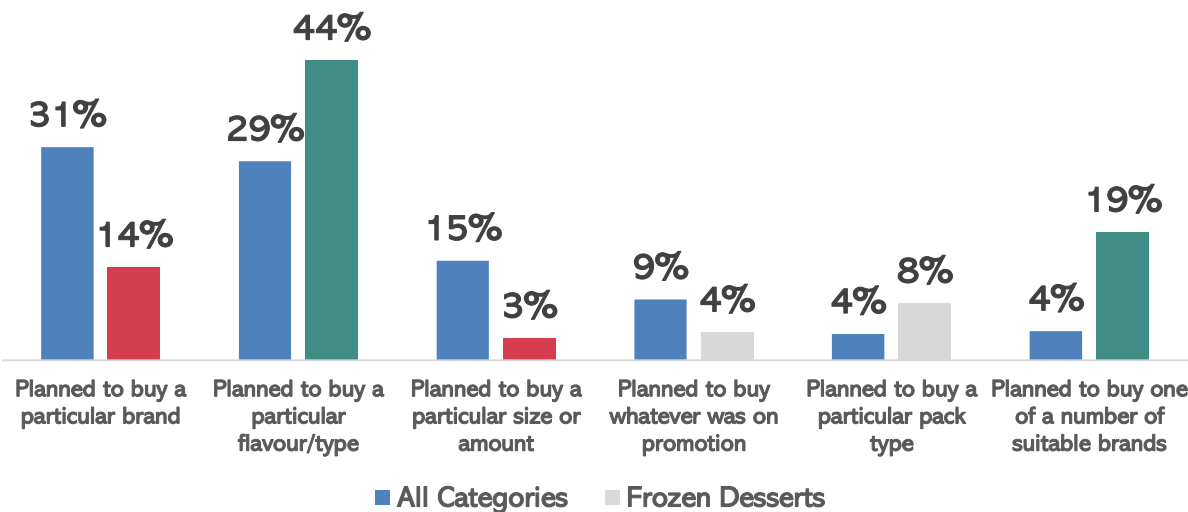
Full sugar



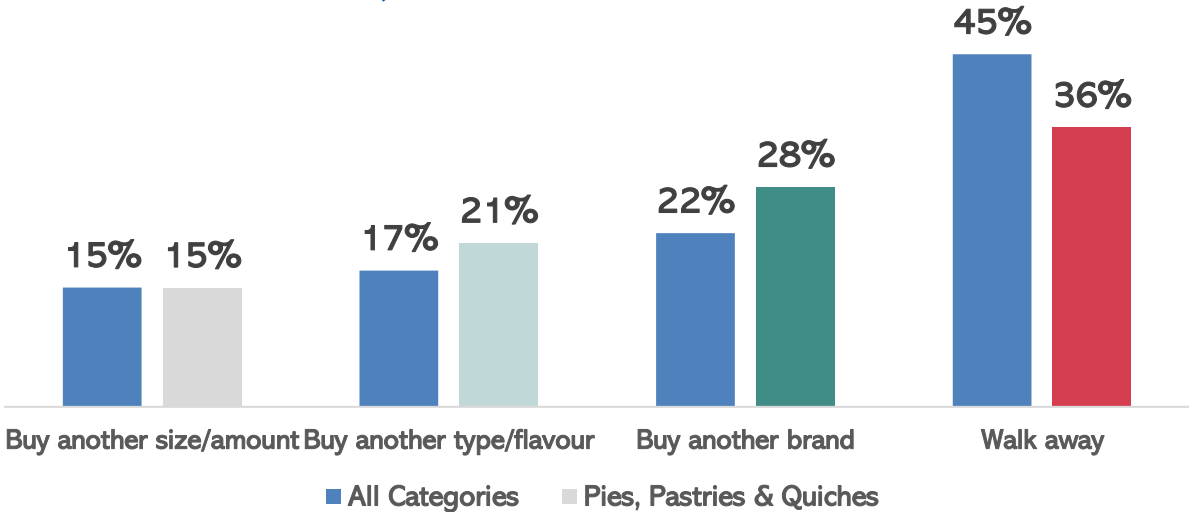
# We need to consider pre-store and in-store decisions



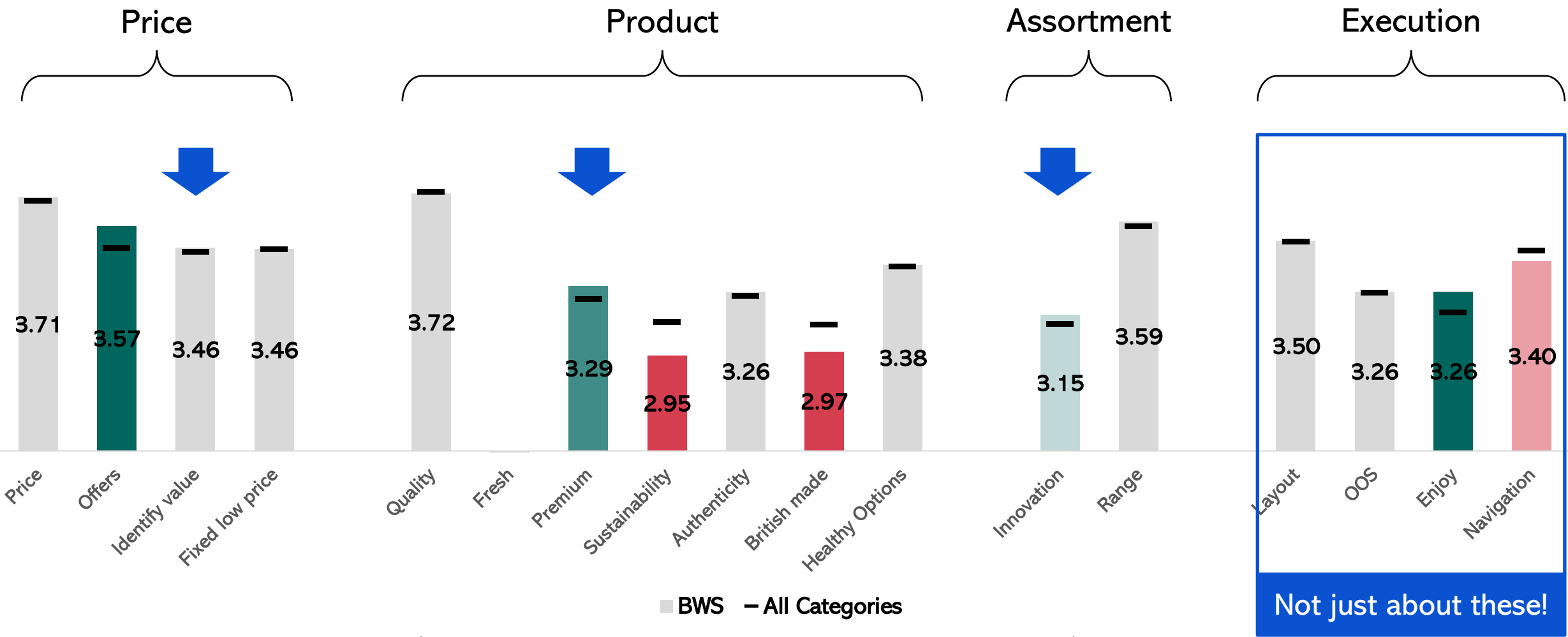
## Pre-store decisions



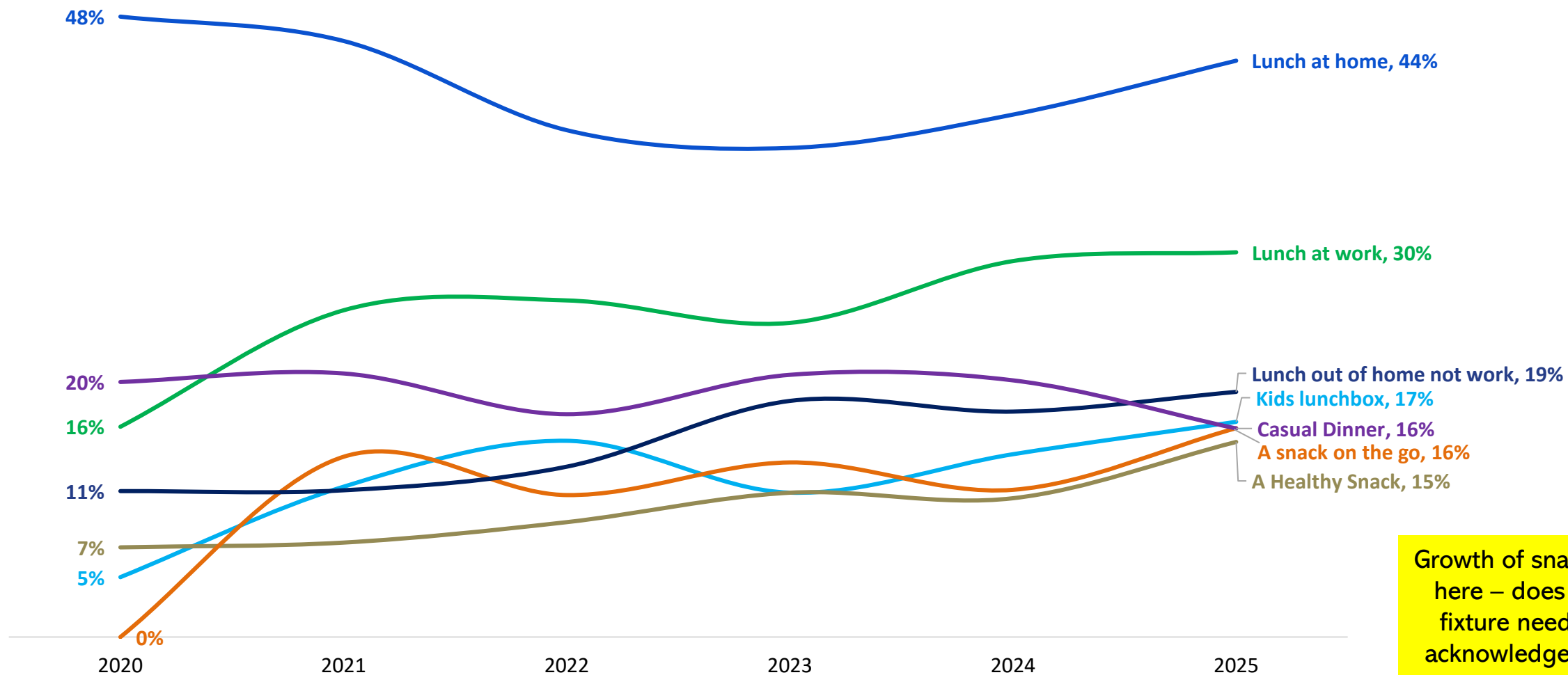
## In-store decisions



# The shopper can also tell us how important merchandising is and what to focus on

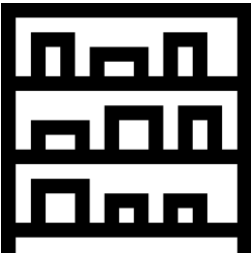


# Needs and occasions – should we consider merchandising for these

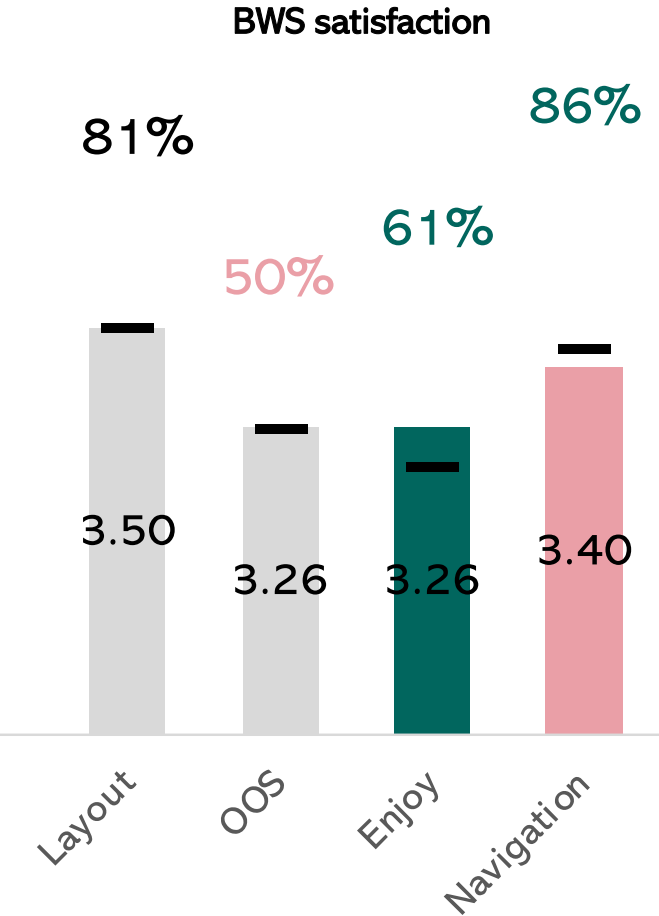


Growth of snacking here – does the fixture need to acknowledge this

# Don't forget shopper satisfaction will also flag issues

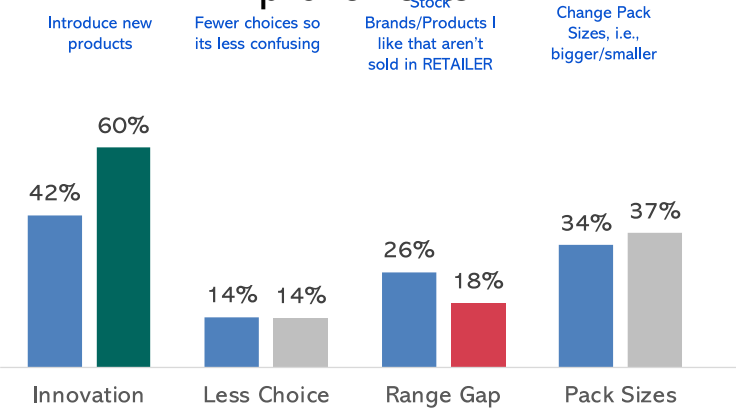


## Fixture execution

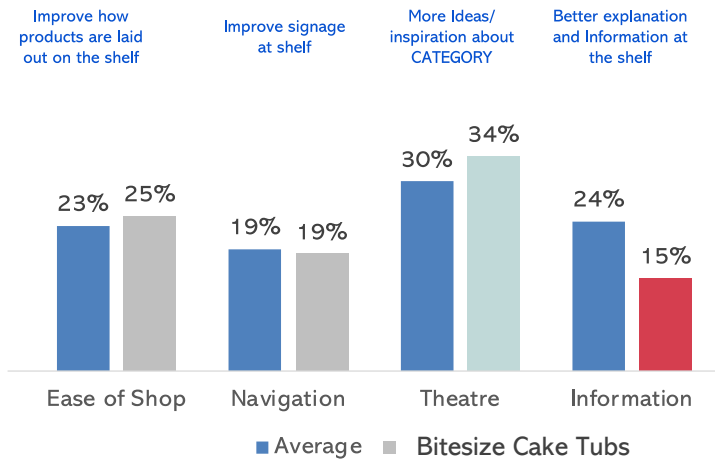


## What are shoppers asking for

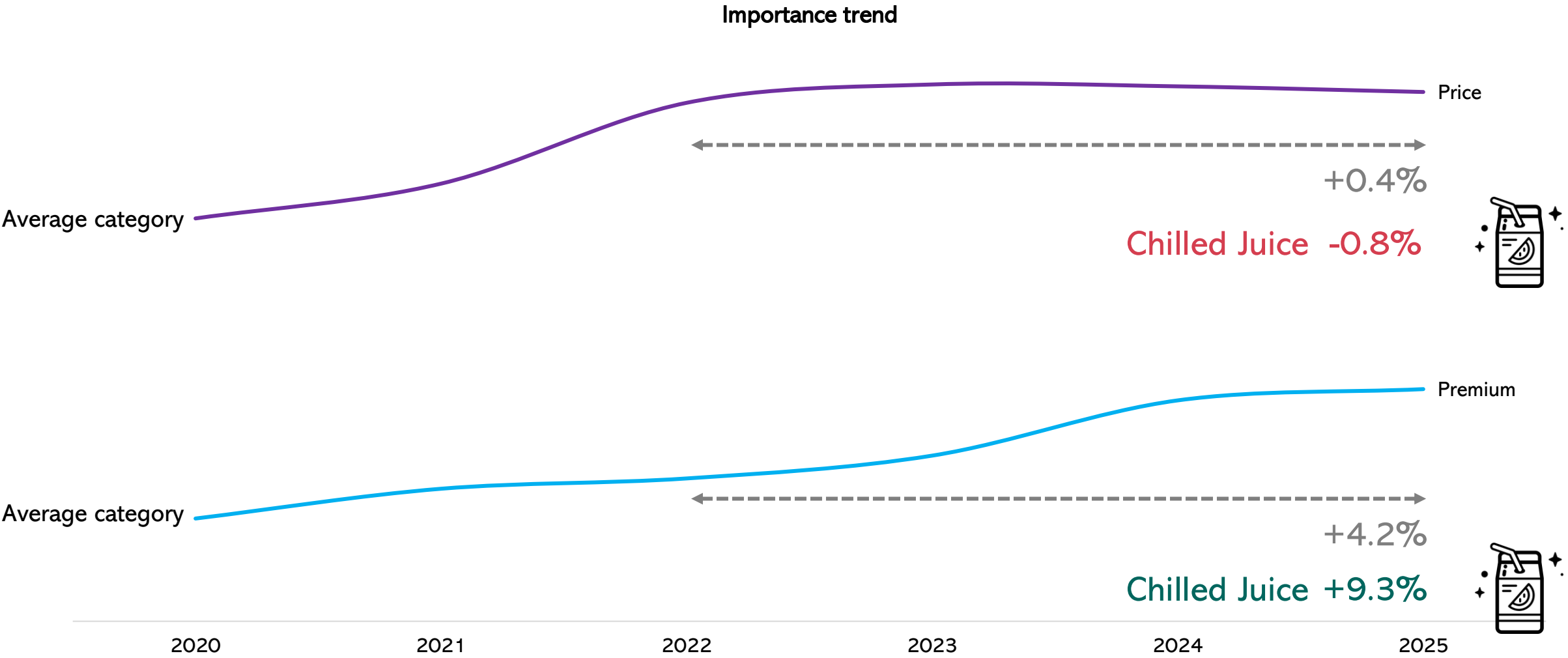
### Product improvements



### Display improvements



# Trends can also help us inform merchandising and layout, again not just around execution factors..



# Creating a compelling vision!



Two aspects we need to look at:





## Timings

When is it slated to happen

When is each key milestone for the project



## Mechanics

How does it actually get done, e.g. required steps

Where does it take place, e.g. Merch centre



## Guidelines

What retailer restrictions are there, e.g. % range change

Are there regional or affluence plans to consider



## Setup

How many plans are there, will they share them

What planogram software is being used

## Some actions to think about for this stage..



- Map out the critical path to make sure you don't miss out on the opportunity
- Ask your retailer to share the current plans and any specific guidelines they may have for the review
- Review plans, start with the most common and build up and down from there
- If you can't get plans, visit stores and get photos to work from
- Clarify the use of aspects like POS and theatre
- Keep all stakeholders informed throughout the process

# One final point:



If there is a more radical view or merchandising idea that comes out of the work you do, don't just dismiss it

This could be the perfect opportunity to pitch for a test store or stores

# Next time...

Next up in the Category Hacks series...



HOW TO MAXIMISE  
PROMO EFFECTIVENESS

discount  
35%

CATEGORY  
**HACKS**  
LESS WORK,  
MORE WINS!

2nd  
July

11 AM

**Shopper  
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The banner features a gradient background from orange to blue. On the left, a hooded figure with a black mask and white eyes holds a blue sign that says "CATEGORY HACKS" in large orange letters, with "LESS WORK, MORE WINS!" in smaller white letters below. Next to the figure is a white trophy with a blue diamond on top. In the center, a white-bordered box contains the text "2nd July" and "11 AM". On the right, a large green circular graphic contains the word "discount" in blue and "35%" in large green letters. The Shopper Intelligence logo and tagline are in the bottom right corner.

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