

HOW TO PREPARE FOR A RANGE REVIEW



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



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

One of the most important meetings you'll have!



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**

NEXT: How to **Conduct a Merchandising Review**

5. 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**



Our experts...



Chris Adkins



20+ Years FMCG Experience



Martin Baptie



25+ Years FMCG Experience



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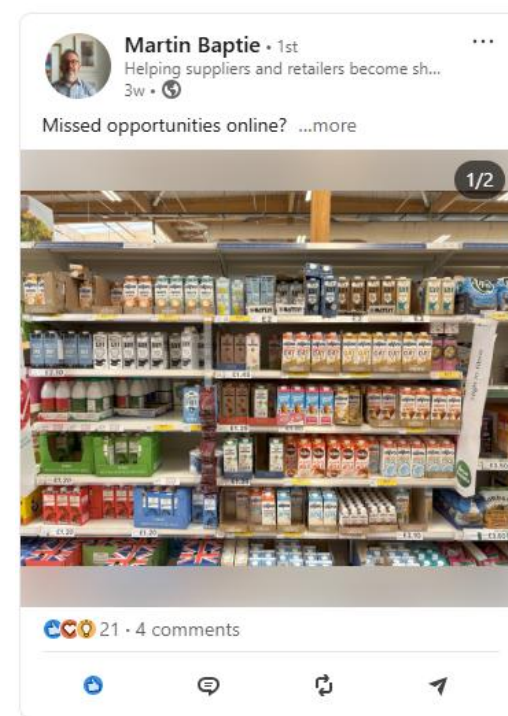
#martinsmusings



[linkedin.com/in/martinbaptie](https://www.linkedin.com/in/martinbaptie)

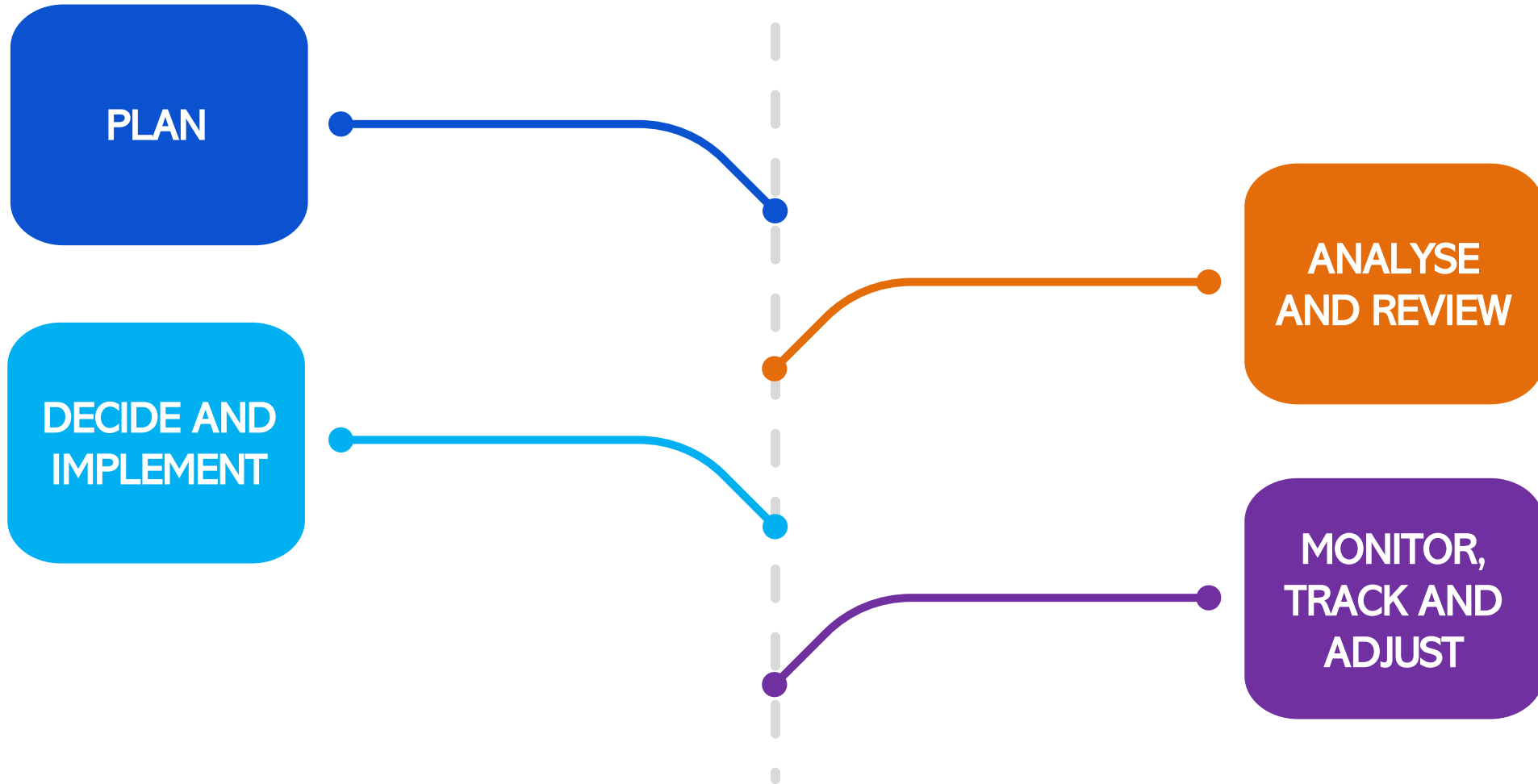


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How to prepare for a Range Review

Four steps to a successful range review:



Plan



Be clear on the objectives of the review



**Arrest a decline
in performance**



**Align range with
market**



**Improve shopper
loyalty**

Know your stakeholders and their current position



Shopper

- What are their current spending habits
- What are they not happy with
- What do they want to see improved



Internal

- What is the current portfolio of products
- What are the upcoming innovation plans
- Are there planned delists



Retailer

- What is the category vision
- Will macro strategy influence (e.g. health)
- Which teams need to be involved

Look for alignment, but prepare for differences



Don't forget to consider all the risks



- Category advisor/captain
 - Will you get a share of voice in the review
 - If not, how can you!
- What will your competition be telling the retailer
 - How can you prepare for this, e.g. wargames
- Is your business at risk from the review
 - Do you have SKU's in the range tail
 - What about distribution across the estate

Stay objective! Use data and insight to influence and demonstrate credibility



Analyse and review

Know your data sources, and how they help..



Data/Insight Type	Providers	Main Deliverable	Source	What does it give you?	Benefits	Risks/Limitations
Scan / Epos	Nielsen IRI/Circana	Volume/Value by SKU Distribution, Rate of Sale	Sales Data	What has been sold and where?	Detailed SKU performance	Backward looking Expected (everyone has it - no unique view)
Panel	Kantar Worldpanel Nielsen Homescan North Star Illuminator	Penetration Trip spend Weight of Purchase Frequency	Sales Data Demographics	Who is buying what, where and how often? What are the purchase trends?	Identify buying behaviour trends	Limited 'panel' of shoppers Doesn't explain the 'why'
Loyalty	Dunnhumby Quantum Coop Hive Nectar 360	Volume / Value by Sku Trip Spend Weight of Purchase Frequency	Sales Data Demographics	Who is buying what by retailer? What are the purchase trends by retailer?	Detailed retailer understanding Broader purchase behaviour ('in my basket')	Specific to one retailer Not shareable
Top line/Market	IGD Shopper Vista Mintel Euromonitor Lumina	High level view on big topic items (e.g. Health, Cost of Living) Market overviews	Shoppers Consumer	Market level sentiment Macro trend understanding	Good for framing retailer discussions Top-to-top discussions	Limited level of detail
Large Scale Quant	Shopper Intelligence	Category/segment/brand level insight Ongoing coverage Tailormade content	Shoppers	In depth shopper and category understanding Critical contextual insight Depth to brand, segment, shopper type	Applicable to most day-to-day and strategic challenges Provides a retailer lens (in their language) Cost effective, high ROI Shareable across the market	New way of working needs to embed
Custom Quant	Multiple/Ad Hoc	Bespoke content Usually category or brand level	Shoppers Consumers	Customised coverage Broad potential scope	Deep knowledge of chosen focus area Designed to meet specific objective	Expensive and potentially 'one-off' Less scope for broader application
Custom Qual	Multiple/Ad Hoc	Deep dive on specific topic	Shoppers Consumers	Varied methodology to meet needs In depth understanding on specific topic	Very tailored to specific questions Good 'sound bites' to engage retailers	Limited scale could be misleading Category objectivity
Shopper Community Providers	Multiple	Bespoke content Usually category or brand level	Shoppers	Custom 'panel' to build relationship with Broad potential scope	Quick to get answers Tailored to specific needs	Limited re-use Category objectivity
Quick Response	Attest Vyper	Bespoke content Usually brand driven	Shoppers Consumers	Product/consumer understanding Customised coverage/content	Good for testing product development Speed of response	DIY approach required Large commitment (credits)
Free Stuff	Internet Others	High level view Typically shaped around 'hot topics' at the time of release	Shoppers Consumers	Broad knowledge	Good for framing presentations	Accuracy and source Not specific for needs

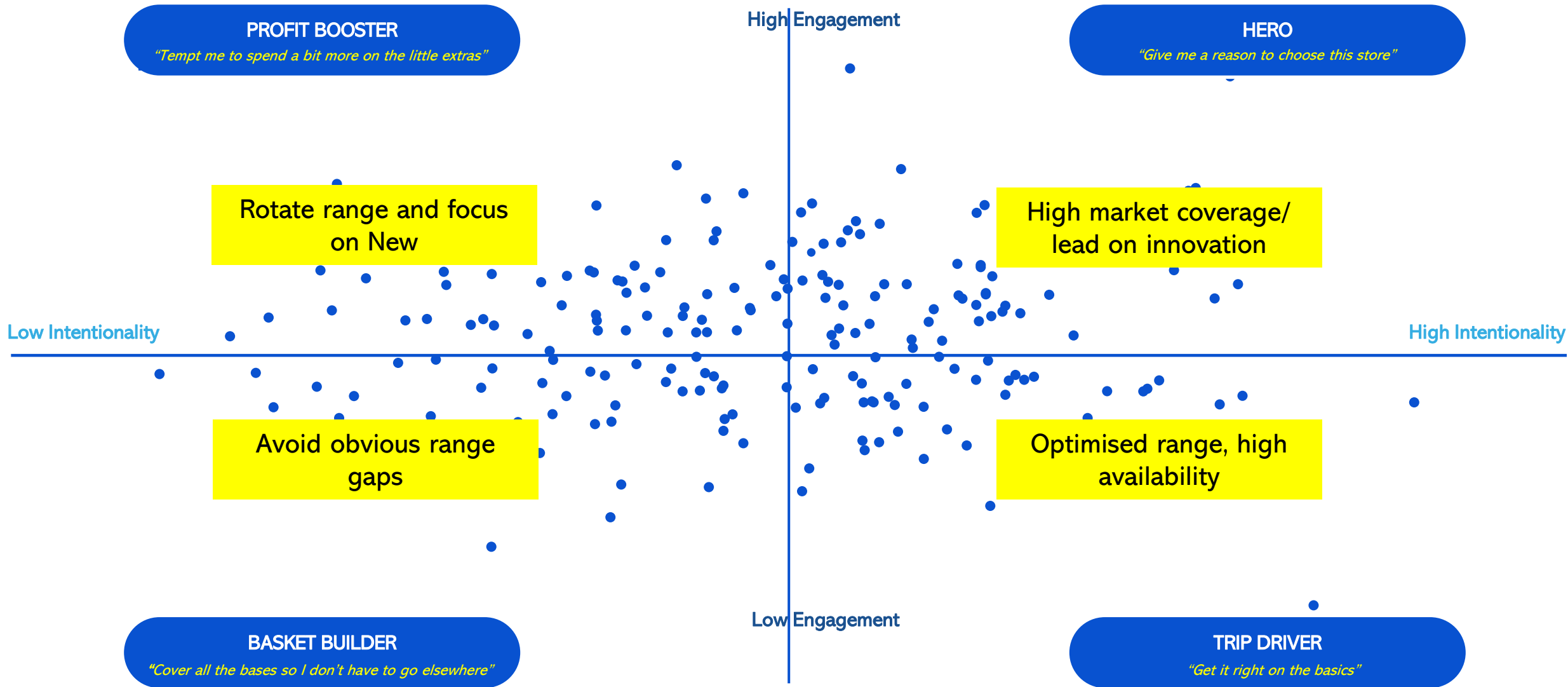
It shouldn't just be about market performance!

WHAT

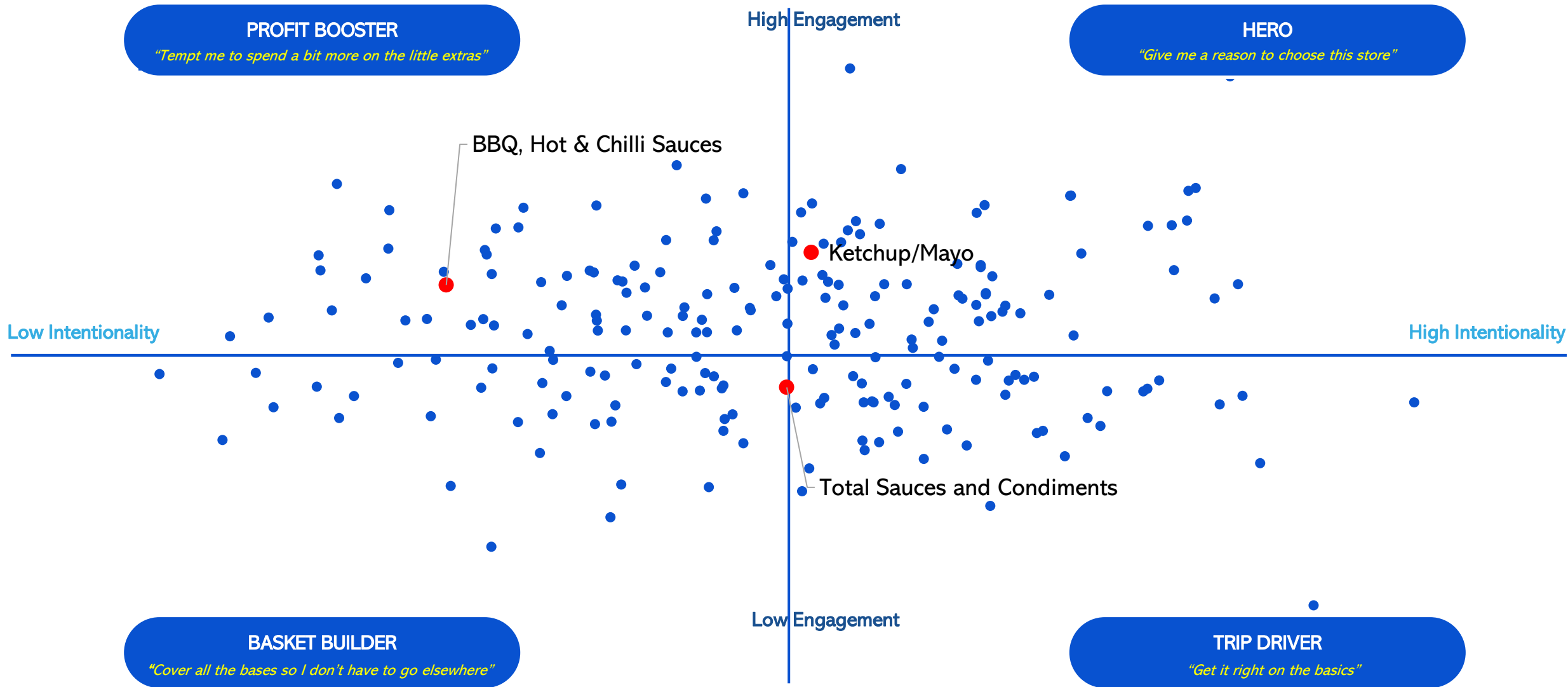


WHY

Category role for example, has a big role to play in range plans



Even within categories shoppers tell us they want different things:



Consider trends, historical and predictive



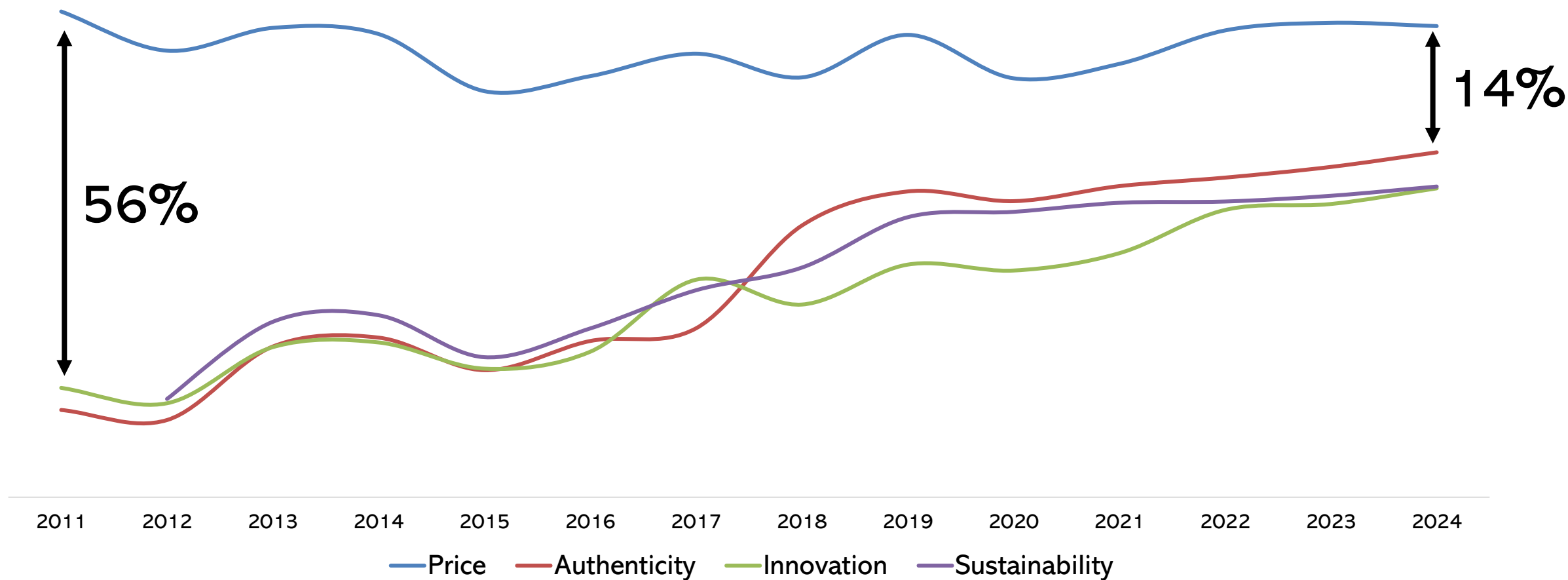
**What are the
declining
category
segments**



**What are the
emerging
shopper /
consumer
trends**

Remember this, we shared it last year..!

Change in Importance to shoppers: 10-year trend



Gap analysis is also critical!



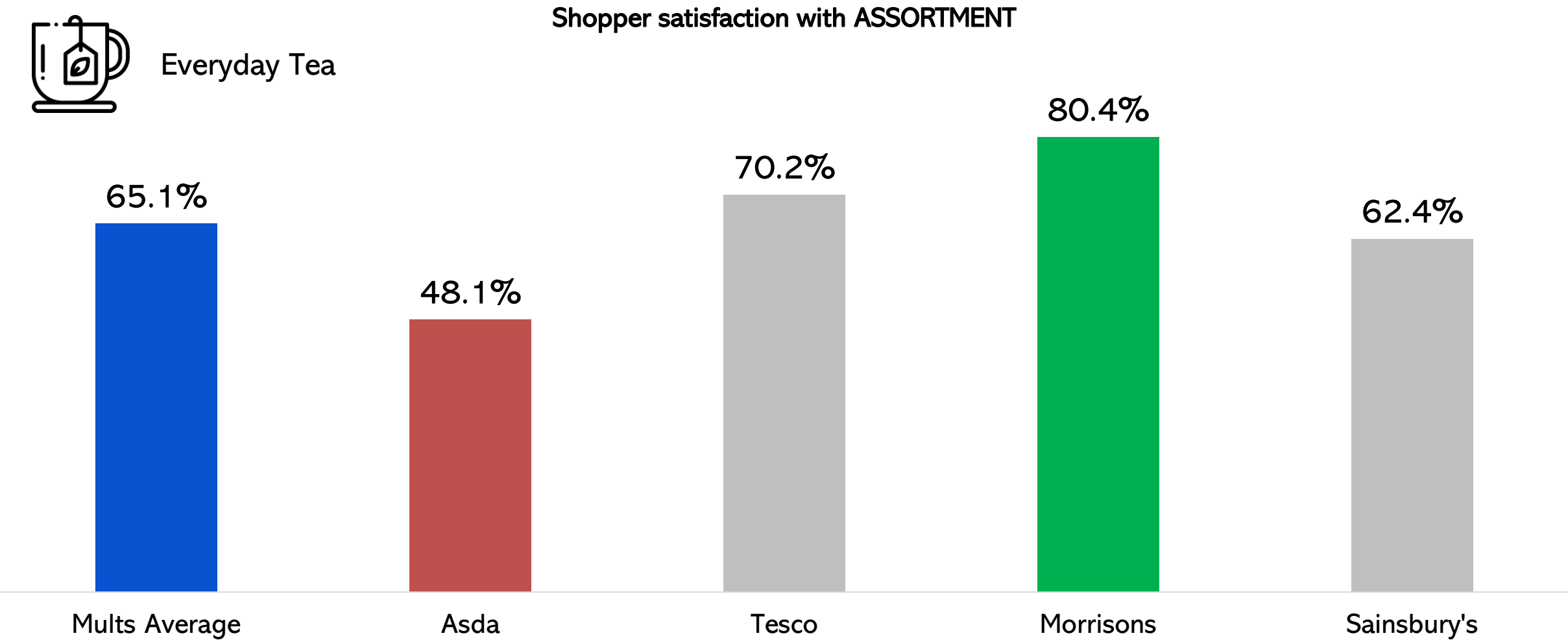
- How does range compare to the rest of the market, are other retailers carrying different options
- What do shoppers think, how does current satisfaction compare
 - within the category and key segments
 - across retailers

Shoppers can tell us where to focus..

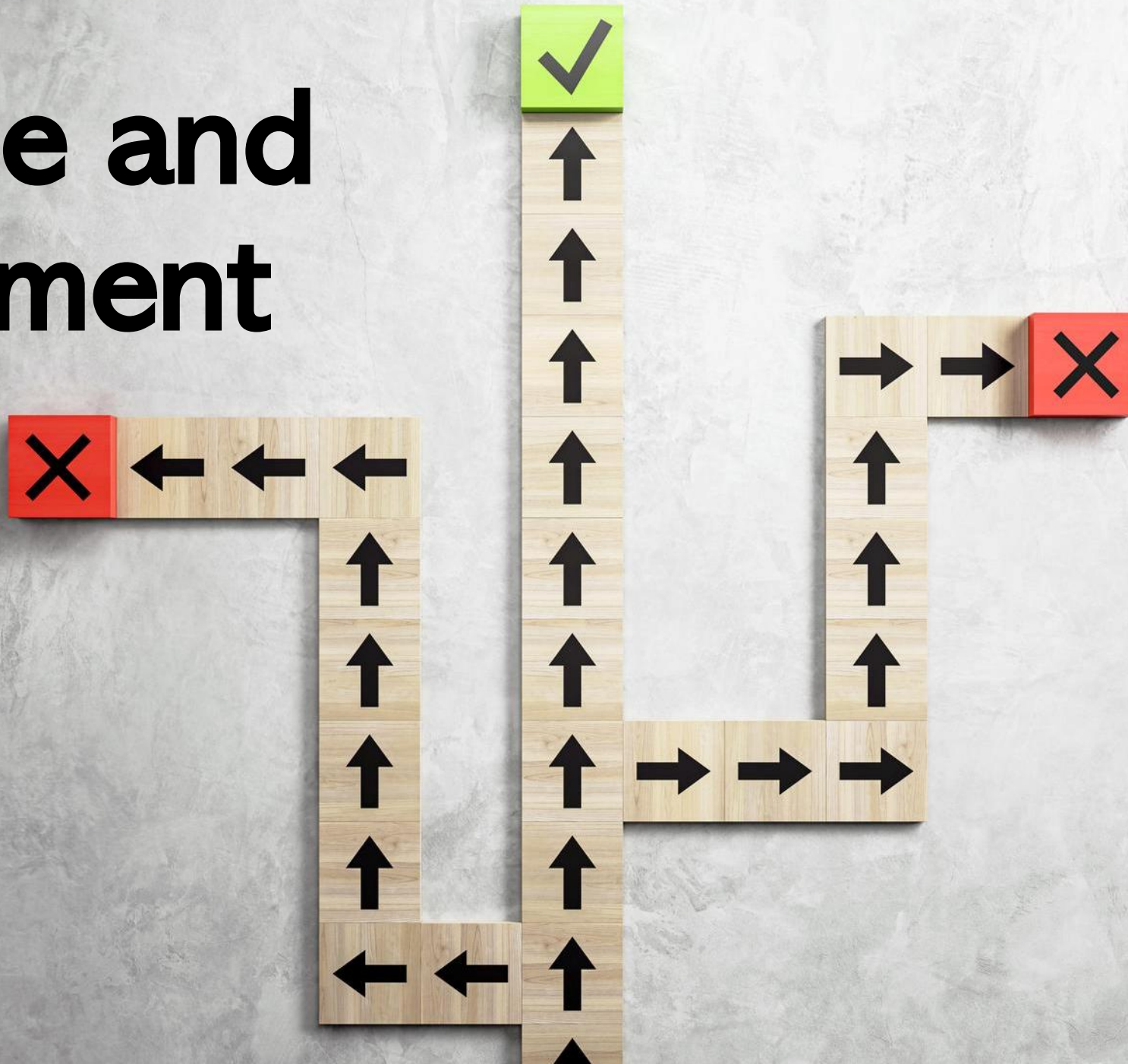


Everyday Tea

Shopper satisfaction with ASSORTMENT



Decide and implement



We need to make decisions now and also think about what success looks like



Priorities

Key segments, delists, etc.



Targets

Performance and shopper

All of this needs to align to the retailer review process



**Range review
timelines**

**Sign-off
process**

**Plannogramming
process**

...and align to the retailer's strategy



- Range reduction targets
- Health and sustainability agenda
- Pricing strategy
- Innovation goals
- PL vs. Brand mix

Tackling the innovation question..

Low Importance
High Satisfaction

High Importance
High Satisfaction

You may be doing too much

Focus innovation in categories where it is more important

Maximise space and remain on the front foot of innovation developments to ensure

Recommend regular reviews

Opportunity to improve frequency, feature & products being launched to meet needs

Medium priority for change

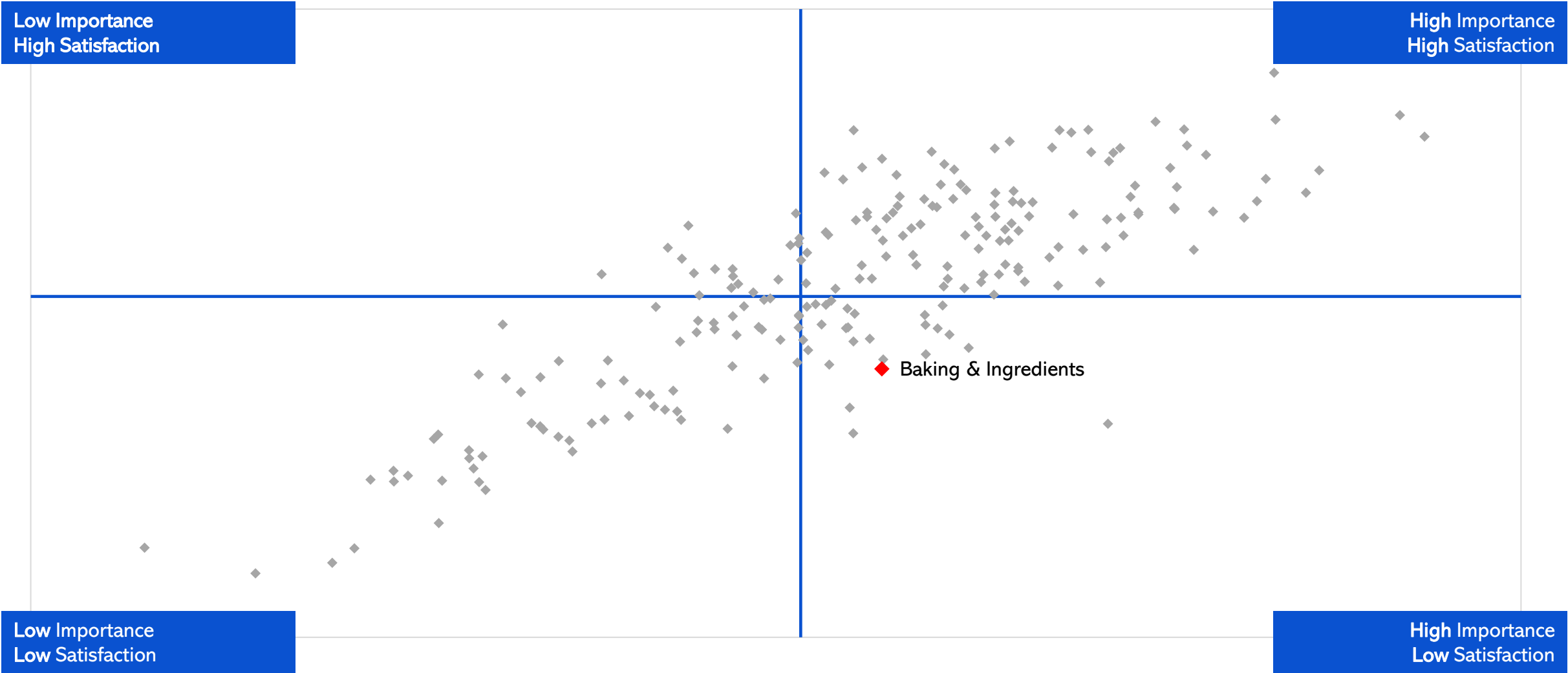
Innovation does not meet shopper expectations

Improve Innovation plan as a matter of urgency; products, frequency & level of feature

Low Importance
Low Satisfaction

High Importance
Low Satisfaction

There are a number of categories we see that shoppers tell us could benefit from better innovation



Importance = 1 (not important) to 5 (most important); Satisfaction = % net agreement with Innovation statement; Retailer/All Categories

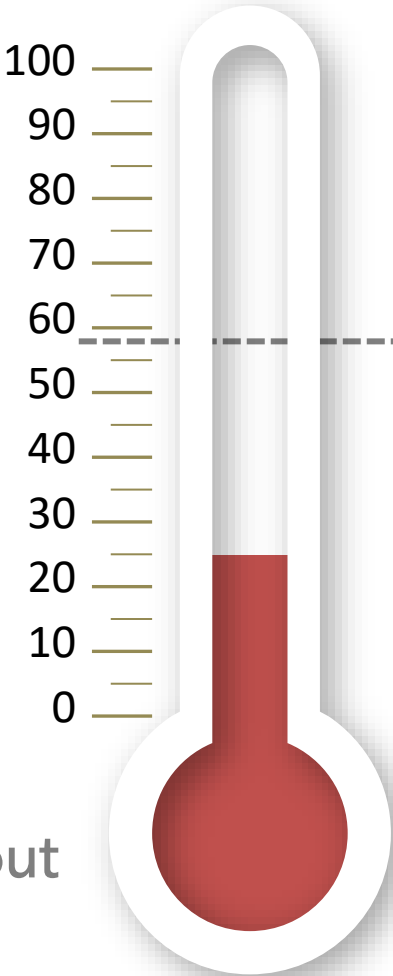
What about the PL vs. Brand mix



Less likely to try
Retailer Private Label in
the category

Less need for extensive
PL range

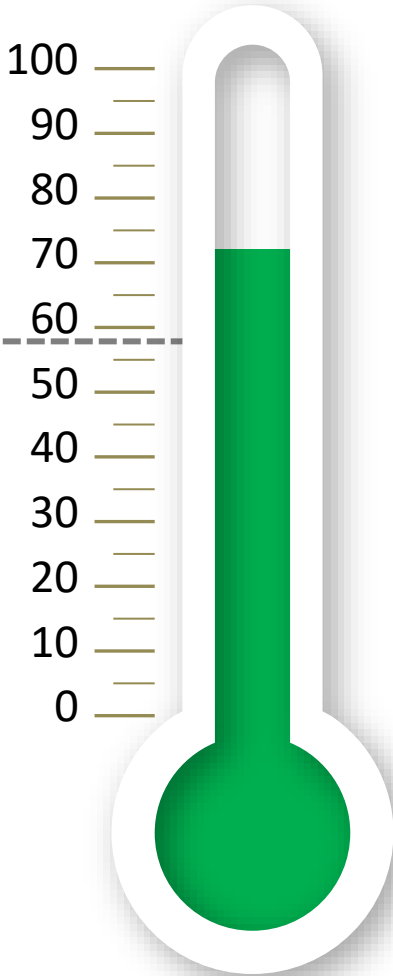
Bitter/Ales/Stout



More open to trying
Retailer Private Label in
the category

More need for extensive
PL range

Herbs and Spices



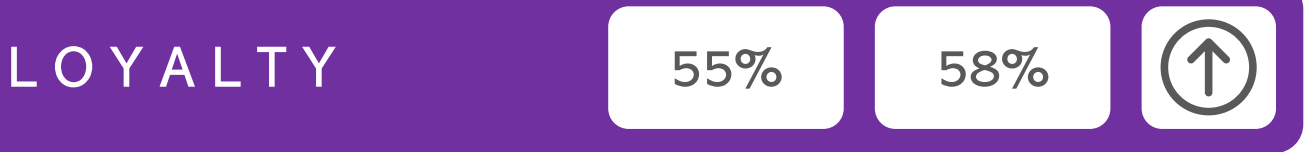
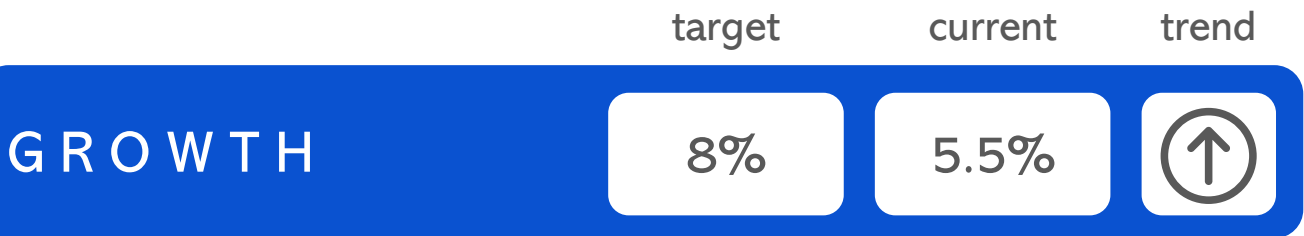
Monitor, track and adjust

The background of the image shows a close-up, slightly blurred view of a document with several rows of checkboxes. Some checkboxes are marked with green, purple, and orange ink. Below the document, the top edge of an orange computer keyboard is visible, showing several keys.

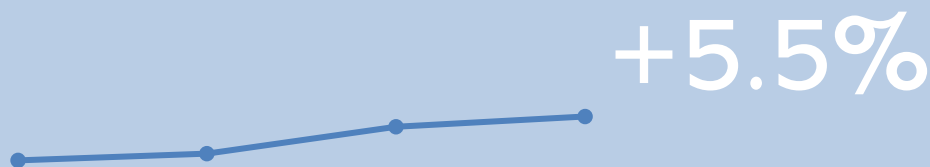
Track what matters!



Create a category focussed scorecard, aligned to the initial plan



sales growth by quarter



range satisfaction by quarter



Set scheduled performance reviews to analyse progress



	01 Jan	02 Feb	03 Mar	04 Apr	05 May	06 Jun	07 Jul	08 Aug	09 Sept	10 Oct	11 Nov	12 Dec
IMPLEMENTATION												
REVIEW ONE												
REVIEW TWO												

- Our new quarterly tracking means this is now possible for shopper metrics as well as sales and volume performance
- Track how your range review is influencing shopper perceptions and behaviours

Be prepared and plan for tweaks..



Next time...

Next up in the Category Hacks series...



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4th
June

11 AM



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