Category management analytics

Confectionary manufacturer

Developed dynamic sales performance trackers and executive-level dashboards with actionable insights for driving growth by improving sales performance of key brands across retailers

Confectionary manufacturing company needs syndicate data to drive analytics and reporting

Picture this…

You're looking for partnering with the category management team on a long-term basis to develop dynamic sales performance trackers and executive-level dashboards with actionable insights to enable data-driven decisions. Currently, you are focused on driving growth by improving sales performance of key brands across retailers by seizing distribution opportunity, improving sales velocity and efficiency of promotional events

You turn to Accordion.

We partner with your team to developed dynamic sales performance trackers and executive-level dashboards with actionable insights for driving growth by improving sales performance of key brands across retailers, including:

1) Creating **~70 performance trackers and analytical models (adaptable to changing business scenario)** to measure the KPIs that impact sales performance (distribution, pricing, sales rate, promotional performance, competitive threat etc.) with flexibility to view the report at various levels (SKU, brand, retailer, sales channel etc.)
2) Leveraging **third-party syndicated database (IRI)** to drive the reporting trackers and models - setup the algorithms for various metrics, creating custom aggregates and calculations in the database.
3) Developing streamlined and robust process for monthly update of trackers and models including data cleansing and consolidation of raw data

Your value is enhanced.

You have trackers and analyses provided the client with a reliable and structured view of category and brand performance, enabling the client to identify opportunities for increasing market share. You have trackers that are leveraged for negotiating deals with the retailers to increase shelf space, implement effective promotional events, deciding the retail price to optimize margins etc.

KEY RESULT

VALUE LEVERS PULLED

- Sales performance trackers
- Executive level dashboard

Opportunity assessment

Description | Estimates $ sales opportunity (i.e., incremental $ sales that can be realized) for a brand at a selected geography by increasing the distribution (achieved by setting target distribution at a pack type level) of the brand at that geography

White Space Opportunity for BRAND 1 - Aggregated

Legend — Please select from dropdowns

Select Channel Food

Select Retailer Food and Groceries

Please select Target ACV% from dropdowns below

Legend:
ACV / $ Opp ($ '000s)

Avg weekly % ACV and Annualized $ sales opportunity by pack type for product aggregates at selected geography

Pack type →	Pack Type 1	Pack Type 2	Pack Type 3	Pack Type 4	Pack Type 5	Pack Type 6	Pack Type 7	Total
Set Target ACV	70%	60%	75%	95%	80%	50%	70%	
BRAND 1 Agg. A	10.4% $528	0.1% $0	35.6% $506	85.9% $1,436	52.4% $1,097	26.7% $1,096	46.2% $1,523	90.6% $6,187
BRAND 1 Agg. B	0.0% $0	0.0% $0	3.9% $214	55.2% $836	18.0% $840	0.0% $0	6.9% $1,329	67.2% $3,220
BRAND 1 Agg. C	0.0% $0	0.0% $0	5.2% $88	9.9% $434	4.0% $438	0.0% $0	0.0% $0	14.0% $960
BRAND 1 Agg. D	0.0% $0	0.1% $80	0.0% $0	0.0% $0				0.2% $80
BRAND 1 Agg. E				21.0% $918				21.0% $918
BRAND 1 Agg. F				8.5% $846				8.5% $846
BRAND 1 Agg. G	0.0% $0	0.0% $0	0.0% $0	9.2% $438	0.0% $0	0.0% $0	0.0% $0	9.2% $438
BRAND 1 Agg. H	0.0% $19	0.0% $0	0.0% $0	3.9% $232	27.1% $921			30.7% $1,172
BRAND 1 Agg. I				4.3% $165	0.0% $0			4.8% $165
BRAND 1 Agg. J	23.1% $791	0.0% $0	0.0% $0	0.0% $0	0.0% $0	0.0% $0	0.0% $0	23.1% $791
Brand 1 Total	29.5% $1,338	0.2% $80	36.0% $807	88.8% $5,305	57.6% $3,296	26.7% $1,096	46.4% $2,852	92.6% $14,775

Dropdowns for selection of retailer or channel

Dropdowns for setting Target ACV at pack-type level

Actual ACV and $ opportunity at an aggregate pack-type level

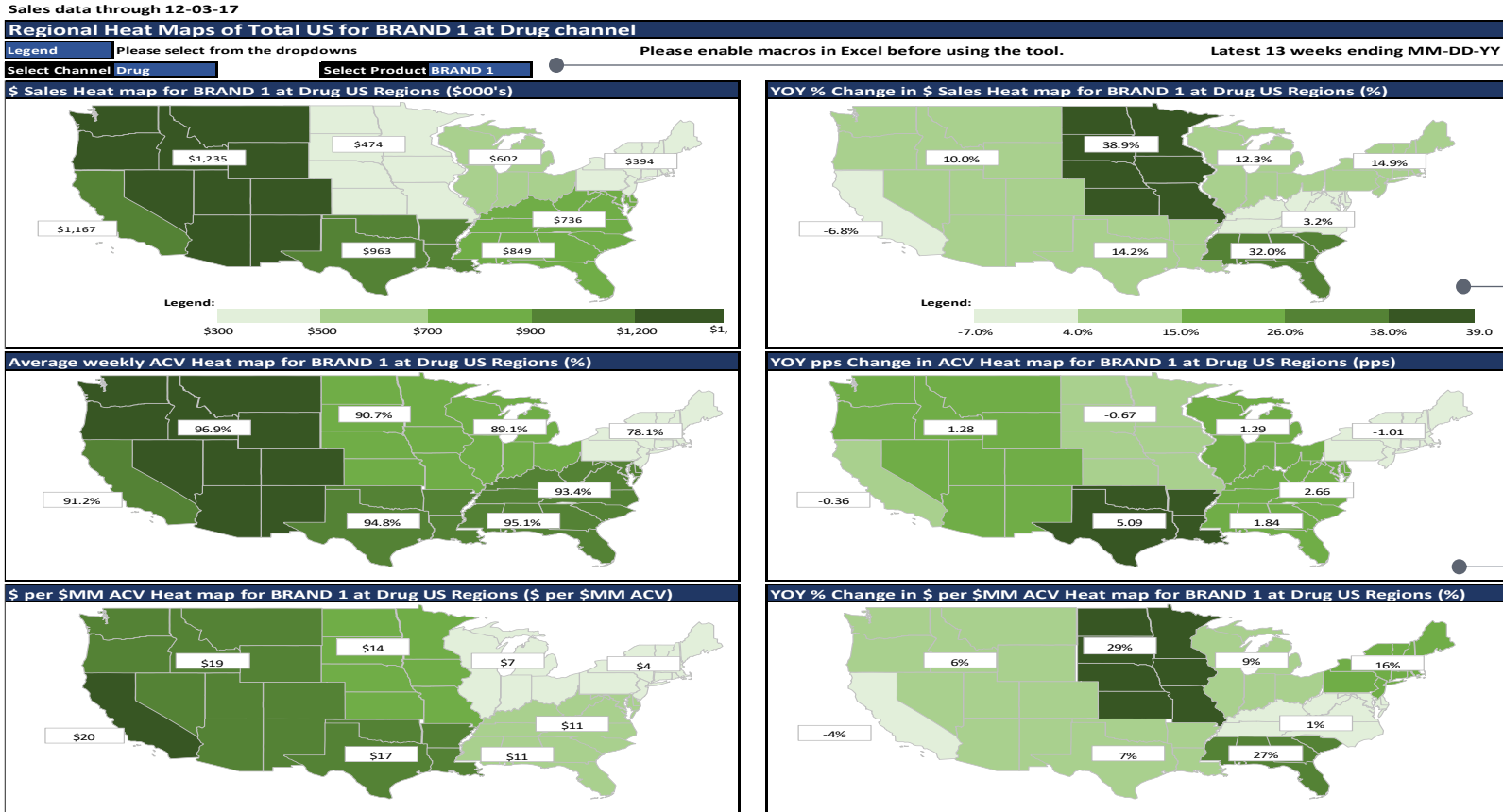**Total $ Opportunity for BRAND A at Food and Groceries**

Impact | This report enabled the client to identify and capitalize on distribution opportunities at a brand-retailer level with the highest impact on the top-line performance

Geographic heat maps of key performance indicators

Description

Shows heat maps indicating sales and distribution performance in the latest 13 weeks for the selected channel-product combination across different regions in US. Heat maps for $ sales, distribution (ACV) and velocity ($ per $MM ACV) with YOY change are shown.

Sales data through 12-03-17

Regional Heat Maps of Total US for BRAND 1 at Drug channel

| Legend | Please select from the dropdowns | Please enable macros in Excel before using the tool. | Latest 13 weeks ending MM-DD-YY |

Select Channel **Drug** Select Product **BRAND 1**

$ Sales Heat map for BRAND 1 at Drug US Regions ($000's)

Legend:
$300 $500 $700 $900 $1,200 $1,

YOY % Change in $ Sales Heat map for BRAND 1 at Drug US Regions (%)

Legend:
-7.0% 4.0% 15.0% 26.0% 38.0% 39.0

Average weekly ACV Heat map for BRAND 1 at Drug US Regions (%)

YOY pps Change in ACV Heat map for BRAND 1 at Drug US Regions (pps)

$ per $MM ACV Heat map for BRAND 1 at Drug US Regions ($ per $MM ACV)

YOY % Change in $ per $MM ACV Heat map for BRAND 1 at Drug US Regions (%)

Dropdown for selection of channel and Brand

$ Sales and YOY chg. in $ sales across US Geographic regions for the selected Channel-Brand combination

Factors driving sales (distribution and Sales rate) and YOY chg. in these factors

Impact

- This report enabled the client to view comparative strength and performance of a brand across US regions (for a sales channel)
- It was also used to identify the cause of sales performance i.e., impact due to distribution or velocity at a brand - region level

Sales waterfall

Description	Shows the impact of different factors (new skus introduction, skus discontinuation, promotions, sales velocity and distribution) driving brand performance (yoy $ sales change) at a geography for the selected time period

Sales and promotion data through MM-DD-YY

Sales Waterfall for BRAND 1 at Retailer A

Legend	Please select from the dropdowns

Dropdowns for selection of geography, brand and time period

Select Geo. Hierarchy	Retailer	Select Product	BRAND 1	Select Time Period (weeks)	26

Select Retailer	Retailer A

Impact of different factors on Dollar Sales for BRAND 1 at Retailer A in latest 26 weeks

Waterfall chart — Dollar Sales ($ 000's):
- Year Ago: 260.5
- New SKUs Introduced: 97.5
- Old SKUs Discontinued: 0.0
- ΔDist. +ve & ΔVel. +ve: 41.2
- ΔDist. +ve & ΔVel. -ve: -0.6
- ΔDist. -ve & ΔVel. -ve: -49.2
- ΔDist. -ve & ΔVel. +ve: -12.9
- Current Year: 336.5

Factors impacting Sales / Existing SKUs
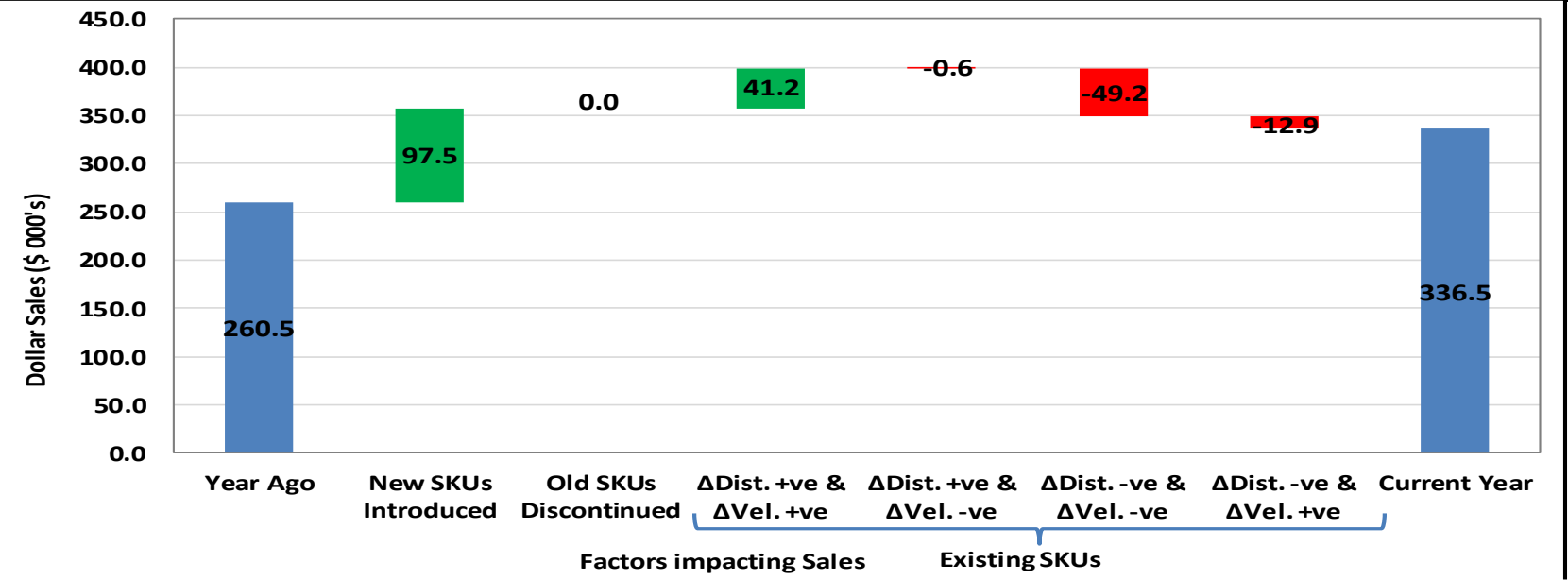
Factors impacting sales performance:
New SKUs
Discontinued SKUs
Change in SKUs distribution
Change in SKUs velocity

impact	• This report was leveraged by the client to view the aggregated impact of sku level behavior on the brand enabling them take appropriate actions to enhance brand performance • It also enabled the client to assess the performance of promotional activity for brands to plan future promotions

Seasonal performance (Christmas)

Description

Shows performance of category (and client) for a season broken up by manufacturers, brands, skus, segments and sub-segments at the selected geography

Christmas Performance by Non-Chocolate Segment for Category and COMPANY at Retailer A

| Select Channel | Convenience Stores |
| Select Retailer | Retailer A |

Dropdowns for selection of geography

Products ↓	CY $ Sales	YA $ Sales	YOY Chg in $ Sales	YOY % Chg in $ Sales	$ Share of Segment	YOY Chg in $ Share Segment (pps)	$ Share of Season	YOY Chg in $ Share of Season
Category - Christmas	**$31,297,249**	**$29,780,503**	**$1,516,746**	**5.1%**				
SEGMENT A	**$10,120,588**	**$9,938,793**	**$181,795**	**1.8%**			**32.3%**	**-1.04**
SUB SEGMENT A1	$3,985,928	$4,284,673	-$298,745	-7.0%	39.4%	-3.73	12.7%	-1.65
SUB SEGMENT A2	$2,565,986	$2,886,955	-$320,969	-11.1%	25.4%	-3.69	8.2%	-1.50
SUB SEGMENT A3	$1,979,923	$1,806,899	$173,024	9.6%	19.6%	1.38	6.3%	0.26
SUB SEGMENT A4	$1,402,741	$785,772	$616,969	78.5%	13.9%	5.95	4.5%	1.84
SUB SEGMENT A5	$186,010	$174,494	$11,516	6.6%	1.8%	0.08	0.6%	0.01
SEGMENT B	**$6,691,082**	**$6,284,636**	**$406,447**	**6.5%**			**21.4%**	**0.28**
SEGMENT C	**$8,102,895**	**$7,596,320**	**$506,575**	**6.7%**			**25.9%**	**0.38**
SUB SEGMENT C1	$4,306,457	$4,186,806	$119,652	2.9%	53.1%	-1.97	13.8%	-0.30
SUB SEGMENT C2	$2,483,746	$2,465,762	$17,984	0.7%	30.7%	-1.81	7.9%	-0.34
SUB SEGMENT C3	$1,200,776	$729,138	$471,638	64.7%	14.8%	5.22	3.8%	1.39
SUB SEGMENT C4	$111,915	$214,614	-$102,699	-47.9%	1.4%	-1.44	0.4%	-0.36
SEGMENT D	**$6,382,684**	**$5,960,754**	**$421,929**	**7.1%**			**20.4%**	**0.38**
COMPANY - Christmas	**$7,419,001**	**$7,390,961**	**$28,040**	**0.4%**				
SEGMENT A	**$256,434**	**$173,430**	**$83,004**	**47.9%**			**3.5%**	**1.11**
SUB SEGMENT A1	$227,268	$130,257	$97,011	74.5%	88.6%	13.52	3.1%	1.30
SUB SEGMENT A2	$29,166	$43,173	-$14,006	-32.4%	11.4%	-13.52	0.4%	-0.19
SEGMENT B	**$2,564,057**	**$2,860,370**	**-$296,313**	**-10.4%**			**34.6%**	**-4.14**
SEGMENT C	**$4,156,699**	**$3,955,036**	**$201,663**	**5.1%**			**56.0%**	**2.52**
SUB SEGMENT C1	$3,229,115	$3,058,731	$170,383	5.6%	77.7%	0.35	43.5%	2.14
SUB SEGMENT C2	$709,914	$670,649	$39,265	5.9%	17.1%	0.12	9.6%	0.49
SUB SEGMENT C3	$187,806	$181,341	$6,465	3.6%	4.5%	-0.07	2.5%	0.08
SUB SEGMENT C4	$29,864	$44,314	-$14,450	-32.6%	0.7%	-0.40	0.4%	-0.20
SEGMENT D	**$441,811**	**$402,125**	**$39,685**	**9.9%**			**6.0%**	**0.51**
SUB SEGMENT D1	$376,423	$379,937	-$3,514	-0.9%	85.2%	-9.28	5.1%	-0.07
SUB SEGMENT D2	$58,732	$17,561	$41,172	234.5%	13.3%	8.93	0.8%	0.55
SUB SEGMENT D3	$6,656	$4,628	$2,028	43.8%	1.5%	0.36	0.1%	0.03

Table showing category and client performance by segment and sub-segment for christmas season

Impact

- This report enabled the client benchmark their performance with respect to the category and competitors at various levels, e.G., Segment, brand and SKU, to identify major opportunity areas
- It was also leveraged by the client to analyze price performance of seasonal skus to initiate pricing action and plan promotional drives at retailers

ACCORDION