

## Building the Right Performance Support for Your Category Management Efforts

We define "Performance Support System" as the combination of on-line support, reference materials and training programs you make available to help your people understand and use a category management program in their work situations. It is important when designing your category management learning experiences to consider all three of these elements as one integrated system.

Building the right performance support system for your category management program begins with a look at some basic logistical and administrative issues:

- The size, distance and geographic dispersion of your audience
- Other current opportunities for group learning (i.e., where you might include training in the agenda of an already scheduled sales meeting)
- How quickly the training must be accomplished
- Budget limitations for the delivery process
- Levels of personnel turnover, and the degrees of repetitive training required
- Learning opportunities presented by the format in which the category management program is being delivered (e.g., what combination of computer, print, video deliverables are involved)

Of course, it is best that up-front planning for any category management program includes discussions and decisions about the learning strategies to be used, both in the development of the program and its delivery. Our experience indicates that these up-front discussions should deal with answers to these questions:

- What degree of KNOWLEDGE MANAGEMENT does the program require? Applying a category management program effectively means that the person using it must be skilled at reading, interpreting and manipulating large and often diverse information and data resources.

- What degree of DISTANCE LEARNING should be necessary? Consider the number and variety of different geographic locations where training must be provided. Most sales organizations are geographically dispersed, with little opportunity for bringing them into group situations for ongoing category management training. This means it may be appropriate to build distance learning tactics (e.g., video conferencing, software with built-in tutorials, interactive video and/or CD-ROM deliverables) into the plan for your category management program.
- What degree of JUST-IN-TIME LEARNING should be necessary? Consider whether the category management training must be available to individuals at a moment's notice, where these persons are likely to be located, and the technology available to deliver a just-in-time learning opportunity to them. If your target audience for the training is equipped with laptop computers or can readily access a client/server system, for example, you might provide the learning opportunities via their computers.
- How much LEARNING CUSTOMIZATION is needed? Consider whether or not there will be differing versions of the category management program for different trade channels or market situations which might require more than one training approach. For example, if a cross-functional category team is involved in implementing a principal's category management program, you may need to create custom learning modules for each of their functions that describe how the functions support team efforts. Another example: a category management program developed for the retail, food service and military trade channels of a principal's business may share some common training material, but also require special learning modules specific to the responsibilities of three separate sales forces.

- How will LEARNING BE SHARED PRODUCTIVELY AS THE PROGRAM DEVELOPS? Sharing best practices and experiences in an effective, timely fashion as a category management program develops and starts generating results is a key learning opportunity for broker and principal alike. Plan up-front, how lines of communication, evaluation, reporting and other issues will become avenues for sharing with and learning from each other.
- How should PERSONAL LEARNING PERFORMANCE be measured? As with every training initiative, performance measurement tactics should be built into every category management learning process. Consider what combination of hands-on measurement (where a person's performance is actively monitored by someone else) and hands-off measurement (where a person's performance is measured principally by that individual) you want to use. Generally, category management programs lend themselves to a self-directed, self-paced type of learning approach, with strong, hands-off measurement tactics integrated into the program. For example, a trainee might complete a self-directed learning module covering "category merchandising factors and opportunities," and then be directed to a self-grading application exercise requiring him to integrate what he has previously learned about category demographics with the merchandising segment.

When you get into these discussions of learning strategy in conjunction with planning for a category management program, invariably you will begin talking about what delivery technology is available to you and makes sense for your business. Multimedia training approaches (e.g., text and data combined with high-quality skills, motion/interactive video, animation with or without sound) have definite advantages from both learning theory and cultural standpoints. After all, we are a generation of multimedia junkies. But multimedia training remains expensive and generally is justified only when the learning program it supports is going to be used continually. There is one learning technology, however, that we have singled out here for special

attention because of its special significance and promise. That technology is computer-based learning.

### **Computer-Based Delivery for Category Management Learning**

Because leading-edge category management programs are often designed, presented and delivered via computer, a computer-based learning (CBL) strategy can be very effective for training. CBL can be expensive to create. We have seen creative budget estimates ranging from a high of 100 hours of development time for each one hour of CBL down to eight hours of development for one hour of CBL. But we have also found that close attention to the capabilities of the software used in creating the category management program itself and careful, creative application of CBL learning strategy can produce embedded CBL at a cost that is competitive with straight print deliverables. Consider the fact that a category management program with imbedded CBL can be easily distributed on diskettes or CD-ROMs to a sales force scattered around the U.S., guaranteeing that each individual receives the same training program. Compare that to the cost of bringing that same sales force into a central location for group training. That can make CBL a very attractive alternative.

Here are some examples of how CBL can be built into a computerized category management program in a cost-effective manner. None of the tactics we describe here requires specialized CBL authorware. All are ways you can write learning experiences directly into almost any category management program on the computer, regardless of the software used to create that program.

- Include HELP screens which can be accessed by the trainee as he reviews the program, if needed. When it comes to how many HELP screens should be created, err toward the high side. Any terminology, fact statement or concept which might be a stumbling block for the trainee deserves a HELP screen that explains it clearly and succinctly. The person writing these screens should have a good grasp of the category management program in all aspects...but also be someone who will not assume that any aspect of the program is self-explanatory.

- Include AUTHORS' IDEAS AND THOUGHTS with each distinct section and/or presentation page in the computerized category management deck that forms the program. This is a relatively easy way for the experts involved in development of the program to provide helpful and thought-provoking comments which supplement the actual data and information in the category management program.
- Include INTERACTIVE SOLUTION TEMPLATES in the category management program to not only make it easier for the trainee to design tailored account presentations, but also serve as a learning tool. A template which suggests how a person could present a merchandising solution for the category, for example, might double as a learning tool when you add an exercise such as this: "Use this template to develop what you believe is the best category merchandising solution for the above-described scenario. When finished, click the answer icon and compare your solution with the one described."
- Include THOUGHT-PROVOKING QUESTIONS AND CHALLENGE STATEMENTS at strategic and natural breaks in the category management program topics. This is similar to writing test questions and exercises into a printed piece of information literature such as a sales manual. As the trainee reviews the category management program on computer and comes to these planned topic breaks, he is directed to:
  - Answer some thought-provoking questions which help him rate his own understanding of what he has just read and studied.
  - Read some statements which challenge his understanding of the material and either defend or deny that statement.

In both cases, the trainee can then compare his answers to "expert" answers found in the CBL program. These CBL tactics can be used to embed effective learning experiences into any category management program that has been created on computer. They can also be part of a more complete and elaborate tutorial created to provide a total CBL experience that interacts with your category management program. This may require some use of

CBL authoring software, but will also build added value into the diskettes or CD-ROMs you deliver. For example, you gain greater ability to monitor and track each salesperson's learning progress as he works through the category management program, and then provide additional information or practice for those who need it, embedded directly in the same diskettes or CD-ROMs. CBL authorware in the hands of a good learning professional who is familiar with category management can result in an extremely effective learning package for your category management program. Expect, however, to budget 50 to 100 hours of development time for every one hour of finished CBL when you get into that degree of sophistication.

### **Focus on the People Who Will Make Your Category Management Program Work**

It is easy to get caught up in the research, data preparation, information development and deliverables of category management. The technology is exciting. The charts and graphics are carefully designed and aglow with color and valuable information. There is also a tendency to believe that as long as category management materials have been well prepared and look great, that any experienced salesperson should be able to take it and run with it.

### **The best category management program in our industry, however, is only as good as THOSE WHO MAKE IT WORK!**

That means that every successful category management initiative should begin with the commitment to equip people with the knowledge and skills to make category management pay off. As we have seen, the learning commitment to category management is two fold. Companies must empower those within their company who are responsible for implementing category management, and develop and execute a carefully planned learning strategy with every category management initiative their company takes.