IBM Shopper Insights Version 17 Release 1 February, 2017

Users' Guide



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Chapter 1. Overview

In this guide, you will learn how IBM Shopper Insights next-generation shopper-centric dashboards can help you better understand and serve shoppers. These dashboards provide insights into the behavior of shopper segments, geographies, and much more.

New Features in IBM Shopper Insights 17.1

In IBM Shopper Insights 17.1, many dashboard issues and bugs have been resolved to provide enhanced application usability and performance.

Before You Begin

Before you begin using Shopper Insights, make sure that you review the requirements for your system.

System Requirements

The following details standard system recommendations for using Shopper Insights.

	Recommended					
RAM	1.5 GB					
CPU	2 GHz					
Free Disk Space	100 MB					
OS	Windows 7 32-bit or 64-bit					
Browser	Internet Explorer 11 or higher					
	Note: Internet Explorer 11 in Enterprise Mode is not supported					
	Mozilla Firefox 14.0 or higher					
Google Chrome Version 39 or higher						
	The browser must have support of 128-bit encryption enabled.					
Export	Adobe Acrobat Reader 10.x or higher					
Applications	Microsoft Office 2003-2013					
Adobe Flash	Adobe Flash Player 11.x or higher					
Screen Resolution	1440 x 900 or 1920 x 1080					
Connection	T1					
Mouse	Three-button with scroll feature					

What is IBM Shopper Insights?

Shopper Insights is a shopper-centric tool you can use to view and analyze your data, providing powerful segment-based dashboards that can help your company make better pricing, promotion, assortment, and strategic decisions.



These dashboards integrate standard analyses with an intuitive graphical user interface:

Shopper Insights provides 21 dashboards, each containing vital information about your shoppers at various levels of analysis, from the enterprise-level Topline Dashboard to the individual item level, using granular drill-down dashboards like the Item Importance Dashboard. Using these interactive dashboards, you can research performance across:

- Shopper segments, using a variety of segmentation schemes
- Geographies and store clusters
- Different time periods using historical data

These dashboards provide a new outlook for analyzing your business — rather than focusing on the overall results of a promotion, pricing decision, or assortment choice, you can focus on your shoppers's specific behavior. This data can help you to increase effectiveness in reaching key segments by showing you which products, promotional activities, and other decisions are important to those high-value shoppers. Here are some of the questions you can answer with IBM Shopper Insights:

- Which segments should I target?
- What are the key sales drivers for those segments?
- What are my key value items (KVIs) and how valuable are other items by segment?

- What causes my most important shoppers to purchase more, or visit more frequently?
- What products are most effective for co-promotions?
- · Were my tactics effective for my targeted segments?

Getting Started

To get started using Shopper Insights, you can:

- Learn how Shopper Insights can change your business: "What can I do with Shopper Insights?" on page 5
- Learn how to navigate the dashboards: "How do I get Started?" on page 7
- Learn more about the dashboards: "Dashboard Overview"
- Get more details about specific dashboards: Chapter 2, "Using Shopper Insights Dashboards," on page 25

Related Topics

"What can I do with Shopper Insights?" on page 5

"How do I get Started?" on page 7

"Dashboard Overview"

Dashboard Overview

Each Shopper Insights dashboard provides a different perspective, offering new ways to aggregate and analyze your data. This can help you understand your shoppers' behavior and create effective programs to meet their needs.

Note: Some dashboards may not be available for your company.

- "Affinity Dashboard" on page 25: Demonstrates item co-occurrence, allowing you to see which items are frequently bought together, and might therefore be candidates for cross-promotion or cross-merchandising. It has attribute availability for filtering and report level.
- "Event Compare Dashboard" on page 26: Compares sales performance of products between two time periods, allowing you to evaluate promotions or events by segment. It has attribute availability for filtering. You can also run this dashboard by Aggregate + Detail.
- "Item Importance Dashboard" on page 28: Identifies how important a product is to a given segment. This allows you to see which items drive loyalty among particular segments, and where growth opportunities exist. It has attribute availability for filtering and report level. You can also run this dashboard by Aggregate + Detail.
- "KVI Dashboard" on page 29: Uses model-by-segment data to plot items by their relative elasticity and volume. The resulting quadrant analysis identifies categories of items such as image items and profit drivers.

Note: This dashboard may not be available for all retailers.

• "Multiples Per Trip Dashboard" on page 34: Shows how the selected items are purchased together on individual trips, providing insight into which segments purchase multiples per trip and how frequently multiples occur in trips during the selected time period. It has attribute availability for filtering. You can also run this dashboard by Aggregate + Detail. The maximum number of multiples is 50.

• "New Item Dashboard" on page 36: Enables analysts to assess the performance of a new product by segment, including detailed geography analysis.

Note: This dashboard may not be available for all retailers.

- "New Lost Retained Dashboard" on page 38: Depicts the buyer flow for an item showing new, lost and retained shoppers' purchasing behavior for the item by segment over the selected time period. It has attribute availability for filtering. You can also run this dashboard by Aggregate + Detail.
- "Overlap Dashboard" on page 39: Helps users understand which categories or items shoppers buy together over time or in the same trip, as well as items which are frequently purchased exclusively. It has attribute availability for filtering and report level.
- "Product Compare Dashboard" on page 41: Compares multiple products and multiple time periods allowing you to analyze consumer purchasing for all shoppers and by segment.

Note: This dashboard may not be available for all retailers.

- "Product Dashboard" on page 42: The Product Dashboard (also called Sales Behavior Dashboard by some retailers) provides breakdown of the key sales drives for categories and individual items by segment. This can help to drive business strategies and tactics.
- "Promotion Response Dashboard" on page 45: Shows changes in purchasing behavior in response to promotional activity, aggregated by segment and promotion vehicle. Lifts are available at both individual item and product group levels.

Note: This dashboard may not be available for all retailers.

- "Purchase Frequency Dashboard" on page 48: Provides insight into purchase patterns for the selected items, showing how the product performs among shoppers by purchase frequency and segment. It has attribute availability for filtering. You can also run this dashboard by Aggregate + Detail.
- "Purchase Summary Dashboard" on page 50: Enables users to compare key sales driver metrics across multiple product selections by segment. You can also run this dashboard by Aggregate + Detail.
- Sales Behavior Dashboard: Refer to Product Dashboard.
- "Sales Decomposition Dashboard" on page 52: Depicts the trends over time for key sales drivers among selected segments, geographies, and products.

Note: This dashboard may not be available for all retailers.

- "Sales Driver Dashboard" on page 54: Displays which metrics drive sales growth or decline compared to last year. It has attribute availability for filtering and report level. You can also run this dashboard by Aggregate + Detail.
- "Segment Compare Dashboard" on page 55: Enables comparison of segments across categories. This allows you to see how key items perform for various segments, and which segments may provide growth opportunities.
- "Segment Dashboard" on page 56: Shows detailed purchasing information for the selected segment, including trend insights, top items, and performance of the segment across a variety of geographies.

Note: This dashboard may not be available for all retailers.

• "Source of Volume Dashboard" on page 58: The Source of Volume dashboard is a way to understand shopper behavior within a category between two time periods. It helps us understand what switching is taking place and to dissect

where gains and losses are coming from for a group of products. The attribute availability is filtering for this dashboard. You are limited to 10 anchor products and can only export Net Switchers to Excel.

- "Time Series Dashboard" on page 59: Helps identify whether certain metrics, products, product attributes, or customer segment behaviors are changing over time
- "Topline Dashboard" on page 60: Shows a big-picture view of recent financial performance for the retailer, showing results for all departments by segment and drilling down to categories within specific departments for the key sales driver metrics.

Note: This dashboard may not be available for all retailers.

• "Trial and Repeat Dashboard" on page 65: The Trial and Repeat Dashboard (also called New Item Launch Dashboard by some retailers) helps you assess a new item's trial and repeat performance. Evaluate the product's sales, promotion response, repeat purchases, and average retail as distribution builds by segment and store grouping. The Trial and Repeat Dashboard has attribute availability for filtering. You can also run this dashboard by Aggregate + Detail.

What can I do with Shopper Insights?

IBM Shopper Insights provides a new way to visualize your enterprise, delivering key insights embedded within the workflows of IBM merchandising and trade optimization software services.

Using a set of interactive dashboards tailored to retail and consumer products analysis, you can:

- Approach business problems armed with new information
- Track core metrics that influence shopper segment performance
- Quantitatively analyze shopper, segment, and basket-specific trends
- · Grow your business with accurate and actionable shopper analytics

Each of these capabilities is useful for different parts of retail and consumer products organizations; Shopper Insights dashboard are organized accordingly, providing answers to key questions for pricing, promotion, and assortment initiatives.

Working in Shopper Insights

Each Shopper Insights dashboard has been developed to provide you with answers to specific business questions. These dashboards can help you quickly gather information and communicate actionable research with other parts of your organization:

- **Intuitive, Usable Design**: Each dashboard was designed to provide quick access to information by product, time period, and shopper segment.
- **Toggling**: View data from different perspectives, such as revenue vs. trips, or actual vs. growth.

💿 Actual 🛛 🔵 Grov	vth
\$ Sales	•
\$ Sales	-
Profit	E
# of Shoppers	
% of Segment Shoppers	NE
\$ per Shopper	

- **Drop-downs**: Select key data groups using simple drop-down menus, allowing you to show specific data for segments, geographies, products, and time periods.
- **Drilling**: Easily move from high-level overviews of your entire enterprise to detailed information about specific products using drill-down capabilities within the same dashboard.

Department	Category
Cookies	> Cookies
Crackers	

- **Segmentation Flexibility**: While each Retailer's implementation is different, IBM Omni-Channel Merchandising data structure provides multiple ways to analyze your existing shopper segmentations.
- **Segment-Neutral Dashboards**: Dashboards contain information that use customer-defined shopper segmentation, rather than conforming dashboard design to existing segmentation.
- **Segmentation Hierarchy**: By creating a nested segmentation hierarchy, users can access high-level information about the intersection of different segmentation schemes.
- **Metrics**: Each dashboard is built around a set of key sales driver metrics, enabling you to understand complicated relationships quickly. These will enable you to quickly analyze performance of trial and repeat, co-occurrence, and more.
- **Security**: Security measures enable you to restrict access in ways that meet your business and internal security goals.
- **Exporting to Flash**: Dashboards can be exported to Flash to enable single dashboard manipulation, such as changing segments or metric views, offline or outside of the Shopper Insights User Interface.
- Exporting to Excel and PDF: Data contained in Shopper Insights dashboards are easily accessible in common formats, such as Microsoft Excel and Adobe PDF. To export the data from a dashboard, select the information you'd like to export from the **Choose Export** drop-down list, then click the Excel icon:

Choose Export:	Product List		3
		40	
			Export to Excel

From the resulting page, you can use the buttons at the top of the screen to export to Excel or PDF, or to print the data shown:



For more information about getting started, please see "How do I get Started?."

For more information about individual metrics, please see Chapter 3, "Metric Dictionary," on page 69.

Related Topics

"How do I get Started?"

How do I get Started?

IBM Shopper Insights begins with a question: what do you want to know? Each of the dashboards holds insights about your shoppers, which can be used to help you make business-critical strategic and tactical decisions.

To get started, navigate to Shopper Insights in the services drop-down menu:

ice	
MyDemandTec	
Master Calendar	>
Price	>
Promotion	>
Markdown	>
Shopper Insights	
OpenLink 🖞) >
Admin	>

If you have access to Shopper Insights, there are two ways to start using the dashboards to answer your questions:

• Use the built-in navigation interface to find your question on the left-hand side of the screen:



• To navigate directly to a dashboard, click on the dashboard in the thumbnail view. Hold your mouse cursor over each dashboard thumbnail to read a description of the dashboard's functionality.

Navigating Shopper Insights

Hierarchy Navigation

The hierarchy on the left-hand side of the screen is divided into logical units to access information at various levels, such as Group, Division, Department, Category, Type, and Item, or Group, Division, Department, Class, Subclass, and Type.

The same dashboard opened from two different levels from the left-hand side navigation will yield different input prompts. For example, opening the Product Dashboard from the Category level will default to category prompts and opening the Product Dashboard from the Item level will default to item prompts.

Note: This guide refers to product hierarchy levels using Department, Category, Type, and Item. However, these terms may vary in your environment, and are customizable upon request. For more information, please contact your IBM representative.

Navigation Questions

The questions on the left-hand side of the screen are divided into a variety of roles, enabling you to quickly find a question that meets your needs. Once you find a question, clicking on it will show you a list of dashboards that can help you answer the question. For most questions, you can also specify a product hierarchy level you would like to examine.



Once you have chosen a dashboard, click it in the thumbnail view to the right. After reaching a dashboard, you can learn more about its usage, sections, and particular details by clicking the Help icon:

Drilling Down to Lower Hierarchy Levels

Some dashboards accommodate drill-down analysis through multiple levels of the product hierarchy, allowing you to quickly move from one level to another.

Department		Category		Туре
Alcohol Spirits	>	Asian Wine	>	Plum Asian Wine

Clicking on one of the drill-down buttons on the top-left portion of the page will allow view the next level of that dashboard in a new window. For example, this can enable you to analyze categories within a department or products within a category.

If you cannot drill down within a particular dashboard, close the dashboard and access the dashboard through lower-level navigation instead. For example, if you accessed the Product Dashboard from the Category Navigation Menu and cannot to drill down to item information. Try accessing the Product Dashboard from the Item Navigation Menu instead.

Dashboards Open in New Windows

Some business-critical questions may require the use of multiple dashboards. When loading the dashboards from the Shopper Insights User Interface, each dashboard loads in a new window, allowing you to compare reports side by side or drill down to find the exact data you need to make better decisions.

Application Time-Out

IBM Omni-Channel Merchandising applications time out after 180 minutes of inactivity to protect you and prevent security issues. Because Dashboards open in new windows, it may not always be clear when the application has timed out.

If you experience any of the following, try re-loading Shopper Insights to check whether your session has timed out:

- · A dashboard stops responding to metric changes
- · A Run Document request does not return within a reasonable timeframe
- The following error message is displayed:

Error Id: 1316619329487

Unexpected application error encountered. Please try again in a minute. If the problem persists, please contact DemandTec IT support personnel and report this issue.

You should close your browser completely and re-log in to the Shopper Insights application if you are timed out.

User Access

The Shopper Insights application is intended to be used as a collaboration tool. As such, Merchants and Vendor representatives both can have access to the same information.

To ensure data integrity and confidentiality, Vendors may have restricted access to the retailer's data in the Shopper Insights application. Typically, this means that certain dashboards and metrics, such as profit, are not available to a vendor user.

Dashboard Prompts

When you run a dashboard, you must select the criteria you wish to analyze in the selected dashboard. In each selection, prompts explain how the selections will affect your dashboard, showing which fields are required and what types of entries are allowed.

After choosing to run your document, some criteria selections will require additional information on a secondary selection criteria page (for example, The Product Group criteria selection will require an additional entry of the desired Product Group). Required selections vary by dashboard, and may include:

- **Segmentation Type** Use this menu to select the segmentation schema you wish to see in your analysis. You can only select one segmentation type each time you run a dashboard, even if multiple segmentation schemes are available.
- **Department** Some Dashboards prompt for a Department to analyze. The Department heading is your product hierarchy and typically correlates to your product category or class structure. The departments displayed are based on your application permissions.
- **Product** Depending on the dashboard, the product prompt may be used to select a Department, Category, Product, or Item Attributes for specific dashboards. This selection sets the product focus of the dashboard, whether it is the entire product category or one item. Some dashboards also allow you to choose from Product Groups your company has created, allowing you to focus analysis on a brand, manufacturer or test product group. For more information, please see "Setting up Groups" on page 15.
- **Product Hierarchy Level, Item, or Item Grouping** Depending on the dashboard, the product prompt may be used to select a Department, Category, or Product. This selection sets the product focus of the dashboard, whether it is the entire product hierarchy, one item, or a group of items. The exact prompt shown will vary, depending on the dashboard drill-down level you select.
- **Time Period** Each dashboard enables you to analyze a specific time period. In this prompt, you can select the quarter, quarters, or date range to show in the dashboard. In some dashboards, the quarter selected will be compared to the same quarter a year before. Some dashboards (Purchase Summary, Product, and Sales Driver) also have flexible time frames to choose customized "base" and "analysis" time frames.
- Geography or Store Group Level Most dashboards allow you to focus your analysis on individual geographic regions or Divisions, while some dashboards may prompt you to specify multiple regions. Some dashboards also allow you to choose a Store Group, a grouping of stores that you create, to focus analysis on a group of regions, pricing zone or test store group. For more information, please see "Setting up Groups" on page 15.

	1. Segmentation Type (Required)		
Summary of your selections	Select one Segmentation Type to analyze in this dashboard. This prompt allows only one selection.		
Segmentation Type (Required)	Search for:		
Department (Required)	R Match case		
Time Period (Required)	Available:	Selected:	
Geography	Sehavior	(none)	
	Price Sensitivity		
	RFM		
		**	
		4	
		00	
		(<u></u>)	
	2. Department (Required)		T
	Select the Department to analyze.		
	This prompt allows only one selection.		
	Search for:		
	Match case		
	Available:	Selected:	
	Adult Health General	(none)	
	Alcohol Spirits		
	Analgesics	44	
	Auto Home Hardware		
	😝 Baby Food And Care	<u>~</u>	
	😝 Bacon Sausage	66	
	Bags Storage Disposable Dining		
	H 4 1-30 of 90 b N		
	N 4 1-300790 P H		
	3. Time Period (Required)		T
	Select one quarter to analyze in this dashboard. This prompt allows only one selection.		
	Search for:		
	🔍 🗖 Match case		
	Available:	Selected:	
	General 2009 Q4 (11/01/2009-01/30/2010)	(none)	
port Message Name:			

Some Dashboards will give you a secondary prompt page based on the prompts selected on the first page. For example, if you choose Store Groups, a secondary prompt page will display to allow you to select which of the established Store Groups you would like to analyze.

Related Topics

"Setting up Groups" on page 15

Saving Dashboards

You can now save dashboards with prompt answers, so you can more quickly run favorite dashboards with typical prompt answers across different sessions.

After running a dashboard, you now have the option to save it and prompt answers for future use. You can then run saved dashboards from the Shopper Insights home page. You can also opt to select the Most Recent Week for any dashboard, allowing you to analyze the data for the most recent week that is available.

Exporting Dashboards

When dashboards are exported, they are sent directly to Microsoft Excel. To ensure successful export, you must have the following settings enabled: Automatic prompting for file download, File download, and Allow script-initiated windows without size or position contraints.

About this task

To enable these settings:

Procedure

- 1. In the browser menu, navigate to **Tools** > **Internet Options**.
- 2. Navigate to the Security tab and click on Custom level....

eneral Security Privacy	Content Connections Programs Advanced
Select a zone to view or ch	ange security settings.
Internet Local intr	anet Trusted sites Restricted sites
Internet	Sites
This zone is for In except those listed restricted zones.	ternet websites,
Security level for this zone	
Allowed levels for this z	e for most websites
content	efore downloading potentially unsafe ActiveX controls will not be downloaded
content - Unsigned /	
content - Unsigned /	ActiveX controls will not be downloaded
content - Unsigned /	ActiveX controls will not be downloaded

3. Scroll down to the **Downloads** section and click on the **Enable** radio button directly underneath **Automatic prompting for file downloads** and the **Enable** radio button directly underneath **File download**.

🛃 A	nloads utomatic prompting for file downloads) Disable	Î.
0	Enable	
🛃 Fi	ile download	
C	Disable	
_) Enable	
P F	ont download	Ξ
	Disable	
) Enable	
0.0	Prompt	
	le .NET Framework setup	
	isable nable	
	ellaneous	
	ccess data sources across domains	
6) Disable	-
•	III	4
*Takes e	ffect after you restart Internet Explorer	
eset custo	om settings	
leset to:	Medium-high (default)	Reset

- 4. Scroll down to the **Miscellaneous** section and click on the **Enable** radio button directly underneath **Allow script-initiated windows without size or position constraints**.
- 5. Click OK in the Security Settings Internet Zone box.
- 6. Click **Apply** in the **Internet Options** box.

What to do next

You can export to a flash file or to Excel, as illustrated in the following diagram.

- The upper left corner is where you can export to a flash file.
- The upper right corner is where you can export to Excel.

Note: Exporting to Excel will quickly re-prompt the server and it can take several minutes.



Setting up Groups

Groups are collections of products or stores that you create organized by type of product or store region.

A product group can contain products in any combination you choose, such as a single category, KVIs, products in a single brand, or products from a particular manufacturer. Similarly, a store group may contain stores in a specific region, state, or neighborhood.

You can select groups of products and stores when creating scenarios in IBM Price, promotions in Promotion, markdown plans in Markdown Optimization, or when you use the following Shopper Insights dashboards:

- Flexible Affinity
- Flexible Item Importance
- Flexible Product
- Flexible Segment Compare
- Event Compare
- Multiples
- New Item
- New Lost Retained
- Purchase Frequency
- Purchase Summary
- Sales Driver
- Source of Volume
- Time Series
- Trial and Repeat

Creating Shopper Insights Product Groups

Shopper Insights product groups are static after you create them; they do not automatically change or update. When products are added to the assortment that belong to the Product Group, you should manually update the group.

About this task

To create a Shopper Insights product group:

Procedure

- Choose Data > Product Groups. The Product Groups page shows existing product groups for the selected category, number of members in each group, last date updated, and the user who made the update.
- 2. Click **New Product Group** to create a new product group. The New Product Group page opens.

New Product Group	
* : indicates required field	
Name*:	Ziploc
Type*:	 Automatically update product group. Maintain static product group. Maintain Shopper Insights product group.
Category*:	002_STORAGE_FOOD
Products:	Select Products

- **3**. Enter a name for the group in the **Name** field. Use a unique name that is easily identifiable.
- 4. Choose a product category from the **Category** list. Use the scrollbars to move up and down the list.
- 5. For the product group type, select **Maintain Shopper Insights product group**. You will select the individual products for a Shopper Insights product group on the next page.
- 6. Click Select Products to navigate to the Products page.

Note: You can click **Add Next Product Group** at the bottom of the New Product Group page to define new product groups, and add the products to this group later.

The following reports are available on the **Select Products** page:

- All Products Basic Displays active products for the category. Includes basic product information; does not include pricing or selling information.
- All Sellable Items Displays active products for the category. Includes average pricing and selling information for a product at the chain or division level.
- All Logistical Units Displays active logistical units for the category. This report is only viewable if your company creates promoted product groups by Logistical Unit.
- 7. Check the **Include** checkbox next to each product that you want in your group. Click the checkbox again to deselect the product.
 - Press Ctrl-click or Shift-click to select multiple products.
 - Click **Check All** to select all products. Click **Uncheck All** to remove all products from the group.

8. Click **Save**. You are done. The **Product Groups** screen opens, including the product group you just created.

New Product Grou	p Name 0		Find	SIProductGroups	• Edit		
7 Product Group ID	Name	All Categories	PG Type	Product/Loca tion	Products PG Description	Date Updated	Updated By
749	Canned Beans - DSD		Static		0	May 29, 2003 1:35 PM	Robin Adamson2
76	SVT Product Group	-	Static		0	Jun 10, 2003 10:51 AM	Dan (SVT) Anderson@HEB1
781	SVT Product Group A	101	Static		0	Jun 10, 2003 4:22 PM	Dan Anderson@HEB1
311	ranch beans	600	Static	100	0	Jun 19, 2003 1:49 PM	Tony Fisher
812	DSD BEANS	100	Static		0	Jun 16, 2003 2:56 PM	Tony Fisher
4652	Test PG 8-14	100	Static		5	Aug 14, 2015 12:50 PM	DemandTec Developer
New Product Group	v land		_				dde
•indicates required fi	ield	_	-	_			. dide
			-			1	. dde
 indicates required from the second sec	Unnamed Group	By Product Id					ase
 indicates required from the second sec	Unnamed Group	By Product Id	_				űde
 indicates required from the second sec	Unnamed Group		e below Separate (any numbers by carriage retur	×		đđ
 indicates required from the second sec	Unnamed Group		e below Separate (my numbers by carriage retur	и.		
 indicates required from the second sec	Unnamed Group		e below Separate d	any numbers by carriage retur	<u> </u>		edd
 indicates required from the second sec	Unnamed Group		e below Separate i	any numbers by carriage retur	м.		66
 indicates required from the second sec	Unnamed Group		e below Separate d	any numbers by carriage retur	х.		đđ

Note: You can choose to build Product Groups **By Hierarchy**, **By Product Id**, or by Product Attributes.

Editing Shopper Insights Product Groups

You can edit Shopper Insights product groups.

About this task

To edit a Shopper Insights product group:

Procedure

- 1. Open the Product Groups page (Data > Product Groups).
- 2. Right-click on a Shopper Insights product group in the list, and choose **Edit/View Details**.

		Al Categories			Products Description		
5607	Red Damond - Ca	nie 👘	Shopper Insights	10	7	Sep 12, 2011 2:26 PM	Carrie Connolly
\$599	Mios - Carrie		Shopper Insights		10	Sep 8, 2011 6:55 AM	Carrie Connolly
5600	Sunny D - Carrie		Shopper Insights	10	16	Sep 8, 2011 7:08 AM	Carrie Connolly
5647	Tea	Edit	Shopper Insights		148	Sep 21, 2011 8:46 AM	Carrie Connolly

- **3**. The **Product Group Summary** screen opens. Add or remove products from the group by setting or clearing products in the list.
 - Press **Control-click** or **Shift-click** to select multiple products.
 - Click **Check All** to select all products. Click **Uncheck All** to remove all products from the group.

	284_DARY_CHILLED_JUCES				iduct group.								
Uncheck /	Report Al Products - Ease + Edt	Devisio Chain			+ "teo"		Rnd	Cear Search	-				
F JURCE	GREEN TEA W/HONEY 3202	32	OUNCE T	6100264	1040796								
RIZONA	GREEN TEA W/GINS 640Z	64	OUNCE T	6100284	1010244								
AIZONA	ICED TEA W/LEMON 640Z	.64	OUNCE T	6100284	1040254								
RHOLDPAL 40Z	MER TEA W/LEMONADE	64	OUNCE T	GT00284	4040756								
RNOLDPAL 40Z	MER TEA W/STRAW/LEMON	64	OUNCE T	6100284	4040757								
ORDEN	SWEET TEA 12802	129	QUNCE T	6700294	1040635								
YRNE DAIR	IV ROED TEA 1280Z	128	OUNCE T	GT0020-	1040230								
1 1 1 1 1 1 1	F JUICE F JUICE ISZONA ISZONA BIOLDPAL IOZ INOLDPAL IOZ INDEN	Uncheck.All All Products - Base + [EBE] * NACE GREEN TEA W/HORKY 32002 REDNA GREEN TEA W/LENKH 6402 NICLOPAURIT TEA W/LENKH 6402 NICLOPAURIT TEA W/LENKH 6402 NICLOPAURIT TEA W/LENKH 6402 NICLOPAURIT TEA W/LENKH 6403 NICLOPAURIT TEA W/STRAWLENKH	Dischedk All All Products-Rese E.B.E. Chain INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF INF <	Unchesk AI Alt Products-fase + Edit Chain Image me Sea Oratit Sea Oratit Sea me Sea Oratit Sea	Uncheck AII All Products-base East Chain Tame me Sae GORH Sae GOR	Disched AI AltProducts-Real Edit Chain Name * Tea* MI Sea Code Sea Code Sea Se	Uncheck All All Products-Reac Edit Chain Name * Taxe* res Case Cost C	Disched AI All Pedicts-Base Edit Chain Team Team File Intel See GADH USC Crait Crait	Discrete All All Posicis - Sasc + Edit Chain Year Find Discrete All rest Sasc (Colin 1 / Sinc) Sasc (Colin 1 / Sinc) (Are Colin 1 / Sinc) Sasc (Colin 1 / Sin	Uncheck AI Alt Peducis- Resic Edit Chain Name * Tes* End Class Starch MM Starck Uncheck Starck Uncheck Starck Starck	Uncheck AI Alt Products- fase + Edit Chain Name + Yea* Thrd Class Sale Chain Sale Ch	Unclede AII All Poachs-Base + Edit Chain New * "Ne" [Prd] Class Starch met Saw Coll Saw Coll <td< td=""><td>Uncheck AI Al Poduce-lase + Tell: Chain have + Tell: Chain have + Tell: Chair Search - tell Chair Search - Sear Clear Search - Part ORDIN TEX WHORKY 3302 2 CARKET T570328440796 - Search TEA WHORKY 3302 4 CARKET T570328440724 - SECONA GREEN TEA WHORKY 6402 4 CARKET T570328404725 - SECONA GREEN TEA WHORKY 6402 2 28 CARKET T570328404735 - SECONA GREEN TEA LIBOOZ 228 CARKET T570328404735 - SECONA GREEN TEA LIBOOZ 228 CARKET T570328404735 - SECONA GREEN TEA LIBOOZ 228 CARKET T570328404735 - SECONA GREEN TEA LIBOOZ 2 28 CARKET T570328404735 - SECONA GREEN TEA LIBOOZ - SECONA GREEN</td></td<>	Uncheck AI Al Poduce-lase + Tell: Chain have + Tell: Chain have + Tell: Chair Search - tell Chair Search - Sear Clear Search - Part ORDIN TEX WHORKY 3302 2 CARKET T570328440796 - Search TEA WHORKY 3302 4 CARKET T570328440724 - SECONA GREEN TEA WHORKY 6402 4 CARKET T570328404725 - SECONA GREEN TEA WHORKY 6402 2 28 CARKET T570328404735 - SECONA GREEN TEA LIBOOZ 228 CARKET T570328404735 - SECONA GREEN TEA LIBOOZ 228 CARKET T570328404735 - SECONA GREEN TEA LIBOOZ 228 CARKET T570328404735 - SECONA GREEN TEA LIBOOZ 2 28 CARKET T570328404735 - SECONA GREEN TEA LIBOOZ - SECONA GREEN

4. Click **Save** when you have finished editing. Your changes are saved, and you return to the Product Groups page.

Importing Shopper Insights Product Groups

If you prefer to add or modify Shopper Insights Product Groups using Microsoft Excel, you can also import and export product groups. These groups are available wherever you would select a Product Group when loading dashboards.

About this task

To import a Shopper Insights Product Group:

Procedure

1. Load the Shopper Insights Product Group import template.

Note: You must have appropriate application permissions to import and export Shopper Insights Product Groups. If you do not have the permissions necessary to complete these steps, please contact your administrator.

2. In the template Excel file, add the product groups names, as well as the items you would like to add to those product groups. When you have finished editing the excel file, it should resemble the figure below:

폡	<u>File Edit View Insert Format Tools Data Window I</u>	Help Adobe PDF	- 8
P	🙄 Arial 🔹 9 🔹 🖪 🖌 💆 📄 🚍	🔤 \$ 💷 🛄 • 🖄	• <u>A</u> •
	▼ X √ fx		
	A	B	C -
	Change Indiate Dealant Course Name	UDC	Ī
1	Shopper Insights Product Group Name	UPC	
-	Bacon	2090020	
-	Bacon	2090224	
-	Bacon	2090229	
5	Bacon	2090485	
-	Bacon	2090486	
-	Bacon	2090621	
-	Bacon	2091194	
	Eggs	2091253	
	Eggs	2091254	
	Eggs	2091292	
	Eggs	2091301	
	Eggs	2091325	
	Eggs	2091343	
	Eggs	2091352	
	Eggs	2091453	
17	Sausages	2090001	
	Sausages	2090002	
	Sausages	2090003	
	Sausages	2090004	
21	Sausages	2090005	
22	Sausages	2090010	
23	Sausages	2090011	
24	Sausages	2090012	
25	Sausages	2090013	
1 1	> H\Sheet1 (- PI
dit		NUM	

- 3. Save your file and return to your Shopper Insights session.
- 4. From the main Shopper Insights screen, select **Data** > **Import**.
- 5. Select Shopper Insights Product Group from the Data Type drop-down menu.

Import	? Ĉ X
Actions: Import Cancel	
Import Data	
Data Type:	
Shopper Insights Product Group	
Description	
Description:	
Bacon, Eggs, and Sausag	
Upload File	
File:	
C:\Users\IBM_ADMIN\Desktop\baco Browse	
Imp	ort Cancel

- 6. Add a description of your import and click Browse.
- 7. Select your file and click Import to complete your Import.

Once your import has processed, you will be able to see information about the import, as well as any errors, in the **Data** > **Import Status** window.

Importing Static Product Groups

You can import static product groups for usage in both Shopper Insights and Promotion Planning and Optimization. These groups are read-only, helping to mirror groupings from third-party systems to IBM Omni-Channel Merchandising workflows.

About this task

To import Product Groups:

Procedure

- 1. Navigate to **Data** > **Import**.
- 2. In the Data Type drop-down, select Product Group.
- 3. Add a description, browse to your import file, and click Import.

Your imported product group will be visible in the **Data** > **Product Groups** report, and will be available in the following products, if you have access to them:

- IBM Promotion Planning, Optimization, and Execution
- IBM Shopper Insights

Exporting Shopper Insights Product Groups

You can also export existing Shopper Insight Product Group information for any category to Excel or CSV.

About this task

To export your groups:

Procedure

- 1. Navigate to **Data** > **Export**.
- 2. In the **Export** window, select **Shopper Insights Product Group** from the **Report** drop-down menu.

rport	? ८ >
Report	
Report:	
Shopper Insights Product Group	
Description	
Description:	
Exporting bath category	
File Type	
File Type:	
Microsoft Excel 97-2003 O Microsoft Excel 2007	CSV
Get Record Count	
Export Category	
Category:	
BATH	
	Export Cancel Refresh

- **3**. Write a description, choose an export file type, and choose the category to export from the **Category** drop-down menu.
- Click Export. When your export has finished, you will be able to download the file by clicking the link from the Data > Export Status window.

Creating Shopper Insights Store Groups

Shopper Insights Store Groups are static and do not change. When stores are added to the chain that belong to the Store Group, the group must be manually updated.

About this task

To create a Shopper Insights store group:

Procedure

- Navigate to Data > Shopper Insights Store Groups. The Shopper Insights Store Groups page shows the store groups, number of members in each group, division level, last date updated, and the user who made the update.
- 2. Click New Store Group. The New Store Group page opens.

Store Group		
: indicates required	field	
Name*:	Midwest Region	
Description:		
Division*:	Chain	
Туре*:	Maintain Shopper Insights store group.	
Stores:	Select Stores	
stores:	Select Stores	Add Next Store Group Done

3. Enter a name for the store group in the **Name** field. Use a unique name that is easily identifiable. Duplicate Store Group names will cause an error.

Note: Store Groups can be seen by all users for your company so, be specific when naming a store group.

- 4. Enter a description of the store group in the **Description** field.
- 5. Select the Division for the store group. Choose Chain if no divisions exist.
- 6. In the **Type** field, select **Maintain Shopper Insights store group** to create a Shopper Insights store group.
- 7. Click Select Stores to navigate to the Store Group Summary page.

Note: You can click **Add Next Store Group** at the bottom of the New Store Group page to define new store groups, and add the stores to this group later. The following reports are available on the Stores page:

- All Stores Displays all stores where a product has sold in the category.
- **Members Only** Displays members of the store group. This report will be blank when creating a new store group.

Name: Midwest		Description:								
Division:		Туре:	Maintain Shopper store group.	insights						
ctions: OK Cane	el] [Check All] [Uncheck All] [Delete Group	Report: Al Stores	• Edt Oty	•	Find					14 (in Page 3
		Store Number								
	ROSEVILLE	000001	ROSEVILLE	MN	55113 NORTH REGION	60199 - MN/WI/ND/SD	TWIN CITIES		Y	
	KNOLLWOOD	000002	ST. LOUIS PARK	PRV	55426 NORTH REGION	60191 - MN(NE/1A	MPLS SW		Y	
	ORYSTAL.	000003	ORYSTAL	HN .	55428 NORTH REGION	60199 - MN/WI/ND/SD	MINESOTA		Y	
	DULUTH	000004	DULUTH	MAX	55811 NORTH REGION	60199 - MN/WUND/SD	MINNESOTA,N.C	AI.	¥.	
	BLOOMINGTON	000005	BLOOMINGTON	PEN	55431 NORTH REGION	60191 - MN(NE/JA	TC METRO S		Y.	
	GLENDALE	000006	DENVER	co	80246 WEST REGION	60297 - CO/UT/JD/WY	DERVER METRO		Y	
	WESTLAND	000007	LAKEWOOD	00	80215 WEST REGION	60297 - CO/UT/JD/WY	DENVER METRO		Y	
	PRIMI PU		PROPERTY.	1.01	PERSONAL INSTRUMENTAL	20100	TILS PITTY			

- 8. Set the **Include** checkbox next to each store that you want in your group. Click the checkbox again to deselect the store.
 - Press Control-click or Shift-click to select multiple stores.
 - Click **Check All** to select all stores. Click **Uncheck All** to remove all stores from the group.
- **9**. Click **OK** when you are done. The Shopper Insights Store Groups page opens with your new group in the list.



Editing Shopper Insights Store Groups

You can edit Shopper Insights store groups.

About this task

To edit a Shopper Insights store group:

Procedure

- Open the Shopper Insights Store Groups page (Data > Shopper Insights Store Groups).
- 2. Right-click on a Shopper Insights store group in the list, and choose **Edit/View Details**. The **Store Group Summary** page opens.

Actions: Save New St	tore Group	Report: Store Groups	Edit	Search: Date Updated 👻	🗂 to	Find
¥ Name	De	scription	Men	bers Division	Date Updated	Updated By
Midwest Regtion				t/View Details	Sep 21, 2011 9:02 AM	Carrie Connolly
				lete port Table		

- **3**. Choose whether you would like to view all stores or group members only from the **Report** drop-down menu.
- 4. You can change the group name in the **Name** field, and add or remove stores from the group by setting or clearing stores in the list.
 - Press Control-click or Shift-click to select multiple stores.
 - Click **Check All** to select all the stores. Click **Uncheck All** to remove all stores from the group.
- 5. Click **OK** when you are done. Your changes are saved, and the Shopper Insights Store Groups page opens.

Using Imported Store Groups

If your company has configured Imported Store Groups, you will be able to select them when generating a dashboard.

About this task

Index X Summary of your selections	5. Geography Filtering Style (Requi	red)	T
1 Segmentation Type (Required)	Select a geography filtering style. This prompt allows only one selection.		
2 Number of Weeks (Required)	Available:	Selected:	
3 Week Ending Date (Required)	🔞 Select a Division	(none)	
4 Product Filtering Style (Required)	Select a Shopper Insights Store Group	*	
5 Geography Filtering Style (Required)	3 Select Store Groups (Imported)	**	4
		<u> </u>	
		44	
			<u>•</u>
Run Document	J		

Note: Your prompts and screens may look different if your company uses customized labels. You cannot directly import Store Groups into Shopper Insights. For more information about importing Store Groups, please contact your IBM representative.

You can also use the **Store Group (Imported) Classes** report to view the details of imported Store Groups, as described below:

Procedure

- 1. Navigate to Data > Shopper Insights Store Groups.
- 2. In the Report: drop-down, select Store Group (Imported) Classes.

	Store Group (Imported)	NAME OF TAXABLE PARTY OF TAXABLE PARTY.			
Name	Description	Members (Division	Date Updated	Updated By
ImportedLCC4-all categories		11		Sep 11, 2013 7:29 PM	Store Group DataSta
ImportedLGC1		8		Sep 11, 2013 7:00 PM	Store Group DataSta
ImportedLGC2-category1	CEREAL	19		Sep 11, 2013 7:17 PM	Store Group DataSta
ImportedLGC2-category2	FRESH_HERBS	19		Sep 11, 2013 7:23 PM	Store Group DataSta
ImportedLGC3- category1,2	CEREAL and FRESH_HERBS	31		Sep 11, 2013 7:33 PM	Store Group DataSta
ImportedLGC5-PD1	Ad	36		Sep 11, 2013 9:36 PM	Store Group DataSta
ImportedLGC6-PD2		35		Sep 11, 2013 9:39 PM	Store Group DataSta
	•				

3. The grid lists imported Shopper Insights store groups. Right-clicking any group provides access to additional **Details** and the ability to **Export Table**.

Chapter 2. Using Shopper Insights Dashboards

Each of the dashboards included in IBM Shopper Insights is outlined below, including descriptions of common usage, the data shown in each dashboard, and how to use that information to enhance your decision-making process.

Affinity Dashboard

The Affinity Dashboard shows how often products or product groups are purchased together in the same basket. This allows you to find products that are likely to have positive indirect effects from promotions, as well as to evaluate items that are suitable for co-promotion or co-merchandising.

Note: You are limited to the top 100 affinities (by basket lift) when exporting.



In the example above, we see that there is a strong affinity between cookies and items in the Breakfast category, and that items from the two categories co-occurred in 9.6% of baskets. To change the products shown in the bubble graph, you can select or de-select products from the list on the right:

<< Hide	Select Departments >>
Select Affin	ity Departments to display
All	
📃 Bags Stor	age Disposable Dining
📃 Box Dinne	er Beans Rice
🗹 Breakfast	
📃 Canned Fi	ish And Meat
📃 Canned Fi	ruit
📃 Canned V	egetables
🗹 Cereal	
📃 Frozen Br	eakfast

The table at the bottom of the dashboard shows additional relevant data for related products, including basket lift and sales information.

There is a minimum threshold for products to appear in the affinity report. There are three pieces of criteria:

- The number of baskets threshold is currently 4 baskets per week at the item level, 8 baskets per week at the subclass level, 16 baskets per week at the class level, and 32 baskets per week at the department level.
- The Basket Lift must be greater than or equal to 1.
- The product must be one of the top 100 in terms of Basket Lift.

Product groups as part of the universe are considered "item" level.

Note: You can analyze trips as well as individual transactions. This is useful if there may be multiple transactions in a single trip due to separate in-store registers. Contact your IBM representative for more information.

The Affinity Dashboard uses the following metrics:

- "# of Baskets" on page 69
- "% of Baskets" on page 77
- "Basket Lift" on page 80
- "Co-occurrence" on page 81
- "Item Basket Count" on page 83
- "Weekly Units per Store Selling" on page 92

Event Compare Dashboard

The Event Compare Dashboard shows financial metrics for a product or group of products over two events, allowing you to compare promotional effectiveness during the two selected time periods.

This can help you decide on a promotional strategy, using insights from segment-by-segment data and key sales metrics:



The top sections of the dashboard show overall financial performance for the two selected time periods, while the **Segment Performance** graphs below shows segment-by-segment response to each event through key sales driver metrics. You can select a different sales driver in the **Metric** drop-down menu.

Interpreting Results

The **Event Compare Performance** graph shows the overall performance of the two events. Use the **Metric** drop-down menu to show comparative performance in key sales metrics.

Note: These values are not adjusted for the length of the event.

The table in the upper right and area of the dashboard shows a wide variety of per-week metrics for both events, allowing you to see the effectiveness of each event side-by-side. The table also includes an **Index** column, showing the relative effectiveness of Event 2 on an average index of 100. For more information about the metrics in the table, please see Chapter 3, "Metric Dictionary," on page 69.

The Event Compare Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "\$ per Shopper" on page 71
- "\$ per Trip" on page 72
- "\$ per Unit" on page 73
- "\$ per Unit Index (Segment Compare)" on page 74
- "\$ Sales" on page 74
- "\$ Sales per Week" on page 76

- "\$ Sales per Week Index" on page 76
- "% of Promoted Units" on page 77
- "Basket \$ Sales with Item" on page 80
- "Basket \$ Sales with Item Index" on page 80
- "Trips per Shopper" on page 87
- "Units" on page 88
- "Units per Shopper" on page 90
- "Units per Trip" on page 90
- "Units per Week" on page 91
- "Units per Week Index" on page 91
- Wkly \$ per Shopper
- Wkly \$ per Shopper Index
- "Wkly \$ per Trip" on page 93
- "Wkly Trips" on page 93
- "Wkly Trips Index" on page 94
- Wkly Units per Trip Index

Item Importance Dashboard

The **Item Importance Dashboard** compares product loyalty by segment. Loyalty, also known as **Share of Requirements**, highlights the importance of a given product to an individual shopper or group of shoppers.

Beyond sales, Share of Requirements uses dollar share to show which products are selected more definitively by a given group of shoppers. High-loyalty products are often considered less substitutable because their high share of a shopper's category dollars.



Each of the colored bubbles in the graph represents one product or product group for one segment. In the case above, the selected bubble represents the Perimeter Perusers segment, and mousing over its bubble shows the metrics for that group. We can see from this graph that Perimeter Perusers have a greater Share of Requirements (loyalty) for cookies than the other segments, since it is farther right on the x-axis.

To select additional product groups, you can use the check-boxes on the right. You can also use this list to eliminate products and simplify the bubble graph.

<< Hide	Select Categories >>
---------	----------------------

Select up to 10 Categories

All
🗹 Cookies
Crackers
📃 Grain Cakes
SS Cheese

The lower portion of the dashboard shows the data values corresponding to your selections, using the **Metrics** drop-down menu:

	Metrics \$ Sales								
Primary Fami Segment	nilies on the Go	Weight Watching	Sweet Tooth Bakers	Latin Flair	All Natural	Young Families	Maturing Families	Perimeter Perusers	Party People
Category	\$ Sales	\$ Sales	\$ Sales	\$ Sales	\$ Sales	\$ Sales	\$ Sales	\$ Salos	\$ Salos
Cookies	\$38,006	\$50,714	\$47,096	\$52,602	\$124,241	\$54,862	\$130,010	\$100,804	\$159,198

The Item Importance Dashboard uses the following metrics:

- "\$ per Shopper" on page 71
- "\$ Sales" on page 74
- "Share of Requirements" on page 85

KVI Dashboard

The Key Value Item (KVI) Dashboard uses model-by-segment data to plot items by their relative elasticity and volume. The resulting quadrant analysis identifies categories of items such as image items and profit drivers. You can use these quadrants to identify important products, such as image items and profit drivers.

About this task

Note: This dashboard may not be available for all retailers.

The KVI dashboard contains 4 sections:

Procedure

- 1. KVI Quadrant Scatter Plot
- 2. Top 10 Image Items by Strength
- 3. Top 10 Profit Drivers by Strength
- 4. Product Filter



The KVI dashboard also allows you to view data by segment by selecting from the **Segmentation Type** and **Primary Segment** drop-downs at the top of the dashboard. This allows you to view the image items and profit drivers for a group of product, both for your overall population and for key segments.

Note: This dashboard uses a 10% sample size for all calculations. Data displayed are representative of this 10% sample.

KVI Quadrant Scatter Plot

The main area of the dashboard contains the KVI Quadrants scatter plot.

This plot has 4 sections, each of which contains a subset of the selected products. The total list of the chosen products are shown in the Product Filter area. Using **Elasticity** on the left side of the graph and **Relative Unit** sales on the right side of the graph, products are sorted into four groups:

- Image Items
- Profit Drivers
- Niche Items Low Sensitivity
- Niche Items High Sensitivity



Mouse over any individual data point to see the specific data for that product, as well as the product name. The top image items and profit drivers are listed to the right of the main graph area, sorted by strength.

The **Elasticity** metric shows how price sensitive shoppers of a particular item are. Objects that rank as highly elastic tend to be very price sensitive; small changes in price can cause major changes in shopper behavior. The **Relative Units** metric is an index of how frequently the item is purchased, relative to the other items selected for the dashboard.

Top 10 Image Items by Strength

This section of the KVI dashboard lists the top 10 items identified in the upper right quadrant of the KVI scatter plot, sorted by strength.

Strength is calculated by identifying the distance of the item from the center of the scatter plot's x and y axes (1,1). These products provide a quick list of items that are both highly elastic and sell a high number of relative units.

Top Image Items by Strength					
UPC 3 - FIBER ONE 16.20Z	4.03				
UPC 14 - FIBER ONE HONEY CLUSTERS 160Z	3.40				
UPC 33 - BASIC 4 160Z	2.64				
UPC 22 - OATML RASN BRN 160Z	2.58				
UPC 5 - RASN NUT BRAN 160Z	2.48				
UPC 36 - OATML RASN BRN 160Z	2.33				
UPC 15 - TOTAL WHOLE BRAN 160Z	2.13				
UPC 7 - KELLOGGS SPECIAL K RED BERRIES 16.70Z	1.76				
UPC 16- CRACKLIN OAT BRAN 170Z	1.37				
UPC 31 - KELLOGGS SPECIAL K CHOC 13.40Z	1.23				

Top 10 Profit Drivers by Strength

This area of the KVI dashboard shows the top 10 profit drivers from the selected group of products, as shown in the lower right portion of the KVI scatter plot, sorted by strength.

Strength is calculated by identifying the distance of the item from the center of the scatter plot's x and y axes (1,1). These products are very popular, selling high numbers of units relative to other selected products, but have low elasticity, and are not very sensitive to price changes or promotional activity

Top Profit Drivers by Strength					
UPC 23 - MOTHERS PUNUT BTER BUMPRS	5.02				
UPC 24 - CASCADIAN FA OATS N HNY GRNLA 160Z	4.67				
UPC 33 - KASHI GO LEAN HIGH PRTN FIBER 16.7	4.58				
UPC 42 - KASHI HRT2HRT BLBRY 13.40Z	4.21				
UPC 14 - BEAR NAKED FRUIT & NUT 160Z	3.83				
UPC 46 - CASCADIAN FA CINMN RASN ORGNIC 160Z	3.38				
UPC 45 - YOGI GRANOLA MTN BLBRY FLAX 13.4	3.35				
UPC 47 - KASHI ORGNIC AUTUMN WHEAT 160Z	3.34				
UPC 49- CASCADIAN FA CINMN CRUNCH 160Z	3.01				
UPC 37 - KASHI HRT2HRT HONEY TOASTED 13.40Z	2.99				

Product Filter

The product filter allows you to select which products are displayed in the **KVI Quadrants** section of the dashboard.

Selecting or deselecting products will update the dashboard dynamically, allowing you to see changes in relative performance with or without some of the products selected during the dashboard prompts.


Interpreting Results

Locating key Image Items and Profit Drivers can help drive your decision-making processes for promotion, pricing, and assortment. The image items listed in the upper right portion of the **KVI Quadrants** section are highly sensitive to price changes, and may be very important for competitive advantage. For example, in the example below, it may be very important to maintain a competitive price for FIBER ONE 16.20Z and FIBER ONE HONEY CLUSTERS 160Z.

Top Image Items by Strength	
UPC 3 - FIBER ONE 16.20Z	4.03
UPC 14 - FIBER ONE HONEY CLUSTERS 160Z	3.40
UPC 33 - BASIC 4 160Z	2.64
UPC 22 - OATML RASN BRN 160Z	2.58
UPC 5 - RASN NUT BRAN 160Z	2.48
UPC 36 - OATML RASN BRN 160Z	2.33
UPC 15 - TOTAL WHOLE BRAN 160Z	2.13
UPC 7 - KELLOGGS SPECIAL K RED BERRIES 16.70Z	1.76
UPC 16- CRACKLIN OAT BRAN 170Z	1.37
UPC 31 - KELLOGGS SPECIAL K CHOC 13.40Z	1.23

And the Profit Drivers section identifies items that may be very important in making additional margin; as low-elasticity items with high unit sales, you may be able to increase prices or change merchandising and marketing activities for items such as MOTHERS PUNUT BTER BUMPRS or CASCADIAN FA OATS N HNY GRNLA 16OZ:

Top Profit Drivers by Strength	
UPC 23 - MOTHERS PUNUT BTER BUMPRS	5.02
UPC 24 - CASCADIAN FA OATS N HNY GRNLA 160Z	4.67
UPC 33 - KASHI GO LEAN HIGH PRTN FIBER 16.7	4.58
UPC 42 - KASHI HRT2HRT BLBRY 13.40Z	4.21
UPC 14 - BEAR NAKED FRUIT & NUT 160Z	3.83
UPC 46 - CASCADIAN FA CINMN RASN ORGNIC 160Z	3.38
UPC 45 - YOGI GRANOLA MTN BLBRY FLAX 13.4	3.35
UPC 47 - KASHI ORGNIC AUTUMN WHEAT 160Z	3.34
UPC 49- CASCADIAN FA CINMN CRUNCH 160Z	3.01
UPC 37 - KASHI HRT2HRT HONEY TOASTED 13.40Z	2.99

Niche items are lower-selling items, but may still represent a significant opportunity for your business, allowing you to identify items that have strong brand presence but low relative unit sales and high elasticity. These items could potentially benefit from promotion, increasing share easily.

The KVI Dashboard uses the following metrics:

- Image Items
- Niche High Sensitivity
- Niche Low Sensitivity
- Profit Drivers
- Relative Elasticity
- Relative Units

Multiples Per Trip Dashboard

The Multiples Per Trip Dashboard displays information about shopper purchasing patterns when buying one versus multiple items during a trip.

In the following example, the **Multiples Purchased** section of the dashboard shows **Trips** for the Yogurt category, aggregated by number of yogurt items purchased during each trip. From the graph, we can see that single purchases accounted for the most Trips, but quite a few shoppers also bought 2-3 yogurts at one time, 4-5 yogurts at one time, etc.



To change the metric displayed in the **Multiples Purchased** and **Segment Performance** sections of the dashboard, select from the **Metric** drop-down menu. The upper right section of the dashboard shows **Top 10 Units per Trip**, displaying items from your selections that drive the most multiples purchasing.

Mousing over any of the bars in the **Multiples Purchased** section displays the characteristics for that bar. The example below shows that shoppers who purchased 2-3 yogurts in one trip accounted for a greater portion of the **\$ Sales** for yogurt than any other group:



Clicking on any bar in the graph above changes the view for the **Segment Performance** section to reflect segment performance for the selected group of shoppers. For example, the graph below shows that the "Best Shoppers" segment accounted for most of the \$ Sales among shoppers who purchased 2-3 yogurt items in a trip.



Interpreting Results

This dashboard provides a deeper understanding of your shoppers' multiples purchasing behavior, allowing you to tailor your multiples strategies for segments, locations, and products.

The Multiples Per Trip Dashboard uses the following metrics:

- "\$ per Trip" on page 72
- "\$ per Unit" on page 73
- "\$ Sales" on page 74
- "% of \$ Sales" on page 77
- "% of Promoted Units" on page 77
- "% of Trips (Multiples)" on page 79
- "Basket \$ Sales with Item" on page 80
- "Trips" on page 86
- "Units" on page 88
- "Units per Trip" on page 90

New Item Dashboard

The New Item Dashboard enables you to assess the performance of a new product, showing financial performance at the Total Chain level, as well as sales information for up to ten selected geographies.

Note: This dashboard may not be available for all retailers.



The dashboard has three sections:

- The **Total Chain Weekly Trend** section shows trends for Point-of-Sale (POS) Sales, POS Unit Sales, and % ACV Distribution. This allows you to monitor compliance and sales at the total chain level for the new item.
- The **Division Comparison** section shows sales across the geographies you selected.
- The **Segment Performance** section shows segment-by-segment performance in the selected time period and geographies for the selected **Metric**.

Interpreting Results

Using the New Item Dashboard, you can see the effectiveness of a product launch, including week-by-week results for each geography. Additionally, you can see the trends in sales and distribution for the new product.

You could use this dashboard to determine:

- Is the item gaining as much distribution as you would expect?
- Which segments are driving initial purchasing behavior of this item?
- How is the item performing in particular geographies?

The New Item Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "\$ per Shopper" on page 71
- "\$ per Trip" on page 72
- "\$ per Unit" on page 73
- "\$ Sales" on page 74
- "% of Segment Shoppers" on page 78

- "POS \$ Sales" on page 84
- "POS Units" on page 84
- "Trips per Shopper" on page 87
- "Units" on page 88
- "Units per Shopper" on page 90
- "Units per Trip" on page 90

New Lost Retained Dashboard

The New Lost Retained Dashboard provides insight into the buyer flow for the selected time period and geography. It separates each shopper into one of three groups.

- **New** The shopper did not purchase the selected product during Period 1, but did purchase during Period 2.
- Lost The shopper purchased the selected product during Period 1 but not in Period 2.
- **Retained** The shopper purchased during Period 1, and also purchased during Period 2.



Note: To be counted as a shopper, each counted individual **must** have purchased the selected product at least once in Period 1, Period 2, or both.

Interpreting Results

Using the New Lost Retained Dashboard, you can immediately determine whether your new shoppers are making up for lost shoppers. In the **Period 1 vs. Period 2** graph, you can see how new, lost, or retained shoppers accounted for each key sales driver metric. Select a value from the **Metric** drop-down menu to view performance for a different sales driver. The height of the bar represents total performance for the selected period; the colored sections at the top of the bars show how much of the total performance for the selected metric is attributable to new or lost shoppers.

The **Primary Segments** graph shows how your new, lost, or retained shoppers are distributed among primary segments. Each pie chart shows how the new, lost, or retained groups are comprised; change the view by selecting from the **Shopper Group** drop-down. You can also see segment-specific analysis in the **Segment Performance** graph, showing comparative numbers of new, lost, and retained shoppers by segment. Select **Period 1** or **Period 2** to view distribution for each time period. The pie chart is created using the metric you chose in the **Period 1 vs. Period 2** chart shown previously.

The New Lost Retained Dashboard uses the following metrics:

- "\$ Sales" on page 74
- "Units" on page 88
- "# of Shoppers" on page 70
- "Trips" on page 86
- "\$ per Shopper" on page 71
- "Trips per Shopper" on page 87
- "\$ per Trip" on page 72
- "Units per Trip" on page 90
- "Units per Shopper" on page 90
- "Promoted Units" on page 85

Overlap Dashboard

The Overlap Dashboard shows how frequently products, or portions of your product hierarchy, are purchased together over the time period analyzed.

The dashboard displays a grid of up to 20 products or product hierarchy levels, sorted by the percent of trips that contained those items out of all trips that contained any of the selected products. You can export up too 100 overlaps into Excel.

The Overlap Dashboard includes:

- Flexible product selection use customized Shopper Insights Product Groups or browse your product hierarchy to select products for analysis
- Segmentation select from your available segmentation types and view sales metrics by segment
- Time period use any time period with sales data, up to 52 weeks
- Flexible store groups use predefined store groups or store divisions to select locations

All Segments	•								11	STING -	(4)										Alleska Sto	res
																Thema: 17,65	9					
	SofTass	Exclusivity	OED-05- CLEANING CHENICAL 5		OED AT. LAUNENCY ADDITIVE S	013-04 MR FRESHNE RS	003-06- LAUNDRY DETERGE NTS	063-06- DISH DETERSE NTS	BADY BADY TOLETHE S	007.67. BABY WPES	002.02. PLASTIC STORAGE	007.84. HXSGE 5	007.15 BABY FOOD	007-02. PAMPERS	007.05- BFANT FORMULA	DOT-01. PREVATE LABEL DAPERS	002-01- LAUNDRY VIASTEBA SKETS	002-05. CLOSET	002-04- RETCHEN ORGANIZA TION		082.03- 1000 5108468	ACCESS REAL
003-05-CLEANING CHEMICALS	21.00%	43.90%		19.60%	14.10%	13.30%	10.00%	13.20%	3.70%	3.70%	2.30%	2.20%	2.40%	1.20%	1,20%	0.90%	2.00%	1.30%	1.90%	0.80%	1.30%	0.90
002-09-CLEANING SUPPLIES	12.20%	39.50%	33.90N	1	11.50%	11.00%	9.20%	14,00%	3.10%	3.00%	2.00%	2.10%	1.80%	1.00%	1.10%	1.00%	4.20%	2.10%	3.50%	1,20%	1.00%	1,10
003-07-LAUNDRY ADDITIVES	11.80%	38.30%	25.29%	11.90%		11.60%	28.00%	14.80%	4.30%	4.50%	1.60%	2.50%	2.40%	1.50%	1.00%	1.10%	2.00%	1.10%	1.40%	0.60%	1.20%	0.9
00-04-AR FRESHNERS	11.40%	45.20%	24.60%	12.60%	11.90%		10.70%	10.10%	3.50%	3.90%	2.20%	1.80%	2.50%	1.60%	1.10%	1.00%	2.90%	1.40%	1.40%	0.90%	1.50%	0.0
00-00-LAUNDRY DETERGENTS	10.30%	35.30%	22.10%	10.00%	32.00%	11.00%		15.80%	4.00%	3.90%	1.50%	2.80%	2.80%	1.80%	1.70%	1.30%	2.60%	1.20%	1.50%	0.70%	1,20%	0.7
003-06-DISH DETERGENTS	10.10%	35.00%	27.50%	18.00%	17.20%	11.40%	17.10%		3.70%	4.60%	1.70%	2.90%	3.00%	1.70%	1.60%	1.30%	2.80%	0.80%	2.20%	0.80%	1.00%	0.7
007-08-BABY TOLETRIES	9.30%	45.90%	8.30%	4.00%	5.50%	4.20%	5.30%	3.90%		15 90%	2.40%	8.90%	11.40%	8.80%	5.70%	3.90%	1.00%	0.70%	1.00%	0.40%	0.50%	0.7
007-07-BABY WIPES	9.30%	31.60%	8.50%	3.90%	5.70%	4.70%	4.30%	5.00%	20.00%		1.80%	15.90%	11.30%	17.00%	7.30%	10.00%	0.70%	0.40%	0.40%	0.00%	0.00%	0.3
N2-02-PLASTIC STORAGE	7.10%	66.30%	6.90%	5.00%	2.70%	2.50%	2.20%	2.50%	3.10%	2.30%		1.40%	1.80%	1.30%	0.90%	1.00%	4.10%	4.50%	2.80%	2.70%	1.20%	1.0
N7-04-HUGGIES	7.00%	47.20%	6.60%	3.60%	4.10%	2.90%	4.10%	4.20%	11.90%	21.20%	1.50%		9.70%	5.30%	8.40%	2.80%	0.50%	0.80%	0.20%	0.30%	0.50%	0.3
COCH YEABY FOOD	6.80%	40.00%	7.50%	3.10%	4.10%	4.10%	4.20%	4.40%	15.60%	15.30%	1.90%	\$ 90%		10.10%	14.90%	4.50%	0.80%	0.50%	0.70%	0.40%	0.40%	0.2
07-02-PAMPERS	5.80%	42.00%	4.20%	2.00%	3.00%	3.20%	3.20%	3.00%	14.10%	27.30%	1.60%	5.40%	11.90%		8.40%	2.10%	0.70%	0.50%	0.00%	0.20%	0.80%	0.2
007-00-INFANT FORMULA	4.40%	40.20%	5.50%	3.10%	2.70%	2.90%	4.00%	3.70%	12.00%	15.30%	1.40%	13.30%	23.00%	11.00%		3.50%	0.80%	0.40%	0.00%	0.30%	0.80%	0.3
107-01-PRIVATE LABEL DWPERS	3.90%	50.80%	5.00%	3.20%	3.20%	2.00%	3.30%	3.30%	9.20%	23.70%	1.70%	4.90%	7.80%	3.20%	4.00%		0.50%	0.10%	0.40%	0.40%	0.10%	0.9
N2-01-LAUNDRY/MASTEBASKETS	3.40%	47.00%	15.90%	15.10%	6.90%	9.70%	7.90%	8.20%	2.80%	2.00%	8.50%	1.00%	1.70%	1.20%	1.00%	0.70%		5.00%	8.90%	2.70%	1.50%	2.0
02-05-CLOSET	3.00%	52.70%	9.50%	8.80%	4.20%	5.30%	4.20%	2.90%	2.10%	1.10%	10.90%	1.90%	1.10%	1.00%	0.50%	0.20%	5.70%		4.00%	4.20%	1.10%	5.0
102-04-KITCHEN ORGANIZATION	2.50%	47.22%	15.60%	15.90%	6.80%	6.50%	6.10%	3.00%	3.80%	1.40%	7.90%	0.50%	1.80%	1.40%	1.10%	0.70%	12.00%	4.70%		3.80%	3.29%	0.9
002-11-LAMPARE ORGAND	2.30%	59.20%	7.50%	6.30%	2.90%	4.60%	2.90%	3.40%	1.70%	2.40%	8.20%	1.00%	1.20%	0.50%	0.50%	0.70%	3.90%	5.30%	4.10%		2.20%	1.2
002-03-FOOD STORAGE	2.20%	57.60%	12.80%	9.10%	6.30%	7.80%	5.50%	7.60%	2.10%	2.60%	3.90%	1.60%	1.30%	2.10%	1.50%	0.30%	2.30%	1.50%	3.50%	2.30%		1.0
002-00-IRONING ACCESSORIES	1.00%	62.10%	10.70%	7.60%	5.70%	3.80%	4.10%	3.80%	3.50%	1.60%	4.10%	1.30%	0.90%	0.50%	0.50%	0.30%	3.80%	8.20%	1.30%	1.00%	1.30%	

For each row, the value in the column for that row shows the **% Overlap** — how frequently purchasers of the item in the row also purchased the item in the column over the same period. In the example below, 33.90% of people who purchased "cleaning supplies" during this period also purchased "cleaning chemicals" during the same period. By contrast, only 19.60% of people who purchased "cleaning chemicals" during this period purchased "cleaning supplies" during the same period. If you are looking at transactions, this refers to each specific transaction (for example, checking out at the Pharmacy, Electronics, and the front register are all one transaction). If you are looking at trips, this includes all of the person's shopping behavior in one day at one store.

	% of Trips I		CLEANING CHEMICAL S	CLEANING SUPPLIES
CLEANING CHEMICALS	21.00%	43.90%		19.60%
CLEANING SUPPLIES	12.20%	39.50%	33.90%	
LAUNDRY	11.80%	36.30%	25.20%	11.90%

In addition to a matrix showing the percentage of co-purchasing between each of the 20 items, you can use the **Exclusivity** column to view how frequently the items were purchased alone. If you want to review results for a particular segment, use the **Segment** drop-down menu in the upper left-hand corner of the dashboard.

Interpreting Results

You can use the Overlap Dashboard to answer a wide variety of questions, such as:

- What products do shoppers purchase together over time?
- What % of trips are exclusive to a single product?
- What products appear together in the same trip?

You can use the overlap percentages to determine opportunities for co-promotion, identify unique co-purchasing behavior by segment, and identify items that are likely to bring shoppers in for an exclusive trip.

Note: You can analyze trips as well as individual transactions. This is useful if there may be multiple transactions in a single trip due to separate in-store registers. Contact your IBM representative for more information.

The Overlap Dashboard uses the following metrics:

- "% of Trips (Overlap)" on page 79
- "Exclusivity (Trip)" on page 82
- "Exclusivity" on page 82
- "% Overlap (Trip)" on page 77 (label not displayed in User Interface)
- "% Overlap (Shopper)" on page 76
- "% of Shoppers" on page 78
- % of Txns

Product Compare Dashboard

The **Product Compare Dashboard** allows you to compare between two and ten products, visually representing the selected products in a bubble chart, displaying change versus the previous year for key metrics such as dollars per trip and number of trips.

You can also focus the data on a particular segment by using the **Primary Segment** and **Secondary Segment** drop-down menus.



Note: This dashboard may not be available for all retailers.

The bubble graph allows users to quickly identify which products are driving higher traffic on the y-axis of **Trips per Shopper**, with the x-axis showing the items that drive higher basket value, **\$ per Trip**. The size of the bubble represents the relative **Total Trips** for the item.

On the right-hand side of the dashboard, you can select and deselect products, allowing you to reduce the number of bubbles or eliminate outliers.

<< Hide

🖌 All

- 🗹 Adult Health General
- Alcohol Spirits
- Analgesics
- 🗹 Auto Home Hardware
- 🗹 Baby Food And Care
- 🗹 Bacon Sausage

The Product Compare Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "\$ per Shopper" on page 71
- "\$ per Trip" on page 72
- "\$ per Unit" on page 73
- "\$ Sales" on page 74
- "Basket \$ Sales with Item" on page 80
- "Basket Unit Sales with Item" on page 80
- "Item \$ per Basket" on page 82
- "Item Units per Basket" on page 83
- "Rest of Basket \$ Sales" on page 85
- "Rest of Basket Units" on page 85
- "Trips" on page 86
- "Trips per Shopper" on page 87
- "Units" on page 88
- "Units per Shopper" on page 90
- "Units per Trip" on page 90

Product Dashboard

The Product Dashboard (also called Sales Behavior Dashboard by some retailers) provides insights to help you develop and evaluate business strategies and tactics.

This is done by identifying the key sales drivers for each shopper segment:

- **# of Shoppers** how many people purchased the selected product or products buying from the selected categories during the specified time period. This is also known as Penetration.
- **\$ per Shopper** the amount of money spent by each shopper during the specified time period. This is also known as Buying Rate.



Note: The Product Dashboard is called Sales Behavior Dashboard by some retailers and it will not display the lower left chart.

The top portion of the dashboard is a graph showing the decomposition of sales for the selected quarter. Each metric is shown as an absolute value and shows the percent change versus one year before, allowing users to identify which metrics are driving business performance.

The line graph in the lower left hand corner of the dashboard is the Sales Decomposition Trend, showing a time series for sales, number of shoppers, and dollars per shopper. Each line's color corresponds to the colored stripe in the sales decomposition graphic above. If you want to see the graph in more detail, click **Sales Decomposition Trend** to open the Sales Decomposition Dashboard.



The bottom right-hand corner shows information about your primary segments, showing actual or growth values for each segment in key sales driver metrics. Select **Growth** to view the segment's performance versus the year before.

Interpreting Results

The Product Dashboard can help you discover product performance issues quickly, acting as a "Product Report Card". For example, if particular sales drivers are declining for a segment, you can more effectively target those issues for resolution. You could interpret results and use them to drive actions:

- You could discover that a sales decline is not due to decreasing units sold per shopper, but to decreased trips per shopper. This insight allows you to focus on tactics that bring more shoppers into the store.
- You could find an unexpected trend in a particular segment's performance, indicating that you may need to examine your promotional plan to better engage that segment.

The Product Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "\$ per Shopper" on page 71
- "\$ per Trip" on page 72
- "\$ per Unit" on page 73
- "% of Segment Shoppers" on page 78
- "POS \$ Sales" on page 84
- "Profit per Shopper" on page 84
- "Profit per Trip" on page 84
- "Profit per Unit" on page 85
- "Trips" on page 86
- "Trips per Shopper" on page 87
- "Units per Trip" on page 90

Promotion Response Dashboard

The **Promotion Response Dashboard** enables you to analyze how much revenue increase occurs for selected products when using particular discounts and promotional tactics. These results can be filtered by category, promotion types, and segment.

About this task

Note: This dashboard may not be available for all retailers.

The Promotion Response Dashboard is separated into 4 areas:

Procedure

- 1. Segment Promotion Lift Analysis
- 2. Item Lift for Selected Segment/Discount
- 3. Graph Display Criteria
- 4. Segment Filter



Note: This dashboard uses a 10% sample size for all calculations. Data displayed are representative of this 10% sample.

Choosing Data to Display

To use the dashboard, you must first select the **Category**, **Promotion Type**, and **Segmentation Type** you wish to view. Then, using the line graph in the **Segment Promotion Lift Analysis** area, click on a particular data point to update the graph below. Each of the data points in the graph above represents the revenue increase for a certain segment and discount percent. Clicking on that data point will show the item-by-item data for that segment and discount amount, showing which items are most affected by the selected discount percentage.

Changing any of the selections in these drop-downs changes the data filter, selecting a different category, promotional tactic, or segmentation type for the

dashboard. For example, the graph above shows an analysis of the Cereal category for promotions using a Display tactic. The two lines shown are for the two segments selected on the right: the "Healthy Aspiring" segment and the "Only the Best" segment.

Segment Promotion Lift Analysis

The **Segment Promotion Lift Analysis** area of the dashboard shows an overview plot for each segment selected in the right-hand check-box list. Each segment is represented by a line in the graph, showing the revenue lift percentages associated with certain discount or Temporary Price Reduction (TPR) levels.

For example, the graph below shows that revenue % lift for the selected products peaks at around a 25% discount for both the "Healthy Aspiring" and "Only the Best" segments. a 25% discount yields approximately a 125% revenue lift for each, though lift is slightly lower for the "Only the Best" segment.



When you mouse over any data point on this graph, you will see the associated data for that point. Clicking on that data point updates the lower graph, showing revenues and percentage lifts for the selected items.

Item Lift for Selected Segment/Discount

After you click a data point from the **Segment Promotion Lift Analysis** area of the dashboard, this area updates to reflect the item-by-item revenue and lift data for the selected discount percent and segment.

For example, the graph below shows that the user clicked the data point for "Healthy Aspiring" shoppers at a discount percentage of 25%:



Mousing over any of the data points in this graph shows the relevant data for the item. This shows how discounts and promotional tactics vary by item, discount,

and segment. If you want to see specific data for another segment or discount percentage, select that data point on the graph above.

Graph Display Criteria

The Graph Display Criteria area is required each time you run the dashboard. These three drop-down menus at the top of the dashboard allow you to focus in on one category, promotional tactic, and segmentation type for the dashboard display.

Note: Each of these drop-downs is required; to show data in the graphs below, you must select a category, promotion tactic, and segmentation type. The segments available for the segmentation type are shown in the segment filter section, as described in the Segment Filter section below.

		GM FIBER ON	IE (3)			
Category	Cereal	Promotion Type display	r 👻	Segmentation Type	Lifestyle	~
 Revenue 	O Units O Profit				Total Chain	

If you have selected multiple categories in the dashboard loading prompt, you must select one of the categories from the **Category** drop-down. If you selected only one category, it will be loaded by default. The **Promotion Type** drop-down allows you to show criteria for a single promotion tactic, such as display or ad. This allows you to examine promotion tactics' effectiveness for segments and categories.

Finally, use the **Segmentation Type** drop-down to choose the segmentation scheme you would like to use in your analysis. The segments available for the selected segmentation type will be displayed in the filter list on the right-hand side of the dashboard.

Segment Filter

The **Segment Filter** allows you to select segments for display in the top graph of the Promotion Response dashboard. Each selected segment will have a line in the **Segment Promotion Lift Analysis** graph, and selecting individual nodes from that line will show the relevant data by item for the lower graph.

```
<< Hide Select Segments >>
```

- Select All
- Voung Budgeters
- Traditionalist
- Voung Spenders
- Healthy Aspiring
- Only the Best

Interpreting Results

The Promotion Response Dashboard provides a granular view of how your products respond to discounts by segment. For example, this dashboard could help you answer the following questions:

- How steeply should I discount Chex if I want to maximize promotional effectiveness for Families with Young Children?
- Which items in Dairy are most effective in driving increased profit from Baby Boomers?
- Which segments will see the greatest lift from the promotion I am planning to execute?
- Which promotional tactic will provide more lift with this promotion: Ad or Display?

In the graph below, the Promotion Response Dashboard shows an important insight: for Healthy Aspiring shoppers, a 25% discount with a display tactic for FIBER ONE 16.2OZ provides a much greater lift than for the other items selected for analysis. Using this data, you would likely select this product for promotion over the other items shown in the dashboard.



The Promotion Response Dashboard uses the following metrics:

- % Discount
- Profit % Lift
- Revenue % Lift
- Revenue
- Unit % Lift

Purchase Frequency Dashboard

The Purchase Frequency Dashboard details how financial performance for the selected items is distributed among shoppers who bought one time or multiple times, as selected when loading the dashboard.

For example, the **Performance by Purchase Frequency** section of the dashboard below shows metric values for shoppers who purchased one of the selected items 1 time, 2-3 times, 4-5 times, etc.



Use the **Metric** drop-down to show performance of shoppers and segments in each group across other metrics. The **Top 10 Items, Trips Per Shopper** section of the dashboard shows the top 10 items from the selected group, sorted by Trips Per Shopper.

Mousing over any bar in the **Performance by Purchase Frequency** section will show the characteristics used to create that bar:



Clicking on a bar selects that group of shoppers, showing data for that group by segment in the **Segment Performance** section at the bottom of the dashboard:



For example, the graph above shows that for all shoppers who bought any of the selected products 2-3 times in the selected time period, the "Best Shoppers" segment contributed most of the \$ Sales. Changing the metric selection in the **Metric** drop-down will also change this graph to show segment performance by the selected metric.

Interpreting Results

Identifying products that generate trips can help you leverage the draw of those products to bring shoppers into the store. More importantly, segment performance characteristics can help you identify areas with potential for growth. You can leverage insights from the Purchase Frequency Dashboard to:

- Determine how frequently shoppers are coming to your store and purchasing from the selected category or product group
- Identify key segments that can drive additional trips
- Understand shopping patterns for your segments and frequent shoppers

The Purchase Frequency Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "\$ per Shopper" on page 71
- "\$ per Trip" on page 72
- "\$ per Unit" on page 73
- "\$ Sales" on page 74
- "% of \$ Sales" on page 77
- "% of Promoted Units" on page 77
- "Basket \$ Sales with Item" on page 80
- "Trips" on page 86
- "Units" on page 88
- "Units per Shopper" on page 90
- "Units per Trip" on page 90

Purchase Summary Dashboard

The Purchase Summary Dashboard enables you to analyze key metrics across segments using flexible product selections and custom metric selections.

You can use the Purchase Summary Dashboard to create on-demand reports, using:

• Flexible product selection — use customized Shopper Insights Product Groups, browse your product hierarchy, or search for products to analyze.

- Segmentation select from your available segmentation types and view sales metrics by segment
- Time period use any time period with sales data, up to 52 weeks
- Flexible store groups use predefined store groups or store divisions to select locations

When loading the dashboard, you can choose the metrics to display in the Select Metrics area. After loading the dashboard, you will be able to see these metrics for the selected products by segment.



To view a different segment's sales performance metrics, select a segment from the **Primary Segment** drop-down menu. If your segmentation type has secondary segments, you will also be able to select from secondary segmentation types.

Primary Segment	Mature		•							1.4	CA Store Group
	Morn with		R								
Product	Morn with Empty Ne			\$ per Unit	\$ Sales	% of Segment Shoppers	Basket Sales with Item	Trips	Trips per Shopper	Units per Trip	Units
001	Mature			\$69.88	\$23,760	0.0%	\$115.69	270	1.2	1.3	340
002	missing			\$6.81	\$2,710,706	28.2%	\$92.77	203,230	1.5	2.0	397,940
003	206,300	\$20.30	\$10.14	\$4.80	\$4,188,101	43.3%	\$84.96	413,170	2.0	2.1	872,130
007	106,630	\$47.16	\$18.91	\$5.15	\$5,029,114	22.4%	\$89.29	265,890	2.5	3.7	975,830
008	12,780	\$84.66	\$78.23	\$66.62	\$1,081,956	2.7%	\$145.97	13,830	1,1	1.2	16,240
009	21,280	\$55.84	\$47.74	\$24.06	\$1,188,365	4.5%	\$129.40	24,890	1.2	2.0	49,400
012	35,790	\$21.37	\$17.04	\$13.10	\$764,838	7.5%	\$84.00	44,890	1.3	1.3	58,390
013	38,190	\$31.12	\$24.62	\$19.42	\$1,188,304	8.0%	\$110.63	48,270	1.3	1.3	61,180
014	27,020	\$30.57	\$24.75	\$18.50	\$826,073	5.7%	\$118.51	33,380	1.2	1.3	44,650
015	24,250	\$27.76	\$22.93	\$17.60	\$673,161	5.1%	\$113.71	29,360	1.2	1.3	38,240
016	81,210	\$26.87	\$17.49	\$9.34	\$2,181,738	17.1%	\$100.76	124,710	1.5	1.9	233,670
018	30	\$11.66	\$11.66	\$11.66	\$350	0.0%	\$102.14	30	1.0	1.0	30
020	25,520	\$21.11	\$17.40	\$10.67	\$538,791	5.4%	\$106.46	30,960	1.2	1.6	50,490
021	7,580	\$35.61	\$26.44	\$17.11	\$269,949	1.6%	\$103.40	10,210	1.3	1.5	15,780
022	36,130	\$14.63	\$12.19	\$5.16	\$528,603	7.6%	\$91.46	43,380	1.2	2.4	102,420
023	30,000	\$22.41	\$18.68	\$11.62	\$672,360	6.3%	\$97.59	35,990	1.2	1.6	57,870
024	17,120	\$19.54	\$17.73	\$15.44	\$334,578	3.6%	\$89.80	18,870	1.1	1.1	21,670
025	42,530	\$9.89	\$8,19	\$4.80	\$420,800	8.9%	\$77.52	51,370	1.2	1.7	87,590

To export or print your custom dashboard results, click the Excel icon in the upper-right-hand corner of the dashboard.

Interpreting Results

This dashboard provides a flexible custom report baseline, which you can use to split up and analyze your sales data using product groups, specific metrics, segmentation types, and more. You can use these reports to:

Ni @

- · Analyze segment performance for the selected products over the time period
- See which metrics are driving growth for product groups or parts of your product hierarchy
- · Compare segment performance across equivalent stores, timeframes, and metrics

The Purchase Summary Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- # of Shoppers Growth
- # of Shoppers Last Year
- "\$ per Shopper" on page 71
- \$ per Shopper Growth
- \$ per Shopper Last Year
- "\$ per Trip" on page 72
- \$ per Txn Growth
- \$ per Txn Last Year
- "\$ per Unit" on page 73
- \$ per Unit Growth
- \$ per Unit Last Year
- "\$ Sales" on page 74
- \$ Sales Growth
- \$ Sales Last Year
- "% of Segment Shoppers" on page 78
- % of Total Txns
- Basket \$ Sales with DPCI
- Exclusivity in Total Txns
- "Trips" on page 86
- Txns Growth
- Txns Last Year
- "Trips per Shopper" on page 87
- Txns per Shopper Growth
- Txns per Shopper Last Year
- "Units" on page 88
- Units Growth
- Units Last Year
- "Units per Shopper" on page 90
- "Units per Trip" on page 90
- Units per Txn Last Year

Note: The Purchase Summary Dashboard does not take returns into consideration.

Sales Decomposition Dashboard

The Sales Decomposition Dashboard can help you determine which of the key sales metrics shown in the graphs are driving sales over time. This dashboard is available at various drill-down levels, allowing you to analyze the performance of a product or product hierarchy level.

Note: This dashboard may not be available for all retailers.

A change in any of the key metrics may help you determine which tactics should be explored more thoroughly. For example, if a decline is sales is driven by a decline in units per trip, you could adjust the mix of promotions to deliver optimal results, focusing on big items versus little items, or buy-one-get-one versus a single price point.



By using the check-boxes at the top of the dashboard, you can select the metrics you would like to view individually, adding or removing lines from the line graph below. For a fair comparison between lines, click **Log Scale** to display the graph in a log scale.

To drill down to a category, type, or item, click the drill-down buttons at the top of the dashboard:

Department	Category
CANDY	

The Sales Decomposition Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "\$ per Shopper" on page 71
- "\$ per Trip" on page 72
- "\$ per Unit" on page 73
- "\$ Sales" on page 74
- "Trips per Shopper" on page 87
- "Units per Trip" on page 90

Sales Driver Dashboard

The Sales Driver Dashboard displays which metrics drive sales growth or decline compared to last year. It takes into account all transactions, not only transactions made by shoppers.

Key metrics in the Sales Driver Dashboard include:

- "# of Shoppers" on page 70
- "Trips per Shopper" on page 87
- "Units per Trip" on page 90
- "\$ per Unit" on page 73
- "Trips" on page 86
- "\$ per Trip" on page 72
- "\$ Sales" on page 74

Note: Some retailers do not have these shopper metrics available.

Growth numbers for all metrics are also included. The comparison is for the same time period a year ago (that is, year over year).



The above grid is interactive and the visualization will update based on your product selection. The sales driver accounts for returned items.

You can also use the **\$ Sales Impact** radio button to see what effect changes to your key sales metrics had on your bottom line sales. For example, the **\$** Sales Impact view might help you answer the following question: "Was the decline in sales for this category more due to trips or dollar per trip?"

Note: The \$ Sales Impact radio button is applicable to only some companies.

Note: The Sales Driver Dashboard is based off of a 10% sample of sales data. You cannot drill down on this report. If your company has customized your product level labels, you will see customized labels on the Shopper Insights home page and in the report. Vendors can browse and select only those products to which they have access.

Segment Compare Dashboard

The **Segment Compare Dashboard** enables you to compare shopper preferences across multiple products. Select the products to view in the list on the right side of the screen, and you will see each segment's purchasing behavior for the selected products in the bar charts to the left.



The dashboard contains two sets of graphs: the top set of graphs displays **Actual** results for the selected quarter across segments, while the **Index** section shows indexed values for the same metric. The graphs shown reflect the key sales driver metric shown in the **Metric** drop-down. By default, the value is **\$ Sales (PDI)**, but you can use the drop-down to view cross-segment performance on any available metric:

Metric	\$ Sales (PDI)	-
	\$ Sales (PDI)	-
	# of Shoppers (PDI)	=
	Trips (PDI)	
	Units (PDI)	
	\$ per Shopper	•

The Index graphs show variance of each segment's performance around a mean of 100, showing how each segment's purchasing behavior compares other segments. If the index is high, the segment is "over-indexing" for the selected product groups, showing an increased penetration in that segment relative to expected penetration.

The Segment Compare Dashboard uses the following metrics:

- "# of Shoppers (PDI) (Drillable Segment Compare)" on page 70
- "# of Shoppers Index" on page 71
- "\$ per Shopper" on page 71

- "\$ per Shopper Index" on page 72
- "\$ per Trip" on page 72
- "\$ per Trip Index (Segment Compare)" on page 73
- "\$ per Unit" on page 73
- "\$ per Unit Index (Segment Compare)" on page 74
- "\$ Sales (PDI) (Drillable Segment Compare)" on page 75
- "\$ Sales Index" on page 75
- "Trips (PDI) (Drillable Segment Compare)" on page 87
- "Trips Index" on page 87
- "Trips per Shopper" on page 87
- "Trips per Shopper Index" on page 88
- "Units (PDI) (Drillable Segment Compare)" on page 89
- "Units Index" on page 89
- "Units per Trip" on page 90
- "Units per Trip Index (Segment Compare)" on page 91

Segment Dashboard

The **Segment Dashboard** can provide in-depth insights into each segment's purchasing decisions, showing how shoppers in the segment purchase the selected product, along with key sales metrics and their trends versus the year before.

This dashboard also drills down, showing top products for the selected segment. You can use information about top purchases to identify products that can drive segment behavior changes.

Note: This dashboard may not be available for all retailers.

Primary Segment Families on t Secondary Segment Total	he Go 🔹 Coo	kies Crac	kers		
Families on the Go	Sales Tr	end		Store C	luster Performance
		Current	%Change	() Ac	
	\$ Sales (K)	\$81.7	8.9%	\$ Sales (K)	•
	# of Shoppers	3,457	4.9%		
- Creat	% of Segment Shoppers	78.0%		Chicago	
	\$ per Shopper	\$23.63	3.8%		
Description	Trips per Shopper	4.4	4.8%	San Maleo	
	\$ per Trip	\$5.38	(0.9%)		
Promotion Effectiveness	Units per Trip	2.1	(3.8%)		
	\$ per Unit	\$2.53	3.0%	New Orleans	
Top 10 \$ per Shopper	J Grain Cakes - Savo	lop 10 Trips j	per Shopper		Top KVIs
Crackers - Regular - Large Pack Crackers - Value - Satines	Cookies - Organic -			Cookies - On	- Savory - Regular
Cookies - Specialty - Ao	Cookies - Specialty			Cookies - Sp	
Grain Cakes - Savory - Regular	Cookies - Organic -	- Fruit		Cookies - On	ganic - Fruit
Cookies - Specialty - Chocolate	Cookies - Specialty	- Chocolate		Cookies - Sp	ecialty - Chocolate
Cookies - Organic - Ao	Crackers - Regular	- Flavored		Crackers - R	egular - Flavored
Crackers - Single Serve - Bags	Cookies - Specialty				ecialty - Oatmeal
Crackers - Regular - Flavored	Grain Cakes - Savo	-			- Savory - Mini
Crackers - Regular - Wheat	Crackers - Regular				egular - Wheat
Cookies - Organic - Fruit	Crackers - Regular	- Cheese		Crackers - R	egular - Cheese

To view characteristics for a segment, use the drop-downs at the top of the dashboard:

Primary Segment	Families on the Go	•
Secondary Segment	Total	•

The results shown in the dashboard will be updated to match your selections, providing key metrics for the selected segments, showing both current sales metrics for the selected quarter, as well as metrics from the same quarter a year before. In addition to the Primary Segment, choosing a secondary segmentation schema could allow you to analyze, for example, the behavior of your most loyal shoppers.

The Segment Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "\$ per Shopper" on page 71
- "\$ per Trip" on page 72
- "\$ per Unit" on page 73
- \$ Sales (K)
- "% of Shoppers" on page 78
- "Trips per Shopper" on page 87
- "Units per Trip" on page 90

Source of Volume Dashboard

The Source of Volume dashboard decomposes revenue and unit gains/losses between different products at two different time periods.

It is useful in answering business questions, such as:

- Did my new item launch help introduce new customers to the category?
- Did my recent promotion help take share away from my competitors?
- Which ones were most affected by it?
- Did it cause a shift in behavior between my own brands or cause cannibalization?
- For the shoppers that stayed loyal to my brand between the two time periods, did they spend more or less with my brand than they did historically?

	Source of Volume Dash	23. A.					-
etric. (§ Volume *	Segment Young Sngles	Evaluate	Daper Brand A		•		Cha
All Segments: \$241,525,350 Volume Diff, Eval vs Source	Summary	Decomposition of	Gains: \$ Volume	De	ecompositio	n of Losses	: \$ Volume
toung Segles Udatawa Udatawa Toung Coges Tean Panles Engly Isaber Engly Isaber	Fair Share Index: 101.37 52 wks -> 0.50/22015 5 110,828,185 (scaled to 26 52 wks -> 10/31/2015 5 149,060,036 Gains 5 103,130,04 93.1% Ecose	Total: \$ 103,130,048	Swit	Inc	tal: (\$ 64,000, cremental 0,456,517	(58.64	*) Switchers \$8,826,273
Terem Samles Matures 50 \$20,000,000 \$40,000,000 \$60,000,000 \$50,000,000 \$100,000	(\$64,898,197 (38.694) Net Change \$38,231,851 34.5%			lew 124,125		1	New \$25,615,40
Matures	Net Change				Net	% Change	
Multives	Net Change \$38,231,851 34.5%		\$36,	24,125	Net \$1,168	% Change 0.0074%	\$25,615,4
Manuss se second s40,000 s60,000 s60,000,000 s60,000,000 s100,000 pp Anchor Products: \$84,848,239 Volume Diff, Eval vs Source	Net Change \$38,231,851 34.5% Net Switch		\$36, Gain	124,125 Loss	14000		\$25,615,4 Fair Share Index
Manuss se stores second	Net Change 34.5% \$38,231,851 34.5% Net Switch Daper Band F		\$36, Gain \$18,115	(\$16,940)	\$1,168	0.0074%	\$25,615,4 Fair Share Index 84,17
Natures 20 2000000 940,00000 950,000,000 980,000,000 950,000,000,000 950,000,000 950,000,000 950,000,0000000000	Net Change \$38,231,851 34.5% Net Switch Deper Brand F Deper Brand AO		\$36, Gain \$18,115 \$1,334	Loss (\$16,940) (\$238)	\$1,168 \$396 (\$206)	0.0074%	\$25,615,4 Fair Share Index 84,17 138,96
Natures 20 500,000 541,000 00 550,000,000 550,000 000	Net Change \$38,231,851 34.5% Net Switch Daper Brand F Daper Brand AO Diaper Brand G		536, Gain \$18,115 \$1,334 \$18,194	224,125 Loss (\$16,940) (\$93,90) (\$18,401)	\$1,168 \$396 (\$206) (\$26,654)	0.0074% 0.0025% (0.0010%)	\$25,615,4 Fair Share Index 84.17 138.96 116.67 148.59 94.33
Matura Se Sociolo de Secondo S	Ket Change \$30,233,851 34.5% Net Switch Deper Brand F Deper Brand G Deper Brand G		530, Gain \$18,115 \$1,334 \$18,194 \$47,542	224,125 Loss (\$16,940) (\$938) (\$18,481) (\$74,196)	\$1,168 \$396 (\$206) (\$26,654) (\$27,906)	0.0074% 0.0025% (0.0010%) (0.1683%)	\$25,615,4 Fair Share Index 84:17 138.96 116.67 148.59

Defining the Evaluation Time Period

The Source of Volume dashboard requires two different time periods: the evaluation time period and the source time period. The evaluation time period typically represents an event or the most recent time period and shows what customers ended up buying. The number of weeks in an evaluation time period is typically less than or equal to the number of weeks in the source time period. You can currently only enter a maximum of 52 weeks for the evaluation time period.

Defining the Source Time Period

The source time period is typically used to define the baseline of customer behavior before the evaluation time period. When you want to normalize behavior from the source time period, you can use a longer time duration. As a result, the number of weeks in the source time period will typically be greater than or equal to the number of weeks in the evaluation time period.

Defining Anchor Products

Anchor products are the specific set of products, product groups, or brands that you are interested in tracking specific switching behavior in the Net Switch report between the two time periods. Anchor products can be your primary competitors or your own brands if you wish to track cannibalization within your own portfolio. Typically, these products are within one category or department, but can be used to track products in adjacent categories that are potential substitute products. For example, you may want to track carbonated beverages together with juices as anchor product because consumers may switch their spending between these items despite being in two different categories. The source of volume dashboard currently limits the number of anchor products that you can track up to ten selections.

Product Universe

The product universe is defined as the general set of products, product groups, or brands which you consider to be substitutable products. It will contain products or brands in addition to those defined in the anchor products section. The product universe should be a superset of products that also contains the anchor products. This is typically defined as an entire category or department, but may include additional products in other categories or departments which are believed to be possible substitutes. This will help the application track which shoppers are completely new to this universe in the evaluation time period for the decomposition of gains section and which ones left the product universe in the decomposition of losses section.

It is generally recommended that you select the same anchor items and product universe items. This will make your analysis more straightforward. If you have more than 10 anchor items, put the 9 that you are most interested in first and then create an "all others" bucket using product groups (because you can only select 10 anchor items). Also, at this time, you can export only the Net Switchers to Excel.

Time Series Dashboard

For retailers and vendor analysts, the Time Series dashboard is useful in identifying whether certain metrics, products, product attributes, or customer segment behaviors are changing over time.

The **Select a View Prompt** defines what is displayed in separate time series lines. You can select from four options:

- **By Segment**: Display each customer segment as a separate line for a given segmentation type, product, and metric.
- **By Product**: Displays each product as a separate line for a given customer segment, product, and metric.
- **By Product Attribute**: Displays each line as a product attribute time series such as brand, color or size.
- **By Metric**: Displays each line as a different metric.



The Time Series Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "\$ per Shopper" on page 71
- \$ per Txn
- "\$ per Unit" on page 73
- "\$ Sales" on page 74
- "% of Segment Shoppers" on page 78
- % of Total Txns
- Basket \$ Sales with DPCI
- Exclusivity in Total Txns
- Transactions
- Txns per Shopper
- "Units" on page 88
- "Units per Shopper" on page 90
- Units per Txns

Topline Dashboard

The Topline Dashboard allows executives, category managers, analysts, and department managers to evaluate the entire chain by department and compare its category performance by shopper segment and division. By interacting with the heatmap and specifying segments, you can gain unique insight into your shoppers' behavior.

About this task

Note: This dashboard may not be available for all retailers.

	1-	Go		ropinie	Dashboard		2009 Q2 (05/03/2009-0	
Secondary Segment	(Total	h Growth #c	• •	\$ per Shopper			Total Chain	1
Total (All Segments):	\$125,625	14.8%	150,858	\$832.74	# of	Shoppers Growth: (2.2%)	\$ per Shopper Growth:	17.4%
Party People	\$29,902	12.5%	38,627	\$774.12		Primary Segment		
		13.5%		\$909.63	2.0%	r mary sequence	, a chi chi chi	
Maturing Families	\$25,532		28,069				Famil	lies on the Go
All Natural	\$22,209	14.8%	24,972	\$889.36	1.0%		 Weig 	ht Watching
Perimeter Perusers	\$15,176	22.0%	21,840	\$694.89	S 0.0%			et Tooth Baker
Latin Flair	\$8,764	13.1%	9,877	\$887.35	-1.0% U			Flair
Young Families	\$7,533	19.8%	9,210	\$817.95	G -2.0%			iatural vg Families
Weight Watching	\$6,092	14.9%	6,870	\$886.76	₽ -3.0%			vg Families wing Families
Sweet Tooth Bakers	\$5,656	13.1%	6,894	\$820.43	-4.0%			meter Peruser
Families on the Go	\$4,759	12.1%	4,499	\$1,057.88	12.0%	16.0% 20.0%		y People
						\$ per Shopper Growth	Bubble St	ne is \$ Sales
Primary Segment	Families on th	ne Go		\$ Sales and	Growth			
Heatmap View		Grid View				Adult	t Health General	
Ss Beverages	Alcohol Spirits	Ice Cream	Prepared C	heese Breads	Cereal Cookies			
us continugos	Control of other (2)		Food	Baked G			Actual	Growth
				oods Pr emade	5	\$ Sales (K)	\$1.3	45.1%
		Dath Care		emade			\$1.3	45.1% 19.6%
	Dairy	Pet Care	Bac To on ac	b Bab Can Fro	Po Bo Fa Ho ult x bri t	# of Shoppers	61	19.6%
Frozen Prepared Mea	Dairy	Pet Care Dell And Fre	on acc Sau o	b Bab Can Fro y F dy zer ood Gu Pro And m pa	Po Bo Fa Ho ult x bri t ry Din c Be Fre ne Ca ve	# of Shoppers \$ per Shopper	61 \$22.00	19.6% 21.3%
Frozen Prepared Mea Is	Dainy	Deli And Fre Coffee	on acc Sau o Ish sag	emade b Bab Can Fro y F dy zer ood Gu Pro And m pa Car Min ed	Po Bo Fa Ho ult x bri t ry Din c Be Fre ne Ca ve	# of Shoppers \$ per Shopper Trips per Shopper	61 \$22.00 2.0	19.6% 21.3% (4.6%)
Frozen Prepared Mea Is	Dairy	Deli And Fre Coffee	on acc Sau o sh sag e fe Pork Fre	b Bab Can Fro y F dy 28 ood Gu Pro And m pa Car Min ed sh S B H P e a o a	Po Bo Fa Ho ult x bri t ry Din c Be Fre ne Ca ve sh rB re ra S FrR E R FHCB ko e gr Lar a	# of Shoppers \$ per Shopper Trips per Shopper \$ per Trip	61 \$22.00 2.0 \$11.09	19.8% 21.3% (4.6%) 27.1%
Frozen Prepared Mea Is	Dairy Beef Fresh	Deli And Fre Coffee	on act Sau o sh sag e Pork Fre Soups	b Bab Can Fro y F dy zer ood Gu Pro And m pa Car Min ed sh S B H P e a o a af ki t st	Po Bo Fa Ho ult x bri t ry Din c Be Fre ne Ca ve	# of Shoppers \$ per Shopper Trips per Shopper	61 \$22.00 2.0 \$11.09 1.6	19.6% 21.3% (4.6%)
Frozen Prepared Mea B		Dell And Fre Coffee Luncheon N at Paper Produ	on act Sau o sh sag e Pork Fre Soups xtt Frozen V Refrigera	b Bab Can Fro c y F dy Can Fro cood Gu Pro And M ed sh S B H P S B H e ao a af ki t st regato o n d a	Po Bo Fa Ho ult x bri t ry Din c Be Fre ne Ca ve sh rB re ra S FrR E R FHCB ko e gr Lar a	# of Shoppers \$ per Shopper Trips per Shopper \$ per Trip	61 \$22.00 2.0 \$11.09	19.8% 21.3% (4.6%) 27.1%
Frazen Prepared Mea 5 Produce Fresh		Dell And Fre Coffee Luncheon N at	on act Sau o sh sag e Pork Fre Soups xtt Frozen V Refrigera	b Bab Can Fre c yF dy zer ood Gu Prr And m pa Car Min ed sh S B H P sh a D a afkit st feget 0 n d a afket y da	Po Bo Fa Ho out x brit reene Cave sh rBerera SFRERFHCB Koegtlara cstgeotarag	# of Shoppers \$ per Shopper Trips per Shopper \$ per Trip Units per Trip	61 \$22.00 2.0 \$11.09 1.6	19.6% 21.3% (4.6%) 27.1% 5.0%
ls	Beef Fresh	Deli And Fre Coffee Luncheon N at Paper Produ S Condiments	on act Sau o sh sag e Soups act Frozen V Refrigera Hispanic I Househol	b Bab Can Firc y F dy zer occ Gu Pri And m pa Car Min ed sh S B H P e a o a af kit st reget o 0 0 A ated o 0 0 A	Po Bo Fa Ho out x brit reene Cave sh rBerera SFRERFHCB Koegtlara cstgeotarag	# of Shoppers \$ per Shopper Trips per Shopper \$ per Trip Units per Trip \$ per Unit	61 \$22.00 \$11.09 1.6 \$6.95	19.6% 21.3% (4.6%) 27.1% 5.0% 21.0%
ls		Dell And Fre Coffee Luncheon N at Paper Produ S Condiments ressings S Juice	on act Sau o Ish sag Pork Fre Soups Att Frozen V Refrigera Hispanic I Househol Breakfast	b Bab Can Pro cy F dy zer ood Gu Pro And m Pro Car Min ed sh S B H P h B a o a af ki t st reget o n d a sted Food	Po Bo Fa Ho out x brit reene Cave sh rBerera SFRERFHCB Koegtlara cstgeotarag	# of Shoppers \$ per Shopper Trips per Shopper \$ per Trip Units per Trip \$ per Unit Units	61 \$22.00 \$11.09 1.6 \$6.95 193	19.6% 21.3% (4.6%) 27.1% 5.0% 21.0% 19.9%
ls	Beef Fresh	Dell And Fre Coffee Luncheon N at Paper Prod. 5 Condiments ressings Ss Juice Baked Good	on act sau o sau o e Pork Fre Soups ACT Frozen V Refrigera Hispanic I Househol Baked Gr Baked Gr	b Bab Can Fro ood Gu Pro And m pa Car Min ed sh S B H p e a o a afk it st teed o g o A teed o g o A teed o g o A	Po Bo Fa Ho out x brit reene Cave sh rBerera SFRERFHCB Koegtlara cstgeotarag	# of Shoppers \$ per Shopper Trips per Shopper \$ per Trip Units per Trip \$ per Unit Units	61 \$22.00 \$11.09 1.6 \$6.95 193	19.6% 21.3% (4.6%) 27.1% 5.0% 21.0% 19.9%
ls	Beef Fresh	Dell And Fre Coffee Luncheon N at Paper Produ S Condiments ressings S Juice	on act sau o sau o e Pork Fre Soups ACT Frozen V Refrigera Hispanic I Househol Baked Gr Baked Gr	b Bab Can Fro ood Gu Pro And m pa Car Min ed sh S B H p e a o a afk it st teed o g o A teed o g o A teed o g o A	Po Bo Fa Ho out x brit reene Cave sh rBerera SFRERFHCB Koegtlara cstgeotarag	# of Shoppers \$ per Shopper Trips per Shopper \$ per Trip Units per Trip \$ per Unit Units	61 \$22.00 \$11.09 1.6 \$6.95 193	19.6% 21.3% (4.6%) 27.1% 5.0% 21.0% 19.9%

Note: Vendor users will not be able to view the Topline Dashboard.

The Topline Dashboard contains three sections:

Procedure

1. A breakdown of the total store sales and growth by segment:

Secondary Segment	Total		•						Т	otal Chain
	\$ Sales (K)	% Growth	# of Shoppers	\$ per Shopper						
Total (All Segments):	\$125,625	14.8%	150,858	\$832.74		# of 5	hoppers Growt	h: (2.2%)	\$ per Sho	pper Growth: 17.4%
Party People	\$29,902	12.5%	38,627	\$774.12			Prima	ry Segment	t % Growth	
Maturing Families	\$25,532	13.5%	28,069	\$909.63	2.0%					• Families on the Go
All Natural	\$22,209	14.8%	24,972	\$889.36	1.0%					 Weight Watching
Perimeter Perusers	\$15,176	22.0%	21,840	\$694.89	\$ 0.0%	_				Sweet Tooth Baker
Latin Flair	\$8,764	13.1%	9,877	\$887.35	-1.0%s			-		😑 Latin Flair
Young Families	\$7,533	19.8%	9,210	\$817.95	-2.0%					 All Natural
Weight Watching	\$6,092	14.9%	6,870	\$886.76	-3.0%					 Young Families Maturing Families
Sweet Tooth Bakers	\$5,656	13.1%	6,894	\$820.43	-4.0%					Perimeter Peruser:
Families on the Go	\$4,759	12.1%	4,499	\$1,057.88		12.0%	16.0%	20.0%	24.0%	Party People
							\$ per SI	iopper Growth		Bubble Size is \$ Sales

2. The **heatmap**, which shows sales performance of particular categories, as well as total category sales for the selected segment or total chain. The heatmap can

) Heatmap View) Grid View											
Ss Beverages	Alcohol Spirits	Ice Cream Novelties	Pre Foc	pared Id	Che	Cheese		Breads Baked G oods Pr emade		Cereal		Cookies Cracker s	
	Dairy	Pet Care		Bac on	Tob acc	уF	Can dy	Fro zen	Po ult	Bo x	Fa bri	H(t	
Frozen Prepared Mea ls		Deli And Fr Coffee	esh	Sau sag e	0	ood And Car	Gu m Min	Pre par ed	ry Fre sh	Din ne r B	c Ca re	Be Ve ra	
		Luncheon I at	Me	Pork Soup	Fresh	S e af	BH ao fkit	i P S a k st n	i o e		FH	CE r a	
	Beef Fresh	Paper Product				n d a C e		ei	i s Pr C	l s			
Produce Fresh		Condiments D ressings Hispar		nic Fo	od 🚊								
	Salty Snacks	Ss Juice		Household Cl 🖓 Breakfast				-					
		Baked Goo		Bakec Meat		ds T	· ·		÷	_		-,	
		\$ Sales 0	irow	th									
(100.0%)	(45.8%)	8.4%	6	2.6%		116.	7%		170.	9%			

also be customized heavily, as described in "Topline Dashboard" on page 60.

3. A full breakdown of the key sales driver metrics for the selected heatmap category. Simply click on a box in the heatmap to show the sales breakdown for the selected item:

	Actual	Growth
\$ Sales (K)	\$1.3	45.1%
# of Shoppers	61	19.6%
\$ per Shopper	\$22.00	21.3%
Trips per Shopper	2.0	(4.6%)
\$ per Trip	\$11.09	27.1%
Units per Trip	1.6	5.0%
\$ per Unit	\$6.95	21.0%
Units	193	19.9%
Units per Shopper	3.2	0.2%

Using the Heatmap

The heatmap can be customized by segment using the Primary Segment drop-down menu. Select **Total** to view the totals for all segments. You can also customize the heatmap by entering interactive mode. To change the display characteristics of the heatmap, right-click anywhere on the heatmap and select **Interactive**:



This loads the interactive panel:

Heat Map - 9,0,250,090						
▼ Controls						
Size: Size: Sales Growth Disable Delete Sales Growth Vision Science						
 Attributes 						
Unused Attributes	Grouping					
	Jepartment 🛞					
 Metric Filters 						
Filter						
Size: \$ Sales Growth						
(38.9%)	181.0%					
Δ	Δ					
Color: \$ Sales Growth						
(38.9%)	181.0%					
	Δ					
 HeatMap Colors 						
 Blend Colors 						
Band Colors						
(38.9%)	181.0%					
▼ Search						
	Search Filter					

This panel can be used to change the colors of items in the heatmap to make them more representative of their dollar sales or sales growth. For example, you could set positive sales growth to green, and all declines to red. You can also use the interactive mode to delete particular items from the heatmap. To delete an item, click the **Enable Delete** button. When you do, each field in the heatmap can be deleted by clicking its **close** button, causing the heatmap to re-generate:

Mens Health		t: Mens Health 0 wth: 181.0% \$0.17
	Digestive Car e	Seafood Froz
	Eu Eus Care	Baked Goods Onsite Bakery
	Ear Eye Care	Tobacco
Lamb Fresh	Adult Health	Frozen Veget ables

The Topline Dashboard uses the following metrics:

- "# of Shoppers" on page 70
- "\$ per Shopper" on page 71
- "\$ per Trip" on page 72
- "\$ per Unit" on page 73
- \$ Sales (K)
- "Trips per Shopper" on page 87
- "Units" on page 88
- "Units per Shopper" on page 90
- "Units per Trip" on page 90
- **Related Topics**

"Topline Dashboard" on page 60

Trial and Repeat Dashboard

The Trial and Repeat Dashboard (also called New Item Launch Dashboard by some retailers) can help you analyze a new item's trial and repeat performance over a selected geography and time period.

You can analyze a variety of factors, including:

- Depth of Repeat
- Promotion Response
- Purchasing Behavior by Segment



To focus the analysis on a particular segment, choose a segment from the **Primary Segment** drop-down menu. You can also choose a **Secondary Segment**, which varies by company, but may show particular groups of interest within the Primary Segment, such as high-loyalty shoppers. Segment performance for key metrics is shown in the **Primary Segment Performance** graph.

Interpreting Results

The **Promotion Response** graph in the lower left area of the dashboard shows how promotions affected trial and repeat behavior, showing promoted units, non-promoted units, and \$ per unit over the selected time period. You can use this graph to determine promotion effectiveness and appropriately promote the new item.

In the **Trial and Repeat Trend** graph, you can see how the selected segment purchased the product over the selected time period, showing cumulative triers, compliance, and how often triers repeated.

The **Depth of Repeat** graph depicts each segment's repeat behavior, showing how often members of the segment repeated 1, 2, 3, or 4+ times. You can also click on the graph button to view the data underlying the bar chart, providing one-click access to precise repeat data.

The Trial and Repeat Dashboard uses the following metrics:

- # of 1st Repeat Shoppers
- # of 2nd Repeat Shoppers
- # of 3rd Repeat Shoppers
- # of 4+ Repeat Shoppers

- "# of Triers" on page 71
- "\$ per Shopper" on page 71
- "\$ per Trip" on page 72
- "\$ per Unit" on page 73
- "\$ Sales" on page 74
- "% ACV" on page 76
- "% of Repeat" on page 77
- "% of Segment Shoppers" on page 78
- "% of Promoted Units" on page 77
- "Cum # of Triers" on page 81
- "Cum # of Repeaters" on page 81
- "Non Promoted Units" on page 83
- "Promoted Units" on page 85
- "Trips per Shopper" on page 87
- "Units" on page 88
- "Units per Trip" on page 90
Chapter 3. Metric Dictionary

The Metric Dictionary provides brief explanations of the metrics used throughout IBM Shopper Insights. Usage of these metrics may vary by dashboard, as noted.

of 4+ Repeat Shoppers

Number of shoppers who purchased the selected products only five or more times (trial purchase and at least 4 repeat purchases) during the selected time period

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: # of Shoppers who purchased a product more than four times in the selected time period

Additive: Not in most cases. Example: # of 4+ repeat shoppers can be additive across non-overlapping geographies. Example: # of 4+ repeat shoppers can be added to a comparably dimensioned # of first or # of second or # of third repeat buyers, and so on.

of Baskets

Number of distinct trips that contained the product

Also known as: Purchase Occasions, Trips

Used by dashboard: "Affinity Dashboard" on page 25

Calculation: Count of distinct baskets that contained the product

Additive: No

of First Repeat Shoppers

Number of shoppers who purchased the selected products only twice (trial purchase and 1 repeat purchase) during the selected time period

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: # of Shoppers who purchased a product only twice in the selected time period

Additive: Not in most cases. Example: # of first repeat shoppers can be additive across non-overlapping geographies. Example: # of first repeat shoppers can be added to a comparably dimensioned # of second repeat buyers, and so on.

of Second Repeat Shoppers

Number of shoppers who purchased the selected products only three times (trial purchase and 2 repeat purchases) during the selected time period

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: # of Shoppers who purchased a product only three times in the selected time period

Additive: Not in most cases. Example: # of second repeat shoppers can be additive across non-overlapping geographies. Example: # of second repeat shoppers can be added to a comparably dimensioned # of first repeat buyers, and so on.

of Shoppers

Number of identified shoppers who purchased the product at least once

Used by dashboards: "Event Compare Dashboard" on page 26, "New Lost Retained Dashboard" on page 38, Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50, "Sales Driver Dashboard" on page 54, "Time Series Dashboard" on page 59

Calculation: Count of distinct shoppers who purchased the product at least once

Additive: Yes

of Shoppers (Actual)

Number of identified shoppers who purchased the product at least once

Used by dashboards: Sales Behavior (refer to "Sales Driver Dashboard" on page 54

Calculation: Count of distinct shoppers who purchased the product at least once

Additive: Yes

of Shoppers (PDI)

Relative importance, based on # of Shoppers, of a product for a segment in comparison to the importance of all the selected products for the segment

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: (% of shoppers in a segment who purchased a product / % of shoppers in the segment who purchased any of the selected products) * 100

Additive: No

of Shoppers (PDI) (Drillable Segment Compare)

Relative importance, based on # of Shoppers, of a product for a segment in comparison to the importance of the product's universe for the segment

Used by dashboard: Drillable "Segment Compare Dashboard" on page 55

Calculation: [(% of shoppers in a segment who purchased a product) / (% of all shoppers in a segment who purchased the product's universe)] * 100

of Shoppers (PDI) (Flexible Segment Compare)

Relative importance, based on # of Shoppers, of a product for a segment in comparison to the importance of all the selected products for the segment

Used by dashboard: Flexible "Segment Compare Dashboard" on page 55

Calculation: (% of shoppers in a segment who purchased a product / % of shoppers in the segment who purchased any of the selected products) * 100

Additive: No

of Shoppers Index

Relative importance, based on % of Shoppers, of a product for a segment in comparison to the size of the segment

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: [(% of shoppers in a segment who purchased a product) / (% of shoppers in the segment)] * 100

Additive: No

of Third Repeat Shoppers

Number of shoppers who purchased the selected products only four times (trial purchase and 3 repeat purchases) during the selected time period

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: # of Shoppers who purchased a product only four times in the selected time period

Additive: Not in most cases. Example: # of third repeat shoppers can be additive across non-overlapping geographies. Example: # of third repeat shoppers can be added to a comparably dimensioned # of first or second repeat buyers, and so on.

of Triers

Number of shoppers who purchased a product once

Used by dashboard: New Item Launch Dashboard (also called "Trial and Repeat Dashboard" on page 65)

Calculation: Count of distinct shoppers who purchased a product once

Additive: No

\$ per Shopper

Dollars spent per shopper for a product

Also known as: Buy Rate

Used by dashboards: "Event Compare Dashboard" on page 26, "Item Importance Dashboard" on page 28, "New Lost Retained Dashboard" on page 38, Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50, "Segment Compare Dashboard" on page 55, "Time Series Dashboard" on page 59, New Item Launch Dashboard (also called "Trial and Repeat Dashboard" on page 65)

Calculation: \$ Sales of a product / # of shoppers who purchased the product

OR

Trips per Shopper * \$ per Trip

Additive: No

\$ per Shopper Index

Relative importance, based on \$ per Shopper, of a product for a segment in comparison to the importance of the product for all shoppers

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: [(Average \$ Sales of a product by a segment) / (Average \$ Sales of the product by all shoppers)] * 100

Additive: No

\$ per Trip

Dollars spent per trip on a product

Also known as: \$ per Txn, Purchase Size

Used by dashboard: "Event Compare Dashboard" on page 26, "Multiples Per Trip Dashboard" on page 34, "New Lost Retained Dashboard" on page 38, Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50, "Sales Driver Dashboard" on page 54, "Segment Compare Dashboard" on page 55, New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: \$ Sales of a product / # of trips that contained the product

OR

\$ per Unit * Units per Shopper

\$ per Trip Event

Dollars spent per trip on a product

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: \$ Sales of a product / # of trips that contained the product

OR

\$ per Unit * Units per Shopper

Additive: No

\$ per Trip Index (Event Compare)

\$ Sales per Trip per week for a product during Event 2 compared to Event 1

Also known as: \$ per Txn Index

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: [((Event 2 \$ Sales / Trip))/ # of Weeks) / ((Event 1 \$ Sales / Trip)) / # of Weeks)] * 100

OR

(Event 2 Wkly \$ per Trip / Event 1 Wkly \$ per Trip) * 100

Additive: No

\$ per Trip Index (Segment Compare)

Relative importance, based on \$ per Trip, of a product for a segment in comparison to the importance of the product for all shoppers

Also known as: \$ per Txn Index

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: [(Average \$ Sales per Trip that contained a product by a segment) / (Average \$ Sales per Trip that contained the product by all shoppers)] * 100

Additive: No

\$ per Unit

Average unit price for a product

Also known as: Average Retail Price (ARP)

Used by dashboards: "Event Compare Dashboard" on page 26, "Multiples Per Trip Dashboard" on page 34, Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50

page 50, "Sales Driver Dashboard" on page 54, "Segment Compare Dashboard" on page 55, "Time Series Dashboard" on page 59, New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: \$ Sales of a product / # of units of the product that were purchased

Additive: No

\$ per Unit Event

Average unit price for a product

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: \$ Sales of a product / # of units of the product that were purchased

Additive: No

\$ per Unit Index (Event Compare)

\$ per Unit per week for a product during Event 2 compared to Event 1

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: [((Event 2 \$ Sales / Units)) / # of Weeks) / ((Event 1 \$ Sales / Units))/# of Weeks)] * 100

OR

(Event 2 Weekly \$ per Unit / Event 1 \$ per Unit) * 100

Additive: No

\$ per Unit Index (Segment Compare)

Relative importance, based on \$ per Unit, of a product for a segment in comparison to the importance of the product for all shoppers

Used by dashboards: "Segment Compare Dashboard" on page 55

Calculation: [(Average \$ Sales per Unit of a product by a segment) / (Average \$ Sales per Unit of a product by all shoppers)] * 100

Additive: No

\$ Sales

Dollars spent on a product

Used by dashboards: "Event Compare Dashboard" on page 26, "Item Importance Dashboard" on page 28, "Multiples Per Trip Dashboard" on page 34, "New Lost Retained Dashboard" on page 38, "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50, "Sales Driver Dashboard" on page 54, "Time Series Dashboard" on page 59, New Item Launch (also called "Trial and Repeat Dashboard" on page 65), Sales Behavior (refer to "Product Dashboard" on page 42), "Segment Compare Dashboard" on page 55

Calculation: Sum of \$ Sales for a product

Additive: No

\$ Sales (PDI)

Relative importance, based on \$ Sales, of a product for a segment in comparison to the importance of all the selected products for the segment

Used by dashboard: Drillable "Segment Compare Dashboard" on page 55

Calculation: (% of \$ Sales of a product by a segment / % of \$ Sales by the segment for the sum of the selected products) * 100

Additive: No

\$ Sales (PDI) (Drillable Segment Compare)

Relative importance, based on \$ Sales, of a product for a segment in comparison to the importance of the product's universe for the segment

Used by dashboard: Drillable "Segment Compare Dashboard" on page 55

Calculation: [(% of \$ Sales for a product by a segment) / (% of \$ Sales for the product's universe by the segment)] * 100

Additive: No

\$ Sales (PDI) (Flexible Segment Compare)

Relative importance, based on \$ Sales, of a product for a segment in comparison to the importance of all the selected products for the segment

Used by dashboard: Flexible "Segment Compare Dashboard" on page 55

Calculation: (% of \$ Sales of a product by a segment / % of \$ Sales by the segment for the sum of the selected products) * 100

Additive: No

\$ Sales Index

Relative importance, based on \$ Sales, of a product for a segment in comparison to the size of the segment

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: [(% of \$ Sales for a product by a segment) / (% of shoppers in the segment)] * 100

\$ Sales per Week

\$ Sales per shopper per week for a product

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: \$ Sales / # of Weeks

Additive: No

\$ Sales per Week Event

Dollars spent on a product

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: Sum of \$ Sales for a product

Additive: No

\$ Sales per Week Index

\$ Sales per Shopper per week for a product during Event 2 compared to Event 1

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: [(Event 2 \$ Sales/# of Weeks) / (Event 1\$ Sales/# of Weeks)] * 100

OR

(Event 2 \$ Sales per Week / Event 1 \$ Sales per Week) * 100

Additive: No

% ACV

Percent of \$ Sales of stores that sold a product out of \$ Sales of all stores

Used by dashboard: New Item Launch Dashboard (also called "Trial and Repeat Dashboard" on page 65)

Calculation: \$ Sales of stores that sold the a product / \$ Sales of all stores

Additive: No

% Overlap (Shopper)

Percent of shoppers who purchased both products out of all shoppers who purchased the product in the rows

Used by dashboard: "Overlap Dashboard" on page 39

Calculation: # of Shoppers who purchased both products / # of Shoppers who purchased the product in the rows

% Overlap (Trip)

Percent of trips that contained both products out of all trips that contained the product in the rows

Used by dashboard: "Overlap Dashboard" on page 39

Calculation: # of Trips that contained both products / # of Trips that contained the product in the rows

Additive: No

% of \$ Sales

Percent of \$ Sales of a product in a basket. For example, 20% of \$ Sales were purchased by people buying two units at a time.

Used by dashboards: "Multiples Per Trip Dashboard" on page 34, "Purchase Frequency Dashboard" on page 48

Calculation: \$ Sales of a product in a basket / \$ Sales of the product

Additive: No

% of Baskets

Percent of all baskets that contained a product

Also known as: % of Trips

Used by dashboard: "Affinity Dashboard" on page 25

Calculation: # of Baskets that contained a product / # of Baskets

Additive: No

% of Promoted Units

Percent of units of a product in a basket that were purchased on promotion. For example, 20% of all units were purchased on promotion.

Used by dashboards: "Event Compare Dashboard" on page 26, "Multiples Per Trip Dashboard" on page 34, New Item Launch (also called "Trial and Repeat Dashboard" on page 65), "Purchase Frequency Dashboard" on page 48

Calculation: Units Sales on promotion / Unit Sales

Additive: No

% of Repeat

Percent of triers who are repeaters. The value is <= 100%.

Used by dashboard: New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: (Cum - # of Repeaters / Cum - # of Triers) * 100

Additive: No

% of Segment Shoppers

Percent of segment shoppers who purchased a product

Also known as: Segment Penetration,

Used by dashboards: Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Summary Dashboard" on page 50, "Time Series Dashboard" on page 59, New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: (# of segment shoppers who purchased a product / # of segment shoppers) $^{\ast}100$

Additive: No

% of Segment Shoppers - Last Year

Percent of segment shoppers who purchased a product

Used by dashboards: Sales Behavior (refer to "Product Dashboard" on page 42)

Calculation: (# of segment shoppers who purchased a product / # of segment shoppers) $^{\ast}100$

Additive: No

% of Shoppers

Percent of shoppers who purchased both products out of all shoppers who purchased the product in the rows.

Used by dashboard: "Overlap Dashboard" on page 39

Calculation: # of Shoppers who purchased both products / # of Shoppers who purchased the product in the rows.

Additive: No

% of Total Txns

Percent of trips that contained the selected products out of all trips of any product during the selected time period

Also known as: % of Total Trips, % of All Trips, % of All Transactions

Used by dashboard: "Time Series Dashboard" on page 59

Calculation: # of Trips that contained the selected product / # of Trips that contained any product during the selected time period.

Additive: No

% of Trips (Multiples)

Percent of trips that contained x # of units of a product. For example, 20% of all trips contained two units of the product.

Also known as: % of Baskets, % of Txns

Used by dashboard: "Multiples Per Trip Dashboard" on page 34

Calculation: # of Trips with x # of units of a product / # of Trips

Additive: No

% of Trips (Overlap)

Percent of trips that contained a product out of all trips that contained any of the selected products

Also known as: % of Baskets, % of Txns

Used by dashboard: "Overlap Dashboard" on page 39

Calculation: # of Trips that contained a product / # of Trips that contained any of the selected products

Additive: No

% of Txns

Percent of trips that contained a product out of all trips that contained any of the selected products.

Also known as: % of Baskets, % of Trips

Used by dashboard: "Overlap Dashboard" on page 39

Calculation: # of Trips that contained a product / # of Trips that contained any of the selected products

Additive: No

Basket \$ Sales with DPCI

Average dollar value of the entire basket, for baskets that contain the selected DPCI (product)

Also known as: Avg Basket Size with DPCI, Avg Basket Size with Item

Used by dashboard: "Time Series Dashboard" on page 59

Calculation: \$ Sales of all baskets that contained the DPCI (product) / # of baskets that contained the DPCI (product)

Basket \$ Sales with Item

Average dollar value of baskets that contained a product

Used by dashboards: "Event Compare Dashboard" on page 26, "Multiples Per Trip Dashboard" on page 34, "Purchase Frequency Dashboard" on page 48

Calculation: \$ Sales of all baskets that contained a product / # of baskets that contained the product

Additive: No

Basket \$ Sales with Item Base Event

Average dollar value of baskets that contained a product

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: \$ Sales of all baskets that contained a product / # of baskets that contained the product

Additive: No

Basket \$ Sales with Item Index

\$ Sales of a basket that contained a product during Event 2 compared to Event 1

Also known as: Total Basket Ring Index

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: (Event 2 dollar value of baskets that contained a product / Event 1 dollar value of baskets that contained a product) * 100

Additive: No

Basket Lift

Probability that two products will be purchased together. The value should be read as "x times more likely."

Used by dashboard: "Affinity Dashboard" on page 25

Calculation: Co-occurrence of two products / # of baskets that contained the second product / # of total baskets

Additive: No

Basket Unit Sales with Item

Average number of units in all baskets that contained a product

Calculation: # of units in baskets that contained a product / # of baskets that contained the product

Co-occurrence

Percent of baskets that contained both products

Used by dashboard: "Affinity Dashboard" on page 25

Calculation: (# of Baskets that contained both products / # of Baskets) * 100

Additive: No

Cum - # of Repeaters

Cumulative number of shoppers who purchased a product two or more times. For each week in the dashboard, it adds the additional number of repeaters.

Used by dashboard: New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: # of Shoppers who purchased a product at least twice

Additive: No

Cum - # of Triers

Cumulative number of shoppers who purchased a product once. For each week in the dashboard, it adds the additional number of triers.

Used by dashboard: New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: Count of baskets that contained a product

Additive: No

Cumulative Repeaters

Cumulative number of shoppers who purchased a product two or more times. For each week in the dashboard, it adds the additional number of repeaters.

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: # of Shoppers who purchased a product at least twice

Additive: No

Cumulative Triers

Cumulative number of shoppers who purchased a product once. For each week in the dashboard, it adds the additional number of triers.

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: Count of baskets that contained a product

DPCI Basket count

Number of baskets that contained both products

Used by dashboard: "Affinity Dashboard" on page 25

Calculation: Count of distinct baskets that contained both products

Additive: No

Exclusivity

Percent of shoppers who purchased only the indicated product(s) and nothing else, out of all shoppers who purchased the product.

Used by dashboard: "Overlap Dashboard" on page 39

Calculation: # of Shoppers who purchased only a product and nothing else / # of Shoppers who purchased the product

Additive: No

Exclusivity (Trip)

Percent of trips that contained only the indicated product(s) and nothing else, out of all trips that contained the product.

Used by dashboard: "Overlap Dashboard" on page 39

Calculation: # of Trips that contained only the product and nothing else / # of Trips that contained the product

Additive: No

Exclusivity in Total Txns

Percent of transactions that contained only the indicated product(s) and nothing else out of the total transactions.

Used by dashboard: "Time Series Dashboard" on page 59

Calculation: # of Trips that contained only the product and nothing else / # of Total Transactions

Additive: No

Item \$ per Basket

Dollars spent on a product per trip

Calculation: \$ Sales of a product / # of Trips that contained the product

OR

\$ per Unit * Units per Shopper

Additive: No

Item Basket Count

Number of baskets that contained both products

Used by dashboard: "Affinity Dashboard" on page 25

Calculation: Count of distinct baskets that contained both products

Additive: No

Item Profit per Basket

Number of units in a basket that contained a product, excluding the product

Calculation: Count of units in a basket that contained a product, excluding the product's units

Additive: No

Item Units per Basket

Number of units of a product per basket

Calculation: Unit Sales of a product / # of Trips that contained the product

Additive: No

Lift

Probability that two products will be purchased together. The value should be read as "x times more likely."

Used by dashboard: "Affinity Dashboard" on page 25

Calculation: Co-occurrence of two products / # of baskets that contained the second product / # of total baskets.

Additive: No

Non Promoted Units

Number of units of a product that were purchased without a promotion

Used by dashboard: New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: # of non-promoted units of a product

Additive: Yes

POS \$ Sales	
	Total dollars of a product based on all transactions
	Used by dashboard: Sales Behavior (refer to "Product Dashboard" on page 42)
	Calculation: Sum of \$ Sales for a product across all transactions
	Additive: Yes
POS Units	
	Number of units of a product that were purchased based on all transactions
	Calculation: Sum of units of a product across all transactions
	Additive: Yes
Profit	
	Variance between \$ Sales and Cost
	Calculation: \$ Sales of a product - Costs of a product
	Additive: Yes
Profit per Shopper	
	Profit per shopper for a product
	Used by dashboard: Sales Behavior (refer to "Product Dashboard" on page 42)
	Calculation: Profit / # of Shoppers
	OR
	Trips per Shopper * Profit per Trip
	Additive: No
Profit per Trip	
	Profit per trip for a product
	Also known as: Profit per Txn
	Used by dashboard: Sales Behavior (refer to "Product Dashboard" on page 42)
	Calculation: Profit / Trips
	OR
	Profit per Unit * Units per Shopper
	Additive: No

Profit per Unit

Average profit for a product

Used by dashboard: Sales Behavior (refer to "Product Dashboard" on page 42)

Calculation: Profit / Units

Additive: No

Promoted Units

Number of units of a product that are purchased during a promotion

Used by dashboard: "New Lost Retained Dashboard" on page 38, New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: Count of promoted units

Additive: Yes

Rest of Basket \$ Sales

Average dollar value of baskets that contained a product, excluding the product

Calculation: \$ Sales of baskets that contained a product - \$ Sales of the product

Additive: No

Rest of Basket Profit Sales

Profit of baskets that contained a product, excluding the product

Calculation: Profit of baskets that contained a product - Profit of the product

Additive: No

Rest of Basket Units

Average number of units in baskets that contained a product, excluding the product

Calculation: Number of units in baskets that contained a product - number of units of the product

Additive: No

Share of Requirements

Percent of \$ Sales that a product represents out of a set of products shoppers have purchased

Also known as: Loyalty

Used by dashboard: "Item Importance Dashboard" on page 28

Calculation: (\$ Sales of a product by a shopper segment / Total \$ Sales of product(s) selected by user for the same shopper segment) * 100

Additive: No

Total Store ACV

Total of \$ Sales of stores that sold a product out of \$ Sales of all stores

Used by dashboard: "Trial and Repeat Dashboard" on page 65

Calculation: \$ Sales of stores that sold a product

Additive: No

Transactions

Number of transactions that contained the selected products.

Also known as: Trips

Used by dashboard: "Time Series Dashboard" on page 59

Calculation: Count of transactions that contained the selected product.

Additive: In some cases. Example: Transactions can be additive across non-overlapping geographies. Example: Transactions can be additive across non-overlapping time periods and shopper segments.

Transactions (PDI)

Relative importance, based on # of Trips, of a product for a segment in comparison to the importance of all the selected products for the segment

Also known as: Trips (PDI)

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: (% of Trips by a segment that contained a product) / (% of Trips by a segment that contained any of the selected products) * 100

Additive: No

Trips

Number of trips that contained a product

Also known as: # of Baskets, Transactions, Txns

Used by dashboard: "Multiples Per Trip Dashboard" on page 34, "New Lost Retained Dashboard" on page 38, Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50, "Sales Driver Dashboard" on page 54

Calculation: Count of trips that contained a product

Additive: Yes

Trips (PDI) (Drillable Segment Compare)

Relative importance, based on # of Trips, of a product for a segment in comparison to the importance of the product's universe for the segment

Also known as: Txns (PDI)

Used by dashboard: Drillable "Segment Compare Dashboard" on page 55

Calculation: [(% of Trips that contained a product) / (% of Trips that contained the product's universe)] * 100

Additive: No

Trips (PDI) (Flexible Segment Compare)

Relative importance, based on # of Trips, of a product for a segment in comparison to the importance of all the selected products for the segment

Also known as: Txns (PDI)

Used by dashboard: Flexible "Segment Compare Dashboard" on page 55

Calculation: (% of Trips by a segment that contained a product / (% of Trips by a segment that contained any of the selected products) * 100

Additive: No

Trips Index

Relative importance, based on % of Trips, of a product for a segment in comparison to the size of the segment

Also known as: Txns Index

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: [(% of Trips that contained a product) / (% of Shoppers in the segment)] * 100 $\,$

Additive: No

Trips per Shopper

Number of Trips per shopper that contained a product

Also known as: Traffic, Frequency, Txns per Shopper

Used by dashboards: "Event Compare Dashboard" on page 26, "New Lost Retained Dashboard" on page 38, Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Summary Dashboard" on page 50, "Sales Driver Dashboard" on page 54, "Segment Compare Dashboard" on page 55, New Item Launch (also called "Trial and Repeat Dashboard" on page 65) Calculation: # of Trips that contained a product / # of Shoppers who purchased the product

Additive: No

Trips per Shopper Index

Relative importance, based on # of Trips per Shopper, of a product for a segment in comparison to the importance of the product for all shoppers

Also known as: Txns per Shopper Index

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: [(Average # of Trips per Shopper that contained a product for a segment) / (Average # of Trips per Shopper that contained the product)] * 100

Additive: No

Txns (Actual)

Number of trips that contained a product

Used by dashboards: "Sales Driver Dashboard" on page 54

Calculation: Count of trips that contained a product

Additive: Yes

Txns Index

Relative importance, based on % of Trips, of a product for a segment in comparison to the size of the segment

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: [(% of Trips that contained a product) / (% of Shoppers in the segment)] * 100

Additive: No

Txns per Shopper Index

Relative importance, based on # of Trips per Shopper, of a product for a segment in comparison to the importance of the product for all shoppers

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: [(Average # of Trips per Shopper that contained a product for a segment) / (Average # of Trips per Shopper that contained the product)] * 100

Additive: No

Units

Number of units of a product that were purchased based on all transactions

Used by dashboards: "Event Compare Dashboard" on page 26, "Multiples Per Trip Dashboard" on page 34, "New Lost Retained Dashboard" on page 38, "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50, "Time Series Dashboard" on page 59, New Item Launch (also called "Trial and Repeat Dashboard" on page 65), "Segment Compare Dashboard" on page 55, Sales Behavior (refer to "Product Dashboard" on page 42)

Calculation: Sum of units of a product across all transactions

Additive: Yes

Units (PDI)

Relative importance, based on # of Units, of a product for a segment in comparison to the importance of all the selected products for the segment

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: (% of Units of product purchased by a segment) / (% of Units of all the selected products purchased by the segment) * 100

Additive: No

Units (PDI) (Drillable Segment Compare)

Relative importance, based on # of units, of a product for a segment in comparison to the importance of the product's universe to the segment

Used by dashboard: Drillable "Segment Compare Dashboard" on page 55

Calculation: [(% of Units of a product by a segment) / (% of Units of a product's universe by the segment)] * 100

Additive: No

Units (PDI) (Flexible Segment Compare)

Relative importance, based on # of Units, of a product for a segment in comparison to the importance of all the selected products for the segment

Used by dashboard: Flexible "Segment Compare Dashboard" on page 55

Calculation: (% of Units of product purchased by a segment) / (% of Units of all the selected products purchased by the segment) * 100

Additive: No

Units Index

Relative importance, based on % of Units, of a product for a segment in comparison to the size of the segment

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: [(% of Units for a product by a segment) / (% of Shoppers in the segment)] * 100

Additive: No

Units per Shopper

Number of units of a product per shopper

Also known as: Buy Rate

Used by dashboards: "Event Compare Dashboard" on page 26, "New Lost Retained Dashboard" on page 38, "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50, "Time Series Dashboard" on page 59

Calculation: Unit Sales of a product / # of Shoppers who purchased the product

OR

Trips per Shopper * Units per Trip

Additive: No

Units per Trip

Number of units of a product per trip

Also known as: Item Count, Units per Txn

Used by dashboards: "Event Compare Dashboard" on page 26, "Multiples Per Trip Dashboard" on page 34, "New Lost Retained Dashboard" on page 38, Sales Behavior (refer to "Product Dashboard" on page 42), "Purchase Frequency Dashboard" on page 48, "Purchase Summary Dashboard" on page 50, "Sales Driver Dashboard" on page 54, "Segment Compare Dashboard" on page 55, New Item Launch (also called "Trial and Repeat Dashboard" on page 65)

Calculation: Unit sales of a product / # of trips that contained the product

Additive: No

Units per Trip Event

Number of units of a product per trip

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: Unit sales of a product / # of trips that contained the product

Additive: No

Units per Trip Index (Event Compare)

Units per Trip per week for a product group during Event 2 compared to Event 1

Also known as: Units per Txn Index

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: [(Event 2 Trips / # of Weeks) / (Event 1 Trips / # of Weeks)] * 100

OR

(Event 2 # of Shoppers / Event 1 \$ per Shopper) * 100

Additive: No

Units per Trip Index (Segment Compare)

Relative importance, based on Units per Trip, of a product for a segment in comparison to the importance of the product for all shoppers

Also known as: Units per Txn Index

Used by dashboard: "Segment Compare Dashboard" on page 55

Calculation: [(Average # of Units per Trip that contained a product for a segment) / (Average # of Units per Trip that contained the product)] * 100

Additive: No

Units per Week

Unit Sales for a product per week during Event 2 compared to Event 1

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: Event 2 Unit Sales / # of Weeks

Additive: No

Units per Week Base Event

\$ Sales per shopper per week for a product

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: \$ Sales / # of Weeks

Additive: No

Units per Week Event

Unit Sales for a product per week during Event 2 compared to Event 1

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: Event 2 Unit Sales / # of Weeks

Additive: No

Units per Week Index

Unit Sales for a product per week during Event 2 compared to Event 1

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: [(Event 2 Unit Sales/# of Weeks) / (Event 1 Unit Sales/# of Weeks)] * 100

OR

(Event 2 Units per Week / Event 1 Units per Week) * 100

Additive: No

Weekly \$ Sales per Store Selling

\$ Sales of a product per week by stores that sold the product

Calculation: \$ Sales of a product / # of stores that sold the product

Additive: No

Weekly Profit

Profit of a product per week

Calculation: Profit / # of Weeks

Additive: No

Weekly Profit per Store Selling

Profit of a product per week by stores that sold the product

Calculation: Weekly Profit / # of stores that sold the product

Additive: No

Weekly Units per Store Selling

Number of units of a product per week by stores that sold the product

Used by dashboard: "Affinity Dashboard" on page 25

Calculation: Units of a product / # of stores that sold the product

Additive: No

Wkly \$ per Shopper

Dollar sales per shopper per week for the selected products

Also known as: Wkly \$ per Buyer, Avg Wkly \$ per Shopper, Avg Wkly \$ per Buyer

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: (Product \$ Sales / Product Shoppers) / # of weeks

Wkly \$ per Shopper Index

Weekly dollars per shopper for the selected product(s) during Event 2 in comparison to Event 1

Also known as: Wkly \$ per Buyer Index, Avg Wkly \$ per Shopper Index, Avg Wkly \$ per Buyer Index

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: [(Event 2 (Product \$ Sales / Product Shoppers) / # of Weeks)] / [(Event 1 (Product \$ Sales / Product Shoppers) / # of Weeks)] * 100

Additive: No

Wkly \$ per Trip

\$ Sales per Trip per week for a product during Event 2 compared to Event 1Calculation: (Event 2 \$ Sales / Trips) / # of Weeks

Also known as: Wkly \$ per Txn

Used by dashboard: "Event Compare Dashboard" on page 26

Additive: No

Wkly Trips

of Trips that contained a product per week during Event 2 compared to Event 1

Also known as: Wkly Txns

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: Event 2 # of trips / # of Weeks

Additive: No

Wkly Trips Event

of Trips that contained a product per week during Event 2 compared to Event 1

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: Event 2 # of trips / # of Weeks

Wkly Trips Index

of Trips that contained a product per week during Event 2 compared to Event 1

Also known as: Wkly Txns Index

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: [(Event 2 Trips / # of Weeks) / (Event 1 Trips/# of Weeks)] * 100

OR

(Event 2 Trips / Event 1 Trips)*100

Additive: No

Wkly Units per Trip

Number of units of a product per trip per week during Event 2 compared to Event 1

Also known as: Wkly Units per Txn

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: Event 2 # of Shoppers / # of Weeks

Additive: No

Wkly Units per Trip Index

Weekly units per trip containing the selected product(s) during Event 2 in comparison to Event 1

Also known as: Wkly Units per Transaction Index

Used by dashboard: "Event Compare Dashboard" on page 26

Calculation: [(Event 2 (Product Unit Sales / Product Trips) / # of Weeks)] / [(Event 1 (Product Unit Sales / Product Trips) / # of Weeks)] * 100

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