

Shopper Marketing Roadmap – Plotting where you are on the Shopper Marketing Journey

NB: you may be at different levels for different components

	Basic/Introductory	Intermediate	Advanced
Goals, plans and strategy	Need for SM identified but no goals or strategies developed.	Role and priority of SM has been defined and recognised. Has SM goals, mostly tactical. Internal requirements to execute SM plans identified but not yet actioned.	Role of SM integrated throughout organisation, considered and proved to be key growth enabler. SM goals integrated into strategic external and internal plans. SM strategies have been actioned.
Activities and measurement	Instore shopper activations only using a few traditional static techniques. Brand led activations. One-size-fits all activations. Measures major activities only through sales and ROI (outcomes). Defaults to same programs and techniques in absence of measurement and knowing what works.	Uses multiple touchpoints in and out of store. Incorporates some dynamic techniques. One way communications but may integrate shopper feedback into programmes. Brand and category activations. Some retailer and shopper segment specific activations. Trials some new techniques. Measures most program activities at outcome and input (compliance) levels. May adjust programs based on measurement.	Prioritised touchpoints with calibrated messaging by touchpoint. Two way shopper communications and feedback. Category, cross category and occasion/trip type based activations. Digital, social and online cross channel marketing (including online redemptions) a daily way of working. Retailer and shopper specific activations a way of working as identified through shopper insights. Continuous innovation of techniques through trial programmes. Employs a raft of short term program measures and long term trackers that include outcome, input and impact and influence measures. Adjusts programmes based on learnings and measurement.
Shopper Insights	No shopper insights. May have some consumer insights. May have some category data (ie scan).	Has scan and shopper data (ie homescan/shopper scan). Conducts ad hoc shopper studies (including has 'old' ones) but not integrated them into planning. Shopper insights may be used to sell in tactical activities.	Shopper insights collected regularly/continually updated. Shopper insights used in strategy development. Shopper insights sit at hear of all sales, category and retailer category strategy planning. All tactical activities based on shopper insight. Shopper segmentations regularly referred to. Shopper insights built into all relevant tools ie sales presenters.
Structure	Has basic trade marketing function but no category or customer marketing people.	Has some category, trade marketing, customer marketing, shopper marketing people but they all sit under either sales or marketing or are split across sales and marketing. Shopper insights are primarily data based and report into sales or consumer insights/marketing.	Dedicated SM people are own team reporting into Executive or report to both marketing and sales. Shopper insights is its own area and/or reports into the SM team. SM team role and boundaries are clearly understood by other functions.
Resource & Capability	Supported by exec leadership but not acted on. No dedicated SM heads. No consumer or shopper insights person. No SM budget for activities or shopper insights. No training resources for SM involved personnel (but need identified).	Supported by exec leadership and some resources planned for. May have 1-2 SM involved people. Has consumer insights people who organise shopper insights. Some SM and insights budget sits with marketing or sales. Conducts ad hoc training for SM involved personnel.	Supported by exec leadership and resources deployed. Dedicated SM people whose remit is coordinating cross-departmental efforts aimed at shopper. Dedicated shopper insights people. Dedicated SM activity and measurement budget. Dedicated shopper insights budgets. Conducts continuous/frequent training for dedicated SM and involved personnel including agencies.
Relationships	Category and range review based. Agency supplier briefs don't include shopper outside of 'mqb' type targets.	Sharing of selected insights on ad hoc basis or at category/range review times. Shopper insights and objectives shared with supplier agencies.	Joint retailer/supplier planning. Joint category and shopper led initiatives. Joint sharing of data and insights for mutual planning. Explored/run cross category initiatives with multiple suppliers. Agency suppliers provide activation recommendations based on shopper insight and category understanding.