



# Creating your first planogram

A step-by-step guide



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A STEP-BY-STEP GUIDE

## **Author's note**

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## Introduction

Creating professional looking planograms is often perceived as a daunting task. Most people are intimidated by the complexity of most space planning applications and the mystic ways in which the specialists flash through many screens and even more keystrokes if they're asked to demonstrate something.

That's why we made **Retail Shelf Planner**, a simple to use application that doesn't require you to follow long training courses or expects you to use it on a daily basis to remember how things work.

In our opinion creating planograms should be a simple and efficient task. Planogramming software should allow you to quickly and easily translate your knowledge on the category and the consumers into usable information that makes commercial discussions or operational shelf resets easier and more productive. **Retail Shelf Planner** will provide you with the features that are needed to do so, but leaves out all these unneeded extra's that only complicate life.

This white paper will take you with a few steps in approx. 10 minutes through the creation of your first planogram with **Retail Shelf Planner**.

Interesting related reads for follow up are the white papers "Analyzing your first *planogram*" and "*Planogram Data Requirements*" that you'll find on the website as well.

We trust that you'll find it helpful and are ready to answer any questions you may have after reading it. Send them to [info@planograms.eu](mailto:info@planograms.eu) and we'll get back to you as soon as possible.

Erwin Bergsma  
Managing Director



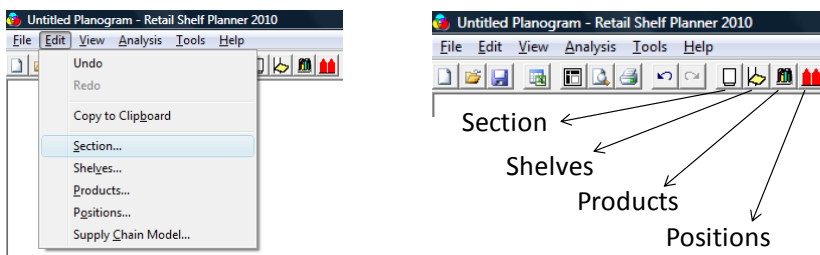
## Creating a planogram

Creating a planogram in **Retail Shelf Planner** is a process that mimics the real life closely. You start by creating a section (backboard and base), then add shelves. Next step is to get the products that are then given positions on the shelves.

The four steps in this document will guide you through creating your first planogram in **Retail Shelf Planner**. As we will focus on the basics at this point, there will be a number of fields in each dialog that will be ignored. You'll see their applicability at a later stage.

Please note that the evaluation version of **Retail Shelf Planner** will not allow you to save your work.

**Retail Shelf Planner** provides access to the various dialogs through the menus as well as via buttons on the toolbar. At the beginning of each of the four steps we will refer to the menu-option or toolbar button as are displayed below:



### Start

For this white paper we start with a blank page as you normally would have after you started the software. Click **File-New** in case you already have a planogram on the screen.

### Step 1. The section

Select **Edit-Section**, or the button on the toolbar. **Retail Shelf Planner** will show the Section dialog that will help you creating the backboard and baseboard. In this dialog you'll have to fill in the following fields:

ID	=	Demo
Height	=	180
Width	=	100
Depth	=	40
Base Height*	=	15
Base Width*	=	98
Base Depth	=	40



\* In reality the base has the same width as the backboard, but in **Retail Shelf Planner** we often make it just a little smaller as this looks visually more appealing.

Click in the field Segments, but leave its value to 1. Now click the OK button. The section should be like displayed above.

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## Creating a planogram, continued

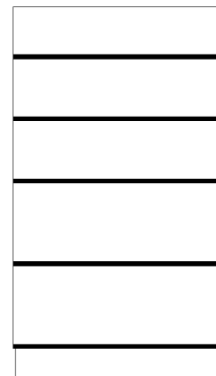
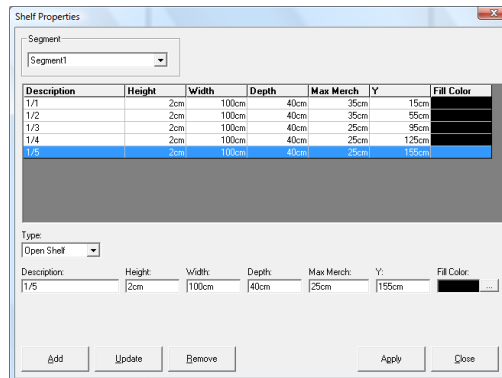
### Step 2. Shelves

The next step is the definition of Shelves. Select Edit-Shelves, or click the button on the toolbar. Add the shelves using the following values:

Type = Open Shelf  
 Description = 1/1  
 Max Merch = 35

Leave the other fields at their default values.

Click the Add-button to add the shelf.



Max Merch is one of these particular terms used when making planograms. It describes the distance above the shelf that is available to merchandise products. If left at 0, **Retail Shelf Planner** will place the products 1 high; otherwise it calculates how many fit in the available space.

The Y coordinate is the distance from the floor to the bottom of the shelf.

Add more shelves with the following values:

Description	Max Merch	Y
1/2	35	55
1/3	25	95
1/4	25	125
1/5	25	155

Leave the dialog by clicking the Close-button. You'll see the shelves being drawn into the section as in the picture above.



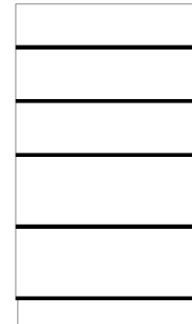


### Creating a planogram, continued

#### Step 3. Products

In step 3 we're adding products to the planogram. This process is pretty similar to how you would get products from the stock room and place them in front of the section prior to filling the shelves. Select Edit-Product or the button on the toolbar to display the dialog, and fill in the following values:

ID	=	P001
UPC	=	5449000133847100
Name	=	Aquarius Orange 1.5 Ltr
Height	=	32.5
Width	=	8.7
Depth	=	8.7



Confirm your information by clicking the OK button. You can repeat this process for additional products if you want, but in practice you'll want to be more efficient and use a product database so that you have to define the products only once.

The ID is a unique article number for the product. This can be the same as the UPC or your own code (e.g. P001, P002, etc.). For flexibility the values in this field can be fully numeric, or a mix of numeric and alpha-numeric (e.g. 101.40.372, or 04752348, etc.) Retailers often assign each product their own code to be used in their internal IT systems.

The UPC is the manufacturer bar code that is on the product. This is also the field that is used to link the product on the shelf to the Live Image for a realistic display of the planogram.

We'll import additional products from a sample database. Select File-Import...

Look for the file to import with the sample files that were installed with **Retail Shelf Planner**. Normally that would be in "C:\Program Files\GRBS Solutions\Retail Shelf Planner\Sample Files". Select the file "RSP Product Import Sample.xls".

Leave the options at "All product fields" and "Update existing & add new products". Click OK to start the import.

Once the import is done, **Retail Shelf Planner** will inform you about the results.

In this case it added 17 new products and updated the product P001 that we already added ourselves manually.



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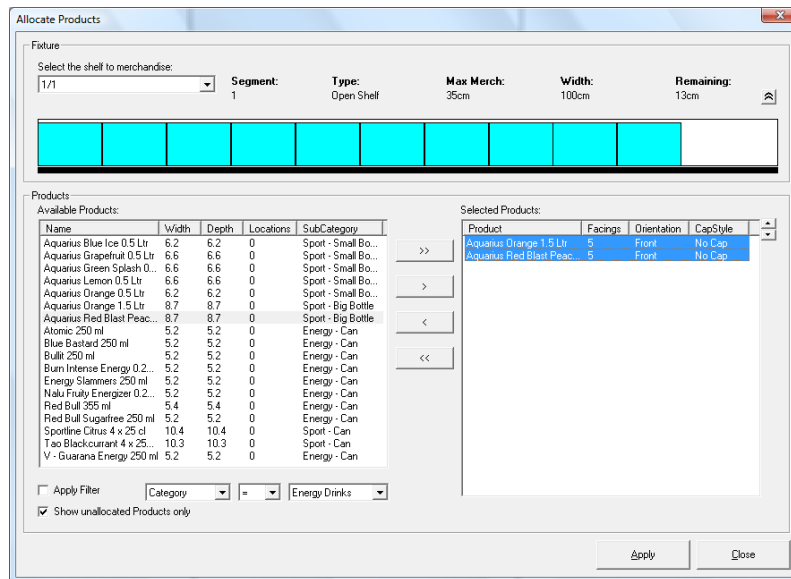
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## Creating a planogram, continued

### Step 4. Allocating products on the shelves

In this last step we'll be taking the products "from the floor" and place them on the shelves. Select Edit-Positions or click the button on the toolbar. **Retail Shelf Planner** will show the Positions dialog:



Select shelf 1/1 in the dropdown top left. In the list of "Available Products" click on the "Aquarius Orange 1.5 Ltr" product and next click the ">" button. Do the same for the other "Sport - Big Bottle" product "Aquarius Red Blast Peach 1.5 Ltr". Select the two products in the "Selected Products" list and press the 5-key on your keyboard. You'll see that both products are given 5 facings.

Click the Apply button to confirm this product placement.



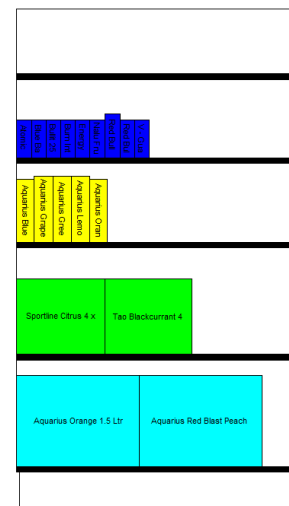
If you accidentally selected the wrong product, you can remove it by selecting it in the "Selected Products" list and press the "<" button.

Next select shelf 1/2. Double click on the "Sportline Citrus 4 x 25 cl" product. Do this another two times. You'll see that **Retail Shelf Planner** increased the facings of the selected product to 3. Add 3 facings of the "Tao Blackcurrant 4 x 25 cl" product in the same way. Click the Apply button to confirm.

Select shelf 1/3. Select the 4 "Sports - Small Bottle" products by clicking the first, then keep the shift-button on the keyboard pressed and click the last product. Click the ">" button to place all four products at once. Click the Apply button to confirm.

Select shelf 1/4 and click the ">>" button to place all remaining products on that shelf. Click the Apply button to confirm.

Click the Close button to leave the dialog. Your planogram should look like the picture on the right.



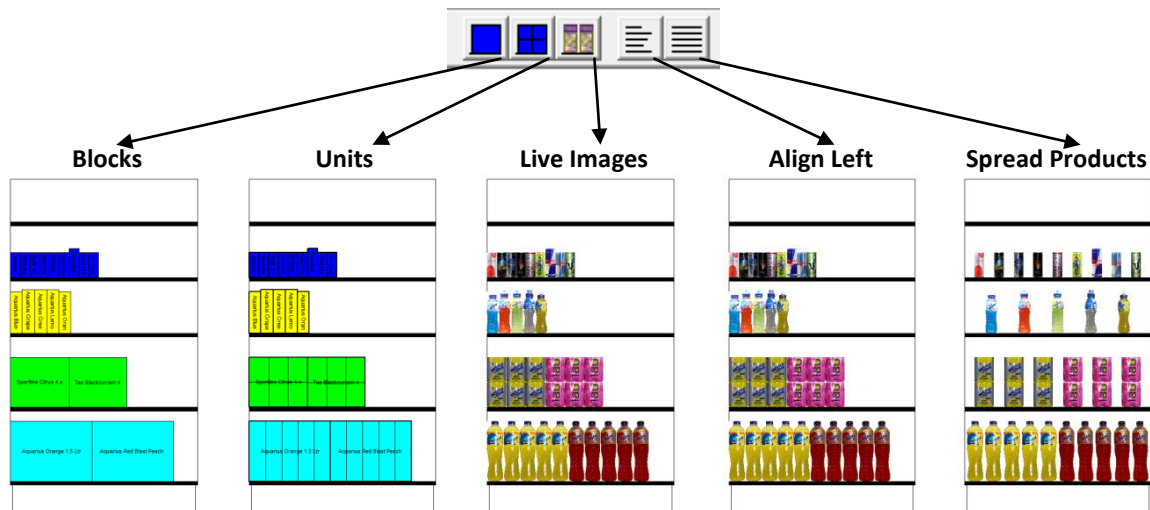


## Making further changes

Once you have a planogram like this, you can use various other, intuitive ways to make further changes to it. This section will give you some ideas about that.

### Displaying the planogram in different ways

On the toolbar you'll find 5 buttons to quickly switch between the different ways to display the planogram:



Click on the buttons to display the Live Images and align the products to the left, as this makes merchandising the planogram easier.

### Changing Facings

Move the mouse cursor over the "Aquarius Red Peach 1.5 Ltr" product in the bottom right of the planogram. Press the 4-key on the keyboard to assign 4 facings to this product. Now move the cursor over the "Aquarius Orange 1.5 Ltr" product. Use the plus-key (+) on the keyboard to increase the facings until the shelf is full. If you increase the facings too much, you can decrease the facings with the minus-key (-).

Use the same methods to assign 4 facings to the "Sportline Citrus 4 x 25 cl" product and 5 facings to the "Tao Blackcurrant 4 x 250 ml" product. Also give 3 facings to each of the small "Aquarius" bottles on shelf 1/3.

### Moving Products

Changing the order of products on the shelves is simply a matter of "drag & drop".

Move the mouse cursor over the "Aquarius Orange 0.5 Ltr" product on shelf 1/3. Keep the left mouse-button pressed and drag the product to the left of the shelf. Once you let go of the mouse-button, the product will be dropped in its new location. In the same way, place the "Aquarius Grapefruit 0.5 Ltr" as the rightmost product on the shelf.

	<p>The position of the cursor versus the center of the products that are already on the shelf decides if the product is placed to its left or right.</p>	
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## Making further changes, continued

### Moving Products, continued

Use the techniques explained in the previous two paragraphs to move the products that are currently on shelf 1/4 into their locations with the number of facings as described in the two tables below.

**Shelf 1/4**

Product	Facings
Red Bull 355 ml	5
Red Bull Sugarfree 250 ml	5
Bullit 250 ml	4
Burn Intense Energy 0.25 Ltr	5

**Shelf 1/5**

Product	Facings
V - Guarana Energy 250 ml	3
Nalu Fruity Energizer 0.25 Ltr	4
Energy Slammers 250 ml	5
Atomic 250 ml	4
Blue Bastard 250 ml	3

After you've done all of the above, click on the "Spread Products" button on the toolbar and your planogram should look like the picture below:



Congratulations, you have completed your first **Retail Shelf Planner** planogram !



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## **About the author:**

Erwin Bergsma is a Dutch national with an international mindset. He has an extensive background in the retailing industry that started back in the 1980's with a regional chain of bookstores in the Netherlands. Later he worked in the buying and merchandising department of Albert Heijn, the largest Dutch grocery-retailer.

During a 14 year career in consulting, account management and marketing with the global market information specialist A.C.Nielsen he built up an in-depth knowledge in the areas of data analysis, Category Management, floorplanning, spacemanagement and assortment planning. Having had local positions in the Netherlands, as well as European and global Marketing positions, Erwin has a broad understanding of the differences and similarities of retailing in many parts of the world.

In 2005 he founded Global Retail Business Solutions, providing specialist software applications and consulting services to companies in the FMCG and CPG business.

Over the years he has worked with many retailers and suppliers, ranging from relatively small locals to large multinationals, in virtually all distribution channels, including Food, Drug, Do-It-Yourself, Convenience, and Mass Merchandising, providing him with a unique and multi-faceted view on the retailing business.



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**Global Retail Business Solutions** is a Belgium based company with 20 years of experience in data analysis, Category Management, assortment-, floor- and space-planning. Our software and services are delivered directly and through partners to clients around the globe.

In those 20 years we worked with hundreds of local and international retailers and suppliers in Food and Non-Food, guiding them in the implementation and successful use of specific software applications supporting their sales, marketing, buying and merchandising departments.

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