



Space Management Brief

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Foodstuffs South Island Shelf Management Policies

All Foodstuffs South Island Ltd Account Managers and Customer Analysts:

General Policy

1. Determine facings on shelf in accordance with volume sales, ensuring that appropriate stock levels are in place so that products are not over faced or under faced.
2. Ensure that private label products are presented in a way where a true comparison can be made on brand positioning and retail pricing. This is also related to customer traffic flow and private label positioning.
3. To provide our Operators with planograms that are non-biased and represent the true volume market share of proprietary brands and our own private label brands.
4. To provide a correct comparison which can be made at store level between a suppliers generated planogram and our own.
5. To provide a process where an Operator can address merchandisers that change product facings in accordance with their own company's wishes.
6. To provide a layout for product placement to meet the needs of the consumer on a store-by-store basis.

Best Practice Guidelines for Planograms with Foodstuffs South Island

Note Plans will not be accepted and will be returned if the following criterion is not achieved.

1. Space and range allocation must be based on average weekly sales data as sent by FSSI. This data represents median sales only (total sales excluding promotional peaks).
2. Please endeavour to use the total product file supplied & take note of any highlighted comments. The only changes to be made to this file should be known manufacturer deletions - if you believe other changes should be made, please contact category management to discuss.
3. Determine facings on shelf in accordance with volume sales, ensuring that appropriate stock levels are in place so that products are not over faced or under faced.
4. If products have to be excluded due to space constraints, we require a separate list of unused products so that the store can be notified. Do not delete unused products from the planogram. Please ensure any overlaid unused products from other relays are not included in the unused list. Should exclusions become necessary please reduce any double facings & ensure any deletions are fair to all brands, category focused & based on sales history.
5. Please utilise the most recent FSSI Spaceman approved plan/schematic as a guide noting Housebrand placement first in flow. All private label products must be included even if they are not currently stocked by the store. Once the case constraints and a minimum 3 days of supply have been met, any available extra facings are to be given to private label products first.

6. Private Label positioning
 - a. Pam's first in flow before market leader in mainstream
 - b. Budget with market leader in economy
 - c. At no point should Pam's and Budget be side by side
 - d. For reporting purposes tag Pam's with mainstream and Budget with economy under Description A
 - e. Both should be reporting under manufacturer as Housebrand.
7. Please ensure Analysts utilise correct and up to date product dimensions on plan.
8. You must make sure that notch counts & fixture dimensions are accurate - if not, these will be returned. Please ensure shelving is **not** assembled i.e. (locked together). These are an important aspect for the implementers & we need to ensure that these are accurate to aid easier implementation.
 - If updating existing plan with new store data, change regular movement of all products in existing plan to 999. This way you can easily identify products that are in the plan but not included the sales data. Data must be returned to the correct figure before we receive the plan. Any SKU's that are not in the store range must be removed.
 - Maximum Merchandise height - please check shelf merchandise heights are set correctly.
 - Combined Shelves: We can only allow the top shelves to be combined. Do not combine any other shelves, as all products will not fit when relay is carried out.
 - No PAK'nSAVE shelves can be combined at all.
 - Premium products are to be placed at eye level. Plans will be analysed for profit! In most cases, we discourage loss leaders from being positioned at eye level.
 - Days of supply are determined on the size of the store. Generally the minimum for market leaders is 3 days of supply on shelf. For bigger stores and PSSI stores, full case facings with a minimum 3 days of supply must be achieved where category space allows.
 - No over hangs will be accepted. This is once again impractical at store level.
 - All product dimensions must be correct for ease of shelf placement and stock ordering.
 - Please ensure that your companies FSSI Account Manager has also seen plans before submitting - a PDF may be required where Spaceman is not available - there are sometimes disparities & disagreements between space planning & sales departments which need to be worked out before they are sent to FSSI for approval.
 - Please ensure your Implementation Team are aware of any updated schematic product flow changes, Housebrand placement on shelf and/or any other unusual issues relevant to store.
 - All plans must be returned in Spaceman format (*.pln) - If using Apollo please check that the plan will open fault free in Spaceman before sending - if unsure please seek assistance from your Apollo account manager.
 - All plans must be approved by Foodstuffs & this approved plan & the implementation pack will be the only authorised.

Foodstuffs South Island Data

FSSI provide a movement file (in Excel format) for use in developing your planograms. The format is as follows:

01/06/2009			Stanmore New World	Average Weekly Sales
PLU	FSSI Code	Barcode	Description	
87265	872652	9310072000329	ARNOTT BISC.200G HUNDREDS & THOUSANDS	6
85646	856460	9310072001128	ARNOTT BISC.250G GINGERNUT	5
85644	856444	9310072001678	ARNOTT BISC.250G MALT-O-MILK	7
85645	856452	9310072000558	ARNOTT BISC.250G MARIE	1
12059	120596	9310072004297	ARNOTT BISC.BRETON 200G	3
21444	214442	9310072000824	ARNOTT BISC.CHEDS 250G	18
87264	872644	9310072000176	ARNOTT BISC.CHOC.ROYAL 200G DARK	10
86189	861898	9310072016030	ARNOTT BISC.HOLBRAN 200G	6
10973	109738	9310072000909	ARNOTT BISC.NICE 250G	20
81553	815535	9310072001777	ARNOTT BISC.SCOTCH FINGER 250G	12
5991	116084	9310072002064	ARNOTT BISC.SUPREME 250G	6
11465	833185	28984282748	ARNOTT CHEESEBOARD CRACKERS 250G	2
28733	282928	9310072010250	ARNOTT CHOC.BUTTERNUT SNAP 195-200G	28
6008	111589	9310072013534	ARNOTT CHOC.DIGESTIVE 200G	12
10875	108758	9310072013541	ARNOTT CHOC.DIGESTIVE 200G FRUIT	12
26255	262552	9310072009001	ARNOTT CHOC.FULL-O-FRUIT 200G	3

Movement File Fields

PLU

This is the FSSI internal code that links to their internal systems. It must be present in all planograms and must be imported into the **Stockcode** field in Apollo.

Article Code

This is the new FSSI Store Code and if provided in FSSI sales data must be included in the planogram in lieu of the PLU code as this is the new **SAP** code the Store uses to order stock when they receive a new planogram. It must be imported into the **Stockcode** field in Apollo in lieu of PLU.

FSSI Code

This is the FSSI Store Code and must be included in the planogram as this is the code the Store uses to order stock when they receive a new planogram. It must be imported into **Description B** in Apollo.

Barcode

This must be imported into the planogram in the **UPC** field to allow for the reading of image files to display.

Description

It is important that this field description be maintained for consistency purposes. FSSI may be receiving planograms from a number of different suppliers and it is important for them to have consistent naming of products. This must be imported into the **Description/Name** field in Apollo.

Mvt

This is a whole number field and is imported into the **Movement** field in Apollo. It is important because it is used in Capacity and Days of Supply calculations. It also is the main field for determining share of space and shelf positioning.

Other Fields

Manufacturer

The **Manufacturer** field in Apollo should also be up to date and consistent. This field is used by FSSI for space to sales analysis.

Subcategory

1. The **Subcategory** field in Apollo should also be up to date and consistent. This field is used by FSSI for space to sales analysis. Subcategory descriptions should be put into the **Description A** field as Spaceman does not recognize the Apollo **Subcategory** field.
2. FSSI PLU or Article information must be used and imported into the planogram as product_id (Stock code in Apollo). This code is included with the data sent to you. Also provided in the data is the FSSI order code that stores refer to. Please ensure this code is imported into the plan using one of the description fields (Description B).
3. Barcode must be included for viewing images.
4. Consistent Long Description and Manufacturer details must be included.
5. Category must be included using consistent subcategory descriptions. There is no need to label the overall category, as this is obvious. Example canned fish – salmon, tuna, sardines & other.
6. For Description A use premium/mainstream/economy segments.
7. Plan Generation
 - a. First draft received back to Foodstuffs within 2 weeks after data being sent
 - b. Any planogram should be implemented within 1 month of conception. This is to preserve the integrity of the plan and the relevance of the data sent to you.

Please insure that the people concerned within your company have a copy of these guidelines.

Converting From Apollo to Spaceman Format Planograms

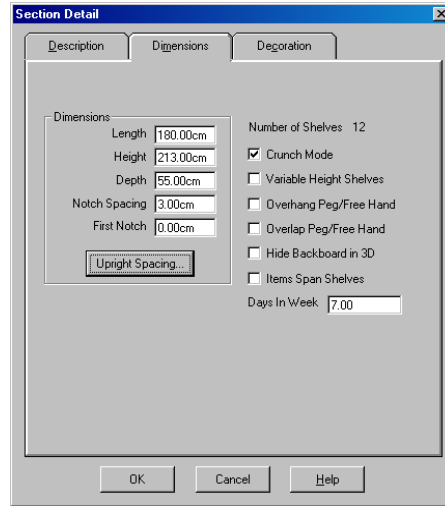
To ensure that Spaceman format planograms (*.pln) created from Apollo 9.2 are complete and correct when opened in Spaceman 8.0 the following check list must be followed.

<p>Duplicate Stockcodes</p>	<p>Spaceman uses a product Stockcode as its unique identifier, whereas Apollo uses a products UPC as its unique identifier. When converting from Apollo to Spaceman, if there are products in the Apollo planogram with duplicate Stockcodes (i.e. products with different UPC's but the same Stockcode) then these products will be dropped off the Spaceman planogram.</p> <p>To fix this, make sure there are no duplicate Stockcodes in the Apollo planogram before conversion.</p> <ol style="list-style-type: none"> 1. Make sure Stockcode is showing in the Item Worksheet <ol style="list-style-type: none"> a. Blank stock codes are ignored so you do not need to fill these in with a unique value. b. Change any products with duplicate stock codes (i.e. products with different UPC's but the same Stockcode) c. All other stock code fields that have unique values present will retain the original value during the conversion.
<p>Duplicate Shelf ID's</p>	<p>When converting from Apollo to Spaceman, in some instances products are removed from shelves in the Spaceman planogram if duplicate Shelf ID's are present in the original Apollo planogram.</p> <ol style="list-style-type: none"> 1. Select View > Open > Shelf Worksheet > Shelf Default 2. Make sure Shelf Number and Desc4 (shelf) are showing in the Shelf Worksheet 3. If you require Shelf ID's, copy the values from the Shelf Number column into Desc4 (shelf) <ol style="list-style-type: none"> a. Setting Desc4 (shelf) to unique values gets rid of the issue of duplicate shelf ID's in Spaceman 4. If you do not require Shelf ID's, blank out all values in the Desc4 (shelf) column
<p>Duplicate Assembly ID's</p>	<p>When converting from Apollo to Spaceman, in some instances products are removed from shelves in the Spaceman planogram if duplicate Assembly ID's are present in the original Apollo planogram.</p> <ol style="list-style-type: none"> 1. Select View > Open > Shelf Worksheet > Shelf Default 2. Make sure Shelf Number and Shelf Meas X02 are showing in the Shelf Worksheet 3. Copy the values from the Shelf Number column into Shelf Meas X02 <ol style="list-style-type: none"> a. Setting Shelf Meas X02 to unique values gets rid of the issue of duplicate assembly ID's in Spaceman

Section Uprights

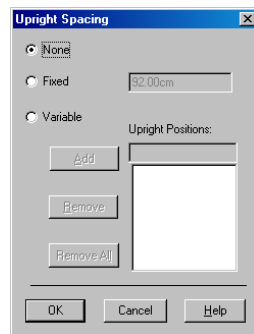
There are issues in the conversion from Apollo to Spaceman if there are either Fixed Uprights or Variable Uprights in the original Apollo planogram.

To fix these, select **Edit > Section Detail > Dimensions tab > Upright Spacing** button



The screenshot shows the 'Section Detail' dialog box with the 'Dimensions' tab selected. The 'Dimensions' section includes input fields for Length (180.00cm), Height (213.00cm), Depth (55.00cm), Notch Spacing (3.00cm), and First Notch (0.00cm). There is an 'Upright Spacing...' button below these fields. To the right, the 'Number of Shelves' is set to 12. Below that are several checkboxes: 'Crunch Mode' (checked), 'Variable Height Shelves' (unchecked), 'Overhang Peg/Free Hand' (unchecked), 'Overlap Peg/Free Hand' (unchecked), 'Hide Backboard in 3D' (unchecked), and 'Items Span Shelves' (unchecked). At the bottom right, 'Days In Week' is set to 7.00. The dialog has 'OK', 'Cancel', and 'Help' buttons at the bottom.

Remove either **Fixed** or **Variable** and make sure **None** is checked

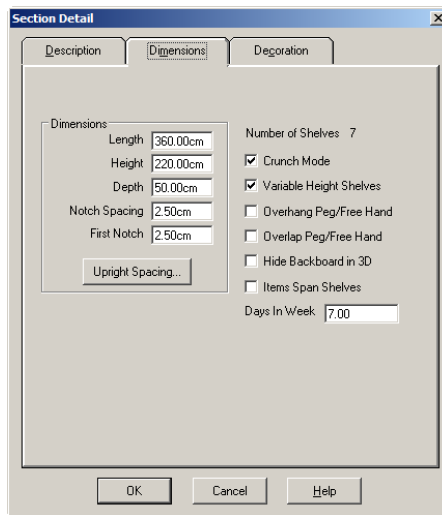


The screenshot shows the 'Upright Spacing' dialog box. It has three radio buttons: 'None' (selected), 'Fixed' (with a value of 92.00cm), and 'Variable'. Below the radio buttons are three buttons: 'Add', 'Remove', and 'Remove All'. To the right of these buttons is an empty list box labeled 'Upright Positions:'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Jump Shelves

Jump Shelves are shelves that run across multiple bays as one continuous shelf. In some instances the fronts high of a product will be limited in the Spaceman planogram when converting from Apollo to Spaceman.

To fix this, in the Apollo planogram go to **Edit > Section Detail > Dimensions** tab and make sure **Variable Height Shelves** is checked.



Conversion

It is recommended to save all Apollo planograms using the **Compressed XML file (*.xmz)** format. This is a standard Apollo format and anyone with Apollo can open *.xmz format planograms.

The Apollo *.xmz format supports additional fields used in converting Apollo 9.2 planograms to Spaceman 8.0 planograms.

1. Before converting your Apollo planogram to a Spaceman planogram, save the Apollo planogram in *.xmz format
2. Select **File > Save As**, choose **Compressed XML Files (*.xmz)** and click **Save**
3. Select **Tools > Renumber Shelves** to set shelves into the correct order (numbered based on your Apollo settings)
 - a. Go to **File > Setup > General** tab and select either *Bottom to Top* or *Top to Bottom* in the *Shelf Renumber Direction* section.
4. Select **File > Save As**, choose **Spaceman (*.pln)** and click **Save**.

Store Specific Requests

The following is a list of common reasons for store specific relays. In most cases, a full planogram is not always required & there are other tools available from FSSI which are often quicker & easier to implement. You must ensure that you have discussed all possible alternatives with the store before embarking upon planogram creation. This will also be checked by FSSI. A quick & easy flow chart has been designed by Category Services to aid decision making with regard to store relays.

Common Reasons

- Range isn't right
- Products look untidy
- Have not had a relay done in a while
- Segmentation of products looks wrong
- Equipment or fixture changes
- More/Less space has been assigned for this category
- Supplier trial
- General tidy up
- Part of a wider super category relay i.e. Health & Beauty or dairy relay
-

Other Alternatives to store specific planograms

- **Core Range Report** – this will give the store an indication of any key products that they are missing from the range, or if they have an overkill of non ranged products. Where a core range report is not available for the category, a comparison of the store to total banner group can be given. This is also known as a Whats In Store Report (WIS)
- **Category Schematics** – these are now available & up to date for most categories & enable stores to utilise their own range & then segment correctly.
- These are often an extremely quick alternative to actual detailed planograms & have been used happily by stores in the past.
- **Generic Planograms** – These can be used to give a more detailed picture of what the category should look like & what the range should be. These are available for a number of categories already with more to be completed throughout 2009.
- **General Advice** – Often stores just need some direction on how to get the best out of their layout & range – Category Services are always available to give this information & speak to stores or suppliers in depth to understand the requirements more.

In all cases, store specific planograms will be the last alternative to be used as these are more time & resource consuming & are often not the best solution for the stores requirements.

The process & requirements when store specific planograms are the only alternative

At the store & submission of form

- Supplier must suggest alternatives to an actual planogram if appropriate
- The sales data release form must be fully completed – otherwise this will not be actioned. A new form has been created which is attached as a separate document – please ensure that this is the only one in use
- Photographs must now be submitted along with the sales data release form of the current fixture – these are an invaluable tool for Category Services as unusual fixtures, actual space allocation & visual awareness of the category can be identified.
- Sales data release forms can be submitted in the following ways – scanned & emailed to one of the team or posted to one of the team. Please do not fax the forms as these often do not reach the Category Services team

FSSI Actions

- The Category Services team will contact the store to check that alternatives have been suggested & to check that planograms are actually required
- FSSI will provide the required information – data for store specific, schematic, core range etc
- Value data for that category will also be downloaded for that store & a control store to enable a 12 week review to take place on the relay. This data will not be provided to suppliers.

Planogram Approval

- Once completed, supplier submits planogram to Category Services for approval & also approximate implementation dates. At this stage, **stores should not be shown the plan until approval is given**
- FSSI will check the plans & deal with any issues & once approved, will provide back to supplier in a pdf format. Stores will also be sent the approved plan.

Implementation & Review

- Suppliers must organise an implementation date that is appropriate for the store
- Photographs of the relayed fixture must be provided to FSSI
- After 12 weeks, FSSI will download value data for the category for the store & control store to assess the impact of the relay. Any further actions are then to be agreed

Please refer to the *planogram flow chart* document (last page) as a starting point.

Sales Data Release Form

Please fill out all sections fully – these will not be actioned if not completed

Store Name: _____

Requested Category: _____

Why is Action Required: _____

What Action is Required: Please circle

Core Range

Schematic

Generic Plan

Store Specific Plan

Current Number of Bays: _____ Proposed Number of Bays: _____

Traffic Flow: _____ Any Other Considerations: _____

Height of Bottom Shelf (floor to top of base shelf) _____

Height of Top Shelf (floor to top of top shelf) _____

Photographs must be included along with this form!

Company & Representative Name: _____

Account Managers Name & Email: _____

Account Managers Signature: _____

I give consent that the above sales information be released to the supplier stated for the purpose of a shelf plan for which myself and Foodstuffs will approve prior to its implementation.

Name: _____

Store Position: _____

Sign: _____ Date: _____

Please scan & email to Claire.boyd@foodstuffs-si.co.nz

Or post to: Claire Boyd, Foodstuffs South Island, 167 Main North Road, Private Bag 4705, Christchurch

Do you need a store specific planogram?

