

2012

Sales Force of the Future Study



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The background of the slide is a dark, almost black, space filled with a complex network of thin, glowing green lines. These lines crisscross and intersect, creating a sense of depth and movement, reminiscent of a fiber optic network or a molecular structure. The lines vary in brightness, with some appearing as sharp, bright green streaks and others as faint, ethereal traces. The overall effect is a futuristic and high-tech aesthetic.

Executive Summary

Executive Summary

It is often assumed in this day of retailer-focused account teams, that sales executives fully understand their customers' current and future needs. But do they?

For the fourth time in the last nine years, Dechert-Hampe Consulting has measured how well manufacturers' sales teams are meeting the current needs of customers -- and preparing for future needs -- through our Sales Force of the Future industry survey. In these surveys, we ask senior sales and retailing executives from some of the largest organizations in America to tell us what their current and future priorities are by rating the current and future importance of nineteen key attributes of customer representation. Then, we ask them how well they think the sales community (defined as manufacturers' sales representatives) are meeting those priorities.

For 2012 we added a completely new segment to the survey, asking retailers alone what type of customer representation and retail coverage they prefer from their vendors. Over the past decade many manufacturers moved to multi-functional customer teams for their largest and most demanding customers, and they did so at considerable expense. This year, we set out to learn just how valuable retailers feel manufacturers' investments in customer teams and retail coverage really are.

This year's results, not unlike previous surveys, reveal some inconsistencies between manufacturer and retailer thinking when it comes to establishing priorities. To start things off, there are differences of opinion regarding which attributes are most important currently.

Manufacturers vs. Retailers Current Importance Ranking	
Manufacturers' Top 10	Retailers' Top 10
<ol style="list-style-type: none">1. Strategic Thinking2. Planning Skills3. Understand/Use Data4. Consumer Knowledge5. Communication Skills6. Own Company Knowledge7. C/M/C* Specific Programs8. Networking Skills9. Analytical Skills10. Financial Literacy	<ol style="list-style-type: none">1. Planning Skills2. Category Knowledge3. Shopper Insights4. Own Company Knowledge5. Retail Merchandising6. Financial Literacy7. Operations Literacy8. Communication Skills9. In-Store Marketing10. Strategic Thinking

*C/M/C = Category/Market/Customer

Attributes manufacturers identified in their top ten most highly rated attributes but missing from the retailers' top ten attributes include:

- Understand/Use Data
- Consumer Knowledge
- Category/Market/Customer Specific Programs
- Networking Skills
- Analytical skills

Conversely, attributes retailers identified in their top ten that were not on the manufacturers' top ten attribute list include:

- Category Knowledge
- Shopper Insights
- Retailer Merchandising
- Operations Literacy
- In-Store Marketing

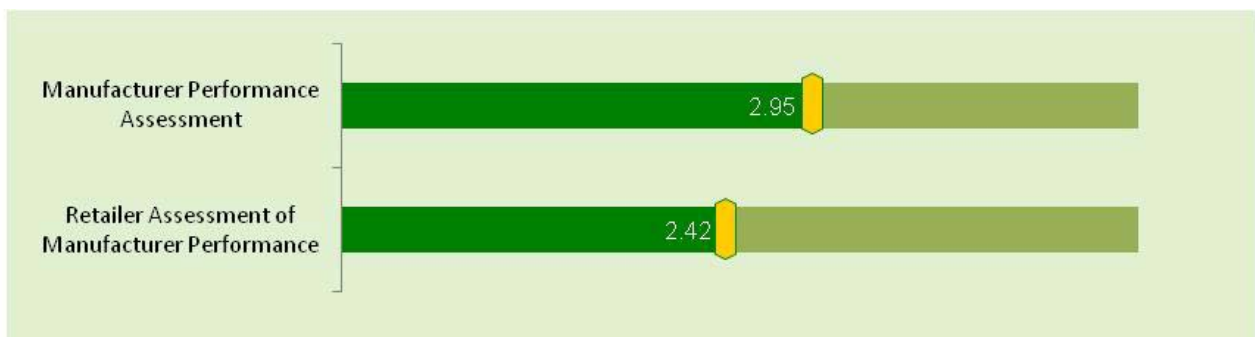
Executive Summary

Clearly manufacturers and retailers continue to view their relationship from their own perspectives. Manufacturers value attributes that tend to address being a more effective brand advocate. Retailers emphasize the importance of attributes that more effectively address their unique shoppers' needs. This suggests some refocusing on the part of manufacturers' sales executives is required to better align sales capabilities with the most highly rated retailer attributes.

As an example, Category Knowledge was the #2 ranked attribute on the retailer list, and Shopper Insights was ranked #3, and neither were in the top ten of the manufacturers' most important attribute list. Many manufacturers have set up Shopper Insights groups within their companies to address this evolving area of focus within the retail community. But apparently manufacturers' efforts are still catching up to the resources needed in the Shopper Insights area.

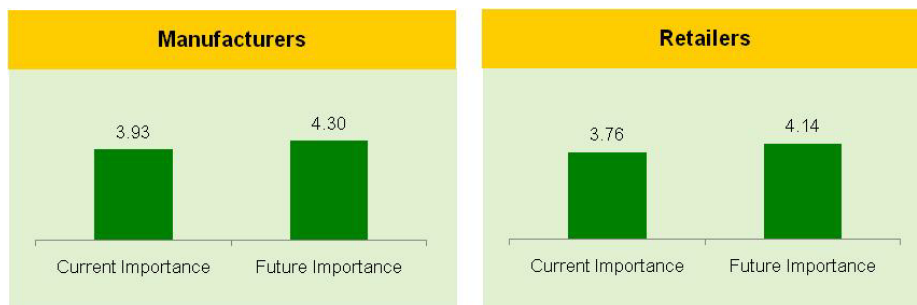
Manufacturers felt that Understand/Use Data is a very important current attribute. Creating and understanding trends is a very important task, and one that manufacturers spend a lot of money on, via the syndicated data companies. But turning such data into category knowledge that can be shared is very important to retailers as indicated by the #2 Retailer ranking.

There is also a significant difference of opinion as to how well manufacturers are performing in general on the attributes evaluated.



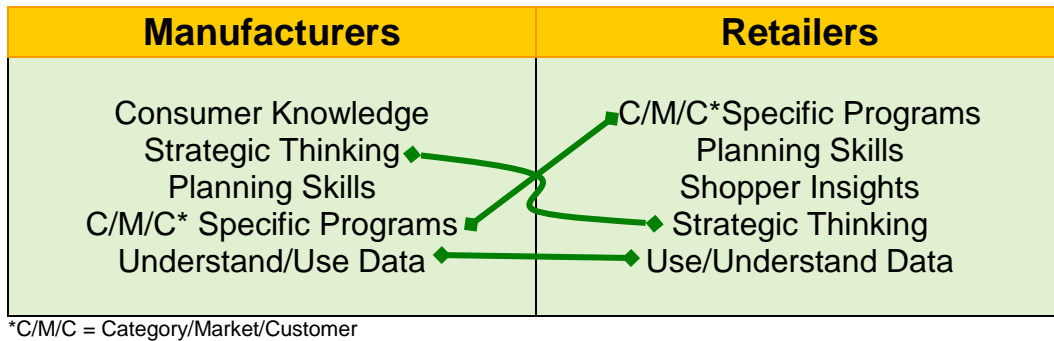
Retailers evaluated manufacturers' performance almost 20% lower than manufacturers assessed themselves. Retailers' assessment of manufacturers' performance was lower on all nineteen attributes versus the manufacturers' self-assessment.

What retailers and manufacturers do agree on is that the current importance of these attributes will grow as time goes on and market complexity continues to increase.



Executive Summary

The top rated attributes for the future are defined by manufacturers and retailers as:



So, for the future, manufacturers and retailers pretty much agree on what the most important attributes/capabilities will be to manage the manufacturer/retailer relationship. Most of the top five retailer attributes for future importance are also on the manufacturers' list.

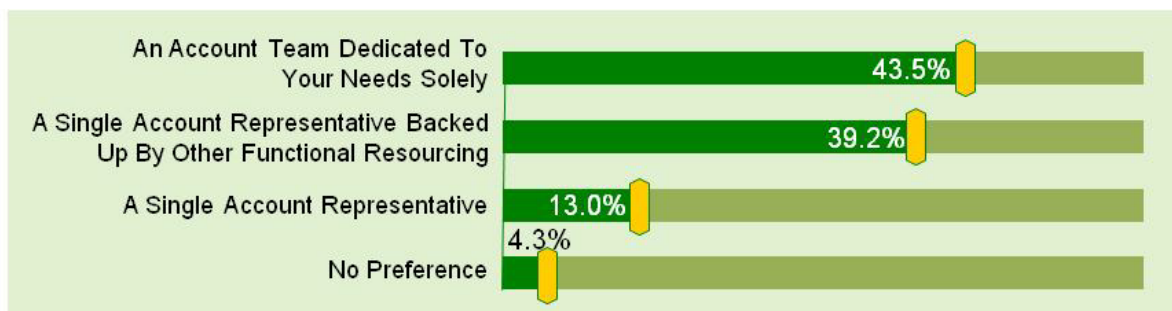
The lone exception may not be much of a difference. Manufacturers mentioned Consumer Knowledge while retailers mentioned Shopper Insights. It can be argued that these two attributes are “two sides of the same coin”, but there is an important distinction to make – perspective. Retailers have moved from thinking about “consumers” to thinking about “shoppers.”

Retailers are interested in the application of this learning to their organization, not the acquisition of data. They need Shopper Insights to be brought down to the market, and even store level. Understanding and Using Data effectively – including having the right Business Intelligence tools – is key to a sales person’s ability to bring this information to the retailer.

Defining Effective Representation

Defining effective representation was the topic of much discussion five or ten years ago as customer teams became popular. This year, Dechert-Hampe decided to revisit that topic to find out just how popular customer teams are and whether retailers feel customer teams are really more effective than single account manager representation.

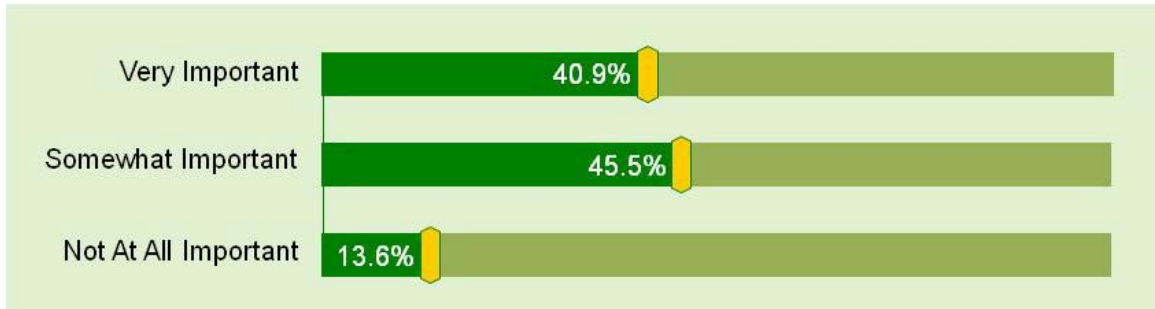
Retailers showed a slight preference for a dedicated account team or “customer business team” over a single account representative. However, if that account representative is effectively backed up by other functional resources, the preference is slim indeed.



Executive Summary

For those retailers who responded “An Account Team” in the question on preferred account representation, we then asked which functions need to be represented on that team. An overwhelming 94% of respondents said Shopper Insights was the most important function to include. After that Business Analyst and Category Management ranked ahead of other areas such as Planogram Specialist and Customer Finance. Clearly retailers are focused on getting resources that can help them better connect with shoppers. That is the number one priority.

When it comes to retail coverage, providing it in some form is still viewed as very important by over a third of our retailer respondents. But almost half rate manufacturer retail coverage as only somewhat important.



Retailers also varied in their preferred type of coverage, with just over 40% of respondents saying they still prefer regular periodic coverage and almost 60% saying they prefer “surge” coverage or planogram reset support only.

Taken as a whole, some clear direction emerges from this year’s findings. Retailers are looking for manufacturers to support them in those elements of the relationship that are shopper focused. The ability to better understand and satisfy each individual retailer’s shopper needs is trumping some of the more traditional, and tangible, elements of the relationship such as logistical support or even retail service.

We are not saying that acceptable levels of customer service and merchandising support are no longer required of manufacturers. In fact, some manufacturers are collecting data on the impact their retail coverage has on a retailer’s sales and effectively using that data to sell at the district manager level and above. But we are seeing that these elements of the relationship are no longer differentiators. The differentiating attributes of today’s relationship are shopper insights, category knowledge and the planning skills needed to turn that knowledge into programs that drive sales.

The background features a dark, almost black, space filled with thin, glowing green lines that crisscross and radiate from various points, creating a sense of depth and movement. A prominent, thicker green line runs vertically on the right side, with other lines branching off from it. The overall effect is reminiscent of a fiber optic network or a complex, abstract pattern.

Introduction

Introduction

In a world where ten retailers control well over half of consumer packaged goods sales, understanding what these powerful retailers value in a manufacturer partner is more important than ever before. These retailers, as well as other leaders in various regions and channels, set the bar of expectation for today's CPG sales representation.

Developing effective customer-facing employees and equipping them with the tools to succeed in today's complex business environment is paramount to being both competitive and profitable. Unfortunately, many attempts to do this fail to deliver the desired results because the attempts are missing a key component: an objective view of what the customer really cares about.

Objective insights into what customers' value in the vendor-buyer relationship, combined with how well they think sales personnel perform against those attributes, are critical elements in assessing investments in Business Intelligence tools and sales training and development resources for maximum effectiveness and payback.

While there have been a number of informative studies on sales force skills and capabilities, the vast majority of these are historic analyses. Few of them looked to future requirements – and yet the future is at the very heart of planning sales development.

Why invest resources on what was important in the past or only for today? Why not look to the future to see what customers want next year or two to three years from now? Why not prepare employees for those requirements now, gaining a competitive edge by ensuring their readiness for the challenges and opportunities of the future?

Another issue with most studies is that they do not include direct input from customers but instead rely strictly on input from manufacturer organizations. This one-sided view cannot identify divergences in perspective between manufacturers and retailers.

In the words of a retailer participant, "They assume they know what I want because they talk to me often. If they really want to know what's important to me, ask me that [question] directly."

To fill that information gap and allow manufacturer organizations to develop solid, forward-looking sales force development strategies, Dechert-Hampe Consulting (DHC) created the Sales Force of the Future Study (SFOTF). The SFOTF study was first conducted in 2002, again in 2007, and 2009.

This 2012 update allows participating organizations to

- Identify what is important to manufacturer and retailer (customer) – now and in the future;
- Determine how well manufacturers are performing – their perspective vs. retailers' (customer) perspective; and
- Enable manufacturers to determine the training and development implications for their organizations

Attributes & Rating Scales

The relationship between manufacturers and retailers consists of a number of different business processes or "touch-points".

Although an Account Manager or Customer Team may not have direct responsibility for all the business process touch-points, our work with both manufacturer and retailer organizations indicates they must be increasingly knowledgeable about all the touch-points in order to manage the customer relationship effectively.

Through our fieldwork DHC identified common attributes or skills required of Account Management to meet the needs of customers as well as their own businesses.

These attributes were combined into five groups that make up "Competencies" defined as follows:

Competency	Attributes Rated
Selling Skills	<ul style="list-style-type: none">• Planning Skills• Networking Skills• Communication Skills• Technical Savvy
Analysis	<ul style="list-style-type: none">• Understand/Use Relevant Data Sources• Analytical Skills• Financial Literacy• Operations Literacy
Creativity	<ul style="list-style-type: none">• Strategic Thinking• Innovation/Creativity• Globalization
Consumer Knowledge	<ul style="list-style-type: none">• Knowledge of Consumer Dynamics• Knowledge of Local Marketplace• Knowledge of Category• Technology Impact on Consumer
Demand Generation	<ul style="list-style-type: none">• Develop/Implement Channel/Market & Customer-Specific Programs• Knowledge of Own Company & Resources• Consumer Marketing/Merchandising Literacy• In-Store Marketing• Retail Merchandising• Shopper Insights

Attributes & Rating Scales

These attributes were rated on a 5-point scale as follows:

Rating Scales		
Importance Ratings	5	Critically Important
	4	Very Important
	3	Important
	2	Somewhat Important
	1	Not Important
Proficiency Ratings	5	Always Exceed Expectations
	4	Always Meet Expectations
	3	Usually Meet Expectations
	2	Meet Expectations Occasionally
	1	Do Not Meet Expectations

We compared retailers' and manufacturers' ratings of the identified attributes across three dimensions:

- **Current Importance** – How important is the attribute today?
- **Current Performance** – How well are manufacturers' account personnel delivering the attribute today?
- **Future Importance** – How important will the attribute be in the future?

Finally, we asked manufacturers to indicate how high in their development priorities each attribute ranked. We also asked retailers if they were seeing progress from manufacturer representation on each attribute. Then we compared the manufacturers' development priority for each of the attributes to the retailers' attribute improvement ratings to see if manufacturers' development plans are bearing fruit.

Participants & Methodology

Participants in DHC's 2012 Sales Force of the Future Study consisted of 182 major consumer packaged goods (CPG) manufacturer and retailing organizations.

Customized questionnaires were developed for both retail respondents and for CPG manufacturers. These questionnaires were distributed via the internet with the assurance of confidentiality to the respondents.

We asked manufacturers to consider all of their Account Managers and/or Teams across their organization when responding to the questions. This provides perspective on how the organization as a whole performs and the importance it places on the rated attributes in general rather than attempting to gauge the skills/competencies of an individual or the importance of attributes for a specific customer.

We asked retailers to consider all of the Account Managers and/or Teams who call on them when responding to the questions. This provides perspective on how important the rated attributes are to their business as a whole, and how well manufacturers in general perform rather than rating the success of any specific manufacturer organization which may or may not be representative of all manufacturers.

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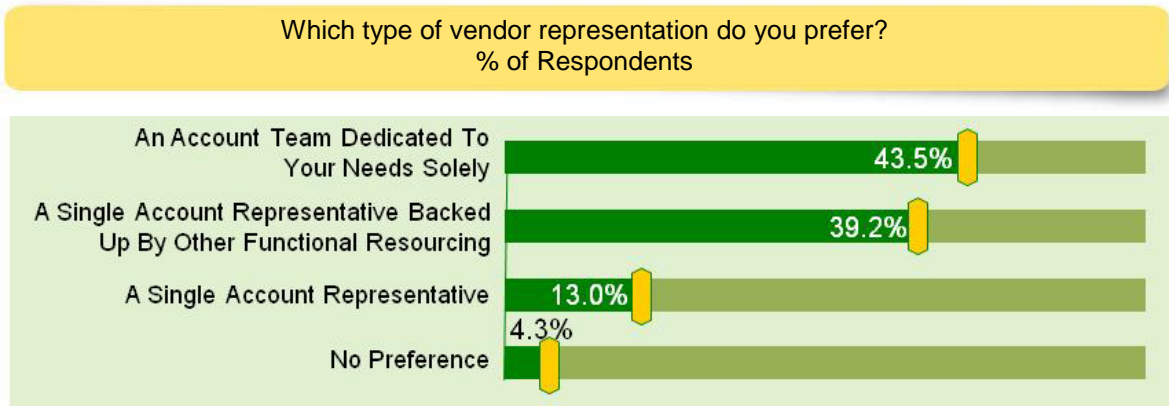
Retailer Service Preferences

Retailer Service Preferences

Before we start defining the current and future importance of skills and competencies that an Account Manager or Customer Team needs to effectively meet their customers' needs, we wanted to find out how retailers would prefer to be serviced.

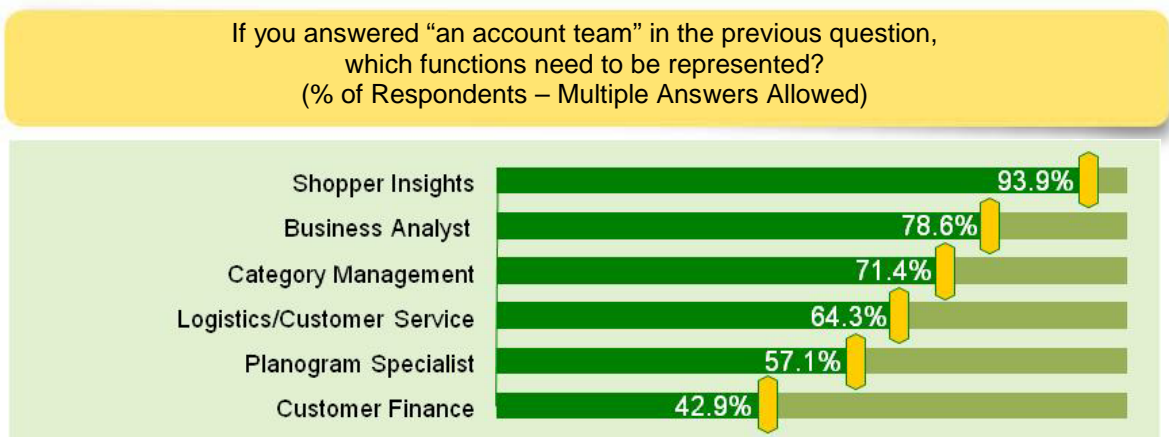
As part of the Sales Force of the Future 2012 Survey, DHC asked retailers some additional questions about their service preferences. The findings below are from questions asked only of the retailer participants in the study.

- **Most retailers prefer to be represented by a dedicated team or by an account representative backed up by other functional resources.**



While it is clear that many retailers would like to be serviced by a dedicated account team, it is also acceptable to many to have a single account representative, as long as they have the appropriate resources assisting them.

- **Shopper Insights are the function that retailers insist needs to be part of any account team.**



Retailers want to know more about their customers' shopping habits and how to improve shopper loyalty. So it comes as no surprise that the most important function to a retailer regarding the account team supporting them is Shopper Insights. The second most important function is Business Analyst, followed by Category Management support.

Retailer Service Preferences

- Retailers felt the two most important characteristics of effective account representation include Knowledge of their Own Companies and Brands, and the Authority to Make Business Decisions.

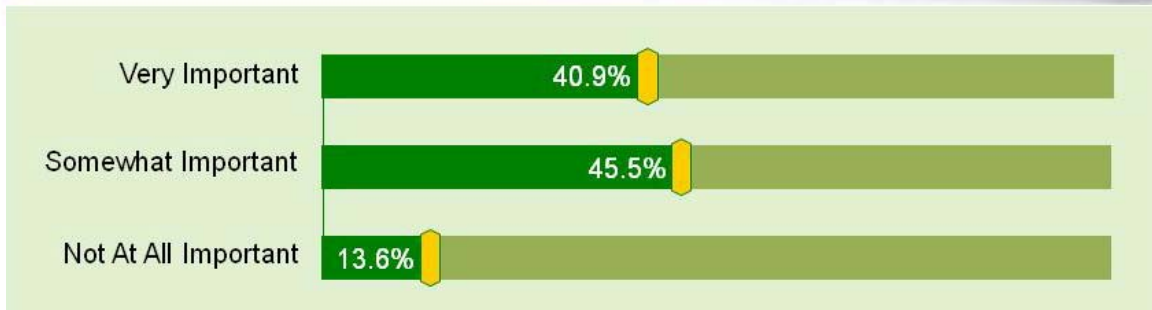
What are the most important characteristics of effective account representation?
(1 = Most Important ... 5 = Least Important)



Certainly retailers expect manufacturers to understand the value of their companies and the support their brands bring to the success of retailers' stores. The second most important characteristic of effective account management is putting someone in front of the retailer who can make business decisions and does not have to spend two to three weeks running decisions "up the flag pole" at headquarters.

- Most retailers felt that Retail Coverage provided by the manufacturer was very/somewhat important.

How important is it that vendors provide some form of retail coverage for your stores.
(% of Respondents)

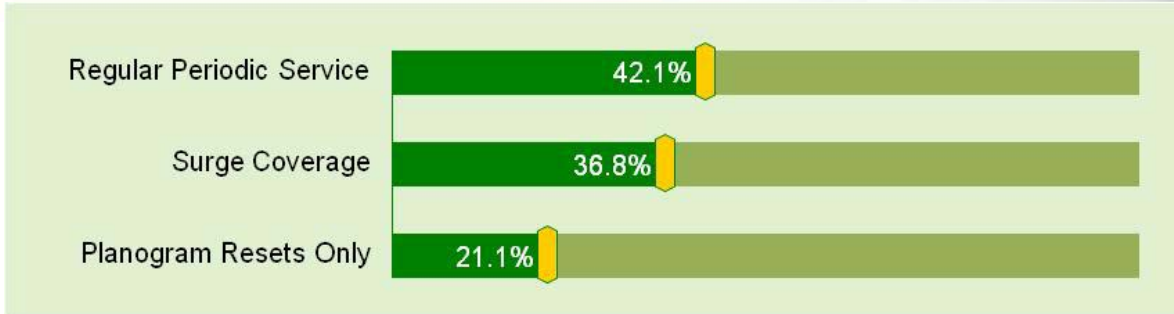


These findings underscore the importance of the store environment. It is the last opportunity to influence purchase decisions. Retailers depend on manufacturers' sales teams and third-party merchandising teams to make sure the shelves and in-store merchandising vehicles get the shopper to "drop one more item in the basket".

Retailer Service Preferences

- Over 40% of retailers would prefer to have regular periodic retail coverage while 37% would prefer surge coverage only.

If you replied “somewhat” or “very important” to the previous question, which form of retail coverage do you prefer?
 (% of Respondents who answered “Somewhat” or “Very Important”)



Retailers were split between preferring Regular Periodic Service or Surge Coverage only. (Note: Respondents were only allowed to select a single answer.)

- The manufacturer resources that mean the most to retailers are Money followed by Shopper Insights.

Which vendor resources do you consider most important in supporting and growing your business?
 (1 = Most Important ... 5 = Least Important)



Retailers feel the manufacturer resource most important to them is Money (Gross Profit Dollars and Promotional Allowances). What may be surprising is that the number two manufacturer resource is Shopper Insights and Shopper Marketing Programs. Retailers want to know more about their customers' shopping habits and how to improve shopper loyalty and are looking to manufacturers to help them in this area.

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2012 Sales Force of the Future – Study Results

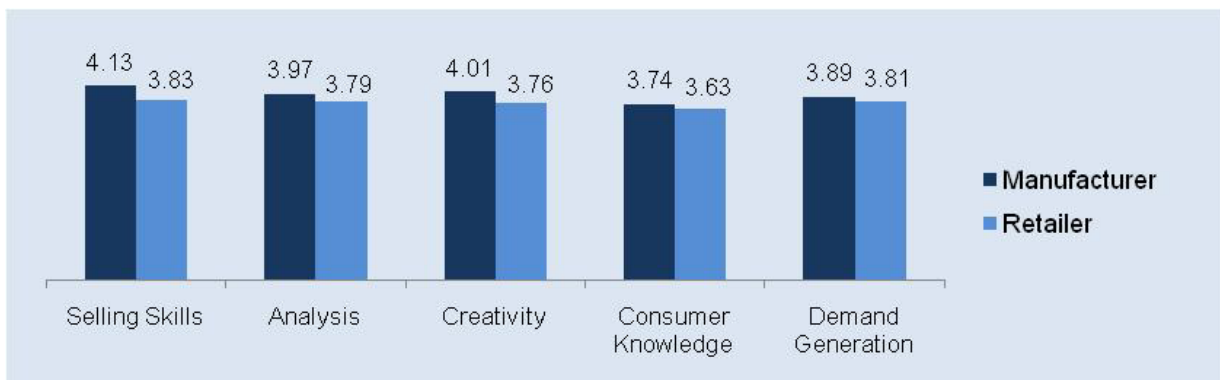
2012 Sales Force of the Future – Study Results

As with previous studies, the attributes in the 2012 Sales Force of the Future Study have been grouped into five Competencies, defined as:

1. Selling Skills
2. Analysis
3. Creativity
4. Consumer Knowledge
5. Demand Generation

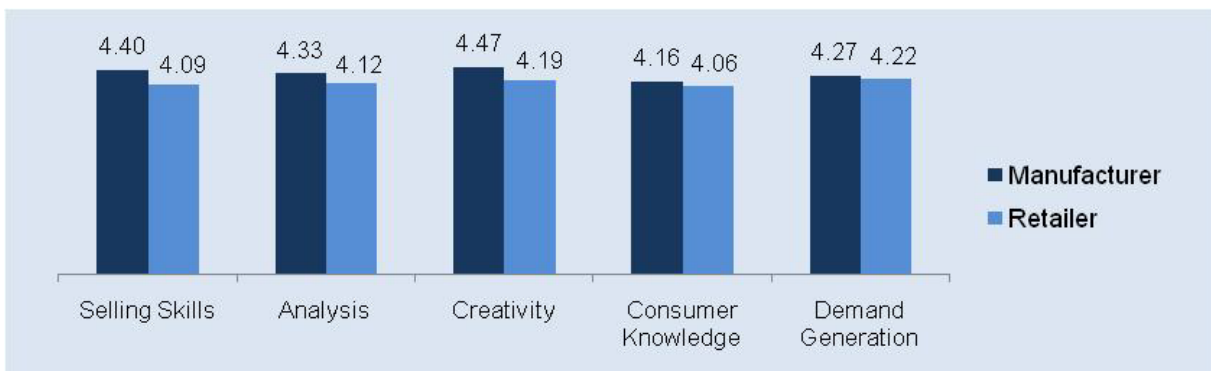
It is interesting to note that from a current importance perspective, the retailers rated the Competencies slightly lower than the manufacturers. Both groups rated Selling Skills as the most important Competency. Manufacturers rated Creativity as the #2 Competency, while retailers rated Demand Generation as #2. Both groups agreed Analysis was the third most important Competency.

Current Importance Rating By Competency



From a future perspective, manufacturers rated Creativity the top Competency, while retailers rated Demand Generation as their top Competency in the future.

Future Importance Rating By Competency

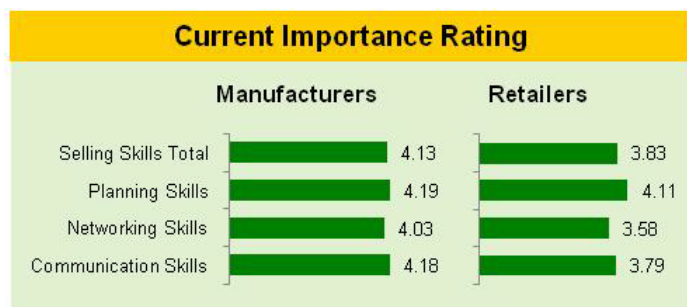


Since retailers rated Demand Generation as the most important Competency for the future, manufacturers should pay particular attention to the attributes in that Competency.

Selling Skills

Current Importance

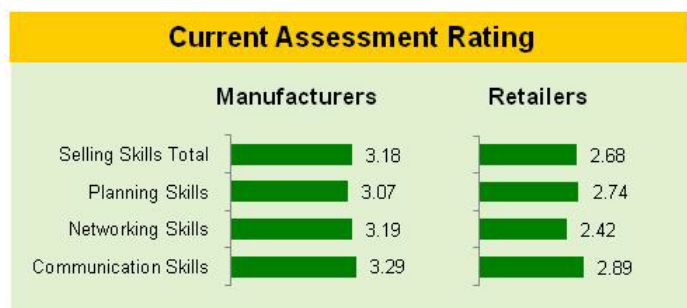
For each of the attributes in Selling Skills, the manufacturers provided a higher rating versus their retail counterparts.



Planning Skills was rated the most important attribute by both manufacturers and retailers. Both sides understand the complexity of the business environment, and the importance planning plays in coordinating activities and helping things run smoothly.

Current Assessment

From a performance perspective, manufacturers rated themselves about 20% higher than retailers on their Selling Skills attributes.



Communication Skills is where retailers had the highest rating of manufacturers' performance and where manufacturers also gave themselves the highest rating.

Future Importance

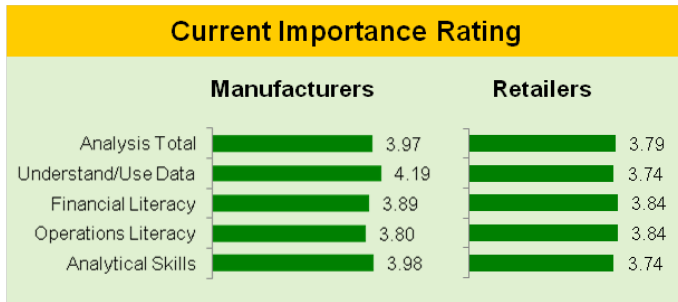


Looking into the future both manufacturers and retailers rate Planning Skills as being the most important attribute in Selling Skills.

Planning and Communication Skills will be an essential part of Selling Skills competency in the future and both retailers and manufacturers understand this. Manufacturers need to make sure their account representatives and teams excel at these skill sets.

Current Importance

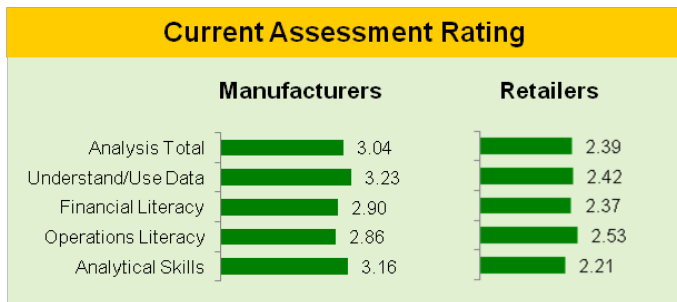
Manufacturers rated all but one of the attributes in Analysis' current importance higher than retailer respondents. That one attribute was Operations Literacy by a very slim margin.



Understand/Use Data was the attribute rated highest by manufacturer respondents. It is interesting that retailers rate two fundamental skills, Financial Literacy and Operations Literacy, highest. This indicates retailers expect salespeople calling on them to understand how the retailers' business works and how retailers make money.

Current Assessment

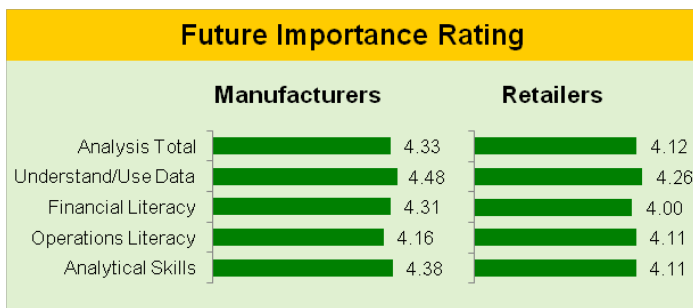
Retailers rated manufacturers lower than the manufacturers' self-assessment of the attributes within Analysis.



The greatest disparity in individual attributes between manufacturers and retailers was Analytical Skills and Understand/Use Data. This suggests that retailers feel salespeople calling on them are not yet providing the insights retailers are looking for. Manufacturers should continue to focus on building Analytical Skills so their sales teams can distill data into meaningful insights.

Future Importance

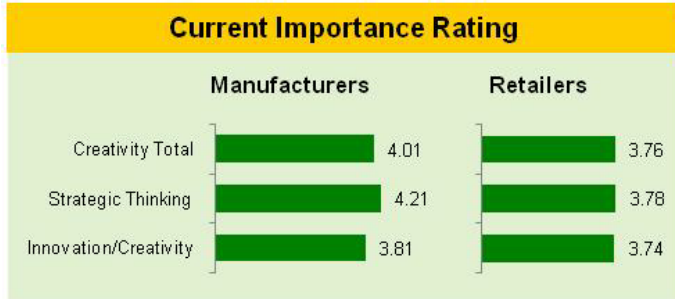
Manufacturers and retailers alike believe the attributes of Analysis will be more important in the future.



Both retailers and manufacturers feel Understand/Use Data will be the most important attribute of Analysis in the future. Once again, manufacturers should make sure their sales associates are continually trained on turning data into actionable knowledge.

Current Importance

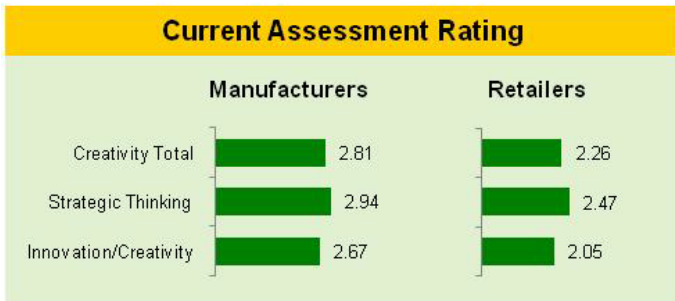
When it comes to Creativity, manufacturers' ratings were slightly higher than retailers' rating. But both groups believe this is a very important Competency.



Retailers draw little distinction between the importance of Strategic Thinking and Innovation/Creativity in impacting their business. Manufacturers tend to place a slight premium on Strategic Thinking.

Current Assessment

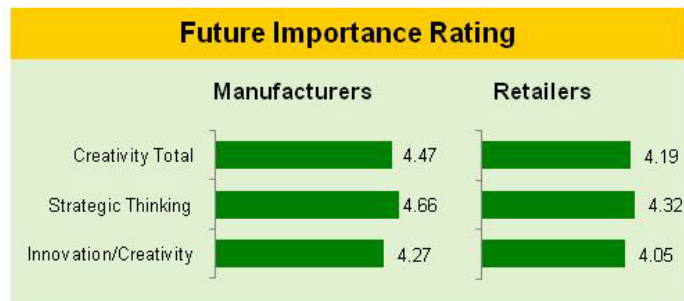
Manufacturers rated themselves about 20% higher than retailers in assessing their current Creativity skills.



Both groups provided a higher rating for Strategic Thinking over Innovation/Creativity, although the absolute performance ratings here are slightly lower than other attributes in the survey.

Future Importance

On a future importance basis, both manufacturers and retailers rated Strategic Thinking the more important attribute in Creativity.

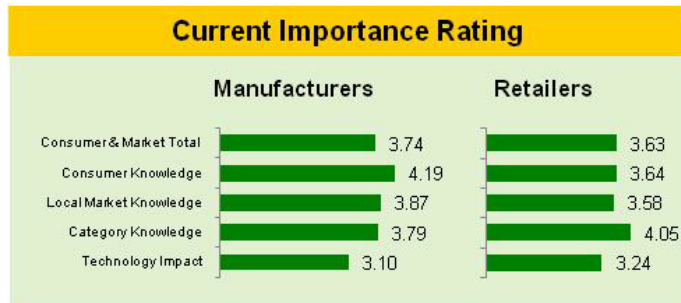


As you may remember from the executive summary, Strategic Thinking was a top ten attribute for both retailers and manufacturers and it was the #1 attribute for manufacturers. Both retailers and manufacturers also see Creativity becoming more important in the future. Narrowing the ratings between both Current and Future Importance and Current Performance would seem to be imperative.

Consumer Knowledge

Current Importance

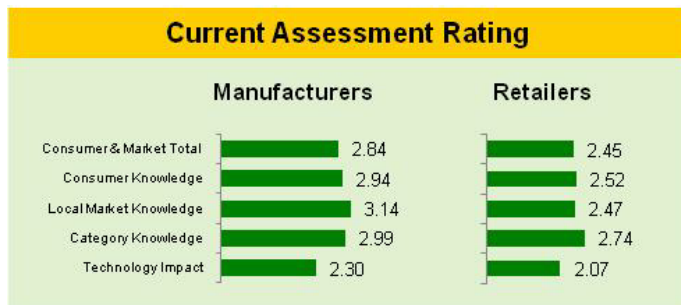
When it comes to the current importance of the Consumer and Market attributes, retailers ranked Category Knowledge and Consumer Knowledge as having the highest importance. Manufacturers also ranked Consumer Knowledge the highest.



Understanding the Category, the Local Market, and the Consumer are all important attributes to both the retailers and manufacturers. These skills tie directly to the importance of generating insights useful in Strategic Planning and other top-rated attributes throughout this year's survey.

Current Assessment

In rating prowess in the Consumer and Market competency, manufacturers fairly consistently gave themselves 10% to 16% higher marks than retailers did.



Manufacturers gave themselves the highest marks in Local Market Knowledge while retailers provided the highest mark for Category Knowledge. The largest gap between manufacturer ratings and retailer ratings is Local Market Knowledge. Manufacturers need to understand the source of this gap and find a way to ensure all sales associates are up to date on their local market knowledge.

Future Importance

Looking into the future, both manufacturers and retailers agree the Consumer and Market competency will be very important.

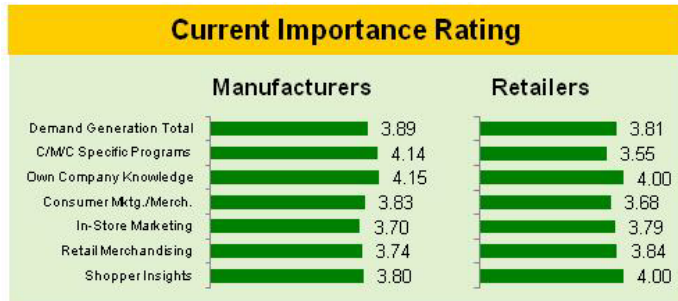


Manufacturers believe Consumer Knowledge will drive this Competency, while retailers believe a much more balanced approach is needed. Retailers gave high ratings to the future importance of Category Knowledge, Consumer Knowledge and Local Market Knowledge. All these attributes will be important for sales teams trying to influence retailers in an ever-changing and challenging marketplace.

Demand Generation

Current Importance

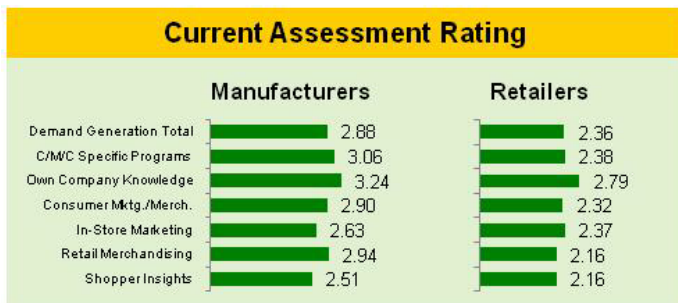
Ratings for Demand Generation were very similar between manufacturers and retailers.



Manufacturers identified the attributes of Own Company Knowledge and C/M/C* Specific Programs as being most important while retailers rated Shopper Insights and Own Company Knowledge as the most important attributes in this group. Shopper Insights is very important to retailers, and having manufacturers' sales associates understand their company and how their brands are well suited for a given retailer are key insights retailers expect.

Current Assessment

Manufacturers tended to rate their performance in Demand Generation about 20% higher than retailers.



The lowest retailer ratings were for Retail Merchandising & Shopper Insights. These attributes are important to the retailer/manufacturer relationship and it seems manufacturers' account representation require more development in these two very diverse areas. Retailers seem to be asking for more help from manufacturers at both the strategic (Shopper Insights) and execution (Retail Merchandising) levels.

Future Importance

Both manufacturers and retailers provided similar ratings for the future importance of Demand Generation.



Both groups rated C/M/C* Specific Programs as the most important attribute within Demand Generation in the future. Shopper Insights is the second highest rated attribute in the future within both groups. It is interesting to note both retailers and manufacturers rated all the attributes above a 4.0. Manufacturers must ensure their sales associates are well versed on all of the Demand Generation attributes as they move forward.

*C/M/C = Category/Market/Customer

Applying the Learning

Survey Implications

It is clear from the survey results that manufacturers and, in particular, retailers believe the 19 rated Account Manager attributes are important today and will continue to become even more important in the future. At the same time, both groups of respondents say manufacturers have plenty of room to improve their proficiency in the attributes nearly across the board.

This suggests those manufacturers that develop their Account Managers' proficiency in the rated attributes to a point where it better measures up to retailers' expectations can establish a competitive advantage. And the thing retailers are looking for most from manufacturers' Account Managers is help generating shopper demand that can be tapped to improve the retailer's competitive position in the market and its financial performance.

Retailers expect Account Managers to know their own company's capabilities and resources well and to be able to access them in support of the retailer's business. But it is also clear from the survey results the retailers expect Account Managers to understand the retailer's business, how it works, how it makes money, and what makes it successful. Account Managers with a customer-centric approach, armed with Shopper Insights and a plan to drive sales, will have a leg up.

And manufacturers that try to grasp that competitive opportunity need to focus on two distinct elements of Account Manager support:

- **Personal Development:** Manufacturers need to provide Account Managers with a development curriculum designed to improve their competence and proficiency in the attributes rated in the survey. The survey results can be used to identify which attributes deserve the highest development priority.
- **Tools:** Account Managers will also need access to data, information and Business Intelligence tools that support customer-centric business relationships with their accounts. No matter how competent and proficient, no carpenter can build a house without the requisite tools.

Remember that the top rated attributes for the future as identified by the retailers are:

1. C/M/C* Specific Programs
2. Planning Skills
3. Shopper Insights
4. Strategic Thinking
5. Use/Understand Data

Do your sales associates have the skills/capabilities/tools to deliver these key attributes to the retailer?

How DHC Can Help

Dechert-Hampe Consulting can help you assess how your Account Managers and the support they receive stack up against the expectations of your most important customers. And we can help you develop Business Intelligence tools and programs to close any significant gaps. In particular, our Productivity & Performance Improvement Services are directed specifically at helping clients address the challenges faced by today's Account Managers. Visit our website at www.Dechert-Hampe.com to learn more about these services as well as our offerings in Strategy and Structure and Research and Insights.

*C/M/C = Category/Market/Customer