



Situation Analysis: 5Cs

Overview


Situation Analysis 5Cs

- The questions on the following pages are an example of the type of information required to build a proper situation analysis for your brand or company. The Situation Analysis is developed to ensure existing knowledge and learning is captured in a clear and concise manner. Questions are traditionally customized for each brand or business.
- The answers to the questions are used to build a complete Situation Analysis report which will help align cross-functional teams and guide commercial planning for the year ahead.
- Each year the situation analysis should be updated with any new information that is pertinent for the next planning year.
- All questions should be answered completely and concisely. Additional documentation of data, analysis, or studies that may be directly relevant and helpful should be included.

5C Summary

Planning should begin with a data capture across the 5Cs.

Climate (Trends)	Category & Competitors	Consumers/ Customers (Buy/Use/Recommend)	Channels (Retailers/Distributors)	Company (Internal factors)
The macro factors that impact the Brand or Company.	External factors that impact the Brand or Company's position in market.	Information and insights about influencers, purchasers, users.	The distribution factors that impact the Brand or Company.	Internal factors that impact the Brand or Company's position in market.



The Situation Analysis Report Must Go Beyond Facts to Illustrate the Link Between Facts and Conclusions



The Situation
Analysis Demands
Broad Perspective
and Analysis to
Find Patterns That
Yield Insights



It requires finding logical linkages between data patterns, findings, and conclusions that lead to action.

5Cs: Climate Questions (Macro trends that may directly affect the business)

Please provide a top-line overview of relevant insights / trends (supported by data / research) explaining how they may impact your brand or grow the category.

Question	Lead	ICP Template
Technology Trends	M&CI	Trends Template
Product Design/Packing Trends	R&D/M&CI	Trends Template
Political or Legislation	GA	Trends Template
Economical Trends	M&CI	Trends Template
Regulatory Trends	RA	Trends Template
Retail/Distribution Trends	Shopper Marketing	Trends Template
Environmental Trends	M&CI	Trends Template
Consumer/Ethnicity Trends	M&CI	Trends Template
Media/Communication Trends	Media Agency	Trends Template
Supply Chain Trends	GCI/M&CI	Trends Template

5Cs: Category & Competitor Questions

Question	Lead	ICP Template
Category definition? Provide the current working definition for the category	Brand Team	Knowledge Alignment Doc
Category history - Please provide an overview of recent category history and key events shaping today's business	Brand Team	Knowledge Alignment Doc
Seasonal dynamics? Provide data on whether the category is driven by seasonality	M&CI Team	Knowledge Alignment Doc
Category knowledge summary - Provide an overview of key learning we know about the category, including relevant data points. Also include hypotheses we commonly use (assumed knowledge) as well as knowledge gaps	Brand Team	Knowledge Summary
Who are your competitors? Provide a complete list of current and future competitors, their products, relative market share, channels, customers, perceived strengths and weaknesses, intelligence on innovation, and then explain/prioritize which ones pose greatest threat	Brand Team/GCI	Knowledge Alignment Doc
How do the competitor brand's relate to one another and your brand? Provide a summary, or map how the key competitors relate to one another and to your brand, including competitor brand equity data	GCI	Knowledge Alignment Doc
Summary of competitor communication – Provide an overview of positioning and insights being addressed through communication. Has there been a recent shift in messaging to address a new category trend? What is their relative share of voice vs. share of market, relative communications channel mixes, examples of media activation/innovation. (Brand Team to prioritize competitor brands for review)	Joint Creative & Media Agency Review/M&CI	Knowledge Alignment Doc

5Cs: Category & Competitor Questions (cont.)

Question	Lead	ICP Template
What are the competitor strategies? Provide perspective on how competitors work with retailers/distributors, which ones do they have strong/weak relationships with. What is their relative distribution share vs. your brand?	Marketing	Knowledge Alignment Doc
What are the competitor sales force capabilities? Provide a perspective on how competitor sales force(s) work, what/who do they focus on, including regional skews and how mobile/effective are they vs. yours	Sales Team	Knowledge Alignment Doc
Competitor knowledge summary - Provide an overview of key learning we know about competitors, including relevant data points. Also include hypotheses we commonly use (assumed knowledge) as well as knowledge gaps	Brand Team	Knowledge Summary

5Cs: Customers Questions

Question	Lead	ICP Template
Who are your consumer targets? Provide an overview of the brand's segmentation and priority segments. How much \$ share do they contribute to total sales? Are they light, medium or heavy consumers?	M&CI	Knowledge Alignment Doc
What are the consumer needs? Provide an overview of what are the primary motivations, purchase habits or drivers that affect purchase decision	M&CI	Knowledge Alignment Doc
Are there any ethnicity skews? Is there an opportunity to reach an ethnic target? Are their consumer needs the same or do they have a different relationship with the Brand?	M&CI	Knowledge Alignment Doc
Customer media consumption & insights? How do they consume media? Provide key insights into their behavior	Media Agency	Knowledge Alignment Doc
What is the customer's perception of the Brand? Provide the current brand equity. Summarize the Brand's core strengths and weaknesses, in the minds of the consumer. Include tracking slides that capture the Brand's awareness over time and key brand metrics that have been prioritized	M&CI	Knowledge Alignment Doc
Consumer knowledge summary – Provide an overview of key learning we have on the consumer, including relevant data points. Also include hypotheses we commonly use (assumed knowledge) as well as knowledge gaps	M&CI	Knowledge Summary

5Cs: Customers Questions (cont.)

Question	Lead	ICP Template
Who are your institution targets? Provide an overview of the brand’s segmentation and priority segments. How much \$ share do they contribute to total sales?	M&CI	Knowledge Alignment Doc
What are the institution needs? Provide an overview of what are the primary motivations, purchase habits or drivers that affect purchase decision	M&CI	Knowledge Alignment Doc
Who are the key HCP influencers? Identify the key influencer HCP targets. How influential are they on the final purchase decision?	HCP Sales	Knowledge Alignment Doc
What are the HCP’s needs? Identify what are the priority HCP ‘needs’ and key drivers that affect their decision to recommend/“prescribe”	Sales Team	Knowledge Alignment Doc
HCP media consumption & insights? How do they consume media? Provide key insights into their behavior	HCP Media Agency	Knowledge Alignment Doc
What is the HCP’s perception of the Brand? Provide the current brand equity. Summarize the Brand’s core strengths and weaknesses, in the minds of the HCP. Include tracking slides that capture the Brand’s awareness over time and key brand metrics that have been prioritized	M&CI	Knowledge Alignment Doc
HCP knowledge summary – Provide an overview of key learning we have on HCPs, including relevant data points. Also include hypotheses we commonly use (assumed knowledge) as well as knowledge gaps	M&CI	Knowledge Summary

5Cs: Channel Questions

Question	Lead	ICP Template
What are the Brand's / Company's distribution channels? Provide an overview of how the products are distributed across. Provide volumes and any regional skews.	Shopper Marketing & HCP Sales	Knowledge Alignment Doc
Who are your preferred retail and distribution partners? Provide a summary of historically who has been good to work with and why	Shopper Marketing & HCP Sales	Knowledge Alignment Doc
Which retail and distribution partners are more difficult to work with? Provide a summary of historically who has been difficult to work with and why	Shopper Marketing & HCP Sales	Knowledge Alignment Doc
What are the distribution needs? Identify what are the priority retailer and HCP distribution 'needs' and key drivers that affect their decision to stock/distribute	Shopper Marketing & HCP Sales	Knowledge Alignment Doc
Retailer / Distributor knowledge summary - Provide an overview of key learning we have on retailers, including relevant data points. Also include hypotheses we commonly use (assumed knowledge) as well as knowledge gaps	Shopper Marketing	Knowledge Summary
HCP distribution knowledge summary – as above for HCP distribution channels	HCP Sales Team	Knowledge Summary

5Cs: Company Questions

Question	Lead	Template
What is the Brand's / Company's history? Provide an overview of recent brand history and a summary of the current state of the business	Brand Team	Knowledge Alignment Doc
What is your existing product line(s)? List sub-brands (based on the brand's architecture), including variants, flavors with relative sales volumes. Provide brief description of product benefits or existing product perceptions amongst consumers	Brand Team	Knowledge Alignment Doc
What is your future product line(s)? Focus on what is likely to be launched in the next planning cycle (12-18 months). Provide brief description of product benefits, new trends it addresses and R&D/consumer research	Innovation	Knowledge Alignment Doc
What is the Brand / Company's Positioning? Provide a one slide summary, using the ICP Brand positioning template	Brand Team	ICP Brand Positioning
Provide a summary of all your targets? List <u>all</u> targets (Influencers, Consumers/Users, and Distributors) that have an impact on your business. List out initiatives that have been specifically designed to talk to each target, and their respective results	Brand Team	Knowledge Alignment Doc
Campaign review – Include top-line plans, creative examples and summary of each initiative. Include research results and any learnings	Brand Team	Learning Template
Test results – Provide a summary of data results, if any, not captured in campaign reviews	M&CI	Learning Template
Brand knowledge summary - Provide an overview of key learnings we have on the Brand, including relevant data points. Also include hypotheses we commonly use (assumed knowledge) as well as knowledge gaps	M&CI	Knowledge Summary



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