

The Relay Playbook: **Winning Shelf Strategies** **with Space and Retail** **Analytics**



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Chapter 1

A New Era of Relay Planning Excellence



The Shifting Landscape of Relay Planning

Category advisors are experts in translating complex data into impactful retail strategies, but the landscape they operate in is evolving rapidly. Gone are the days when straightforward planograms and historical sales data could dictate shelf layouts. Today's retail environment demands agility, precision, and a proactive approach to managing shelf space, inventory, and shopper behavior.

Retailers are grappling with rising complexity. According to the State of Retail 2023 report, 48% of retailers cite out-of-stock items as a primary challenge, and these shortages drive 29% of shoppers to switch brands, resulting in missed revenue and weakened brand loyalty (Draup & SML). Coupled with increased competition and the rise of omnichannel shopping, these challenges underscore the need for smarter, more integrated planning approaches.

Why Integration Matters

Relay planning serves as a critical touchpoint for aligning operational goals with shopper needs. However, traditional methods often silo space planning data from retail analytics, limiting their impact. To achieve best-in-class results, category advisors must embrace the integration of these datasets, transforming them into actionable insights.

- **Space Planning Data:** Provides the structural foundation for shelf layouts, ensuring efficient use of space to minimize waste and optimize category goals.
- **Retail Data:** Offers granular insights into shopper behaviors, demand patterns, and competitive trends.



48% of retailers cite out-of-stock items as a primary challenge, and these shortages drive 29% of shoppers to switch brands.

When combined, these data sources enable category advisors to create adaptive strategies that address real-time challenges and opportunities. For instance, research shows that organizations leveraging integrated analytics can achieve up to 20% higher category growth compared to those relying on fragmented data sources (Draup).

Navigating the Challenges

One of the most pressing challenges in relay planning is balancing inventory needs with shelf constraints. Misalignment between these factors often results in overstocks or stockouts, which can erode both retailer profits and consumer trust. Research highlights that 93% of consumers identify product availability as a key factor influencing their in-store experience, emphasizing the importance of aligning shelf planning with demand signals (Draup).

Another challenge lies in meeting evolving shopper expectations. While **68% of consumers still prefer in-store shopping**, they demand personalized, intuitive experiences that make their trips efficient and enjoyable (Draup). By integrating retail analytics into space planning, category advisors can craft layouts that guide shoppers naturally and encourage larger basket sizes, as well as ensure the right products are aligned with eyesight.

The Transformative Potential of Integrated Insights

Integrating space planning data with retail analytics provides a strategic advantage in tackling these challenges. Advisors can use this approach to:

1 Refine Inventory Allocation

Balance high-demand items with limited shelf space, reducing the likelihood of costly out-of-stock situations.

2 Optimize Category Performance

Identify trends and adjust relay plans to prioritize growth-driving categories and products.

3 Enhance Shopper Engagement

Leverage shopper data to create intuitive layouts that boost customer satisfaction and loyalty.

Consider a case where a retailer applied integrated analytics to a major reset. By aligning space planning with real-time sales data, they achieved a **30% reduction** in out-of-stocks and **increased category sales by 12%**. These results demonstrate the tangible impact of a data-driven approach to relay planning (SML).



68%

of customers
prefer in-store
shopping

↓ 30%

Reduction in
out-of-stocks

↑ 12%

Increase in
category sales

A Path Toward Excellence

Relay planning is no longer just a tactical exercise; it's a strategic lever for driving category success. By merging the precision of space planning with the agility of retail analytics, category advisors can navigate today's complexities with confidence.

In the following chapters, we'll delve deeper into actionable strategies for mastering this integration. From leveraging automation in space planning analytics to creating insight-rich data reports, this guide will equip you with the tools and techniques to elevate your relay planning to the next level.

Chapter 2

Optimizing Relay Outcomes Through Space Analytics

As a category advisor, you're adept at managing the complexities of relay execution. Yet the challenges of today—tight margins, shopper demands for convenience, and omnichannel retail pressures—require sharper, more agile strategies. The solution lies in space analytics: a toolset that combines data-driven insights with automation to maximize shelf performance, reduce inefficiencies, and elevate shopper experiences.

This chapter provides actionable strategies tailored to your expertise, illustrating how space analytics can uncover opportunities in SKU productivity, store-specific planning, and historical refinement.

Actionable Strategies for Superior Relays

1 Analyze Space Productivity

Shelf space is one of the most valuable assets in retail, but not all products utilize it effectively. A deep dive into SKU performance relative to shelf allocation can reveal whether a product is delivering ROI—or consuming resources better allocated elsewhere.

Key Metrics to Consider

- **Sales per Facing:** A foundational measure, this tracks the revenue generated by each shelf-facing SKU.
- **Gross Margin ROI (GMROI):** Evaluates profitability relative to inventory investment.
- **Turnover Rates:** Monitors SKU velocity to identify slow-moving products that tie up space.



20–30%
of underperforming
SKUs occupy
total shelf space

↑30%
profitability
by reallocating
shelf space

✓ Stat Insight

A study by NielsenIQ found that underperforming SKUs occupy as much as **20-30% of total shelf space** in many categories, leading to significant lost sales opportunities. By reallocating space from low-margin SKUs to higher-margin items, a retailer increased overall category **profitability by 18%**, highlighting the power of targeted space analysis.

2 Integrate Store-Specific Needs

No two stores are alike. Shopper demographics, store formats, and regional preferences demand tailored approaches to shelf planning. A one-size-fits-all model risks alienating shoppers and diminishing category performance.

Advanced Adjustments:

- **Geodemographics:** Use localized data to tailor assortments for high-traffic or culturally significant products.
- **Store Format-Specific Planograms:** For smaller stores, focus on essential SKUs with high turnover, while larger stores can incorporate wider assortments.

✓ Stat Insight

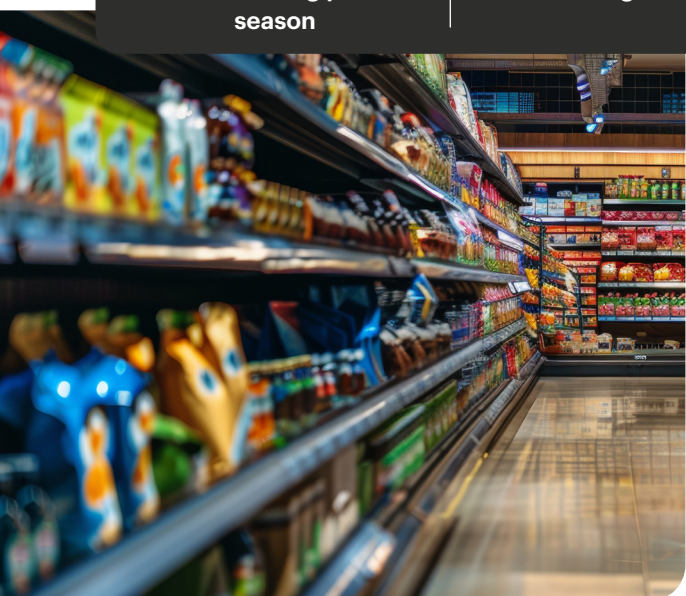
Retailers who adapt assortments to local market needs see an average 7% lift in sales, according to a McKinsey study. A chain operating in coastal regions tailored their beverage assortments based on seasonal weather patterns and shopper preferences. The result? A **12% sales increase** in targeted stores during peak seasons.

↑ 12%

increase in targeted
stores during peak
season

↑ 22%

increase in seasonal
sell-through rates



3 Leverage Historical Data

Past relay outcomes are a goldmine of insights, offering clear pathways to improvement for future executions. However, extracting actionable insights requires systematic analysis.

How to Use Historical Data:

- **Identify Trends:** Analyze year-over-year performance for SKUs to understand seasonal or promotional impacts.
- **Spot Underperformers:** Pinpoint SKUs that consistently fail to meet category benchmarks and consider their removal.
- **Monitor Compliance:** Evaluate execution gaps to ensure planogram accuracy and adherence.

✓ Stat Insight

Data from IRI reveals that poorly optimized shelf resets can contribute to **30% of out-of-stock situations**, which directly impact sales and shopper satisfaction during high-traffic periods. A retailer using historical relay data uncovered that off-season allocations of holiday-themed SKUs consistently underperformed. Adjusting allocations based on these insights boosted seasonal sell-through rates by **22% the following year**.

The Bigger Picture: Space Analytics in Action

Space analytics is more than a tool for managing shelves—it's a competitive differentiator. By combining SKU-level insights with store-specific adjustments and historical refinement, category advisors can:

- **Drive category growth** by allocating space more effectively.
- **Enhance the shopper experience** by reflecting regional preferences and demand patterns.
- **Reduce operational costs** through automation and error reduction.

Real-World Impact:

One retailer using Nucleous space planning to refine relay plans achieved:

- **15% higher shelf productivity** by reallocating underperforming SKUs.
- **A 30% reduction in out-of-stock situations** during key promotional periods.
- **A 10% improvement in execution accuracy**, minimizing compliance issues.

↑ 15%
higher self
productivity

↓ 30%
Reduction in
out-of-stocks
situations

10%
improvement
in execution
accuracy

The Path Forward

Space analytics provides the foundation for mastering modern relay challenges. By leveraging tools like Nucleous and focusing on productivity, customization, and historical learnings, category advisors can craft relays that balance retailer objectives with shopper needs.

In the next chapter, we'll explore how to successfully incorporate space planning data to take these strategies further, offering proactive insights to anticipate trends and shape future relay outcomes with confidence.



Data from IRI reveals that poorly optimized shelf resets can contribute to 30% of out-of-stock situations



Chapter 3

Steps to Incorporate Space Planning Data into Relay Strategy

Relay strategy is as much about precision as it is about innovation. In today's complex retail landscape, category advisors need to move beyond intuition and simple metrics to a robust framework that integrates space planning data into every phase of the relay process. Below is a structured approach to help category advisors optimize their strategies with practical steps and proven results.

Step 1

Audit Planogram Data

The first step in crafting a successful relay is assessing the accuracy and alignment of your current planograms. High-performing SKUs should occupy prime shelf space, while slower-moving items might need to be repositioned or removed. This audit ensures planograms serve category goals, including improved margins, better inventory turnover, and shopper satisfaction.

For example, a Midwest retailer audited its dairy aisle planograms and discovered that private-label SKUs were unintentionally positioned next to top national brands, leading to lower visibility and reduced sales for both (Progressive Grocer). After reassigning premium shelf space to private labels, they observed a 12% increase in private-label sales over the next quarter. Tools like Nucleous Space Planning automate this process by validating planogram accuracy and compliance, saving significant time and reducing costly errors.

Step 2

Map Data Overlays

Combining space planning data with other datasets like sales velocity, shopper demographics, and category trends provides actionable insights that drive smarter decisions. This integration ensures that planograms reflect real-world shopper behaviors and maximize shelf productivity.

For instance, overlaying sales data with shopper traffic patterns enables prioritization of high-demand SKUs in areas with maximum visibility. A retailer leveraging such overlays in their snack aisle identified that premium nut mixes performed significantly better when placed at eye level near checkout zones. This adjustment resulted in a 15% increase in category sales, driven by both impulse purchases and better alignment with shopper preferences (Retail Dive). Such examples highlight how integrating multiple data streams creates a holistic view of the category, fostering more effective space utilization.

✓ Stat Insight

Retailers that incorporate integrated data overlays into their planogram strategies see an average 10–20% boost in category sales, underscoring the critical importance of combining datasets to uncover hidden opportunities (IRI).

Step 3

Measure and Iterate

No relay plan is complete without post-implementation analysis. Measuring the impact of your strategy against predefined KPIs—like revenue per square foot, margin improvement, and shopper satisfaction—provides a clear picture of success. This data-driven approach allows for continuous iteration, ensuring sustained performance improvements.

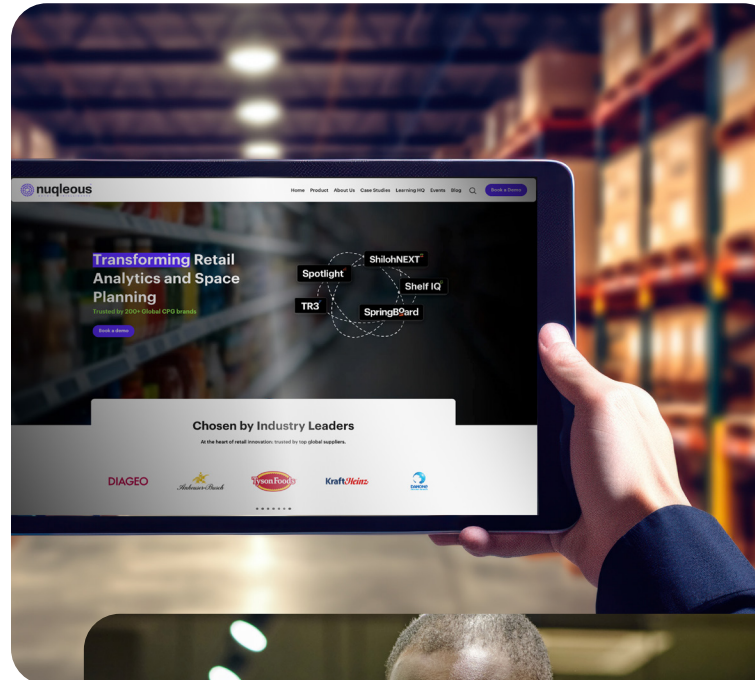
For example, after a Nucleous customer implemented a beverage relay, the retailer found that energy drink sales dropped by 7% due to suboptimal placement. By revisiting the planogram and reallocating shelf space based on performance data, they restored sales to pre-relay levels within two weeks. This iterative adjustment not only salvaged category performance, but also demonstrated the importance of agility in relay planning.

✓ Stat Insight

Retailers that conduct iterative adjustments post-relay see a 10% improvement in execution accuracy, driving both financial and operational efficiency (Forrester).

Bringing It All Together

By following these four steps—auditing planogram data, mapping data overlays, running simulations, and measuring results—category advisors can elevate their relay strategies from functional to exceptional. Each phase ensures that space planning decisions are grounded in data, aligned with shopper needs, and optimized for measurable outcomes. Integrating tools like Nucleous Spotlight and leveraging advanced analytics are critical to unlocking this potential, making relays not just an operational necessity but a strategic advantage.



Nucleous planogram software has not only saved us time but has also improved our confidence in the work we do. The ongoing support and continuous enhancements make it a future-proof investment.

**Gary Wensel, Sr. Manager, Space Planning
Coca-Cola**

Chapter 4

Common Pitfalls in Relay Planning and How to Avoid Them

Even the most seasoned category advisors can encounter challenges during the relay planning process. These pitfalls often arise from relying on outdated approaches, overlooking critical data inputs, or prioritizing speed over precision. By recognizing these potential missteps, advisors can implement strategies to avoid them and deliver optimized outcomes. Below are common pitfalls in relay planning and actionable solutions to overcome them.

Pitfall 1

Relying Solely on Past Sales Data to Guide Relay Plans

While past sales data offers valuable insights, it provides only a partial picture of category performance. Retail environments are constantly evolving due to changes in shopper behavior, emerging trends, and competitive pressures. Over-reliance on historical data can result in strategies that fail to address current market dynamics.

Solution

Combine past sales data with forward-looking analytics like shopper traffic, purchase intent, and regional trends. For example, analyzing shopper traffic patterns can reveal which products perform better in high-visibility zones, even if their historical sales were moderate. Similarly, integrating macroeconomic or seasonal data helps anticipate demand surges or declines, enabling advisors to craft more agile relay strategies.

Pitfall 2

Overloading Shelves with Too Many SKUs

In an attempt to please diverse shopper preferences, some advisors overcrowd shelves with an excessive variety of SKUs. This strategy often leads to cluttered displays, slower inventory turnover, and confusion for shoppers. Overloaded shelves can also exacerbate out-of-stock issues, as the space allocated to high-demand items is reduced.

Solution

Leverage space elasticity models to determine the optimal number of products for each category. These models help advisors strike the right balance between variety and inventory efficiency, ensuring high-performing SKUs are adequately stocked while underperforming items are rationalized.

Pitfall 3

Failing to Account for Store-Specific Variability

Using a one-size-fits-all planogram across all store locations is a common but costly mistake. Store layouts, shopper demographics, and regional preferences vary widely, and a uniform approach often overlooks these nuances, leading to suboptimal performance.

Solution

Customize planograms based on store-specific data. Tailor shelf layouts to align with shopper demographics, traffic patterns, and regional trends. For example, stores in urban areas may prioritize convenience-sized products, while suburban locations may allocate more space to bulk items.

Pitfall 4

Neglecting the Role of Visual Merchandising in Relay Success

Effective relays aren't just about data-driven placement—they're also about creating visually appealing displays that attract shoppers. Advisors often overlook the impact of merchandising elements like signage, lighting, and shelf organization on shopper engagement.

Solution

Incorporate visual merchandising principles into relay planning. Use clean, organized layouts with clear signage to guide shoppers intuitively through the category. Eye-level placement for high-margin items, clear price tags, and cross-merchandising strategies can also enhance the shopping experience.

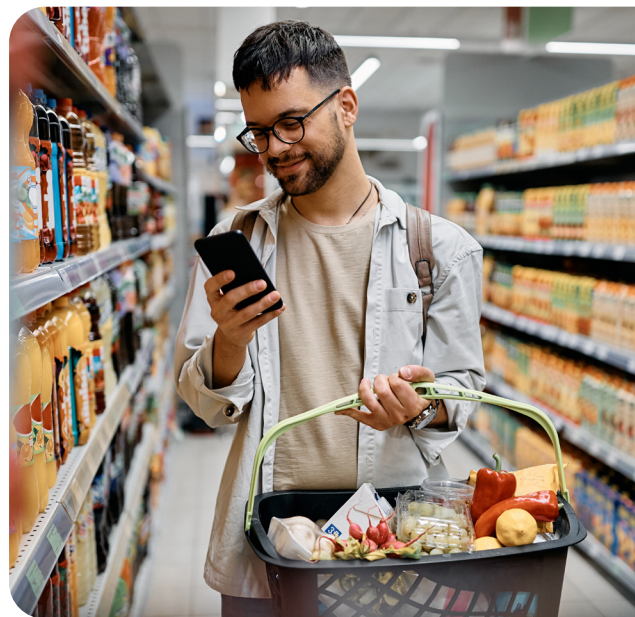
Pitfall 5

Underestimating the Value of Automation in Relay Execution

Manual planogram adjustments are time-consuming and prone to errors, particularly when managing large-scale relays across multiple stores. Without automation, the risk of inaccuracies and compliance issues increases significantly.

Solution

Use automation tools like Nucleous to streamline planogram validation and execution workflows. Automated systems ensure compliance, flag errors, and provide real-time updates on relay progress, freeing up category advisors to focus on strategy rather than execution.



Chapter 5

Future-Ready Relays with AI and Advanced Analytics

AI and advanced analytics are reshaping the retail landscape, providing category advisors with unprecedented tools to optimize relay outcomes. By integrating these technologies, category advisors can harness predictive, dynamic, and real-time capabilities to refine strategies and deliver better results in a rapidly evolving industry.

The Role of AI in Relay Planning

AI-driven solutions bring a proactive approach to retail planning, going beyond traditional methods reliant on historical data. These tools dynamically adjust planograms by analyzing real-time factors like sales velocity, customer preferences, and supply chain disruptions. Retailers investing in AI for planogram optimization have achieved significant gains in efficiency and market responsiveness. By 2026, 70% of retailers plan to adopt AI solutions to maintain a competitive edge (Deloitte).

Real-Time Analytics: A Game-Changer

Real-time analytics platforms synthesize data streams such as point-of-sale (POS) data, inventory levels, and shopper demographics into actionable insights. This capability allows category advisors to make informed, immediate adjustments that prevent out-of-stocks or over-stock scenarios. A study revealed that retailers utilizing real-time data analytics have seen a 20–30% improvement in operational efficiency (McKinsey).

Predictive Simulations for Better Outcomes

Predictive analytics enables advisors to simulate relay scenarios before execution, offering insights into potential successes and risks. By comparing historical sales data with market trends, these simulations identify areas for improvement and help refine shelf allocations. For example, a national retailer used predictive analytics to shift space allocations toward plant-based products in high-demand regions, boosting category sales by 15% (Retail Dive).

Actionable Steps for Advisors

1 Adopt AI for Dynamic Planning

Implement AI tools capable of analyzing vast datasets and providing real-time, actionable recommendations.

2 Invest in Real-Time Data Solutions

Leverage platforms that consolidate and visualize multi-source data for immediate relay insights.

3 Run Predictive Models for Pre-Testing

Use predictive tools to simulate relay outcomes, mitigating risks and optimizing category performance before execution.

A look at the Future

AI and advanced analytics are not just technological trends; they are the foundation of the future of retail relay planning. By embracing these innovations, category advisors can ensure precision, agility, and a shopper-centric approach that positions their categories for sustained success.

To dive deeper into AI applications in retail, explore case studies and insights from Deloitte, McKinsey, and Retail Dive (sources: Deloitte, McKinsey, Retail Dive).

Conclusion

Your Next Step in Relay Optimization

As we've explored throughout this ebook, the future of relay planning relies on the ability to effectively integrate space planning data with retail insights. By combining these two areas of expertise, category advisors can make better-informed, data-driven decisions that ultimately lead to more effective and efficient strategies. This integrated approach helps retailers improve shelf space utilization, meet evolving consumer demands, and drive sales growth—creating a win-win for both retailers and shoppers.

The Power of Integration

The ability to unite space planning data with real-time retail insights is central to the future of relay planning. For category advisors, this integration enables sharper decision-making and enhanced category performance. By understanding how space allocation impacts product visibility, sales velocity, and customer satisfaction, advisors can optimize their strategies to drive category growth.

Nucleous' **Space Planning Analytics**, for example, bridges the gap between traditional planograms and advanced analytics by transforming planogram data into actionable insights. The module not only enables dynamic shelf management but also helps category advisors identify underperforming SKUs, optimize product placement, and measure how changes in shelf space affect sales. By utilizing these data points, category advisors can create tailored strategies that focus on what matters most: the shopper experience and increased sales. Key insights, such as eye-level analysis, space vs. sales share, and linear space analysis, can now be visualized with precision, allowing for more agile decision-making that aligns with both retailer goals and shopper preferences.



By integrating planogram data with sales and store data, we're helping category advisors and retail buyers unlock new opportunities to increase both sales and shopper satisfaction.

Bill Kloza, Co-CEO of Nucleous

Becoming an Indispensable Strategic Partner

The role of the category advisor has evolved from simply managing the shelf to becoming a key strategic partner who drives growth by leveraging advanced analytics. Today's competitive retail environment requires advisors to integrate a variety of data sources—including sales performance, shopper behavior, and space planning data—to unlock deeper insights and create more effective relay strategies.

Nugleous' tools, such as Spotlight, ShelfIQ, and Space Planning Analytics, provide category advisors with the support they need to elevate their role. These tools automate workflows, reduce errors, and enhance decision-making by integrating retailer-specific data into one seamless platform. The Space Planning Analytics in particular plays a key role by making planogram validation and execution more intuitive and less error-prone, allowing category advisors to focus on high-value tasks like optimizing shelf space and product visibility.

By leveraging Nugleous' analytics solutions, category advisors can demonstrate their indispensable value in shaping retail strategies, driving better category performance, and increasing shopper satisfaction. The ability to transform planogram data into powerful visual insights ultimately empowers advisors to guide retailers through more efficient, impactful relay executions that result in growth across the board.

Your Next Steps

As we look to the future of relay optimization, it is essential for category advisors to adopt a data-driven mindset and embrace the tools that are reshaping the retail landscape. Nugleous' suite of solutions enables advisors to streamline their workflows, enhance data accuracy, and create better, shopper-centric strategies. By harnessing the power of tools like Spotlight, ShelfIQ, and Space Planning Analytics, you can stay ahead of industry trends and help your organization drive sustained growth.

- **Leverage the Tools:** Implement Nugleous' advanced space planning and retail analytics solutions to make smarter, more data-driven decisions.
- **Commit to Continuous Learning:** Stay informed on the latest trends in AI, shopper behavior, and retail analytics to maintain your competitive edge.
- **Focus on Collaborative Success:** Align your strategies with the broader business goals of retailers while optimizing the shopper experience for long-term success.

By continuing to embrace technology and data, you can redefine relay planning in a way that aligns with today's fast-moving retail environment. With Nugleous by your side, category advisors can confidently navigate the future of space planning, ensuring that each relay is optimized for success.





For more information or to schedule a demo,
visit [Nucleous Solutions](#)

