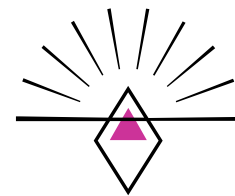


Learning Plan

Guide and Templates



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2024



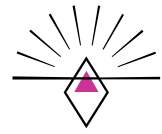
What is a Learning Plan?



A learning plan is a strategic document that outlines what you want to learn about your brand or business over a specific time period. It's a roadmap for discovery, focusing on answering key questions that drive growth and improvement.

Purpose of a Learning Plan:

- ✓ **Targeted Learning:** Ensures there's a strategic approach to insights.
- ✓ **Prioritization:** Focuses resources on the most critical questions for the business.
- ✓ **Actionable Insights:** Create learnings that actually impact business results.



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What is included in a Learning Plan?

Learning Plans can include a wide range of information which is customized to the objectives of the plan.

Each plan is a highly custom document that is based on the needs of the business.



Most Important Elements

Learning Objectives

Clearly defines why these learnings are important. These can be as broad or specific as needed for the business issue.

Key Questions

These are the strategic questions that are to be answered. These objectives might be based on hypotheses to prove or disprove, specific questions that need to be addressed, or foundational learnings that help expanding understanding of a broader topic.

Methodologies

This defines the approach that will be taken to get to the answers. If the questions require formal research (e.g. focus groups, surveys), it is most appropriate for a professional researcher to help determine the appropriate methodology. However, many questions can be answered with simple techniques or easily accessible data.

Timing and Costs:

Committing to dates and budget for the work ensures it gets completed. It's a critical component of the process.



How do you create a learning plan?

1 Ask and Wonder

What don't you know? More importantly, are you sure what you do know? And what don't you know about how the world is evolving?

2 Prioritize Based on Business Needs

Convert learning needs into specific, actionable questions that impact goals.

3 Define the Approach

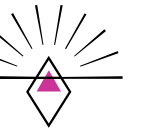
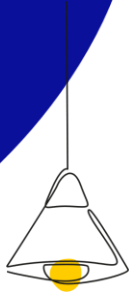
Identify the most appropriate tools and techniques to gather learning.

4 Outline a Timeline

Map out the plan over weeks or months, assigning deadlines to each milestone.

5 Bring Others Along

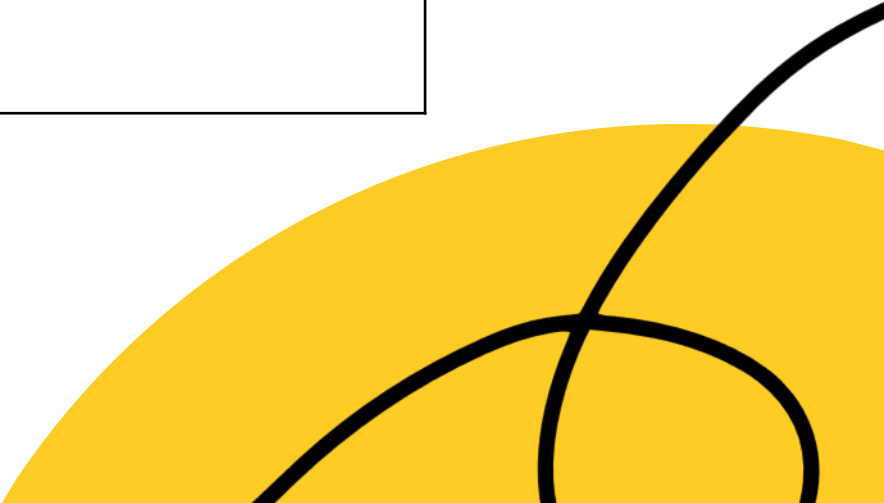
Share the learning plan with your team ahead of time so they have an opportunity to weigh in on the questions and will be more engaged on the results.



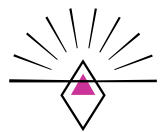
Learning Plan Template

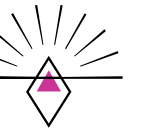
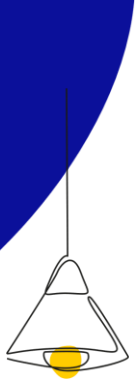
Objective:

Milestone					
Objective					
Methodology					
Key Questions					
Budget					
Timing					



Learning Plan Examples



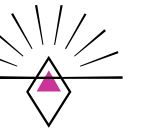
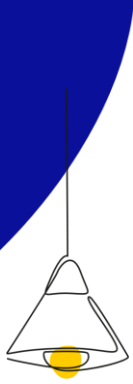


EXAMPLE: Hypothesis-Based Learning Planning

Objective: Establish a business case to expand into gut health products to expand household penetration and topline revenue

Milestone	Defining Size of Prize	Consumer Understanding of Gut Microbiome	Solutions & Messaging Exploratory
Hypothesis	The gut health space is a subcategory that can provide our brand a significant revenue target that is more profitable than our current portfolio.	Our target consumers know enough about the gut microbiome that they are interested in gut health products.	Solutions that have the greatest purchase appeal have a primary benefit that the consumer intuitively understands, therefore requires minimal education.
Key Questions	<ul style="list-style-type: none">• What is the growth trajectory for gut health?• What are the latest trends in the space that have white space opportunities?• How well aligned to our brand strategy is the gut health space?	<ul style="list-style-type: none">• How much does our consumer know about the gut?• How are they learning about the gut?• How important do they feel the gut is in their overall health?	<ul style="list-style-type: none">• How do consumers prioritize benefits and attributes of products in gut health?• What drives intuitive understanding of benefits?
Methodology	<ul style="list-style-type: none">• Desk research• Syndicated reports• Internal brand & financial analysis	<ul style="list-style-type: none">• In-Depth Interviews with target consumers• Social listening	<ul style="list-style-type: none">• Idea Screen• Focus Groups
Timing	February	March – April	May – June
Budget			

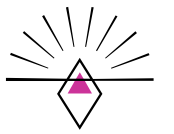




EXAMPLE: Innovation Learning Plan

Objective: Develop a new product concept to extend the brand

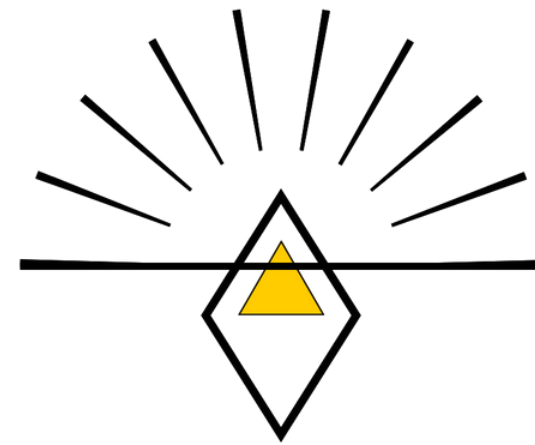
Milestone	Positioning Optimization	Concept Testing	Graphics Optimization	Graphics Validation	Home Use Testing
Methodology	Focus Groups	BASES Quick Predict	Focus Groups	Quantitative Shelf Test	BASES Quick Use Test
Objective	Understand the right positioning angle that optimizes Purchase Interest	Understand concept potential, activation profile and volumetrics	Understand graphics hierarchy to optimize label graphics	Identify a winning pack design that delivers on concept	Understand if complete product delivers on concept
Key Dates	March	April	June	July	Sept – Oct
Dependencies	Internal alignment on prioritized idea	Locked positioning and concept statement with image	Max 3 graphic territories developed for stim	Final optimized graphics for stim	Graphics & formula finalized and product samples ready
Action Standards	Statements and language that drive Purchase Interest above norms	A strategically aligned activation profile to determine launch go/no go and scale of launch	Design concepts that drive PI, fit to concept and fit to brand	Final design that drives PI, fit to concept and fit to brand	Concept hits forecast, PI and repeat interest expectations
Budget					



EXAMPLE: Foundational Learning Plan

Objective: Gain broad insights about our growth occasion to establish a business case to expand into gut health products to expand household penetration and topline revenue

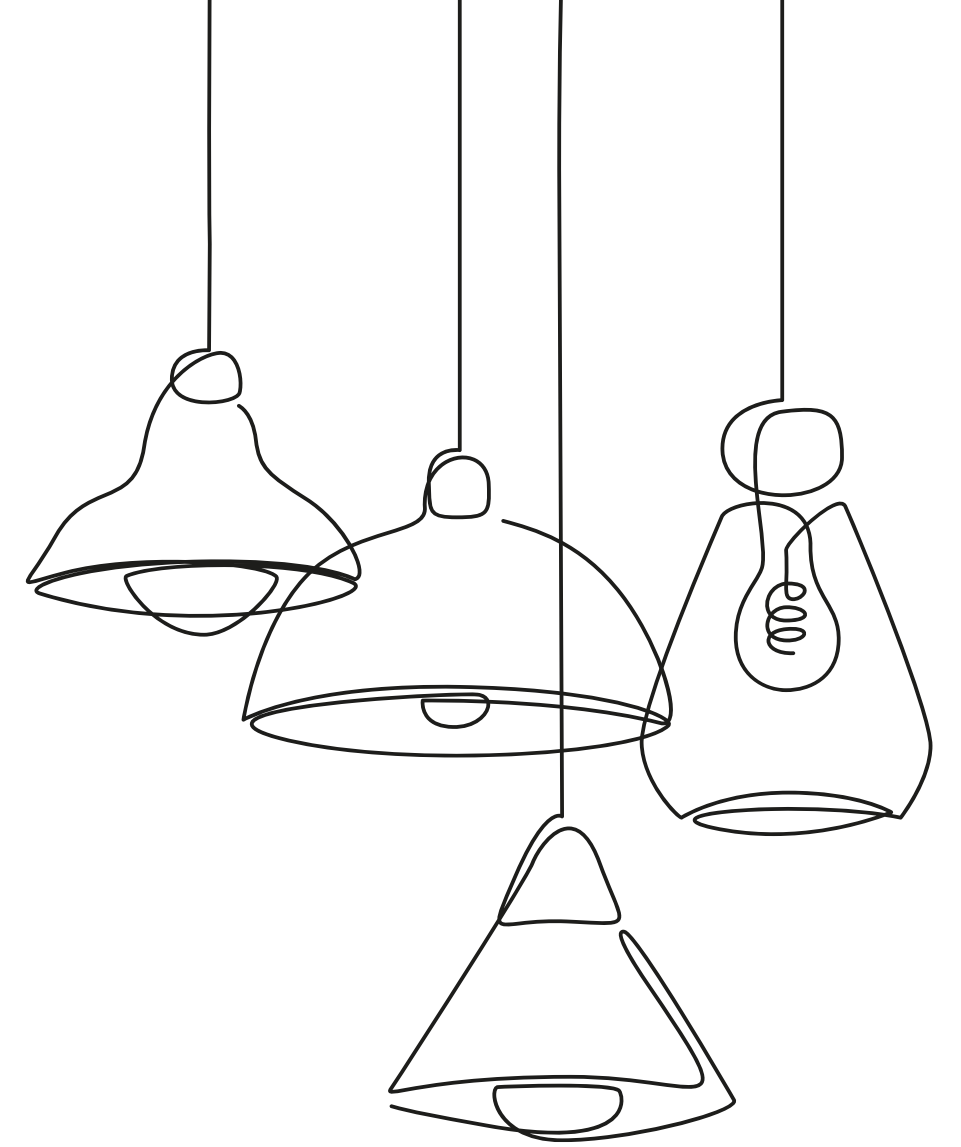
Milestone	Afternoon Boost Immersion	'3PM Lull' Diaries	Afternoon Beverages Quant	Creative Testing	Understand Brand Stretch
Status	RFP	Scoping	Not Started	Not Started	Not started
Research objectives	<ul style="list-style-type: none"> • Experience the job to be done thru consumer's eyes • Explore & share the dynamics of the Afternoon Boost across consumer segments • Explore solutions available and how they compare 	<ul style="list-style-type: none"> • Understand the consumer experience in the "3pm Lull" occasion • Understand how solutions are evaluated and prioritized 	<ul style="list-style-type: none"> • Understand the dynamics of the "3pm Lull" occasion – the size, share of beverages, solutions, purchase drivers, attitudes and perceptions etc. 	<ul style="list-style-type: none"> • Understand the effectiveness of new campaign creatives 	<ul style="list-style-type: none"> • How far beyond our current products will consumers accept and find believable/ appealing from our brand?
Methodology	Consumer Immersion Workshop	Video diaries of mid-afternoon experiences	Quant survey	Quant testing	<ul style="list-style-type: none"> • Idea screen • Brand workshop
Business Impact	More empathetic and motivated championing of our consumer	More nuanced understanding in the consumer voice	Contextualize the market and key drivers of success	Ensure new campaign will deliver ROI	Input into Innovation Pipeline development
Key Dates	Sept	Oct	Jan-Feb	April	April
Budget					



the clarity wizard

the brand positioning experts

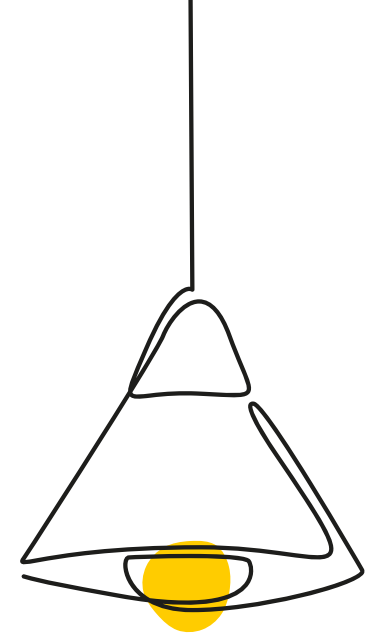
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Our Expertise




The Clarity Wizard helps brands optimize their brand positioning by:

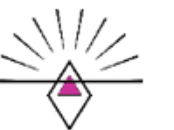
- Getting smarter and more sophisticated about their consumers & their experiences
- Better articulation of their brand promise, benefits, and differentiation
- Leveraging our powerful Clarity Catalyst Framework to create a holistic and compelling brand story



Our Impact

As a result, brand teams have **CLARITY on WHAT, HOW, & WHY**

-  improving consumer connection and driving behavior change
-  competing more effectively everywhere your brand shows up
-  & increasing revenue and decreasing risk!



A message from our CEO & Head Wizard



“For over 20 years, I’ve worked with brands at all stages of development and experienced firsthand that **brand positioning demands dedicated time and effort to "get it right"**.

But most brands do not spend *enough* time on this, and with infinite options, the consumer has no motivation to choose those that don’t effectively speak to them. These brands **struggle to connect with consumers, struggle with mediocre growth, and struggle to motivate teams to deliver work that makes an impact on the business.**

My seasoned approach to optimizing brand positioning, along with my proprietary brand fundamentals framework, and my enthusiasm for your personal success, is the winning combination to make your positioning woes a thing of the past and **push your brand into a new stage of growth.**”

KATHY GUZMÁN GALLOWAY

20+ year CPG brand strategy expert

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kathy@kgallowayconsulting.com

www.Linkedin.com/in/KathyGalloway



President
Women’s Health,
Pharmavite

Kathy is hands down one of the best strategists I have worked with. And I’m not the only one that keeps coming back to her when I need to move the needle quickly.

Areas of Expertise

BRAND POSITIONING: optimizing your insights, brand differentiators and strategic market position for growth and incrementality

CONSUMER INSIGHTS: more sophisticated understanding of your target

STRATEGIC PLANNING: data-based choice-making to maximize growth

Category Expertise

FOOD

salty snacks, yogurt, applesauce, cottage cheese, sour cream, pouch snacks, dip snacks, ice cream & frozen novelties, cookies

BEVERAGES

juice, juice drinks, cocktail mixers, CSD, bottled water, sparkling water, coffee (traditional + RTD), RTD tea, functional drinks, conventional milk, flavored milk, plant-based milk, coffee creamers, conventional

beer

BEAUTY

natural, multicultural haircare

HEALTH

VMS, gut health, probiotics, fiber, gummies, women's OTC, digestive OTC, vaginal/urinary health

CLEANING

multipurpose, bleach, laundry

OTHER

pet



Our Extended Team

Companies, Agencies and Consultants in strategy, trends, research, innovation, product development, and various specialties, industries and product categories



And more!

We look forward to
working with you!

Seen and heard in...

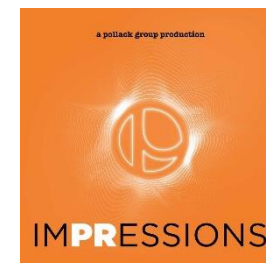
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