

Commercial Excellence Academy

by  Asbiverse Group

— Optimizing Route to Shopper® Capability for Winning in Retail —

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# Route to Shopper®

A Strategic Framework for  
Integrated Shopper-based Value  
Creation in the Consumer  
Healthcare Industry

# Route to Shopper® Framework for Consumer Healthcare

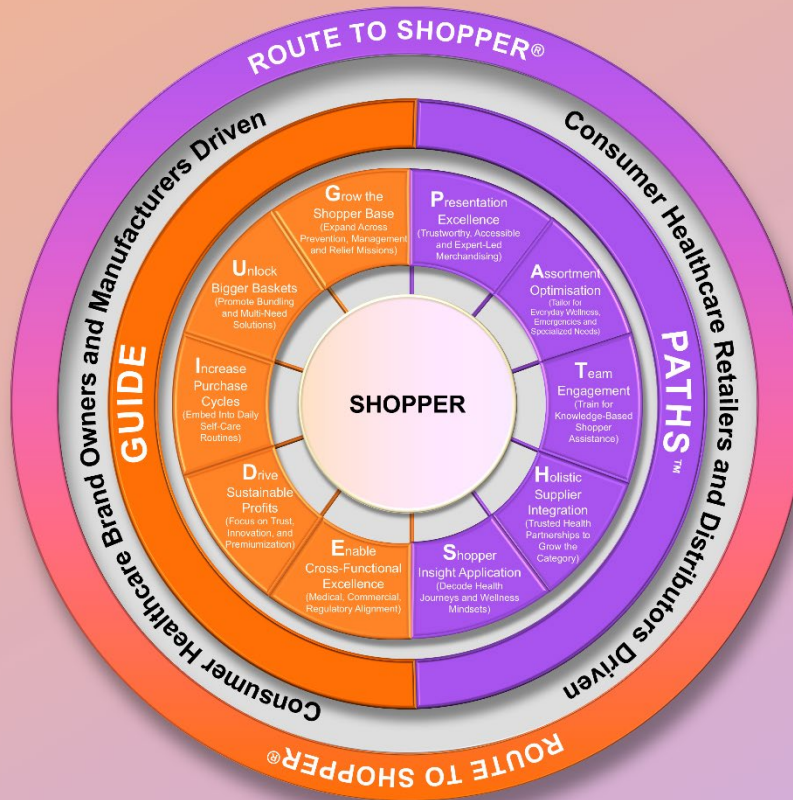
## A Strategic Blueprint for Consumer Healthcare Excellence

*A Strategic Positioning Document from the Commercial Excellence Academy*

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# The Route to Shopper® Framework incorporating GUIDE – PATHS™ for Consumer Healthcare Industry



# Executive Summary

## What does it really take to win a shopper's consideration in a world of endless options?

The Consumer Healthcare industry stands at a pivotal crossroads. As consumers increasingly take control of their health journeys, from urgent relief to preventive care to holistic wellness, traditional go-to-market approaches are no longer sufficient. The **Route to Shopper®** Framework provides a comprehensive capability-building blueprint that bridges brand building, shopper behaviour understanding, category management, and retail execution to drive sustainable growth in this complex and evolving landscape.

This strategic positioning document outlines how the **Route to Shopper®** Framework can transform commercial capabilities across the consumer healthcare ecosystem, enabling organizations to connect more effectively with healthcare shoppers, build trust-centred commercial strategies, and ultimately deliver superior business outcomes.

## Strategic Context: The Evolving Consumer Healthcare Landscape

### Industry Transformation Drivers

The consumer healthcare sector faces unprecedented transformation driven by:

- **Self-care Revolution:** A fundamental shift from treatment to prevention and wellness, with consumers taking greater ownership of their health journeys
- **Trust Imperative:** Heightened shopper scrutiny of claims, ingredients, and efficacy in health-related purchases
- **Channel Proliferation:** Fragmentation across pharmacy chains, mass retail, e-commerce, quick-commerce, direct-to-consumer, and specialty wellness outlets
- **Digital Health Integration:** Growing intersection between traditional OTC products and digital health monitoring, telehealth, and personalized wellness
- **Private Label Expansion:** Retailers developing science-backed private brands across prevention and treatment categories
- **Regulatory Complexity:** Evolving guidelines for claims, ingredients, and merchandising across markets

- **Healthcare Professional Evolution:** Changing role of pharmacists, nutritionists, and other professionals in the purchasing journey

## The Multi-dimensional Shopper Mission Spectrum

Consumer healthcare is uniquely characterized by diverse shopper missions that span:

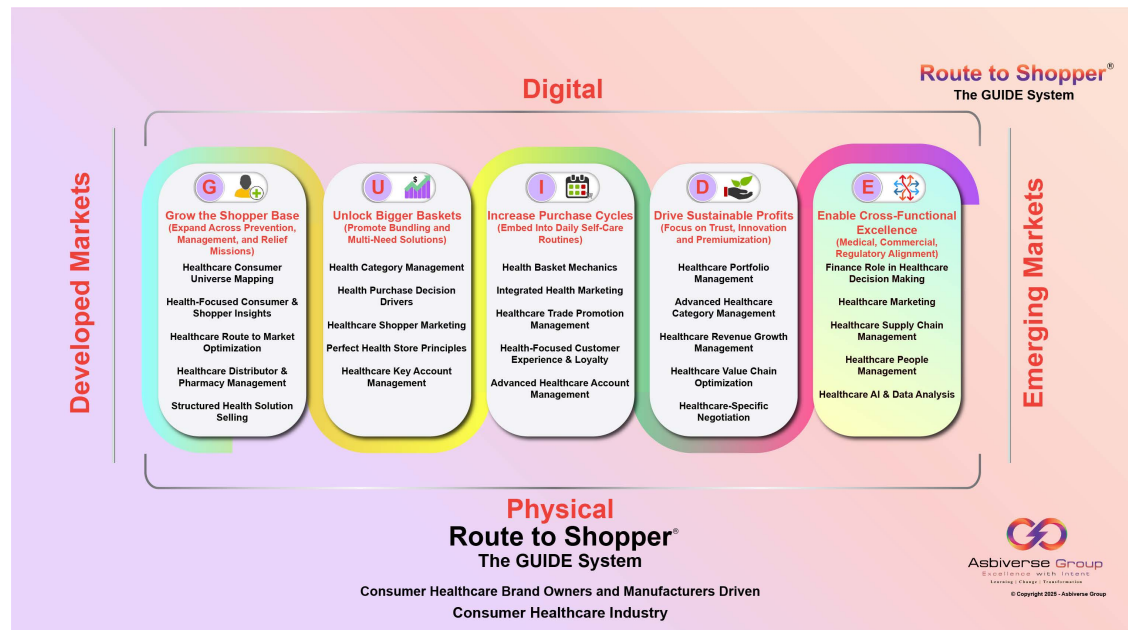
- **Urgent Relief Missions:** "Solve my immediate problem now" (pain relief, fever reduction, allergy attack)
- **Condition Management Missions:** "Help me control my ongoing health concern" (digestive issues, sleep problems)
- **Preventive Health Missions:** "Protect me and my family from future issues" (immunity support, vitamin supplementation)
- **Wellness Optimization Missions:** "Help me achieve my best self" (energy enhancement, beauty from within)
- **Caregiver Missions:** "Enable me to care for my loved ones" (children's medicine, elderly relative support)

Understanding these distinct missions and their unique drivers is essential for commercial success in consumer healthcare.

# The Route to Shopper® Framework for Consumer Healthcare

The **Route to Shopper®** Framework provides a comprehensive approach through two integrated frameworks: **GUIDE** for brand owners/manufacturers and **PATHS** for retailers/distributors.

## GUIDE Framework (Brand/Manufacturer Strategy)



### G: Grow the Shopper Base

#### Expanding reach across prevention, management, and relief missions

- Identify and target emerging health-conscious segments (active aging, mental wellbeing seekers)
- Develop products addressing unmet health needs and new consumption occasions
- Create educational platforms that build category understanding and drive new user acquisition
- Establish credibility through healthcare professional partnerships and science-backed positioning
- Implement segment-specific activation to attract shoppers at different points in their health journeys

### U: Unlock Bigger Baskets

#### Promoting bundling and multi-need solutions

- Create health solution ecosystems spanning multiple categories and needs
- Develop cross-category merchandising strategies that connect complementary health products
- Design value packs and regimen kits that encourage multiple purchases (immunity bundles, sleep wellness kits)
- Implement digital strategies that guide shoppers through complete health solutions
- Establish need-state segmentation that reveals multi-category purchase potential

## **I: Increase Purchase Cycles**

### **Embedding into daily self-care routines**

- Develop consumption habit-building strategies and reminder systems
- Create seasonal health preparation programs that drive predictable repurchase
- Implement subscription and auto-replenishment models for maintenance products
- Design packaging and formats that encourage optimal usage frequency
- Establish loyalty mechanisms that reward ongoing health management

## **D: Drive Sustainable Profits**

### **Focusing on trust, innovation, and premiumization**

- Develop premium science-backed innovations with demonstrable efficacy advantages
- Create clear value ladder strategies across good-better-best positioning
- Implement portfolio pricing architecture that maximizes category value
- Design sustainable and ethical practices that justify premium positioning
- Establish credible innovation pipelines that continually refresh health solutions

## **E: Enable Cross-functional Excellence**

### **Aligning medical, commercial, regulatory teams**

- Create collaborative platforms uniting marketing, medical, regulatory, and sales
- Develop clear claim substantiation processes linking R&D and commercial teams
- Implement agile launch models for health innovations and claim enhancements

- Design cross-functional metrics tracking both commercial and health outcomes
- Establish integrated planning processes that synchronize all commercial functions

## PATHS Framework (Retailer/Distributor Execution)



### P: Presentation Excellence

#### Creating trustworthy, accessible, and expert-led merchandising

- Design health condition navigation systems for intuitive shopping
- Develop educational merchandising that builds shopper trust and confidence
- Implement clear efficacy communications and credibility signalling
- Create digital content architectures for health information discovery
- Establish pharmacist and expert integration within the shopping environment

### A: Assortment Optimization

#### Tailoring for everyday wellness, emergencies, and specialized needs

- Develop channel-specific assortment strategies based on shopper health missions
- Create category definitions reflecting health need states rather than traditional segments
- Implement seasonal health preparation assortment strategies
- Design demographic-specific health solution offerings

- Establish science-backed private label architectures for health categories

## **T: Team Engagement**

### **Training for knowledge-based shopper assistance**

- Develop health recommendation frameworks for frontline staff
- Create condition-specific training programs for common shopper needs
- Implement digital tools supporting guided selling for complex health solutions
- Design compliant health communication protocols for team members
- Establish expert consultation capabilities for complex health questions

## **H: Holistic Supplier Integration**

### **Building trusted health partnerships to grow categories**

- Create joint health education platforms with strategic suppliers
- Develop co-created merchandising solutions for key health need states
- Implement integrated data sharing on health trends and shopper insights
- Design collaborative innovation processes for emerging health needs
- Establish mutual success metrics focused on shopper health outcomes

## **S: Shopper Insight Application**

### **Decoding health journeys and wellness mindsets**

- Create health journey mapping frameworks across different conditions
- Develop segmentation models based on health attitudes and behaviours
- Implement predictive analytics for seasonal health condition spikes
- Design personalization engines for health-based recommendations
- Establish measurement systems for health solution effectiveness

## **Key Distinction: Shopper vs. Consumer in Healthcare**

Understanding the critical difference between shoppers and consumers is fundamental to success in consumer healthcare:

**Healthcare Shopper:** The decision-maker and purchaser who navigates the purchase environment, compares options, processes claims, and ultimately makes the buying decision. They may be purchasing for themselves or others.

**Healthcare Consumer:** The end-user who experiences the product benefits and health outcomes, potentially different from the shopper (caregivers, parents, partners).

In consumer healthcare, these roles are frequently separated:

- Parents purchasing children's medications
- Adult children buying supplements for elderly parents
- Partners selecting treatments for family members

The healthcare shopper's journey is distinctly characterized by:

- Higher information needs and research intensity
- Greater emphasis on trust signals and credibility markers
- Stronger influence from healthcare professionals and trusted advisors
- More complex decision hierarchies balancing efficacy, safety, and value
- Heightened emotional states particularly in treatment scenarios

The **Route to Shopper®** Framework addresses this complexity by providing distinct strategies for engaging healthcare shoppers while ensuring products deliver for healthcare consumers.

## Strategic Application Examples (Hypothetical)

### Example 1: Immunity Support Ecosystem

#### Challenge

A leading vitamins manufacturer seeks to expand beyond single-product purchases into more comprehensive immunity solutions, moving shoppers from reactive to proactive health management.

#### GUIDE Application

- **G (Grow):** Expand beyond cold/flu season shoppers to year-round immune support seekers through education on continuous immunity management
- **U (Unlock):** Create a complete immunity support kit bundling vitamins C and D, zinc, and probiotics with clear regimen guidance
- **I (Increase):** Develop a 30-90-365-day program with subscription options and seasonal boosters
- **D (Drive):** Implement a three-tier offering from foundational to advanced immunity support with clear scientific differentiation

- **E (Enable):** Align R&D, medical affairs, and marketing around consistent immunity benefit messaging and claim substantiation

### **PATHS Application**

- **P (Presentation):** Create "Immunity Headquarters" merchandising with educational elements explaining different immune support approaches
- **A (Assortment):** Develop tiered offering from basic protection to advanced support across formats and price points
- **T (Team):** Train staff on immunity system fundamentals and personalized recommendations based on lifestyle and needs
- **H (Holistic):** Partner with retailers on year-round immunity education beyond seasonal focus periods
- **S (Shopper):** Utilize predictive analytics identifying high-risk immunity periods by region for targeted activation

### **Potential Outcomes**

- Double-digit increase in multiple-item purchases across immunity portfolio
- Expansion of immunity purchasing beyond traditional cold/flu season
- Creation of new "daily immunity management" as distinct category mission

## **Example 2: Pain Relief Quick-response Strategy**

### **Challenge**

A pain relief brand needs to win in the growing quick-commerce channel where immediate relief is the primary shopper mission.

### **GUIDE Application**

- **G (Grow):** Target on-the-go professionals and active lifestyle consumers seeking immediate relief solutions
- **U (Unlock):** Bundle fast-acting pain relief with complementary recovery products like cooling patches and anti-inflammatory supplements
- **I (Increase):** Implement "relief kit" concept ensuring shoppers have solutions available before pain occurs
- **D (Drive):** Create premium rapid-relief formulations with speed-of-action as the primary value driver
- **E (Enable):** Develop streamlined medical, regulatory, and marketing processes for rapid-response products

## **PATHS Application**

- **P (Presentation):** Design "Instant Relief" digital navigation and search optimization for quick-commerce platforms
- **A (Assortment):** Focus on fast-acting formats and convenient pack sizes optimized for immediate consumption
- **T (Team):** Train delivery personnel on handling urgency-based health purchases with care and priority
- **H (Holistic):** Collaborate with quick-commerce platforms on "pain relief in 15 minutes" promise
- **S (Shopper):** Analyse geolocation and timing data to predict pain relief demand patterns

## **Potential Outcomes**

- Double-digit growth in quick-commerce channel
- Establishment of "relief guarantee" as category differentiator
- Development of anticipatory inventory placement based on predictive analytics

## **Example 3: Daily Wellness Value Strategy**

### **Challenge**

A supplement manufacturer seeks to democratize preventive health by making daily wellness products more accessible to budget-conscious families.

### **GUIDE Application**

- **G (Grow):** Target middle-income families traditionally underserved in the supplements category
- **U (Unlock):** Create family wellness packs combining adults' and children's multivitamins
- **I (Increase):** Develop 90-day supply value packs with educational calendars reinforcing daily usage
- **D (Drive):** Engineer cost-optimized formulations maintaining essential efficacy while reducing non-critical ingredients
- **E (Enable):** Align supply chain, formulation, and marketing to deliver quality at accessible price points

## **PATHS Application**

- **P (Presentation):** Implement "Everyday Wellness" merchandising emphasizing value and scientific essentials

- **A (Assortment):** Develop good-better-best architecture with strong everyday value positioning
- **T (Team):** Train staff on budget-conscious wellness conversations that prioritize essential nutrients
- **H (Holistic):** Partner with retailers on year-round "Family Wellness" programs
- **S (Shopper):** Leverage insights on economic pressure points and health prioritization during tight financial periods

### Potential Outcomes

- Category expansion reaching previously untapped price-sensitive segments
- Increased daily compliance through family-based consumption rituals
- Development of "essential wellness" as a distinct value-driven category

## Example 4: Oral Care Therapeutic Mouthwash Strategy

### Challenge

An oral care brand aims to elevate mouthwash from a breath-freshening product to an essential therapeutic oral health solution that bridges daily hygiene and preventive healthcare.

### GUIDE Application

- **G (Grow):** Target health-conscious consumers concerned about gum health and oral microbiome beyond basic breath freshening
- **U (Unlock):** Create complete oral health regimens pairing therapeutic mouthwash with specialized toothpaste, interdental care, and tongue cleaning tools
- **I (Increase):** Develop morning and evening routines with different therapeutic benefits (antibacterial protection, gum health, enamel remineralization)
- **D (Drive):** Implement tiered efficacy strategy with clear scientific differentiation from cosmetic breath fresheners to advanced therapeutic solutions
- **E (Enable):** Establish dental professional partnerships to validate therapeutic claims and create recommendation programs

## **PATHS Application**

- **P (Presentation):** Create distinct "Oral Health Therapy" sections separate from cosmetic oral care, with educational elements on oral-systemic health connections
- **A (Assortment):** Develop condition-specific therapeutic mouthwash offerings (sensitivity, gum health, dry mouth, enamel protection) alongside comprehensive oral care solutions
- **T (Team):** Train staff on the differences between cosmetic and therapeutic mouthwash benefits and appropriate recommendation guidelines
- **H (Holistic):** Partner with retailers on "Complete Oral Health" campaigns connecting oral care to overall wellness
- **S (Shopper):** Analyse purchase patterns to identify transitional moments when shoppers evolve from cosmetic to therapeutic oral care needs

## **Potential Outcomes**

- Creation of premium therapeutic mouthwash segment with significantly higher price points
- Increased basket size through complementary oral care product purchases
- Establishment of twice-daily usage patterns versus occasional breath-freshening
- Higher retailer engagement through oral-systemic health educational platforms

## **Potential Outcomes from Route to Shopper® Deployment**

Organizations implementing the **Route to Shopper®** Framework in consumer healthcare can expect:

### **Strategic Outcomes:**

- Expanded market penetration across the prevention-treatment continuum
- More balanced portfolio performance across impulse, acute, and planned purchases
- Stronger competitive differentiation in increasingly crowded categories
- Greater resilience against private label encroachment through enhanced value perception
- More effective cross-functional integration across commercial, medical, and regulatory teams

## Operational Outcomes:

- Improved forecasting accuracy for seasonal health conditions
- Optimized assortment strategies aligned to channel-specific health missions
- More effective new product launches with clearer role in health solution ecosystems
- Better resource allocation across promotion, merchandising, and pricing levers
- Enhanced digital integration across the online-offline health journey

## Financial Outcomes:

- Increased average transaction value through solution-based merchandising
- Higher category profitability through need-based value ladders
- Improved return on promotional investment via targeted health occasion activation
- Enhanced lifetime value through regimen-building and loyalty strategies
- More balanced revenue distribution across seasons and health occasions

## AI & Digital Enablement in Consumer Healthcare

The **Route to Shopper®** Framework leverages advanced digital capabilities to transform consumer healthcare execution:

### Predictive Health Analytics

- Anticipating seasonal condition outbreaks for inventory and marketing optimization
- Predicting individual replenishment needs based on purchase patterns and usage data
- Forecasting emerging health trends by analysing search, social, and purchase signals

### Personalized Health Journeys

- Creating tailored wellness programs based on individual health profiles and goals
- Dynamically adjusting recommendations based on progress and compliance data
- Delivering personalized regimen support through integrated reminder ecosystems

## **Omnichannel Health Integration**

- Synchronizing health guidance across in-store, online, and healthcare professional channels
- Creating seamless shopping experiences for complex health regimens
- Enabling consistent information and recommendations across all touchpoints

## **Digital Merchandising Excellence**

- Optimizing digital shelf organization based on health need states rather than traditional categories
- Creating intuitive symptom-based navigation systems for solution discovery
- Developing educational content integration within the shopping journey

## **Automated Compliance Systems**

- Ensuring accurate health claims across all customer touchpoints
- Managing complex regulatory requirements across different markets
- Maintaining consistent scientific messaging across all commercial materials

## **Role of the Commercial Excellence Academy**

The Commercial Excellence Academy serves as the catalyst and enabler for transformation through:

### **Capability Development**

- Building cross-functional expertise in healthcare shopper understanding
- Developing specialized skills for health need-state marketing
- Creating centres of excellence in healthcare category management

### **Strategic Transformation**

- Guiding the evolution from product-centric to solution-centric strategies
- Facilitating the development of health occasion-based commercial models
- Supporting the integration of healthcare professional influence into commercial approaches

## Operational Implementation

- Providing practical tools and frameworks for **Route to Shopper®** execution
- Creating measurement systems for health-focused commercial metrics
- Developing implementation roadmaps for capability building

## Knowledge Management

- Capturing and disseminating best practices across markets and categories
- Creating standardized approaches to common healthcare commercial challenges
- Building institutional knowledge around healthcare shopper behaviour

## Call to Action: Leading the Future of Consumer Healthcare

We invite consumer healthcare commercial leaders to:

1. **Embrace Holistic Health Journeys:** Move beyond traditional category definitions to address comprehensive health missions from prevention to treatment
2. **Build Trust-centred Commercial Models:** Develop strategies that prioritize credibility, transparency, and efficacy as the foundations for sustainable growth
3. **Integrate Health Professional Ecosystems:** Create seamless connections between commercial strategies and healthcare professional recommendations
4. **Democratize Health Access:** Develop inclusive approaches making quality healthcare solutions accessible across the socioeconomic spectrum
5. **Pioneer Health Personalization:** Lead the evolution toward individualized health solutions tailored to specific needs and conditions

The **Route to Shopper®** Framework provides the strategic blueprint and practical implementation path to achieve these ambitions, transforming how consumer healthcare companies connect with shoppers, build trusted brands, and deliver sustainable growth in an increasingly complex and promising market.

By investing in these capabilities now, organizations will be positioned not just to respond to the consumer healthcare revolution, but to lead it.

## Contact

To begin a strategic dialogue on implementing the **Route to Shopper®** Framework in your organization, please contact:

Strategic Partnerships Team

Commercial Excellence Academy

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