Feast for Merchants

Facilitator Guide

Introduction

The *Feast for Merchants* training is designed to train merchants to create an assortment in Feast. Participants will engage in hands-on demonstrations and interactive exercises to reinforce assortment planning in Feast.

Key Skills Developed:

- Assortment planning and technical facility in Feast
- Collaboration and teamwork
- Analytical thinking and problem-solving

Activity Type: Interactive Training Session

Modality: Hybrid

Training Time: Approximately 3.5 hours

Overview: Participants should be seated at tables, 4 people per table. Seating assignments should be made in advance and printed and posted at each table.

Materials Needed:

- Computer/Laptop
- Projector/TV
- Feast for Merchants Facilitator Guide
- Feast Software Access
- Feast for Merchants Case Study
- Large expo paper
- Several markers for writing
- Kahoot links
- Feast for Merchants Materials SharePoint link
- Feast SharePoint link
- Online Timer (https://www.online-timer.net)

Preparation:

- Ensure all participants have access to their laptops and Feast software.
- Assign partners based on registration and table numbers. Print and post this information on each table.
- Prepare presentation slides, large paper, markers, and links.
- Set up tables for group discussions and activities.
- Write all shared links on the board for participants to use.
- Producer should have partnered breakout rooms pre-assigned based on registration.
- During the case study, one instructor should be going in and out of virtual breakout rooms for assistance. The others should assist in person.
- This session is recorded.

Agenda

Time	Topic
15 minutes	Welcome and Introduction
5 minutes	Housekeeping
5 minutes	Recap Process and Feast Fundamentals
25 minutes	CIT Demonstration & Activity
45 minutes	Item Ranks Demonstration & Activity
15 minutes	Break
55 minutes	Assortment Build Demonstration & Activity
20 minutes	Submit Assortment Demonstration & Activity
5 minutes	Break
25 minutes	Summary & Closing

Slide 1″ 10 minutes 	SAY: Welcome to the Feast for Merchants session! We'll cover the topics and goals of this session shortly but before we start, let's first introduce the Merchandising Enablement Team. DO: Each Merchandising Enablement Team Member introduces themselves and shares their role, team's goal, and vision. SAY: Now, with Team Members at your tables, share your name, category, and how long you have been at WFM. Then, tell your Team Members, "What celebrity would you like to share a feast with?" DO: Introduce yourself first to model how to answer. Share your name, your role, how long you have been with Whole Foods and a celebrity you'd like to share a feast with. Do not go into WHY you chose that person. Allow Team Members 5 minutes to share at their tables. Set a timer for 5 minutes. SAY: Let's continue and introduce the parking lot. Virtual participants, if you have questions, please use the chat as a parking lot. For in-person participants, if you have questions, please use the large paper located by XXX as a parking lot. We will review the parking lot at specific intervals during training and will answer your questions. For questions that we need to look into or run out of time for, we will find the answers offline and send them out to you after this training has completed. Now that introductions are done let's review the goals of our

	training. By the end of this session, you will be able to plan a category assortment using Feast, locate Feast resources and knowledge base, and identify support. PRODUCER GUIDANCE: Press record.

Slide 2 ″ 5 minutes 	SAY (PRODUCER): Hi, I'm XXX and I will be producing today's session. Let's briefly cover housekeeping for this training: please make sure to mute your microphone when you're not called to speak; silence your phones, notifications, or any other distracting content and devices; avoid side conversations; and be aware of your background and minimize distractions on camera. Please refrain from using your laptops if the direction hasn't been given to use them. If you have any questions, feel free to post them in the chat and we will work to resolve them. We will have one 15-minute break towards the middle of the session, which is noted in our agenda that we will review next. Thank you for attending! SAY: Before we start our training, we would like to create a community agreement to ensure we set expectations of how we will behave in the next few hours to ensure this learning experience is successful. DO: Write the title "Community Agreement" on the side of the white board (this should stay on the board for the remainder of the training). Create a list of statements that begin with "We will" on the white board. Write a couple of statements that ensure the training will be successful. For example, "We will keep our cell phones silent." or "We will be fully present." Once you write one or two statements, ask participants to shout out their own. Write participants statements on the board. Duplicate

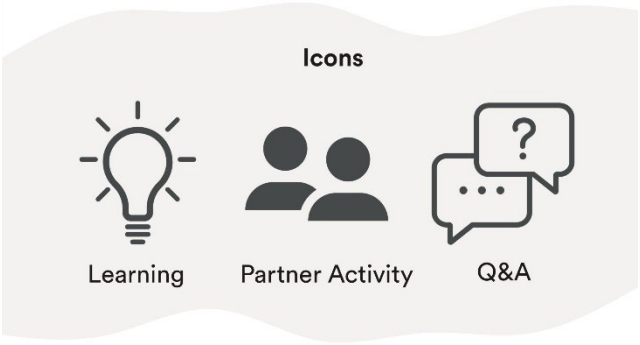
	this activity in the chat by monitoring responses. SAY: Thank you for sharing. Now that we all agree to follow these guidelines throughout the training, let's get started! PRODUCER GUIDANCE: Monitor the chat for raised hands and responses. Read them aloud to the in-person group.

Slide 3 ″ 2 minutes

SAY: This is the agenda for our training today. We will be here for about 3.5 hours with several short breaks. We have already covered the welcome, introduction, and housekeeping. We will cover:

Feast Process and Fundamentals Recap
Feast Walkthrough
Hands-On Feast
Summary
and Closing.

SAY: As a note, water and snacks are available in XXX. Bathrooms are located XXX.

Slide 4 ″ 1minute  	SAY: Throughout this training, you will see icons representing what action you should take: when you see the lightbulb, this means that laptops are closed and your attention is on the screen. When you see the partners, it's time work with your partner on the activity. When you see the question bubbles, it's time to ask questions.

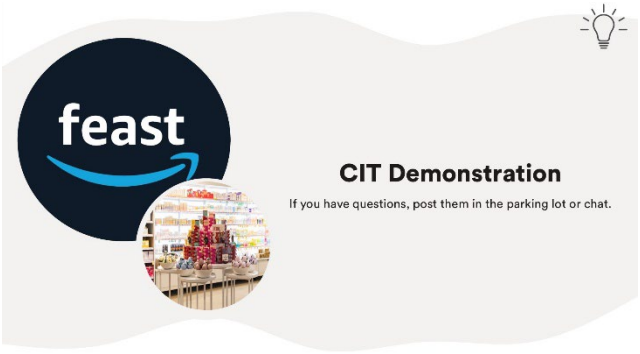
Slide 5 ″ 5 minutes

SAY: Let's briefly recap Process & Feast Fundamentals. In the Process & Feast Fundamentals training, we introduced our new assortment planning tool, Feast. Assortment planning in Feast offers many benefits including more automation, less rework, metrics, and robust support for the end-to-end process. Best of all, Feast saves you time. We also introduced our new round review process that supports Feast, remember the train car view we discussed? As you know, many of our processes and ways of working are not changing. For those that are changing, the changes are aligned with Feast's functions, which encourages efficiency in our work. We noted five distinct phases that were impacted and aligned with Feast: Insights, Hindsights, and Foresight; Customer Strategy and Targets; Assortment Prep, Refinement, and Finalization; and POG. Let's review some of the new vocabulary terms that come with our transition to Feast. Use your phone to access this link [Kahoot link goes here].

Terminology for Kahoot:
Insights – Insights, Hindsights, and Foresights
Legacy regions – Clusters
CDT – CIT
List of eligible/ineligible items – C-Set
Specific ordering of items – Ranks
Method of organizing future items in your assortment – Placeholders

SAY: As a reminder, our helpful resources outside of this and the Process & Feast Fundamentals training

	include the Feast Job Resource Guide and office hours. There will also be a recording of this training provided once this training is complete. We are committed to providing ample support to you in this transition and are excited to see Feast in action. At this time, we will begin the technical training portion of Feast. We will alternate between a live demonstration and a case study where you will be responsible for completing prescribed tasks in pairs. PRODUCER GUIDANCE: Provide the link to the Kahoot in the chat. FACILITATOR GUIDANCE: Reference the written link on the board for in-person learners.

Slide 6 ″ 10 minutes 	SAY: This portion of the training will focus on creating an assortment in Feast that aligns to the round review process. You will alternate between watching a demonstration of Feast and then practicing creating an assortment using an assigned case study. There will be opportunities to ask questions and receive help. Even though we will not work in your specific categories in this training, you should already have access to Feast with your business event set up. If not, please submit an Orchard ticket. DO: Begin screen share of Feast login by changing screen share to Feast window. As you read the script for each specific section, use the scrollbar and mouse to point out the features on the big screen. Be prepared to pause or repeat an action. SAY: To access Feast, login through MyApps. Select the WFM environment. If this is your first time logging in, click the WFM dropdown in the top right of the screen and click "US". Then click on the "Assortment" button at the top of the screen. SAY: Welcome to the Feast homepage. When referring to building assortments, Feast uses the term “plan”. The homepage shows Upcoming Plans based on your categories and events, which are configured during a planning cycle each month. Let's explore columns on the homepage and their uses: Category = your category or categories, if assigned to multiple. Business Events = your round events. The naming conventions you will see

	in Feast will include your round number and the year. In Store Date = the first day of the reset execution. Remember that resets occur in two cycles, so this date just begins the reset. Plan Due Date = the published date of the assortment plan. This is the due date for the assortment plan to be published to MerchPres and Inventory Planning teams. Status = the status of the assortment plan. There are three status categories: not started, in progress, and overdue. The status column helps to plan and keep you on track for your round. The categories section can toggle between viewing categories you're assigned to or viewing all categories. Categories can be searched by keyword. If you click the dropdown to All, you will only have view-only access to the categories. If you click the dropdown to Owned by Me, you will have access to edit the categories. For this session, everyone has access to the sandbox category, Desserts. I will click on Desserts and show you what this looks like. SAY: After clicking into the desserts category, you will see three main sections on the page: Category Information will direct you to the Last Published Plan, Customer Importance Tree, and Items. We will explore those soon. Scroll to the middle of the page to view your Upcoming Plans. Scroll to the bottom of the page to view your

	Published Plans. You can use the filter in the top right of this section to filter time periods. Now, let's explore the Customer Importance Tree. SAY: On this screen, you can see the Customer Importance Tree, or CIT, for this particular category. If you recall in our previous training, CITs are replacing CDTs. CITs are a collection of hierarchical data about how a customer shops. This data comes from the past 52-weeks and ICon. During the Insights, Hindsights, and Foresights process, CITs are generated by the Analytics Team and through a collaborative process, reviewed, and approved by you. This CIT review and approval ensures that you make sound decisions based on data and actionable knowledge and experience. The structure of the CIT is determined by the analytics team and you. Once the CIT is approved, it is finalized and loaded into Feast by the Analytics Team. Let's look at the structure of the CIT. The root of the tree shows the entire sales of the category and how many items make up the category. The sprouting branches consist of the highest-ranking subcategories that make up the entire category. Each node contains weighted sales information for that subcategory and item counts. In the next sprouting branches, information is classified even more distinctly throughout the category in each node. Nodes are synonymous with need states. Need-states can also be seen as the most boiled down element of the CIT. Each node with a star in its title is a need-state. There

	are no empty need-states in this CIT, but if there are any in your category, they will have an alert icon in the node's title. These will need to be resolved through another process we will discuss later. I will click the Non-Dairy Novelties need-state in the tree. Once a need-state is clicked, an accordion tab opens on the screen to show the items included in that need-state. SAY: Before we continue, are there any questions about any of the information covered so far in the demonstration? DO: Answer questions.

Slide 7″ 16 minutes

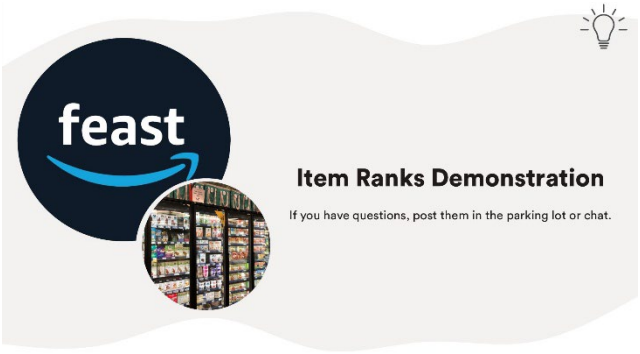
SAY: As mentioned, we will alternate between our demonstration and completing the tasks of the case study. When directed, make sure you are sitting with your assigned partner. One partner will need their laptop open in Feast to complete the activity. One partner will have the Feast Job Resource Guide open on their laptop. Both partners will write their responses on their handout. On each table, you will see your partner and table assignments. Take 2 minutes to find your assigned partner and open your laptops to either Feast or the job resource guide. For virtual participants, you will be assigned into a breakout room with your partner. Make sure to have your links open and ready to begin. If you need help, raise your hand virtually or in-person and a Team Member will assist you. The resource guide can be found here [insert link]. The resource guide is broken down into sections based on which part of the process you're in. By clicking through each of the sections, you will see a description of the process and its relevant tasks. Feast can be found here [insert link]. Once you have your partner and resources ready, please wait for further instructions before beginning.

DO: Set a timer for 2 minutes and allow Team Members to settle. Assign the breakout rooms but wait to launch them.

SAY: Pete Zah is a new Category Merchant on the Grocery team, and he recently kicked off the Category Round Review for Frozen Desserts.

	With the support of his Onboarding Buddy, Breddy Mercury, Pete's met with suppliers and aligned his strategy to identify new items to add to his assortment and items to discontinue, so it's time to create his assortment in Feast. Breddy created a checklist of tasks to complete in Feast to help Pete stay on track. SAY: Using the Feast Job Resource Guide, your handout, and the designated SharePoint Excel file, complete the below checklist of tasks in order. For this part of the training, you will only complete tasks in Part 1. Read the scenario at the top of the page. Then, answer the questions. You will have 10 minutes to complete Part 1. You may begin. DO: Set a timer for 10 minutes. Launch the breakout rooms for virtual participants. Facilitators should walk around the room prepared to assist or clarify any questions. Other available facilitators should pop into breakout rooms for support. After 10 minutes has passed, review the process and answers for Part 1. DO: Debrief for 3 minutes. SAY: Walk us through what you did. DO: Pick a team to talk through the process. This will sound similar to the instructions previously given in the demonstration. SAY: Is there a partner team in-person that would like to answer #1 of Part 1?

	DO: Pick a team to answer #1. SAY: Is there a partner team virtually that would like to answer #2 of Part 2? Please raise your hand. DO: Pick a virtual team to answer #2. SAY: Great work! What questions do you have about interpreting the CIT for a category? DO: Answer questions. SAY: Let's resume our Feast demonstration. Please turn your undivided attention to the big screen as we continue. INSTRUCTOR GUIDANCE: During the case study, all facilitators should walk around the room and observe if Team Members need help. One instructor should be available to jump in and out of breakout rooms for assistance during the case study. PRODUCER GUIDANCE: Prepare partnered breakout rooms. Monitor for raised hands and chat responses. Provide the link to the Feast for Merchants resources in the chat. Set a timer for breakout rooms. TIME DISTRIBUTION: 1 minute to introduce activity 2 minutes for Team Members to settle in with their partner 10 minutes for the activity 3 minutes to debrief

Slide 8 ″ 15 minutes 	SAY: Let's resume our demonstration and go back to the Desserts dashboard. We will now explore items in a category. To get there, I will click on Items at the top of the screen. SAY: This is the Items dashboard. Usually, you will have to give this dashboard some time to completely load. Once it loads, eligible and ineligible items will load. We call this list your consideration set, or C-Set. The C-Set includes all items in your category imported from ICon. You can search for specific items using keywords in the search box and filter items. We will explore the best use of those functions shortly. For now, I will click on the first item's hyperlinked description. In this accordion menu, you will see information about the item including item details, eligibility status, regions, and when available, stores. Close the description panel. Click the checkbox of the first item listed, then click the Actions dropdown in the top right corner of the screen. When items are checked, you can Configure and Resolve Distributors, Resolve Placeholders, Disco Items, Clear Discos, or Set Non POG Status. We will go through these later in this session. SAY: When you access this list of items for the first time, it will need to be scrubbed. This is the process of identifying items in your C-Set and determining their eligibility. Depending on your C-Set, this process could be lengthy. The good part about this is that it only has to be done once at the beginning. This step

	happens in the Insights, Hindsights, and Foresights part of the process. You will need to go through and evaluate items for eligibility and/or ineligibility. ASK: Tell me, what do you think are some of the criteria for an item to be eligible or ineligible for an assortment? If you are participating virtually, feel free to answer in the chat. DO: Allow Team Members to respond in-person. Monitor the chat for responses. You may receive many different responses, including points about the item's criteria in ICon, whether the item should be disco'd or expanded, etc. SAY: Feast helps to determine items' eligibility or ineligibility within your C-Set. I'd like to note that making an item ineligible in Feast is the same as discontinuing an item. Remember that data has been imported from ICon. Maybe there are items that failed testing but are still reflected in the database. These items would be marked ineligible in your list. Perhaps there are new items that have no sales data yet, but are onboarded in ICon. These items would be marked eligible. As a merchant, you have options based on your knowledge of your category and previous data. If there is an item in the C-Set that is marked eligible, but you decide that it should be ineligible, you can adjust that in Feast. Type in the item's name in the search bar, toggle the filter set to Eligible Items, and filter options to

	reflect “Eligibility Status = true”, and click the checkmark next to the item. For example, let’s say I wanted to mark an ice cream ineligible. I click in the search bar and choose a property to narrow down the search. I’ll choose “Customer Friendly Name Contains”. For simplicity, I will type in “Ice Cream.” Just for time’s sake, I will not be picky of which ice cream to choose. Once the item is listed, click the checkbox next to the item. Click Actions. Click Discontinue Items to mark this item as ineligible. As a reminder, you will not see an option that explicitly says, “Mark this item ineligible.” It will just say “Discontinue items”. In Feast, to make an item ineligible and to discontinue it means the same thing. Similarly, to make an ineligible item eligible, change your filters. First, click Clear Filters to start fresh. Choose a filter set. For this one it will be Eligible Items again. This time, we will adjust our filter by clicking on it to set Eligibility Status = false. Click Apply. All ineligible items will appear. To make an item eligible, click the checkbox next to the item. Click Actions. Click Clear Discontinuation. SAY: Let’s talk a bit about local items. Sometimes we don’t have all of the information necessary about our products from foragers. This doesn’t mean that we have to forgo adding items to our assortment. We can Add Placeholders until the item is fully setup in ICon. SAY: To add placeholders, click Add Placeholders at the top right of the

	screen. Click Download Template. You will complete this template with the requested information offline and come back to this screen and upload the template by clicking Upload Template. Your placeholders for those items will load. You should perform this step during the scrubbing of your list. When the item is setup in ICon and data has populated in Feast, you will click the hyperlinked number in the box that says Placeholders Ready to Resolve. Feast will remind you that placeholders exist. It is important to note that Feast updates data overnight. You must resolve your placeholders as the data becomes visible. SAY: Now, let's say an item is doing extremely well in stores and it makes sense to expand this item's distribution. From our C-Set, click the checkbox of the item. Click Configure Distributors. You will see an option to configure distributors by Regions or Stores. In the columns shown, you will see Primary Distributors and Preferred Distributors. Primary Distributors are information imported from ICon. Preferred distributors are user selected and assigned. Depending on which distributor category is available, I can click the checkbox of the Region or Store I want to expand into. From there, click Assign Preferred Distributor and select the distributor. Click Update. Similarly, if an item no longer fits for expansion, you can select Remove Preferred Distributor.

	SAY: Finally, there will be items that are sold in stores that aren't necessarily on POG. For example, this may include items that have a setup near the entrance. For those items that wouldn't be on POG, click the checkbox next to the item. Click Non POG Status. This ensures that when the POG Team receives and plans your assortment, they don't have to plan the item that isn't on POG. SAY: Once your list has been scrubbed, meaning placeholders have been added, items are marked eligible or ineligible, distributors are configured, and items are disco'd, it's time to create an assortment plan. Click the back button to go back to the desserts homepage. Under Upcoming Plans, locate your plan. Plans will be visible to you at T-43 weeks. SAY: For this training only, we will use the plan labeled Pilot Users - Deep Dive Session 1. For the plan, we will click on its hyperlinked text. Click the arrow next to Step 1: Plan Setup to open the accordion. We will click "Review eligible items and assign eligible items to CIT." Now, this screen should look very familiar to you! This is the same items dashboard that we accessed from a different view. In our case for this round, we have already scrubbed our list. If we want to make changes, as long as we do so within the timelines of the process, Feast makes that possible. For example, if we discovered that an item marked ineligible actually would fare really well in our assortment, we

	can mark that item eligible. Once that item has been marked eligible using the steps previously shown, we have to assign this item to our CIT. To do that, click the checkbox next to the item and click “Re-assign to CIT”. Once this item has been re-assigned to the CIT, on this page, we have an opportunity to verify some information. In the “CIT coverage” box, it should read 100%. If it does not, click the percentage. An accordion menu will pop up to show what is missing from the CIT. If you want these items to be eligible for your assortment, click the checkbox next to the item and then click “Assign to CIT node.” X out of this pop up when you’re done. SAY: Feast also will show a notification for placeholders that are ready to resolve. When you are ready to resolve placeholders, click the hyperlinked number in the “Placeholders ready to resolve” box. Items will once again show in the accordion pop up. Click the checkbox next to items to resolve them. SAY: Once CIT coverage = 100%, click the Back button on the right side of the screen again. In Step 1: Plan Setup, click Submit for Optimization. This starts optimization of the breakdown of your assortment. SAY: Are there any questions about completing Step 1? DO: Answer questions. PRODUCER GUIDANCE:

	Keep track of the parking lot and raised hands. Notify instructor when a question is coming verbally or in the chat. INSTRUCTOR GUIDANCE: Screen share the Feast window. As you talk about each part of the demonstration, make sure to highlight or hover your mouse over the elements, as appropriate.

Slide 9 ″ 25 minutes

SAY: Now, we will return to the case study. With your same partner, written scenario, and resources, complete Part 2 of the case study. This portion reflects all of what we've learned in this section. You will have 20 minutes to complete Part 2. Only complete Part 2, do not skip ahead. I will set a timer to keep track of the time. We will re-assign breakout rooms. Help will be available by raising your hand both in-person and virtually. To complete this section, you will need a link to access an Excel file. Please use this link XXX for this file.

DO: Set a timer for 15 minutes and allow Team Members to settle. Assign the breakout rooms but wait to launch them.

SAY: You may begin.

DO: Set a timer for 15 minutes. Launch the breakout rooms for virtual participants. Facilitators should walk around the room prepared to assist or clarify any questions. Other available facilitators should pop into breakout rooms for support.

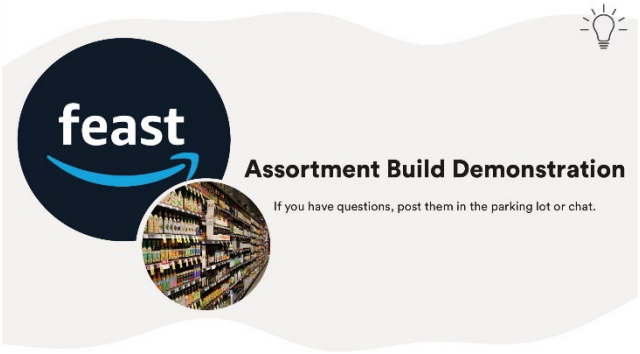
DO: Following the activity, debrief for 10 minutes.

SAY: Let's resume by debriefing the action process for Part 2. I want to hear the responses to some of the questions on Part 2 of the case study. If you are a virtual participant, feel free to raise your hand to be called on, or you may leave your response in the chat.

	DO: Ask the below questions one at a time, leaving opportunities for both virtual and in-person Team Members to respond. ASK: • Where do you find the information needed to complete the Local upload file? • Who can you reach out to for support if you get an error when you upload the file? • What are your committed actions for resolving placeholders? • Can you publish your final assortment if you have unresolved placeholders? Explain. • What do you do if you have less than 100% CIT coverage? DO: Garner responses, if direct questions are asked, answer them. SAY: Great work! What was the most difficult part of this process? SAY: Are there any questions about performing these actions in Feast? DO: Answer questions. SAY: Before we continue, let's review the parking lot. DO: Answer questions from the virtual and in-person parking lots. INSTRUCTOR GUIDANCE: During the case study, all facilitators should walk around the room and

	observe if Team Members need help. One instructor should be available to jump in and out of breakout rooms for assistance during the case study. PRODUCER GUIDANCE: Prepare the same breakout rooms as before. Breakout rooms are 2 to a room and are consistent in pairing throughout the session. Share the SharePoint link of the Excel file needed to complete the activity. Monitor the chat and raised hands for questions. Set a timer for virtual breakout rooms. TIME DISTRIBUTION: 1 minute to introduce activity 15 minutes for activity 10 minutes to debrief

Slide 10 ″ 15 minutes 	SAY: At this time, we will take a 15-minute break. If you have any outstanding questions, feel free to write them in the parking lot and we will review them when we return. We will resume at XX:XX. PRODUCER AND INSTRUCTOR GUIDANCE: Set visible and virtual timer.

Slide 11″ 20 minutes 	SAY: Welcome back! As we regroup, let's take a few minutes to review questions in the parking lot. DO: Review virtual and in-person parking lots. If there are any questions, read them out loud and answer them. SAY: Are there any other questions about what we've covered so far? DO: Answer questions. SAY: Let's continue to Step 2: Build and Review. Step 2 in Feast aligns with the Assortment Prep and Refinement part of our process. In this step, we will build scenarios for review based on your desired assortments. Scenarios are combinations of assortment outcomes with supporting data. Scenarios are created to give you the financial outcome if you choose to assort specific items in your C-Set. Multiple scenarios can exist in Feast, however, only one can be marked Primary. After Submitting for Optimization in Step 1, three system-generated scenarios will populate in Step 2: Sales Weighted Assortment, Reference (Seeded) Assortment, and the Recommended Assortment. The Sales Weighted Assortment is based the total sales volume of your items. The Reference (Seeded) Assortment is inclusive of your C-Set items. The Recommended Assortment is what Feast believes will be the most successful combination of items for your category. Reference Assortments are locked and cannot be modified. Sales Weighted and Recommended

	Assortments are locked and cannot be modified but can be cloned to create new scenarios based adjust the originals. We will see an example of that shortly. SAY: If there are any previously created scenarios, they will also appear here. Let's explore the Recommended Assortment. At the top of the screen, you will see multiple tabs of items. Core represents your core assortment, or the item count selling in most stores. Those items are ranked for your category and nationally. At the end of your core assortment (the amount is visible at the top of the assortment), you will see items in gray. This represents your core cut line. This line is representative of items included in the core assortment and below the line are items not included in the core assortment. This number is generated by the Analytics Team. Local contains your local items. Cluster contains regional items. Remember that current ways of working mean that clusters are equivalent to Legacy Regions. You can change regions using the tabs directly above the items. Items allows you to review items in your assortment. In these tabs containing items, click View Breakdown to view the assortment breakdown of the items in the build subcategories. This assortment breakdown contains data representing store capacity and a visualization of core, local, and cluster items in the assortment. Use this breakdown to make decisions on items included in your assortment. In Scenario, you can

	view the sales data of the assortment, including charts and metrics. This scenario tab helps you determine how your category would perform if reset this way, based on data. You can use this data to finalize your decisions on your assortment. If you need additional help understanding your scenarios, ask your assortment analyst. SAY: Are there any questions about Step 2 or the tabs shown? DO: Answer questions. SAY: Let's take it a step further when creating assortments. As mentioned earlier, scenarios can be cloned. If you are happy with the Recommended or Sales Weighted scenario, click Set as Primary. This means that this is what you want to submit for your category, to be included in the downstream file. If you want more options, you can create them. Start by going to the breadcrumbs menu at the top of the page, and click Scenarios. Click the radio button in whatever assortment you liked best, I recommended starting from the Recommended Assortment. Click Actions, then click Clone. Choose the scenario you want to copy. Name your new scenario. Add a description. You can choose to set it as the primary scenario, but you can wait. Click Create. Now, you can adjust this new scenario using the Recommended scenario as the foundation. SAY: In the Core tab, you can look at your number of stores and number of core items in the top left of the

	screen. In this new assortment, you can change your core cut line. The core cut line is generated by the analytics team to accommodate standard items in stores while leaving room for local items. Look at how many items are in the assortment, and in the list of your items in this tab, scroll down to find the core cut line. Use the mouse to drag the core cut line to indicate the change. You may also click Actions > Edit Space Breaks and enter where you'd like your core cut line to reposition. In this clone, you can now also click the checkbox next to any items represented in the assortment, click Actions, and either View Eligibility, Edit distributors, Remove, or Discontinue. Sort the distribution columns to see an item's serviceability. Compare the actual number of an item to the ideal number. If there are gaps, explore opportunities to expand the item. In a case like this, click the box next to the item, and click Actions > Edit distributors. At any time, click View Breakdown to see the breakdown of the core assortment. SAY: Local items are ranked when data transfers from ICon. Cluster items are represented by cluster. To rank a local assortment, click the checkbox at the top of the Rank column. Click Actions > Optimize. There will be a popup that makes sure you want to optimize, which will rank the local items. If you choose to continue, these items will be ranked. Once again, click View Breakdown to see cluster assortment breakdown by store. The items tab shows all items

	again in no particular ranking, and only allows you to export item review or remove the item by clicking the checkbox next to the item > Actions > Remove items or Export item review. SAY: To view your new scenario, click the Scenario tab. This will provide metrics and charts to view the outcome of the proposed assortment plan. If there are any empty nodes, you will be prompted to fix that by clicking the number in the empty nodes box. This will allow you to assign items to the CIT and fill any empty need-states. Under Dashboard Options, you have the ability to compare the current view scenario with another scenario of your choice. Select a different scenario in the Comparison Scenario box and select which assets you want to compare. I recommend to start with the Overview. Select whether you want to compare All Stores or Shared Stores. You can also filter the desired Performance date range. This will then generate a charted comparison of your current scenario and any other scenario you'd like to compare. If this is your desired scenario and you are satisfied with your assortment, click Set as Primary. At any time if you've changed your items, you can re-rank them. To generate new ranks, go back to your categories homepage using the breadcrumbs menu at the top of the screen. Click your Upcoming Plan. Go back to Step 1: Plan Setup. Review your eligible items again and expand distributors, disco, or include new items. Re-assign the items to the CIT. Then, click Submit for Optimization

	again. Any time you review eligible items, you go back to Step 1 to regenerate ranks. SAY: Are there any questions regarding Step 2: Build and Review? DO: Answer questions. INSTRUCTOR GUIDANCE: Screen share Feast window. As you mention elements, highlight or hover your mouse over them, as appropriate. PRODUCER GUIDANCE: Monitor the chat and raised hands during parking lot review and Q&A.

Slide 12 ″ 40 minutes

SAY: Now, we will return to the case study. With your same partner, written scenario, and resources, complete Part 3 of the case study. This portion reflects all of what we've learned in this section. You will have 30 minutes to complete Part 3. Only complete Part 3, do not skip ahead. I will set a timer to keep track of the time. We will re-assign breakout rooms. Help will be available by raising your hand both in-person and virtually.

DO: Set a timer for 30 minutes and allow Team Members to settle. Assign the breakout rooms but wait to launch them.

SAY: You may begin.

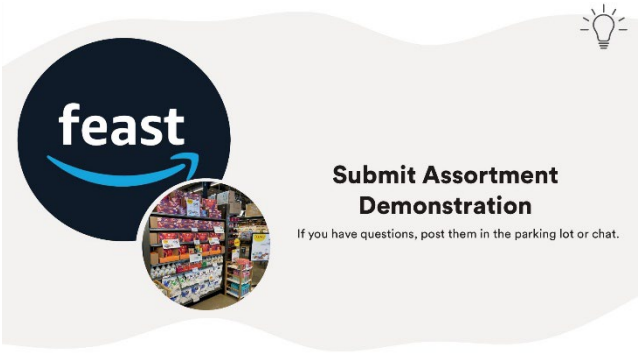
DO: Set a timer for 30 minutes. Launch the breakout rooms for virtual participants. Facilitators should walk around the room prepared to assist or clarify any questions. Other available facilitators should pop into breakout rooms for support.

DO: After the timer ends, debrief for 10 minutes.

SAY: Let's resume by debriefing the action process for Part 3. I want to hear the responses to some of the questions on Part 3 of the case study. Virtual Team Members, raise your hand or leave your response in the chat.

DO: Ask below questions one at a time, leaving opportunities for both virtual and in-person Team Members to respond.

	ASK: • What is the impact to total sales because of the disco? • What is the impact to total units because of the disco? • Are there any empty CIT nodes? If so, what steps would you take to resolve? • What is the impact to total GIG $ because of the assortment changes you made? • What is the impact to total GIG % because of the changes you made? SAY: Before we continue, are there any questions about performing these actions in Feast? DO: Answer questions. SAY: Let's resume our Feast demonstration. Please turn your undivided attention to the big screen as we continue. INSTRUCTOR GUIDANCE: During the case study, one instructor should dedicate themselves to going in and out of breakout rooms for assistance. Others can support the in-person group. PRODUCER GUIDANCE: Set timer and breakout rooms. Monitor the chat and raised hands for questions. TIME DISTRIBUTION: 1 minute to explain activity 30 mins to complete 10 mins debrief

Slide 13 ″ 10 minutes 	SAY: When you're ready with your ideal, primary assortment, you will move on to Step 3: Submit. This step in Feast aligns with the end of the Assortment Refinement process, the Assortment Finalization process, and if necessary, the black out process. The scenario that is marked Primary will appear in this step. If this is the scenario you want, click Submit Final Assortment. If not, return to Step 2 and mark your desired scenario as primary. It is important to note that at T-29 weeks, you will submit your initial assortment following these steps. Once this initial assortment is submitted, you will meet with the POG team about finalizing your assortment. If any changes are necessary following this meeting, at T-21 weeks, you will make any changes to your items in Step 1 and Step 2 of Feast, then click Submit Final Assortment in Step 3 again. The black out period is a win with Feast. The process allows for black outs to be input in Feast during the black out period. If there are any items that need adjustment during black out, they can be added one last time in Feast by once again making any aligned changes to your items in Step 1 and Step 2 of Feast, then clicking Submit Final Assortment in Step 3 again. This final submission is due on Friday of T-18 weeks. It is important to note that whether you press that Submit Final Assortment button or not, whatever shape your assortment is in at T-18 weeks is generated regardless. This downstream file will move to the POG team and continue in the process.

	SAY: A benefit of this process changing with Feast is that there are ample times for correction if something doesn't pan out earlier in the process. We are also not needing to splice the downstream file as much, which reduces user error with spreadsheets. Feast supports our end-to-end process and helps reduce the amount of rework which saves you time and frustration in the process. SAY: Before continuing, are there any questions about Step 3? DO: Answer questions. Be sure to monitor the virtual session too. INSTRUCTOR GUIDANCE: Resume screen share of Feast. As the steps are mentioned, highlight or hover the mouse over the elements, as appropriate. PRODUCER GUIDANCE: Monitor chat and raised hands for questions and assistance.

Slide 14 ″ 12 minutes

SAY: Now, we will finish part 4 of the case study. Please don't actually press the Submit Final Assortment to avoid messing up the data. With your same partner, written scenario, and resources, complete Part 4 of the case study. This portion reflects all of what we've learned in this section. You will have 15 minutes to complete Part 4. After this, we will discuss the process and any additional questions you may have. I will set a timer to keep track of the time. We will re-assign breakout rooms. Help will be available by raising your hand both in-person and virtually.

DO: Set a timer for 10 minutes and allow Team Members to settle. Assign the breakout rooms but wait to launch them.

SAY: You may begin.

DO: Set a timer for 10 minutes. Launch the breakout rooms for virtual participants. Facilitators should walk around the room prepared to assist or clarify any questions. Other available facilitators should pop into breakout rooms for support.

DO: After timer ends, debrief for 2 minutes.

SAY: I want to hear the responses to the questions on Part 4 of the case study. Virtual Team Members, raise your hand or leave your response in the chat.

ASK:

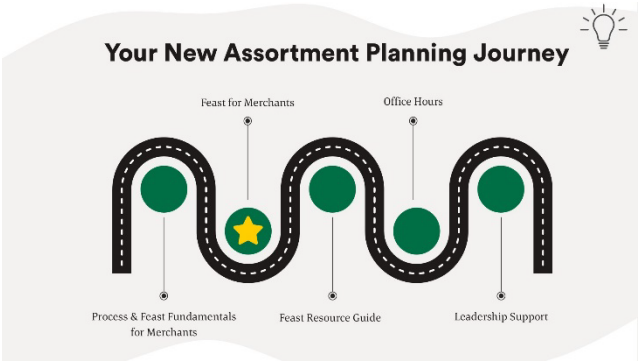
	• What are some things you should consider when choosing your primary assortment? • What role does your TL play in the Assortment Planning phase of the Category Round Review Process? DO: Select several partnered teams to answer each question. SAY: Before we continue, are there any questions about Step 3 in Feast? DO: Answer questions. INSTRUCTOR GUIDANCE: One instructor should dedicate themselves to going in and out of virtual breakout rooms for support and assistance. Remaining instructors should walk around to assist in-person Team Members. PRODUCER GUIDANCE: Launch breakout rooms, set timer, monitor chat and raised hands. TIME DISTRIBUTION: 30 seconds to introduce activity 10 minutes for activity 2 minutes to debrief

Slide 15 ″ 5 minutes 	SAY: If you have a question, please write it in the parking lot. We will now take a 10-minute break and resume at XX:XX. PRODUCER AND INSTRUCTOR GUIDANCE: Set virtual and in-person timer.

Slide 16 ″ 10 minutes 	DO: Review the parking lot. If there are any questions, read them out loud and answer them. If not, skip the next line. *SAY (only if questions are in the parking lot):* Welcome back everyone. I will now answer a few parking lot questions. SAY: In this training, we covered Feast functions in 3 steps: Step 1: Plan Setup, Step 2: Build and Review, and Step 3: Submit. We incorporated our new Feast terminology to learn how to scrub our C-Set, build an assortment for core, local, and cluster items, interpret data from various assortment scenarios, refine and modify our scenarios, compare scenarios, and publish final assortments. What questions do you have about Feast or what part of the demonstrations were difficult and need a refresher or further explanation? DO: Answer the questions. Monitor the chat and virtual raised hands. SAY: What IS clear for you with Feast? SAY: Any remaining questions on Feast? DO: Allow participants to ask questions as they are comfortable. Monitor the chat for raised hands, questions, and responses. SAY: Remember that if there is a question that we don't immediately

	have the answer to, we will figure out the answer and respond offline. PRODUCER GUIDANCE: Monitor the chat and raised hands for questions.

Slide 17″ 3 minutes

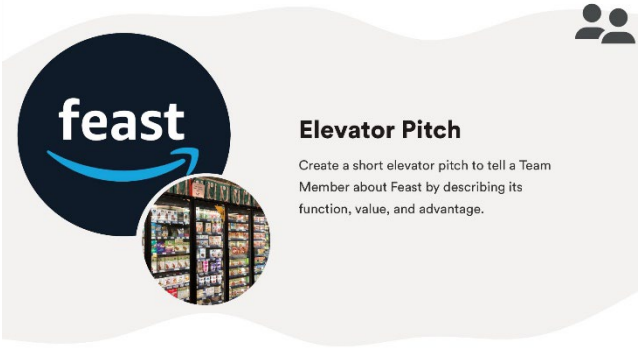


SAY: As we wrap up this session, we want to take this time to remind you of this new assortment planning journey you're on along with methods of support. You have completed Process & Feast Fundamentals for Merchants and are now en route to completing Feast for Merchants. The Feast Resource Guide is a curated Inkdoc of information as you adjust to using Feast to plan assortments. This is the fastest, most direct way to learn more about using Feast. This training and Feast Process and Fundamentals will also be available for replay. There are office hours, leadership support, and Teams chats for support from our subject-matter experts. There is a SharePoint available linking these resources and more. The link to this is [insert link here].

INSTRUCTOR GUIDANCE:
Have the link to the resources on the board for participants to copy and bookmark.

PRODUCER GUIDANCE:
Drop the link in the chat.

Slide 18 ″ 1 minute



SAY: Now, it's your turn to tell us what you know about Feast. Use your handout to create a short elevator pitch to tell a Team Member about Feast by describing its function, value, and advantage. Your pitch should be no shorter than 10 seconds, but no longer than 30 seconds. After everyone is done writing their pitch, we will invite a few of you to share.

DO: Set a 3-minute timer virtually and in-person. After 3 minutes is up, invite Team Members to share.

SAY: Time is up for your elevator pitch. Please raise your hand virtually or in-person if you'd like to share.

DO: Call on several participants to share their elevator pitch. Praise each participant for their efforts when they are done.

PRODUCER AND INSTRUCTOR GUIDANCE:
Set timers.

TIME DISTRIBUTION:
1 minute to introduce activity
3 minutes for activity
2 minutes for share-out

Slide 19 ″ 7 minutes

DO: Show the Success Skills on the screen.

SAY: It's important to link Success Skills to your learning journey using Feast. Look at the Success Skills on the board or if you're virtual, on your screen. At your table and in the chat, talk about one Success Skill that you think has shown up in this learning journey.

DO: Give participants 2 minutes to complete the activity. Set a 2-minute timer. After the timer ends, take 2 minutes to debrief.

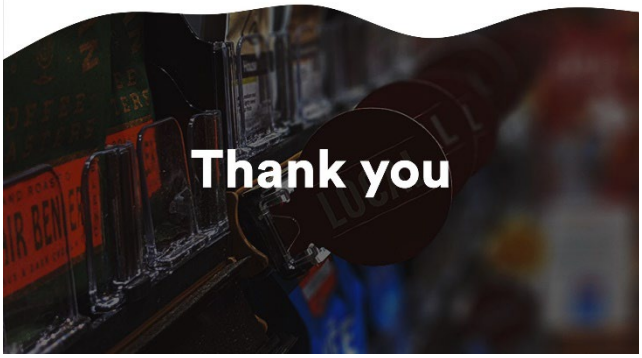
SAY: Let's hear your thoughts. Raise your hand in-person or virtually or comment in the chat.

DO: Call on in-person and virtual participants to share. Make sure to emphasize the importance of linking Success Skills to the learning journey.

SAY: Great work everyone! Thank you for sharing. Before leaving, please take a minute to complete the survey using the link provided. Your input helps us to provide high-quality training.

PRODUCER AND INSTRUCTOR GUIDANCE:
Set in-person and virtual timers for the activity. Prepare and share the link to the survey in the chat. Monitor the chat and raised hands. Motion to the link on the board which was previously prepared to in-person participants.

	TIME DISTRIBUTION: 1 minute to introduce activity 2 minutes for activity 2 minutes for debrief 2 minutes for survey

Slide 20 ″ 2 minutes  	SAY: At this time, we would like to thank you and appreciate you for your participation in this training. We hope that you not only walk away with more understanding about Feast, but also with hope and excitement for using the tool. Does anyone have any appreciations to share? DO: Allow Team Members to shout out appreciations in-person and online. SAY: This concludes Feast for Merchants. Don't forget to check out the Feast SharePoint link for helpful resources. Stay tuned for future trainings, updates, and resources regarding Feast. Thank you for joining us!

FEAST FOR MERCHANTS

PARTICIPANT WORKBOOK

MERCH L&D

Updated: February 2025

The Merchandising Learning and Development Team created and own Feast for Merchants training program and materials.

MerchandisingL&D@wholefoods.com

MERCH L&D

FEAST FOR MERCHANTS

CASE STUDY

Pete Zah is a new Category Merchant on the Grocery team, and he recently kicked off the Category Round Review for Frozen Desserts. With the support of his Onboarding Buddy, Breddy Mercury, Pete's met with suppliers and aligned his strategy to identify new items to add to his assortment and items to discontinue, so it's time to create his assortment in Feast. Breddy created a checklist of tasks to complete in Feast to help Pete stay on track.

Using the Feast Job Resource Guide, your handout, and the designated SharePoint Excel file, complete the below checklist of tasks in order.

Part 1 Task	Complete?
Login to Feast – Use your Amazon laptop and Amazon login for this training: https://gamma.feast.grocery.amazon.dev/assortment • Click **Amazon** • Click **Amazon Retail SMO** and **Select Account** • Select **US** in **Select Business** dropdown in upper-right corner • Click **Assortment**	
Open category and business event • Click **Desserts** to open the category • Open **[Your Session Number + Your Group Number]** Business Event	

Review the CIT
• Click **Customer Importance Trees** on the left menu of Admin dropdown
  ○ Planning Scope = **Desserts**
  ○ Tree = **[Approved for 2025] Final Froz Desserts CIT for Training**
Answer the following questions:
• How many total need states exist for the Frozen Desserts category? _____
• Which subcategory node has the highest percentage of sales? _____
• How many need states are in the "Fruit and Sorbets Novelties" subcategory? _____
• Name three brands in the "Non-Dairy Novelties" subcategory? _____	

FEAST FOR MERCHANTS

CASE STUDY

Part 2 Task	Complete?
Open your Business Event to edit	
Begin Step 1 – Plan Setup • Click **Review eligible items and assign eligible items to CIT**	
Review eligible & ineligible items • Discontinue two items of choice	
Click **Assign to CIT**	
Confirm 100% CIT coverage Answer the following question: • What do you do if you have less than 100% CIT coverage? _____	
Click **Submit for Optimization**	

Part 3 Task	Complete?
Begin **Step 2 – Build and Review**	
Open category and business event • Open **Desserts** category Open **[Your Session Number + Your Group Number]** Business Event	

Clone the recommended assortment by clicking **Create New - Copy**
• Discontinue one top ranked item
  ○ Click remove item from scenario too
  ○ Evaluate and adjust Core Cut Line	

Add one new item placeholder
• Click **Add Placeholders**
  ○ Use the template provided by L&D in SharePoint
  ○ All placeholder product descriptions must be unique (add your name to the end of product description)
Answer the following questions:
• What are your committed actions for resolving placeholders?
_____
_____
• Can you publish your final assortment if you have unresolved placeholders? Explain.
_____
_____	

FEAST FOR MERCHANTS

CASE STUDY

Go to the Local tab • Use the file upload template in SharePoint to upload Forager items. Review any errors with the upload by exporting the failed upload. Note the reasons for failed upload for future investigation. Delete the error line items. Save to desktop as is (do not delete any columns) and try to upload file again.	
• Local items must be assigned and imported into a specific region, metro, or store. Answer the following questions: • Where do you find the information needed to complete the Local upload file? _____ • Who can you reach out to for support if you get an error when you upload the file? _____	
Compare your scenario to the recommended assortment. Select Recommended Assortment from the dropdown. Answer the following questions: • What is the impact to total sales due to the assortment changes? _____ • What is the impact to total units because of the assortment changes? _____	
Expand Distribution • Find and select several items and expand their distribution. o Distribution can only be expanded for multiple items of the same brand. • Find and select two additional items and then discontinue the items. Go to the Cluster tab and **Optimize** your assortment. o Merchants can change their items' ranks in the assortment. For this activity, we will not manually change ranks. Do not click "Override my rank decisions with recommended ranks" at this time.	

FEAST FOR MERCHANTS

CASE STUDY

Compare the Expanded Distribution scenario to the recommended assortment Answer the following questions: • What is the impact to total GIG $ because of the assortment changes you made? _____ • What is the impact to total GIG % because of the changes you made? _____	
Select your primary scenario	

Part 4 Task	Complete?
Step 3 – Submit Final Assortment Answer the following questions: • What are some things you should consider when choosing your primary assortment? _____ _____	
Submit your final assortment Answer the following questions: • If the POG Team is unable to fit all core items within all stores, what options are available to adjust core items within Feast? _____ • What T-minus date would you include black out requests? _____ • What is the next part of the process? _____	

FEAST FOR MERCHANTS

TAKE NOTES