

SOLUTION BRIEF

Smarter Strategies for Merchandising Excellence in Retail

Unlock merchandising intelligence across promotions, assortments, and localized planograms.

Smarter Merchandising Strategies

Retailers face mounting pressure to optimize merchandising across regions, channels, and store formats. With the right people, processes, and technologies, retailers can:

- Increased promotion efficiency by 30%, reducing campaign costs and increasing ROI ([7-11 Customer Story](#))
- Reduced product assortment mismatch by 25%, aligning offerings to actual customer demand ([Sigmoid Customer Story](#))
- Analyze and optimize planograms ([Coca-Cola use case](#))
- Conduct market basket analyses at scale

However, manual workflows and disconnected systems limit the ability to segment customers, analyze preferences, and localize offerings. Planning cycles lag behind consumer shifts, resulting in excess inventory, underperforming SKUs, and ineffective promotions that fail to move the needle across sales metrics.

Alteryx transforms retail merchandising by enabling automated insights across demand, customer behavior, and localized trends. From dynamic promotion optimization to assortment modeling, the platform unifies sales, POS, and inventory data. Retailers reduce manual effort, adjust strategies in real time, and create store-specific planograms driven by analytics—boosting agility and customer satisfaction across the board.

[7-Eleven uses Alteryx to bring key promotion insights in-house—cutting reliance on external vendors. ►](#)

Common Challenges

Alteryx solves the following common merchandising challenges

- Inconsistent data across POS, sales, and inventory systems delays promotional planning decisions
- Promotions and assortment data is stored as text or static exports, not structured for analysis or comparison
- Legacy tools can't scale to dynamic pricing, clustering, or localization requirements
- Marketing, merchandising, and operations often work in silos with no unified data view

5 Myths About Merchandising

1. Merchandising is mostly instinct—data science doesn't apply to assortment or placement
2. Planogram and assortment data is too messy to automate
3. Dashboards are enough for merchandising analytics.
4. Historical sales are all you need to build future assortments
5. Merchandising data is too complex for automation or self-service analytics

5 Ways to Drive Better Merchandising Through Data and Automation

- 1. Discover Patterns with Market Basket Analytics** Analyze transaction-level data to uncover product affinities, frequently co-purchased items, and sequential buying trends. Alteryx applies association rule learning and clustering to expose hidden insights in customer purchase behavior. Retailers can use these patterns to inform cross-selling, bundling, and pricing strategies—improving basket size and conversion rates across categories.
- 2. Optimize Assortments Based on Demand Signals** Use machine learning to align SKU offerings with regional demand, customer preferences, and seasonal trends. Alteryx enables planners to dynamically score and rank products by contribution to revenue, margin, and basket role. This helps reduce assortment bloat, prevent stockouts, and prioritize high-performing items that resonate with specific customer segments.
- 3. Elevate Promotion Planning with Predictive Intelligence** Combine historical campaign performance with sales data to forecast promotion impact and ROI. Alteryx models lift, cannibalization, and halo effects across store formats and customer groups. Retail teams can simulate discount levels, bundle types, and timing windows to fine-tune campaigns that drive measurable revenue lift without margin erosion.
- 4. Localize Execution with Planogram and Clustering Logic** Group stores by demographic, behavioral, or geographic attributes to inform tailored planogram strategies. Alteryx can automate clustering and spatial analysis to build localized shelf layouts that reflect true customer preferences. Store-specific configurations reduce inventory waste, improve visual merchandising effectiveness, and ensure that high-demand products receive priority placement.
- 5. Accelerate Insights with Unified Merchandising Dashboards** Eliminate silos by automating reporting pipelines from ERP, POS, loyalty, and inventory systems. Alteryx powers customizable dashboards that track merchandising KPIs, promotion ROI, and assortment performance in real-time. Stakeholders gain consistent access to actionable metrics without relying on manual data prep—driving faster, more aligned decisions across teams.

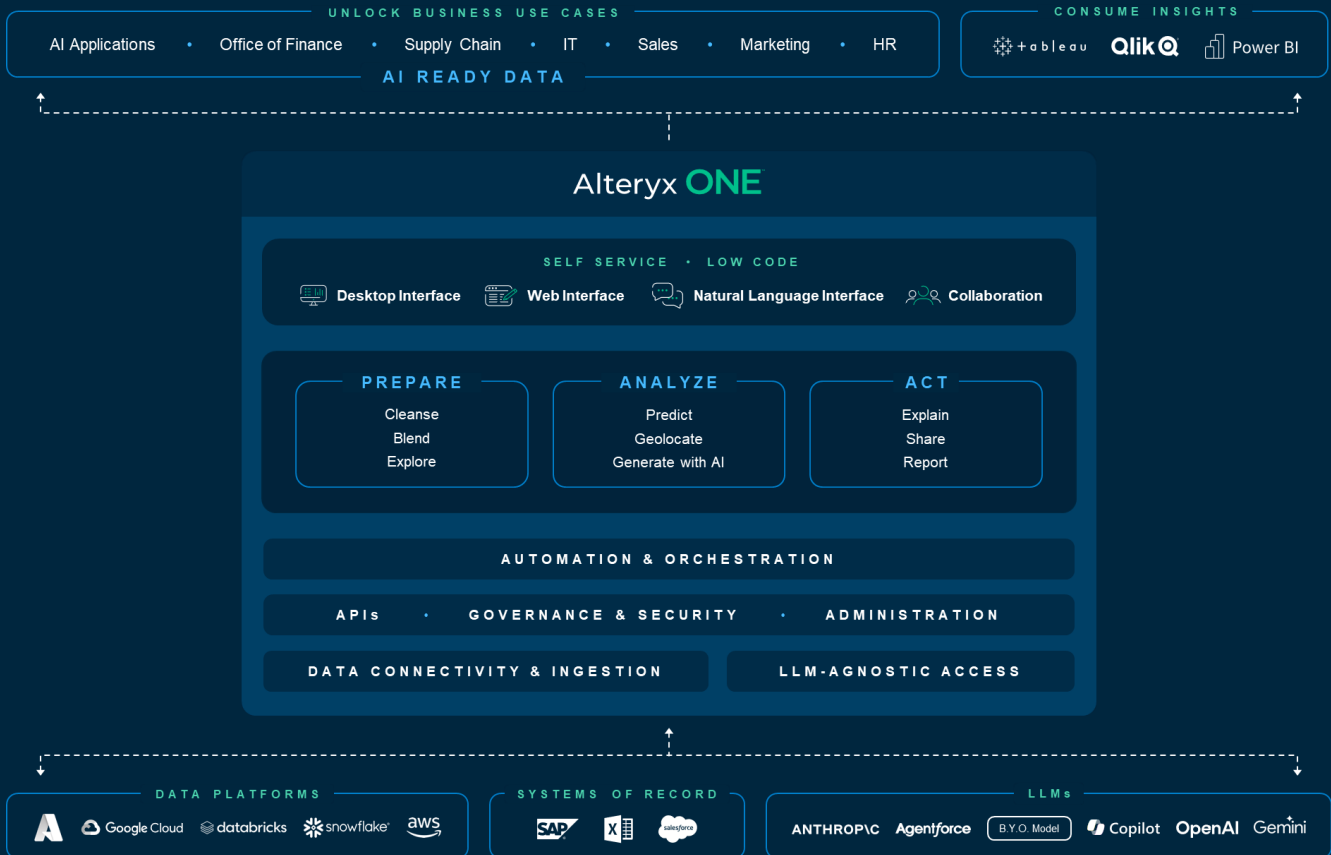
What You Will Need

- Access to POS, loyalty, and inventory data—even if data formats and systems differ
- Some history of promotion performance and sales lift, even if partially incomplete or siloed
- Business context on regional buying behavior, store clusters, or customer segments
- Staff available to review automated recommendations and integrate into current workflows

What Alteryx Provides

1. Connects and blends merchandising data across store, online, and customer systems in minutes
2. Provides drag-and-drop tools for predictive modeling without requiring coding expertise
3. Automates scenario testing, forecasting, and regional clustering for smarter planning decisions
4. Delivers and powers intuitive dashboards to monitor assortments, promotions, and planogram success rates
5. Enables self-service analytics for planning, marketing, and category managers across the business

Alteryx for Merchandising



"We want to transform our products and promotions to be tailored specifically to customers and to be less generic. We want them to be customized to meet targeted customer experiences, and we think Alteryx can be of great help in that process."

- Raghav Nargotra, Manager, Digital Analytics, 7-Eleven

For a complete list of system requirements and supported data sources, visit <https://www.alteryx.com/products/alteryx-platform>

About Alteryx

Alteryx offers an end-to-end, analytics platform which empowers people to break data barriers, deliver insights, and experience the thrill of getting to the answer faster. Business analysts and data scientists alike can discover, share and prep data, perform analysis, and deploy and manage analytic models. Enterprises all over the world rely on Alteryx to deliver actionable insights daily.

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