

# Are You Ready? How to Create an Always-On, Always-Open Shopping Experience

**A View from Retail Leaders on the Industry Imperatives and Needed Standards**





## Introduction

The retail landscape is rapidly transforming as customers demand more information, access and options than ever before. Omni-channel, or all-channel retailing—generally defined as providing a customer with a consistent research, shopping, purchasing and fulfillment experience regardless of channel or channels—is at the heart of this transformation. As a result, a clear omni-channel strategy, where essential components are seamlessly integrated, is increasingly becoming critical to the success of today’s retailers.

Just as customer expectations have changed in recent years, the landscape of standards and solutions to satisfy their needs has also rapidly developed. Leveraging the advent of cost-effective Radio Frequency Identification (RFID) technology throughout the supply chain; the visibility and accuracy of inventory data; and the explosion of standardized attributes, retailers and their trading partners are now able to more closely collaborate and allow for a plethora of possible interactions with the customer.

As exciting as these developments are, the number and diversity of the components create complexity in forming an appropriate omni-channel strategy. The seamless integration of these components may significantly benefit from the adoption of common standards and solutions, such as those that have been developed by GS1. The GS1 System of Standards is the most widely used supply chain standards system in the world. It is a system that seeks to fundamentally improve the efficiency and visibility of supply and demand chains across multiple sectors and industries.<sup>1</sup>

Preparing an organization to satisfy the needs of the ever-changing customer is a multi-faceted journey that can cause a retailer to examine nearly every aspect of their current organization, including reporting structure, fulfillment network, technology capabilities, partners and relationships with their customers. GS1 US and Capgemini Consulting set out into this complex and competitive environment to discuss the current state and future goals with key leaders across major retail organizations.

As any industry evolves, it is critically important for leaders to determine which aspects of the transformation are “collaborative” and should rely on industry processes and standards, and which are “competitive” and should be internally developed and capitalized upon. For the purpose of this study, we focused on the “collaborative” elements of an omni-channel strategy, those elements that rely on industry standards and critical mass for the advancement of the industry.

Capgemini Consulting interviewed executives from seven leading US-based retailers as well as several industry veterans to understand the current state of omni-channel strategy creation and adoption efforts within the retail industry. It was our goal to understand:

1. The organizational focus on and readiness for omni-channel retailing and current areas of priority.
2. The extent to which standards, particularly Electronic Product Code (EPC®)-enabled RFID, have been adopted and have contributed to a successful omni-channel strategy.
3. The advantages, obstacles and unrealized potential derived from adoption of EPC-enabled RFID and other industry standards.

During the interviews, Capgemini Consulting focused on the maturity exemplified by each retailer in the following areas: item identification, data attribution, data aggregation/management/sharing, online search management, eCommerce management, mobile management and the employment of RFID technology as an enabler of inventory visibility. These topics were chosen based on their importance in buttressing a successful omni-channel strategy.

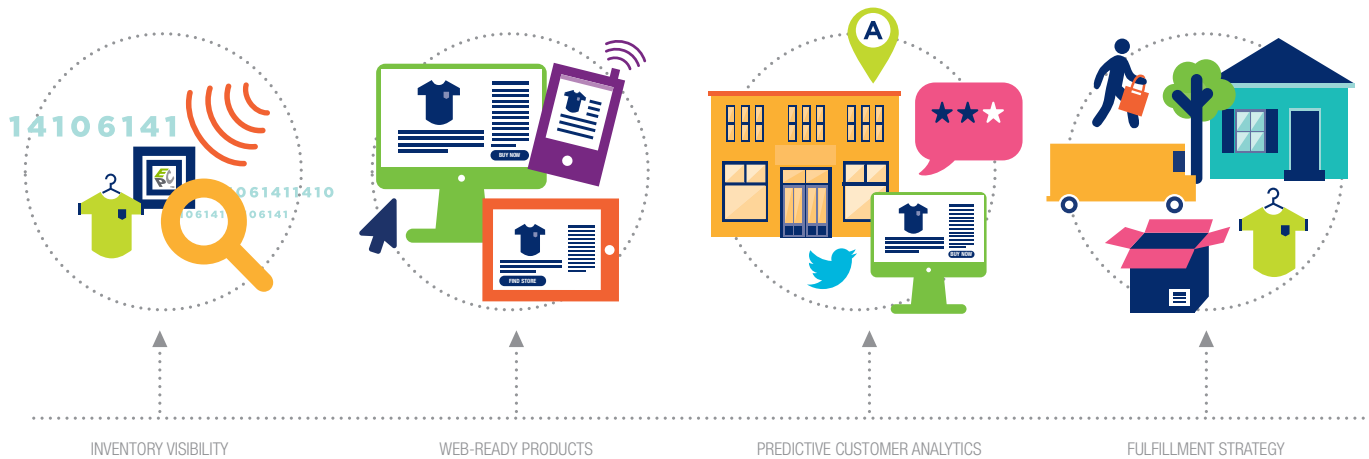
## Omni-Channel Overview

We saw significant alignment among respondents when they were asked the definition of a successful omni-channel strategy and the key components that comprise it.

It is universally clear that the customer is central to the establishment of each organization’s omni-channel strategy, and that inventory management and responsiveness are the most important capabilities of this strategy. Retailers echoed these sentiments with statements such as: “Omni-channel is providing the customer with the same experience, regardless of the channel she uses to purchase the merchandise” and, “Omni-channel is letting her shop the way she wants to and builds the infrastructure necessary to enable this (e.g., enabling the infrastructure for mobile, pick-up-in-store, ship-from-store, etc.).” With that understanding, we probed into key components of our respondents’ omni-channel strategy and discussed the following topics.

<sup>1</sup> GS1, Overview.

## The Four Strategic Levers for Seamless Consumer-Centric Operations



### Four Key Omni-Channel Topics

Through the course of our conversations with retail executives, we discovered that the enablement of omni-channel is, as one might expect, a priority for all of the retailers we interviewed. While the status, intensity and area of focus of retailer efforts varied, four topics were top of mind for our respondents:

#### 1. Inventory visibility, including accuracy, location and inventory management.

Retailers are building out systems and processes to accurately track and manage inventory in the network. The desire among the majority of respondents was to make this information of high enough quality/certainty to share with the customer. The apparel industry is making a big push in the utilization of EPC-enabled RFID to create pinpoint precision in their inventory accuracy, in a more real-time, dynamic way.

#### 2. Web-ready products brought to market more rapidly through enhanced attribute sharing.

Retailers are demanding high quality (i.e., complete, accurate, timely) information and images about the products and services they sell. The stated goal for all respondents is to improve the quality of the information

and reduce the amount of time and labor required for their organization to bring an item to market.

#### 3. Predictive customer analytics.

Attributed customer information is being collected, stored and utilized to anticipate needs based on past behaviors in an effort to enhance the continuity of the omni-channel experience. Although the data security issues retailers face are causing some challenges in this area, retailers are utilizing the information in the form of targeted promotions and offers or enhanced services for the life of the products they buy.

#### 4. Fulfillment strategy, including physical and technological infrastructure.

To support the roll-out of the omni-channel consumer experience, retailers are revising processes, modernizing technologies and updating physical infrastructure. In fact, this area of focus received the most emphasis by the respondents. While the current status of their efforts varies broadly, all respondents agreed that the goal is to provide the customer with the products they desire via a consistent research, shopping, purchasing and fulfillment experience—regardless of channel or channels.

In addition, while the subjects of our interviews are largely focused on enabling the omni-channel experience, they are also beginning to think about search enablement and the impact of mobile as key components of their strategy. Although results vary among those companies we talked to, it is clear that retailers that are investing in the enablement of omni-channel are achieving increased sales through alternate channels, leading to improvements in inventory accuracy and productivity, reduced shrinkage and faster customer demand fulfillment—which in turn leads to increased revenues, enhanced margins and improved customer retention.

## Focus of the Retail Executive

Having identified the four topics that are top of the mind for the retail executives we interviewed, we took a deeper dive into the key items that were priorities within each topic and how they relate to a successful retail omni-channel strategy.

### Inventory Visibility

Many retailers are focused on building out systems and processes to accurately track and manage inventory in their network. Inventory visibility has become an imperative to successful omni-channel execution, and as such, organizations are investing in ways to identify, track and move inventory in an optimized way. Customers expect to be able to query on-hand inventory balances across channels and expect that they can trust and act on the information that they see. Conversely, retailers have learned that easy access to an item in their network (i.e., knowing precisely where an item is in the supply chain or store) can enable faster delivery to the customer, lower fulfillment costs and enhanced customer service levels.

While all respondents echoed the critical importance of inventory visibility, they identified several different ways they are working to enable that in their ecosystem.

**a. Item identification** is classifying an item through the use of standardized identifiers. Examples of identifiers include Global Trade Item Numbers (GTINs) and the GS1-128 Barcode with a Serial Shipping Container Code (SSCC) Identifier. When an item is properly identified, it can easily be recognized along the supply chain and traced to its origin, which would entail tagging as far back in the supply chain as the factory. The importance of vendor tagging is that it begins the tracking process at the earliest point

in the value chain with all the defined attributes included.

Inventory management and responsiveness is a key area of focus for retailers, and consequently, item identification is a key enabler to track the status of an item as it travels from source-to-consumer. The apparel and general merchandise industries have been utilizing the concept of item identification since U.P.C. adoption in the 1980s. Since the initial adoption, EPC-enabled RFID has emerged to help improve inventory management through better item visibility. The success of EPC-enabled RFID is critical to being able to fulfill online orders in a store—a major trend expected to build after increased activity during the 2013 holiday shopping season.

### b. Focus on EPC-enabled RFID:

EPC-enabled RFID is a method of automated identification using electronic tags capable of receiving, storing and/or transmitting digital information by means of, and in response to, radio frequency energy.<sup>2</sup> EPC-enabled RFID allows a retailer to understand how much of each product it has at any given point in time and exactly where that inventory is located within the value chain—within a store or even within a department. As Dan Smith, Chief Information Officer of Hudson's Bay Company (HBC), notes: "Without RFID, a retailer is able to sell an item online, but, subsequently, [may be] unable to fulfill an order, because it cannot be found in the store, because either the inventory is inaccurate or is too hard to find the specific item on the floor." EPC-enabled RFID enables easier, faster, more accurate and more profitable fulfillment through

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- Dan Smith,  
Chief Information Officer of  
Hudson's Bay Company (HBC)

enhanced inventory management and responsiveness.

EPC-enabled RFID was often mentioned as the best way to enhance the identification and management of items in the retail ecosystem. All of the retailers we spoke with have done some level of testing and/or implementation of EPC-enabled RFID. Inventory identification and management was identified as a key enabler to omni-channel success; and in most instances where EPC-enabled RFID has been deployed, inventory management significantly improved. Many of these benefits are quantifiable: up to 99% inventory accuracy, 96% increase in inventory labor productivity, out-of-stock reductions of as much as 50%, and increases in sales of 2% to 20%.<sup>3</sup>

<sup>2</sup> GS1, Taking the First Step towards EPC-enabled RFID.

<sup>3</sup> Patrick Javick, "What's the Future of Item-Level RFID?," Apparel, September 28, 2011.

EPC-enabled RFID has provided clear benefits in replenishment categories for many of the retailers we spoke with. Today, retailers are in a broad spectrum of program use and intensity for future-planning. It is clear that when inventory visibility is an imperative, EPC-enabled RFID can be a powerful tool and a driving factor for product availability and the main reason why all categories are now in focus from an omni-channel perspective in a retail environment.

Six retailers explained that they have adopted EPC-enabled RFID across at least one category within their stores. In most instances these implementations have been in “replenishment” categories—such as apparel, shoes and luggage—which make up 20% to 30% of the Stock Keeping Units (SKUs) in a store. Adopting this standards-based technology allows a retailer to know the level of inventory it actually has in order to better fulfill orders and reduce shrinkage. EPC-enabled RFID helps improve floor replenishment by making it faster and less labor intensive for an associate to detect when a size and/or color is out of stock on the sales floor. In one specific case mentioned, a retailer was able to improve in-stock on the sales floor by 40% when it employed EPC-enabled RFID. Our respondents spoke about the value they have achieved both in-store and in their back-end fulfillment processes as they deploy their omni-channel capabilities.

“Once Lord & Taylor began leveraging EPC-enabled RFID, the benefits were enough to move the needle and get management’s attention,” notes Smith of HBC. Another leading retailer executive interviewed noted that EPC-enabled RFID has allowed it “to provide accurate [item] commitments

to its shoppers” and is being used in 25% to 30% of the store. Yet another leading retailer indicated that EPC-enabled RFID has been rolled out in stores for shoes.

While the pilot and implementation stories we heard were largely successful, one retailer shared a story of an unsuccessful pilot it conducted in one store, in the fashion category. In hindsight, the pilot may have been perceived as less than successful because it did not have the buy-in and involvement of all of the right people in their organization. This same retailer is in the process of kicking off a one-store pilot in its shoe department in the very near future. The company feels that it now has the right people engaged and is anticipating a result more in line with expectations, which will allow EPC-enabled RFID adoption to gain traction.

Another retailer we interviewed led a successful fashion pilot. The pilot involved the appropriate stakeholders and items. Using EPC-enabled RFID in fashion has proved immensely helpful, as it has helped this retailer leverage the data it gets through its various channels to accurately determine early fashion trends both globally and locally. It has also been essential to attaining the inventory visibility necessary in the omni-channel environment to fulfill the customer need.

**c. Supplier tagging back at the source:** The topic of EPC-enabled RFID tags brings up the inevitable discussion around who should bear the responsibility for placing the tags on the products. In many pilot situations, retailers completed the tagging in their own facilities; however, it was clear that once rolled out within a category, our respondents see

significant value in supplier/source tagging for inventory traceability back into the supply chain and better efficiency as a product moves from source-to-store.

**d. Partnerships with third-party logistics providers (3PLs) to track across channels:** Of importance is bridging the gap with the 3PL partners that often fulfill omni-channel orders (either from the retail fulfillment center, the retail store or a drop-ship location to the customer). Many of these third-party partners have their own proprietary systems where they allow the customer to track the status of their packages. Some form of integration between the inventory management systems of the retail operation and these partners was identified as an area of opportunity to further improve service to the customer and inventory visibility.



## Web-ready Products

Making a product “web-ready” from a marketing standpoint is a critical component that is often a bottleneck in the retail process today. The goal for all respondents is to improve the quality of the information and reduce the amount of time and labor required for their organization to bring an item to market.

**a. Online search management:** Online search management means ensuring that a company and the goods it sells are optimally accessed online. In the words of HBC’s Smith, “It is necessary to assign item attributes that help search engines locate the items that fit the consumer needs. Perhaps it can be done faster and cheaper with standards and tools for assigning those attributes. Some companies use numerous people to do this and spend over \$1 million a year doing it to make its product web-ready. We see the ability to more effectively present and refine presentations to the consumer, based upon historical preferences and algorithms that are best utilized with the enriched attributes for the items offered.”

**b. Data attribution:** Data attribution is the consistent ascription of product data, including product images, between supplier and retailer and internally within the enterprise. As customers turn to the Internet for pre-purchase decisions, it has become increasingly important that items are accurately defined, easy to find and comparable through all channels. The number and complexity of data attributes has exploded as customer demand for item information has exponentially increased. Retailers are moving toward extended attributes and want vendors to populate more of this information in an increasingly streamlined and efficient way.

When probed about any potentially missing standards we heard that for the most part the standards that are needed today have been created, but adoption and utilization of the standards continue to be the biggest challenge. Additionally, many respondents pointed to the need for a universally accepted way of sharing item information rapidly between trading partners and validating its completeness and accuracy. For example, items in the apparel industry require an abundance of data that must be captured before an item is ordered, received and placed on a website to be sold. Poor quality or incomplete information can impact inventory, sales and the customer experience. Providing accurate and complete information on standard attributes has historically been a complex task, and the attribute explosion seen in recent years, coupled with the customer demand for faster and faster replenishment, has made this a priority for the retailers we interviewed.

### **c. Improve item set-up speed and reduce labor intensiveness:**

Several respondents expressed frustration with the amount of time it takes to set up new items in their systems, especially those destined for an online presence. There is an issue of duration (e.g., the time that passes from the start of the process to the end was reported at 14 to 28 days) and a frustration with the availability of the information that was needed. It was suggested by a few respondents that the general merchandise industry could benefit from the Global Data Synchronization Network™ (GDSN®) work that has been done in consumer goods. The GDSN enables the sharing of accurate and up-to-date data and information between trading partners; for example, any changes made to one company’s database are automatically and immediately

provided to trading partners. The GDSN ensures that all partners have access to the same accurate information.

**d. Images:** Getting high-quality images of the products in a timely fashion is critical to their omni-channel strategy. In general merchandise, the desired end state differs in whether images should be available through an industry utility or not. Although there were varying opinions, the topic is of universal importance to retailers, regardless of the image source, be it self-sourced or community-sourced.

For example, some of the respondents were in favor of a standardized library of images to drive speed and consistency, while others saw images and the way that their products are represented online as a competitive advantage. So while all agreed that standards should help the accuracy, completeness and speed with which product information is shared, it was consistently noted across certain categories and brands that standardized and readily available enhanced data attribution could yield big benefits and speed-to-market for participating organizations. There are potentially large benefits if those images could be pulled from a standardized, industry pool versus the numerous sites that are available for images today.

Tom Furphy of Consumer Equity Partners suggests that currently shared product images are inefficient because retailers have “to weed through sites to find the images they want and different retailers tend to use different images.” Additionally, he points out that “it’s not only about the right images and content, but also about getting the right product in front of the shopper at the right time through smart personalization

capabilities.” Retailers are also quickly identifying fashion elements, sometimes localized, which allow them to respond in ways that enable them to shorten replenishment cycles, develop alternative short cycle suppliers and react more aggressively to customer preferences.

**e. Data accuracy and completeness:**

These continue to be areas of focus for retail organizations. Many feel that the quality of information has significantly improved over the past five years, but this is still a hot topic as customers are getting closer and closer to the information in the retailer catalog. The omni-channel customer now expects that information—such as extended attributes, images and other value-added information—will be readily available and reliable. The quality of the information available to the customer has become as important as the quality of the product/service itself.

**f. Future considerations:** The retailers we spoke with are well on their way to bringing their omni-channel strategies to life. As we spoke about the role of standards in their journey to date, respondents were quick to point out the importance of those standards that have already been adopted in the industry such as item identification, data attribution, electronic data interchange (EDI), data synchronization and EPC-enabled RFID. The responses were varied regarding future gaps but most agreed that there is a long way to go to achieve the industry-wide depth of usage that is possible with the standards that exist.

**Predictive Customer Analytics**

Sophisticated algorithms and data mining activities that analyze current and historical facts to track shopping patterns are being utilized by retailers



to gain a competitive advantage in the marketplace. Retailers have the ability to create an individual personal shopping experience based on information provided through online profiles. However, retailers must be transparent in the information that is being collected.

**a. Patterns:** Retailers have the ability to forecast behaviors of similar shoppers through data mining activities. Examples of data reviewed include preferred items, colors, sizes and total cost. Consequently, future shopping patterns can be identified by analyzing the information provided by the data. A company can gain a tremendous advantage by determining a customer’s future purchasing habits.

**b. Promotional items:** Retailers are delivering personalized promotional offers based on purchasing habits and personal information provided by a customer. Certain customers appreciate the idea of a retailer sending a promotion based on their specific shopping preferences.

**Fulfillment Strategy**

To support the roll-out of the omni-channel consumer experience, retailers are revising processes, modernizing technologies and updating physical

infrastructure. While the current status of their efforts varies broadly, all respondents agreed that the goal is to provide the customer with the products they desire when, where and how they want them while enabling a seamless experience across channels.

**a. Thinking about assets (facilities and inventory) differently:**

Respondents across the board recognized the need to think creatively about fulfillment and the use of their physical network. Activities that were once considered impossible for the practical reasons of space, inventory visibility and labor have become an imperative. We found that retail leaders are thinking creatively about the fulfillment options available to them; the biggest challenge is focusing on the right options and speeding up the innovation cycles to test, learn and roll out the seemingly endless options they want to explore.

**b. Using third parties:** 3PLs’

investments in engineering, supply chain software and information system infrastructure often dwarf those of their customers in the retail space. Sophisticated, full-service 3PLs provide an interesting option to retail logistics organizations that



want to adapt quickly and decisively to market changes. Retailers are using third parties to expand their assortments as well as pick, pack and ship their orders. The increase in assortment can drive volume for the retailer, but these activities also add a layer of complexity for retailers as they set up items in their systems, track items through their networks and try to maintain one face to the omni-channel customer. Item identification is more important than ever, as retailers expand assortments and nodes within their network.

#### c. Demand forecasting and fulfillment:

Retailers are rethinking their inventory positioning strategy, leveraging their total network to position the product as close to the customer as they can.

#### d. Commerce management:

Commerce management refers to shaping demand and monitoring sales through the online channel. One Fortune 500 retailer explained how drop-shipping helped it expand product and size offerings for customers. This retailer is able to provide a broader spectrum of merchandise online, because it is able to sell items not usually found in its brick-and-mortar locations. Twenty percent of this retailer's eCommerce revenue is realized through drop-ship, while 80% is realized through fulfillment centers. According to another leading retailer, eCommerce has experienced 30 to 40% growth year-over-year. In contrast, brick-and-mortar growth, for the same retailer, has been much slower. As retailers begin to rely on third parties and drop-ship relationships, EPC-enabled RFID will become an even more important strategic component of the trading relationship.

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*Mobile is going to explode in importance because the device knows so much about the user.*

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- Tom Furphy,  
Consumer Equity Partners

**e. Mobile management:** Mobile management involves developing and strengthening a company's strategy for the mobile channel. Last holiday season, retailers experienced unequivocal year-over-year growth in customers using mobile before, during and after the shopping trip. In our conversations with retail executives, we found broad acceptance of the fact that mobile will again change the game and better enable the omni-channel experience for the customer; however, their state of readiness and what it will mean for them is largely unknown.

Industry veteran Tom Furphy of Consumer Equity Partners believes that even with the enhanced awareness and recent success, this channel is underestimated: "Mobile is going to explode in importance because the device knows so much about the user." Additionally, Capgemini Consulting's point of view is that of a new customer-centricity paradigm evolving upon which reaction to the customer in all merchandising activities is paramount; and the mobile technologies have both enabled their capabilities as well as their expectations.

While most of the retailers we spoke to are clearly focused on their current roadmap and the topics explored above, it was clear that the industry is beginning to develop an interest in improving online search management and the standards needed for mobility (specifically payments) as a community.

## Implications

By adopting powerful standards-based technology, particularly EPC-enabled RFID, retailers are able to achieve higher degrees of visibility in their environments, collaborate more closely with their supply chain partners, and streamline critical core business processes such as fulfillment and replenishment. This in turn increases inventory accuracy, reduces shrinkage, provides faster fulfillment speed (e.g., same-day shipping) and ultimately drives revenue and profitability. For example, through improved inventory accuracy, retailers are able to provide accurate commitments to their shoppers, better fulfill orders and ensure that the customer experience is reliable.

Offering same-day deliveries has been a goal that retailers have been targeting for a long time but has thus far proved elusive for most. The process to fulfill and ship same-day orders can be complex and costly, but in order to maintain their competitive edge, organizations are starting to test the concept in several metropolitan areas. By using their storefront locations as distribution centers, retailers (such as Gap) are in a position to deliver products quickly to the customer. However, this requires a level of visibility that many retailers have yet to achieve. Standards-based technology (such as EPC-enabled RFID) will be critical in providing the requisite level of visibility to make same-day delivery a reality.

There is one potential implementation pitfall that may not be a challenge from a standards perspective, but will affect how retailers are organized and managed. For example, to take advantage of the new opportunities presented by omni-channel, organizations may need to move centralized functions to a more distributed or store-based level or vice versa. In some cases, functions that require considerable resources (such as item master set-up) may be greatly curtailed

whereas other functions (such as data analytics) may increase. Retailers that fail to understand these organizational implications will realize neither the true potential nor the full benefit of omni-channel.

## Summary of Lessons Learned

- **Omni-channel is over the tipping point, and the customer is in charge.** The retailers we spoke to are actively working on their strategy and the needs of the customer are clearly at the center of all they are doing.
- **Leading organizations are questioning everything,** from how they are organized, to how their information is organized, to how they will need to interface with the customer.
- **Inventory identification, tracking and management will be the core competency that matters** more than any other in the next five years.
- **EPC-enabled RFID is how leading retailers are enabling inventory visibility and improved performance.** Leaders are using EPC-enabled RFID across some or all of their general merchandise replenishment categories (30% of SKUs) and reporting great success. However, there is little conversation about expanding the usage to food, seasonal or “one-shot” categories.
- **Retailers are thinking about their assets much more creatively,** with some using stores as fulfillment centers and others exploring new ideas with a speed and intensity that has not been previously seen in retail.
- **Images are a nagging issue that will need to be resolved in the near future.** Some see images as collaborative and standard, while others see a high-quality image as a differentiator and a part of their brand.
- **Item setup and maintenance needs to be transformed.** Getting accurate and complete information about an item and getting that information online rapidly continues to be a significant bottleneck and an area that is bubbling up as a barrier to speed and success.
- **Online search is on the minds of retail executives.** Some of the retailers we spoke with feel that online search needs to be collaborative while others see driving customers to their site as the goal. Leveling this playing field will likely have margin implications.
- **Flexible, fast, and accurate fulfillment is becoming an expectation of the consumer.** Inventory visibility will be an imperative to success (in the eyes of the customer) and profitability.
- **As seen in recent holiday shopping statistics, mobility is now the standard for many shoppers.** Executives know it is the reality. They recognize that it is important and transformative, but their main focus appears to be doing the basics well (such as attribution, images and inventory visibility). Some respondents spoke about mobility as the bridge across channels, and the standards implications of that should be explored.
- **Lab, test and roll out FAST!** Although there is a universal, palpable frustration at the current pace of change, organizations will continue to identify and implement opportunities that ensure customers expectations are met in an expeditious manner.

## Conclusion

The retail industry is in the midst of multiple transitions. Customers continue to reshape the industry using technologies that are readily available to them, and this is changing how and where products are sold. In essence, consumers are now accustomed to an “always-on, always-open” shopping experience due to the accessibility offered by online shopping. Omni-channel fulfillment has created a whole new class of competitors pushing traditional channels into digital channels. Customers are going to continue to want seamless shopping from the time they start researching a product online through to final delivery.

Retailers took a big step in 2013 to accommodate two major transitions—including demographic shifts and service requirements—however, there are still many objectives to be met. The key retail industry imperative for 2014, and beyond, will be to keep the omni-channel strategy moving by reaching customers in real-time, continuing to develop key supply chain strategies and maintaining the significant gains made in recent years. The concept of utilizing a physical store location as a fulfillment center will continue to evolve. Retailers are expanding the number of stores that either ship direct or enable customers to pick up items that were ordered online. The ability to combine physical and digital shopping experiences will enable companies to maintain a competitive edge within an industry that is experiencing tremendous change.

Thank you for accompanying us on this journey.

## About the Research

Capgemini Consulting and GS1 US interviewed executives from seven leading retailers, as well as industry veterans to understand the current state of omni-channel adoption efforts within the retail industry. Some of the interviews were conducted in person whereas others took place over the phone. The interviews were aided by an interview guide, jointly written by Capgemini Consulting and GS1 US.



Contact Capgemini Consulting and GS1 US to help you implement a comprehensive omni-channel strategy.

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**About GS1 US**

GS1 US, a member of the global information standards organization GS1®, brings industry communities together to solve supply-chain problems through the adoption and implementation of GS1 Standards. Nearly 300,000 businesses in 25 industries rely on GS1 US for trading-partner collaboration and for maximizing the cost effectiveness, speed, visibility, security and sustainability of their business processes. They achieve these benefits through solutions based on GS1 global unique numbering and identification systems, barcodes, Electronic Product Code (EPC)-based RFID, data synchronization, and electronic information exchange. GS1 US also manages the United Nations Standard Products and Services Code® (UNSPSC®).

More information at: [www.gs1us.org](http://www.gs1us.org)

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