THE INTERNET RETAILING PROCUREMENT GUIDE 2013

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From the Editor-in-chief

Welcome to *Internet Retailing*'s second annual *Procurement Guide*, in which we review the state of supply within our industry, set out the trends and near-future changes, and outline some questions and approaches to ensure you get the best from your procurement process.

As ecommerce concerns and opportunities become ever more cross-channel in scope and impact we've extended the brief of the *2013 Procurement Guide* to encompass 'IRIS' – Internet Retailing In-Store – where we consider the exciting digital technologies that link ecommerce with the store: from click and collect to mobile in-store, via digital signage and staff iPads and enhanced point of sale.

Growth has also been marked for retailers selling outside the UK and we've expanded our coverage of multilingual, multi-currency and multinational fulfilment and delivery further in this year's guide. Also growing in size is our mobile coverage, with Paul Skeldon, editor of M-retailing, considering the continuing importance of the mobile & mobility within cross-channel.

Under the leadership of our supplement co-editors, Chloe Rigby and Jonathan Wright, we've drawn a commercial view of the procurement landscape in 2013, with a look at what's changed since 2012, what's still a priority and what we think is new for 2013. We hope that this guide will serve as both a briefing and a ready reference for months to come on the strategic questions for the year. Even as we go to press, however, we're conscious of the never-ending progress in our sector and we will be covering these areas online at www.internetretailing.net, in our magazine, and the accompanying thematic supplements and events throughout the year.

> **"We hope this guide will serve as both a briefing and a ready reference for months to come"**

Our sponsors and partners have been generous with their experience and insights, while a number of our retail readers have shared their experiences too – our thanks go to them. Do let us know your thoughts, especially concerning areas you'd like us to include in 2014 or areas of importance to you. Let me know your views, ideas and feedback at ian@internetretailing.net

With best wishes
Ian Jindal
Co-Founder and Editor-in-Chief,
Internet Retailing

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Introduction

As we observed last year when we launched the first *Internet Retailing Procurement Guide* on the world, purchasing decisions are always fraught with difficulties. Firstly, there are questions around specification to consider. There's price. And then there's the question of whether a potential supplier can deliver on what's being promised.

These are constant issues that seem particularly acute at the moment because money is tight, meaning there's no margin for error within the procurement process. Ramping up the pressure, cross-channel retail – or omnichannel or multichannel if you prefer – is now a reality, and retailers need to be prepared for this new paradigm.

However, there's good news here too. Many essential retail technologies are now maturing. Get procurement decisions right and companies shouldn't need to replace such technologies for many years.

In order to help in this endeavour, the articles that follow here focus on key areas within retail and the major factor to consider before buying in technology and services.

CUSTOMER-FACING TECHNOLOGIES AND SERVICES

The first section of the guide focuses on Customer-facing Technologies and Services. Within this, we first look at *Strategy*. Finding the right consultants and advisors can be a tricky task, but there are times when it's essential to buy in outside expertise. The second section, *Acquisition Marketing* considers the complexities around gaining new customers. Is social media key here, or should companies invest in refining personalisation techniques?

> **"Because money is tight, there's no margin for error within the procurement process"**

In *User Experience & Performance*, we consider how retailers can ensure that shoppers have a great experience when visiting a retailer's website. More than this, we consider design issues around the various digital interfaces that consumers now use. Searchandising is the essential discipline of ensuring that customers can find the products they're looking for. Here, we look at on-site search, recommendations and reviews. In the *Payment & Fraud* section, we examine the ever-knotty problem of how retailers protect should protect themselves against fraud without making it impossible for customers to buy goods.

Operations & Logistics considers the essential business of getting goods where they need to go, the world of fulfilment services, warehousing, shipping and carrier management. Finally in this section, we focus on *Customer Service & Retention*. It's not cheap keeping existing customers happy, but as the best retailers have long known it's far more expensive snagging new customers.

SYSTEMS AND PROCESSES, PLUS NEW OPPORTUNITIES

In the second part of the guide, Systems and Processes, we take a look at back-office functions. The *Retail* section looks at hosting, database management, retail systems and warehouse management. The *Ecommerce Platforms* section, meanwhile, focuses on ecommerce platforms and also buying software as a service.

In the third and final part of the directory we look firmly towards the future and consider the New Opportunities that are arising because

ecommerce no longer means just selling via the web. In *Internet Retailing In-Store*, we look at digital technologies linking digital techynologies with in-store: click and collect, digital signage, tablets, kiosks, and the interaction of the store experience and the customer's own digital devices.

In *Mobile & Mobility*, we look in more detail at the role of mobile channels and 'mobility' within cross-channel retailing. Finally, the *International Focus* considers the issues around selling to customers overseas.

HOW IT WORKS

As last year, each of the features is made up of two main sections. In Market Overview, we look at where the market is now. What are the essential features that your retail business needs to have, and what are the relevant trends that you need to master in order to stay current, and the questions to ask when procuring these services? Here we also outline 10 key issues to consider when commissioning.

The Innovation and Future Trends section looks up the path to consider some of the issues that will be on the radars of forward-thinking retailers.

KEY LESSON

So what have we learned during the course of our research? As we've already observed, we're now in the era of cross-channel retail. In this context, reports of the death of the bricks-and-mortar store are very much exaggerated, despite the recent problems for retailers reliant on profits gleaned from high-street customers.

What's actually happening out there is that customers are shopping across channels and choosing retailers that deliver great – and joined up – service at all touchpoints, including stores. Undertake procurement projects with this in mind and canny retailers will give themselves the best possible chance of not only surviving the current downturn, but prospering in the future.

We've thoroughly enjoyed putting this guide together, and we hope both that you enjoy reading it and find it a useful source of information over the year ahead.

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Meet the team

Christian Annesley has been writing and talking about business issues since 1997. An award-winning news editor at *Computer Weekly*, he was also the launch editor of the regional business magazine *South West Business Insider*.

Marcus Austin is a business technology writer with more than 20 years of experience. He has been writing on the subject of internet retailing since 1994. Marcus also works as an internet consultant, and has recently worked with the Guardian Media Group (on its mobile platform), the Royal Sun Alliance insurance group and Santander.

Trevor Clawson is a freelance business and technology journalist specialising in new media, fast-growth companies, management and finance. His work has appeared in *Director*, *Growing Business*, *CFO World*, *Guardian*, *Times*, *Sunday Times* and *Mail on Sunday*. He is the author of three business books and co-editor of a fourth (*How to Grow Your Business*).

Penelope Ody has been writing about the retail sector for more than 35 years starting with *Retail & Distribution Management* and *Drapers*, where she was deputy editor. Freelance since 1983, she edited *Retail Automation* (1985-1995) and *Retail Solutions* (1998-2003) and has written on retail topics for numerous publications. Her books include *Online Retailing* (FT, 2000).

Chloe Rigby is *Internet Retailing*'s web editor and supplements co-editor. She's an award-winning former business editor of the *Bristol Evening Post*, where she launched a weekday business supplement. She has written for a wide variety of online and offline publications. After graduating from UCL, she lived for several years in Italy.

Paul Skeldon has been a mobile commerce journalist for 15 years and has been covering the retail sector for the past four. He is editor of *M-Retailing*, the mobile newsletter and website from *Internet Retailing* and has written a book on m-commerce. He's a big fan of gadgets.

Jonathan Wright is *Internet Retailing*'s supplements co-editor. He earned his e-stripes on the UK launch of *Business 2.0*, which rode the crest of the dot.com wave back at the turn of the millennium. Since then he's been writing about subjects from technology to alternative investment to entertainment for a variety of print and online audiences.

Finding a helping hand

IN A RAPIDLY CHANGING RETAIL WORLD EXPERT HELP IS NEEDED RATHER MORE OFTEN THAN IN THE SETTLED BRICKS-AND-MORTAR DAYS. FINDING THE RIGHT CONSULTANTS TO SHARE AND ENCOURAGE YOUR VISION IS VITAL, ADVISES **PENELOPE ODY**

Comet, Jessops, HMV, Blockbuster... the past few months have seen a spate of big-name retail failures, notably in areas where online channels have come to dominate. Inevitably, commentators have pointed to the fact that all these retailers had failed to adapt to the digital world: selling products that were fast becoming obsolete, focusing on physical rather than digital delivery, or having poor websites and cross-channel integration.

Consultants and analysts regularly talk of a 'retail revolution' as consumers opt for cross-channel shopping far faster than retailers can adapt stores and systems to meet the demand. Small wonder then that retailers are turning to digital agencies and 'omnichannel' specialists to help them cope with this changing world.

Retail consultancies vary enormously: from the majors like PwC or Deloitte to the sole trader – who is often a recently redundant retail executive who may simply be filling in time until another corporate job hoves into view. Last year, in the *2012 Procurement Guide*, we noted that entering 'multi-channel retail consultants' into Google produced 16 million results. The same exercise this year produced a paltry 3.4 million while 'omni-channel retail consultants' found only 919,000 pages. However, while the same exercise with 'digital agency' last year brought up 91 million results, this year there were 418 million. The semantics may be changing but finding the right expert to guide your business among that lot is no easier.

> **"Choose an organisation that has a cultural fit, where you actually like the people you'll be working with"**

Keys to success generally include choosing an organisation that has a cultural fit, where you actually like the people you'll be working with, and where the consultant understands and is interested in your business and its development.

"You need a consultancy that has a desire to be a 'strategic partner', not just a 'supplier'," says Martin Girdlestone, head of consultancy services at Salmon. "A company that cares about the retailer's business objectives, who understands and empathises with their day-to-day challenges and has the passion, experience and expertise to help them achieve their longer-term goals."

Paul Bolton, director of product and strategy at Ivis Group, puts culture high on the list: "Retailers often underestimate the working impact of cultural fit when selecting a provider," he says. "As part of any project, the consultancy or agency will need to work with a number of different departments to achieve the required output. If ways of working and more importantly individual personalities within the team clash, then there will be challenges in meeting objectives. It's important for the retailer to get references and ask to see the key people who will be involved in the project."

Retail consultant Clare Rayner agrees: "Never underestimate the value of 'liking' the team you'll

be working with," she says. "If possible arrange for the parties who will work on projects day to day to meet up, ensure there is a rapport and good cultural fit, otherwise no matter how great the services are, if the relationship is strained the value won't be delivered."

CHECKS AND BALANCES

As well as establishing a personal rapport, companies do need to be sure consultants are up to the job: check out case studies on the website, look for consultants with genuine retail experience not just business-school skills, look them up on LinkedIn or other social media sites, talk to other retailers that have used the firm – not just their selected reference sites, make sure they really do understand your business and its needs, and don't just depend on a recommendation from a retail friend – their problems and business culture may be very different.

Remember too that price is not always a guide to expertise and opting for the cheapest is not always the best option. "Typically when budgets are under pressure retailers revert to the lowest-cost provider or the big-name brand," says Clare Rayner. "Some of the niche players, the less well known, are potentially more able to deliver but may be ruled out on price. However, if a small boutique agency can deliver more rapid results and greater ROI, then the absolute cost should not be an issue." As Will Treasure, director, Javelin Group also points out: "Some consultancies deliberately underprice to win the business and then make it up with additional charges later."

Fee structures also vary: there may be a day rate, a fixed project price, or a combination of a base price plus additional fee based on agreed improvements to selected KPIs. This sort of 'outcome-based' price structure can provide the best incentive for a successful project.

"Outcome-based pricing is a powerful commercial approach," says Martin Girdlestone, "Success is based on measurement of specific KPIs over an agreed timescale, for example, revenue, average basket size, basket abandonment rate, repeat purchases and cross-channel conversion, etc. When agreeing metrics, both parties need carefully to consider how to measure the impact of one specific change in isolation of other factors."

Finally, when looking at such metrics don't forget the ROI. Consultancy advice is not just some 'nice to have' reassurance that the in-house ecommerce team has got it right, but something that must deliver tangible benefits and real returns to the bottom line.

Ten issues to consider

1 **Focus on customers:** IT suppliers can offer an exciting vision of the future but is that what you need? "Delivering a technology solution for the sake of delivering new technology will not offer maximum impact," says Paul Bolton at Ivis. "The partner you pick must be able to solve your issues now, and future-proof your business."

2 **Think global...** international growth is on almost every retail agenda so look for consultants with international experience, digital agencies with a physical presence in target markets and SEO specialists with multilingual skills.

3 **...but not all the time:** check if the consultancy will use all its own staff on the project or outsource work offshore. Will that disrupt communications, delay developments or cause additional problems?

4 **Recognise limitations:** retailers like to think they know customers better than anyone – but in a digital age those customers are changing fast. Be prepared to listen to the experts with an open mind. "Consultancies are much more effective at adding value if they are allowed to provide leadership," says Martin Girdlestone at Salmon. "Give them the ability to input to the 'what' as well as the 'how'."

5 **Changing priorities:** last year we noted that with online sales of 10-15 per cent of turnover, CFOs were starting to take an interest. Today those figures can be 20-40 per cent for some retailers and the finance director may well have strong views on what sort of consultancy is needed.

6 **Can a consultant really help?** Can the chosen consultant really help the company to improve operational efficiency and productivity levels, gain competitive edge, differentiate the brand or help the company become an innovator without alienating traditional customers? If not, why employ them?

7 **Think digital:** it is not a bolt-on extra but central to today's retailing. Pick a consultant that understands retailing's heritage but can also embrace the future vision.

8 **Understand what's wanted:** just as important last year as this. "If the retailer cannot explain their own operation and challenges, then the project carries much more risk," says Martin Girdlestone. "Pre-discovery is becoming a pivotal consultancy-led phase in helping businesses prepare correctly for major projects or programmes."

9 **Go for outcomes:** opt for an outcome-based fee structure so that the consultant has an added incentive to deliver results.

10 **Get it in writing:** make sure to get a written agreement detailing terms, conditions, responsibilities, timescales, KPIs, projected outcomes and so on. In the event of an over-run or dispute it is as well to be prepared.

Time to focus on essentials

Time was when retailers would seek advice from consultants about customer demographics, store location, or which PoS system to buy. Today, concerns are many and complex: the likely growth of m-commerce, the importance of social media, achieving a single view of the customer, how to use big data to enhance shopper experience, whether or not to adopt responsive web design, channel integration, digital media in-store, which stores to close, is 90-minute delivery possible, the implications of offering free wi-fi and so on.

There are no simple solutions to many of these issues. Same-day delivery needs accurate real-time stock and transaction records. Add free wi-fi in store and you need staff empowered to negotiate with shoppers who have just found the same item half a mile away at a lower price. Aim for a single view of the customer, and companies need to integrate a diversity of platforms and technologies. Solving some of these issues can mean a major technology investment or extensive staff-training programme, and advice not just from a digital agency but from IT specialists capable of major systems transformation or HR experts adept at developing new skills.

Ask consultants what sort of pain points they expect retailers to be seeking help for in 2013 and the list is long and varied, with an emphasis on the need for cross-channel integration – still a problem for many retailers – as well as ways to enhance customer experience, optimise the use of social media, and improve personalisation and targeting. Ask the consultants what retailers should be worried about and the list is rather different: "They should be seeking advice on how to protect themselves against Amazon's relentless growth," adds Martin Girdlestone at Salmon. "How to provide next-day or same-day deliveries, and which digital trends to embrace – near-field communication (NFC), augmented reality, second-screen usage, location-based services, wearable technology, gamification and so on."

> **"Aim for a single view of the customer, and companies need to integrate a diversity of platforms and technologies"**

While keeping abreast of new technological developments is clearly important, actually solving some very basic cross-channel issues – such as maintaining inventory records in real-time in order to enable same day click and collect or 90-minute deliveries – are major problems for many retailers.

"We have noticed that retailers have started to take the view that it's no longer about a headlong rush to experiment with the latest technology, but more have taken a rational view that it's about consolidating what they have and making it work harder." says Nick McLean, director of products at eCommera. "Without really stepping back and planning to integrate their view of stock, their view of the customer journey, their understanding of how people navigate the site and the understanding of where they fail to deliver on the customer expectation, then they will continue to leave money on the table, or even lose customers to a competitor."

Tony Bryant, head of business development at K3 also believes the basics should still be top of the list: "Retailers should be focusing on two main areas," he says, "improving customer recruitment and retaining existing customers with core and flexible systems and processes."

THE ROLE OF THE STORE

For many retailers, a lack of flexibility in basic store systems remains a major stumbling block to better cross-channel integration. While no-one doubts the continuing importance of the store, how that store is used is changing and there is a real need for store operations to be more closely aligned with online activity – with integration not confined to technology but including management and staff as well.

"The main challenge is how willing, and more importantly, how prepared retailers are to adapt to the current market transformation away from the traditional concept of a store," says Paul Bolton at Ivis. "How able are they to deliver an informative, personable and connected experience for their customers?"

"Multichannel retailers need to be thinking about how they will respond to the growth of both 'showrooming' – customers using stores to view physical products and then purchasing online from the retailer's website, and 'digital shoplifting' – the same but where they purchase from a competitor's site," adds Martin Girdlestone.

Consultancies too are adapting to changing times. Many are prepared to work on limited point solutions in reduced time frames to solve specific tactical problems rather than focusing on strategic developments or major technology implementations. For many, cloud computing is seen as the way forward offering hosted applications and minimal investment in IT while providing access to the data from anywhere or any channel. For others, 'big data' is top of the agenda with powerful analytics capable of delivering highly personalised information on customer expectations and preferences.

Despite continuing online growth, few retailers will be feeling bullish about the overall prospects for 2013. Making better use of technologies that are already in place and using expert help to improve channel integration seem rather more likely than major capital investment in new systems.

Speaking from experience

Head off analysis paralysis

"Retailers should look at what skills they have in-house, but also what time those people have to devote to strategy. Most staff are busy with their day jobs, so consultants can help bring focus and momentum to new initiatives. Make sure that consultants are truly bringing something that doesn't exist in-house, such as wider experience and a different perspective. In the fast-moving multichannel retail world, it's much better to make small changes, learn from those and then make further changes, rather than spend months in 'analysis paralysis'." **Martin Girdlestone, head of consultancy services, Salmon**

Big data challenge

"The current and future ecommerce market will all be about big data, and how to bring that data together to create the 'big picture', and subsequently working the data to deliver the right decisions across all aspects of the operation. Retailers need to look at optimising their end-to-end interaction with the customer. Doing that requires knowing how they're managing every aspect of the operation against the ideal and continually fine tuning it." **Nick McLean, director of products, eCommera**

Consider using specialists

"Many retailers find it difficult to decide between specialist providers who can deliver specific point solutions and services and those that offer many. In reality, retailers often make 'safe' decisions by picking the larger supplier to cover many bases. However, specialist agencies can have the flexibility and personal touch that many of their larger counterparts are lacking." **Paul Bolton, director of product and strategy, Ivis Group**

In summary...

While many forecasters are predicting that the economy in 2013 will remain flat with overall retail growth driven only by inflation, online continues to expand. The more mature UK market may have grown by just 14 per cent in 2012 but the European average is 20 per cent with Germany and eastern Europe seeing growth of 27 per cent – admittedly from a much lower base. The IMRG survey of 670 UK multichannel retailers late last year suggests that some are already achieving online sales of 40 per cent of turnover while the average prediction from the survey group was that 38 per cent of retail sales would be online by 2014.

This suggests a massive and rapid change in the way people want to shop and the way that they use stores. Already 'showrooming' and 'digital shoplifting' are becoming commonplace, and it is no longer unusual to see someone using a smartphone in-store to compare prices. The majority of cross-channel retailers began life on the high street, and their roots are firmly in bricks and mortar. Until recently, many still kept ecommerce entirely separate from store operations and one still hears of staff conflicts when online 'returns' are taken to stores, and there are arguments over whose sales figures must take the hit.

Cross-channel requires a quite different skills set from the high street and it is an area where many retailers still lack in-house expertise – especially at a senior management level. Whether it is systems integration, mobile strategy, using big data or managing click and collect, the right experts will be out there somewhere, able to offer the best available advice or manage the entire project as need be. Finding them takes time, effort and considerable research, but finding the right strategic partner can make all the difference between hitting 38 per cent of sales online by 2014 – or joining the Comets, Jessops and HMVs of this world.

HOW SATISFIED ARE YOUR CUSTOMERS WITH THEIR CROSS CHANNEL EXPERIENCE?

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At Reply, we think the terms 'multichannel' and 'cross-channel' are still too restrictive by being purely focused on the sales channel. As social media starts to permeate all that we do in retail, let's be mindful that the IQ of the crowd can in fact be greater than the most intelligent individual. The sales cycle is going to be extended as our customers start to get help from all sorts of third parties: friends via text, parents via face time, reviews at our finger tips, possibly 'mobile assistants', and so on.

So it's not about the channel, it's about the conversation we have with our customers and whomever they choose to include, regardless of where customers are. They might be at home, online or on the go, but they still want to be served. The combination of social media, touchscreen and mobile technologies has enabled this conversation, but this conversation must be relevant and we need to work hard to ensure it is.

So think, 'Customer... if you want to have a meaningful conversation with me, USE MY NAME!' How can we respond to this behaviour to convert conversations into sales? We've heard of the term proximity marketing but we should be doing more and looking at what our customers are telling us from these conversations and then applying this new knowledge to the entire supply chain and sales cycle.

Proximity Commerce™ allows the retailer to sell to customers anywhere at anytime ON CUSTOMERS' TERMS but with NO LOSS OF BENEFITS to the retailer. Today it is about where and how customers can purchase desired goods and services. It's about the conversation that the retailer can now have with customers, and how evolved habits, behaviours and expectations of the customers are changing dramatically. The rise of Proximity Commerce will blur the boundaries for retailers in their multichannel world – where they will scramble to keep up with customer expectations. In order to be successful in the new world, retailers must adopt a strategy that enables Proximity Commerce to become a reality, and they must invest in the necessary technology and business processes that allow the customers to interact with your brand on their own terms.

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To discuss how your business may benefit, contact Grant Twine, Managing Director of Basel (UK) Limited or Mark James, ecommerce Manager at Basel eBusiness Solutions.

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SimpleUsability is a world class behavioural research and neuromarketing consultancy. beInsight is our proprietary methodology which, when combined with our prolific use of state-of-the-art technology, explores the real motivations behind customers' behaviour and delivers significantly better results for our clients as a result. beInsight splits neatly into four types of media which we conduct testing for: beWebsite, beAdvertising, beMobile and beInstore. Our clients include ASDA, Wal-Mart, George, Jet2.com and Jewson and we help them improve their products and services through deep understanding of their customers. Our work with Walmart has helped to achieve high rankings in the Android and iTunes app stores and has contributed to 1 in 5 grocery orders now being placed on mobile in the UK. We improve the conversion of websites, apps and mobile sites. We also explore the effectiveness of advertising concepts, brochures, packaging and in-store communication. We have worked across most vertical sectors but have unsurpassed depth of knowledge within the multichannel retail sector.

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Crimsonwing is an international IT solutions provider developing and implementing leading-edge solutions for the European market. Having implemented ecommerce platforms for over 10 years, Crimsonwing has developed a vast expertise in this ever-growing sector, along with a deep understanding of the fast moving yet robust requirements of online business. Since 2009, the company has grown to be one of the largest Magento partners in Europe, delivering solutions that provide a significant competitive advantage for our clients. Crimsonwing also delivers solutions based on other ecommerce platforms, such as Intershop and Hybris, giving us a unique position in understanding the latest developments of leading ecommerce platforms. Coupled with consultancy services delivered by our highly experienced business consultants, Crimsonwing is able to find the right solution with the best fit for each client's unique business needs. We excel in delivering high-value, mission-critical projects, which can also entail bespoke solutions and various platform integrations, in order to provide customers with a fully integrated solution.

DEMANDWARE

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Demandware, a leader in digital commerce, enables the world's premier retailers to move faster and grow faster in the changing face of retail. Demandware's enterprise cloud platform minimises the costs and complexities of running global, omnichannel commerce operations, and empowers retailers to respond with speed and agility to new market opportunities and continually evolving consumer expectations. Demandware Commerce is the only digital commerce platform that delivers the speed, agility, innovation and superior economics required to master the new retail reality of constant and unpredictable change. With intuitive applications for both business and technical users, retailers are empowered to quickly execute omnichannel merchandising and marketing, manage operations globally and develop unique capabilities that differentiate their brand. Demandware Commerce removes the barriers and complexities of traditional licensed software, and allows retailers to focus on the strategic business initiatives that drive growth.

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- All from a single source partner.

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At Eclipse we believe that being solely focused on consulting, implementing and supporting hybris multichannel commerce makes sense. We know that our clients, including TNT, Joules, Morgan Motor, Triumph Motorcycles, Enterprise Inns, Medic Animal, Brintons Carpets, CEVA Logistics, IMI Norgren and Maplin appreciate our in-depth knowledge, and that having more than 200 IT professional gives us more hybris-certified developers than any other UK partner. However, for us implementation of a commerce project is more than just being on time, to budget and quality – a given with Eclipse – but delivering a solution that brings increased conversions, higher order values and improved customer retention, with a service culture built upon tracking relevant KPIs against an agreed SLA. Our expertise does not stop at the application layer – we have our own specialist hosting centres and a dedicated UK service desk aligned to ITIL standards. Please get in touch and let us show you how hybris with Eclipse is the future of commerce.

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Greenlight is an award winning Search and Social Media Marketing agency, the largest independent agency of its kind in Europe. Our proven ability to deliver online strategies which have a direct impact on our clients' ROI, makes us the agency of choice for retailers such as Laura Ashley, ghd, Warehouse, Dreams, Coast and Urban Outfitters.

As operators of the most well-funded Search R&D department in the UK, we are dedicated to creating technologies which enhance our clients' performance. Hydra, our unique data aggregation and visualisation platform, provides our teams with unique insights into the true efficiency of clients' SEO/PPC keyword sets, allowing us to create integrated SEO, PPC and Social Media campaigns which avoid overlap and maximise ROI.

If you're looking for an agency which is committed to propelling your brand into the online space, then give us a call on +44 (0)20 7253 7000.

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Javelin Group is Europe's leading specialist consultancy in ecommerce and multi-channel retail advising retailers, brand owners and B2Bs on their ecommerce and multi-channel strategies, operations and technologies, and developing large-scale ecommerce solutions. Clients include 17 of the 20 largest retailers in the UK plus many others across Europe and beyond.

Javelin Group's multi-channel consultancy services, which include international expansion, help retailers, brands and distributors to grow their sales and coordinate their web, mobile, telephone and store channels for maximum profit. Recent clients include Marks & Spencer, ASOS, Waitrose, Matalan, Warnaco and Bosch Siemens.

Javelin Group's ecommerce implementation services include development of world-class ecommerce websites on leading platforms, mobile commerce, and other solutions such as PIM. Services also include rapid international roll-out of multi-country ecommerce solutions. Recent B2C clients include Lakeland, Asda, Direct Wines, Mothercare, sit-up, Tesco and Debenhams, and B2Bs include Rexel, IMI Norgren, Nisbets and Bobcat.

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Portaltech Reply is a market leading provider of ecommerce implementation and multichannel consulting services with offices in London and Milan. We have 20+ hybris implementations (with 50+ hybris web and mobile sites) to our credit and are one of the world's most experienced and respected hybris implementation partners. We have hybris customers as far afield as the United States, Australia and Europe and we are the most successful UK partner by number of projects and breadth of hybris expertise. Portaltech Reply is part of the Reply Group, one of Europe's largest and most successful business consulting and system integration company's with significant operations across the continent and further afield. Key areas of business are ecommerce, Mobile, Digital Media, Supply Chain Execution, Risk Management and Regulatory Compliance.

LEAPFROGG DIGITAL MARKETING

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Leapfrogg is a specialist digital marketing agency helping premium brands and retailers increase customer acquisition, revenue and market share.

We understand how to sell products and services to the discerning consumer better than most, delivering integrated search engine marketing, online PR and social media strategies that align closely with our clients' offline marketing activity. In turn, this helps drive a consistent and seamless experience for customers as they move between channels.

A growing portfolio of high-end retail and travel brands rely on Leapfrogg for our strategic, joined-up thinking, our creative approach to digital marketing and our proven ability to deliver online retail strategies that have a direct, measurable impact on our clients' bottom line.

Our clients include: Filofax, Feather & Black, Cox & Kings, Simpson Travel, Bastyan (Aurora Fashions), C.P. Hart, Peter Christian, Ecclesiastical Insurance and RED Driving School.

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PureNet is a multi-award-winning provider of Enterprise ecommerce Solutions and Custom Web & Mobile Solutions. We offer a complete end-to-end service that includes ecommerce Web Design, ecommerce Development, Digital Marketing, ecommerce Consultancy, Website Development, Systems Integration, Custom Development, ecommerce Hosting and at every stage of the process, Absolute Support for your business and your solution.

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Retailers turn to Salmon to define the right digital strategies and make the correct investment decisions to improve their online competitive advantage and extend brand loyalty. For many, this centres on the development of effective B2C ecommerce websites, optimising customer experiences and executing multi-channel strategies effectively (i.e. optimisation, coordination, integration and synchronisation). Additionally, businesses are turning to Salmon to help them with their mobile sites and apps as well as expanding their market and ecommerce offering internationally. We implement solutions that centre on two key aspirations - increasing revenues today, and putting in place technical platforms to support sustainable and profitable growth for the future. With a unique combination of technical and business expertise, Salmon provides digital consulting, design, delivery and support services. Our pedigree is clear.

Our customers include Akzo Nobel, Argos, Boots, DFS, Halfords, Homebase, Hotter Shoes, Game, Jacques Vert Group, Kiddicare, Morrisons, Pets at Home, Selfridges and Premier Farnell.

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Top brands in consumer-focused industries such as retail, financial services, hospitality, entertainment, and telecommunications rely on The Logic Group to enable them to deliver enhanced shopping experiences for their customers.

We unlock the profitability of customer interactions through innovative payment, reward and loyalty services combined with actionable insight for delivery of increased customer engagement, retention and spend.

As consumer spend increasingly moves online and mobile we can help companies to harness key innovations including touch-and-go, digital wallets, social commerce and cross-border trade to get, grow and keep profitable customers. With over 25 years of experience, The Logic Group is a trusted partner to card acquirers and schemes, alternative payments services, mobile network operators, systems integrators and regulatory industry bodies as well as prominent high-street brands with up to 60% of our target markets as clients.

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T-Systems MMS is the largest and most successful Internet agency in Germany and it has maintained this position for over 10 years. This has been achieved by bringing together innovative solutions with the corresponding expertise from across the entire organisation to offer a full Web-service portfolio of solutions. From Web-centric strategies, to highly secure and reliable applications, we offer the entire spectrum of services, enabling our customers to get the very best solutions at a reasonable cost. With extensive experience ranging from Internet and Intranet portals, as well as social enterprise to team collaboration, e-commerce, mobile solutions, tablet applications and content management, our specialists work in a wide variety of business sectors. Our qualifications enhance your digital presence on the market and keep you one step ahead of your competitors. Our 1,400 web experts handle more than 1,200 projects per year for companies of all sizes including large, medium and small companies across a diverse range of industries.

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Webcredible is a pioneering customer experience design agency. Our work delivers coherent, elegant and highly successful brand experiences that make websites, mobile web and apps, applications, intranets, and in-store interfaces more effective.

We pride ourselves on our insight-led customer experience strategy and design approach, which includes in-depth customer research, business & market insights, planning & strategy, user experience design, visual design and user testing services.

We're passionate about understanding the way people interact with brands, products and services. By researching people's natural behaviours we design fully optimised customer touchpoints that lead to demonstrable success for our clients around the world, including ASDA, Laura Ashley, eBay, Liz Earle, TMobile, Hotels.com, Pearson education, Avios and lots more.

Casting the net

GAINING NEW CUSTOMERS CAN BE A TOUGH CHALLENGE. IN A COMPETITIVE ONLINE MARKETPLACE, RETAILERS SHOULD BE MAXIMISING THEIR CAMPAIGNING FIREPOWER BY USING A MIX OF ESTABLISHED AND DEVELOPING TOOLS AND CHANNELS, WRITES **TREVOR CLAWSON**

Attracting customers to a site and nudging them along towards that all-important first purchase is a notoriously resource-hungry activity, which eats up cash, management time and creative energy. Worse, it's a task where there isn't necessarilly a 'right' way to go about things. As Cyndy Lessing, co-founder of SoSensational, an online fashion retailer selling primarily to women over 45, points out, "There is no single strategy for customer acquisition. You have to reach out to your potential customers in a lot of different ways." To build a customer base, she adds, you have to use the widest possible range of tools and channels to get your message across.

Nevertheless, for most successful online businesses, a strong presence on the major search engines remains the bedrock of acquisition strategy. According to a report carried out by the Henley Business School on behalf of AOL, 74 per cent of UK consumers use search engines to research products and 71 per cent consider so-called organic search as the most trusted source of information. In other words, the search engine is where the overwhelming majority of customer journeys begin.

It's therefore vital that websites are constructed with search engine rankings in mind. It's not enough to provide content laced with keywords.

> **"It's not enough to provide content laced with keywords. The content really has to be tailored and structured to optimise search ranking"**

The content really has to be tailored and structured to optimise search ranking. Certainly that's been the experience of mobile device case retailer Proporta. "Nearly everything we do online now has some SEO science at its core and this goes all the way from changing the category structure of our website, to the naming conventions and keywording we use for new products," says ecommerce and marketing manager Nick Hill. "For example, the word 'device' used to appear over 18,000 times on our website, but how many people search for a protective case for their device? They don't, they search based on their own make and model of phone. So we swapped it out with more customer-relevant keywords and saw an instant uplift."

DISTRIBUTING YOUR MESSAGE.

Search draws in people who are already looking for a certain product but it's also important to distribute your marketing message across the web, with advertising and affiliate marketing as the key tools.

Online advertising has traditionally been used as a direct response tool, although video and large format display are also effective for branding. To put together a campaign, retailers will typically be working with a creative agency and a media buying/planning agency, which may be one and the same. Retailers will also be paying media owners (either directly or indirect) on a CPM (cost per 1,000 impressions) or cost-per-click-through basis.

It's quite a complex marketplace. To place a display/banner ad, a retailer (or an agency) might go direct to media owner and negotiate a price. Or arrange to have ads served to specified audiences (age, demographics, interests, etc) by a specialised ad-serving network. Or retailers can bid to have ads served against keywords at a search engine. Bidding on popular keywords might be costly, but by using third-party research on search terms – such as Experian's Hitwise – retailers can identify less popular keywords that nonetheless deliver customers. This will reduce bidding costs.

Affiliate marketing has long been a mainstay customer acquisition strategy, as important to big retailers such as John Lewis as it is to smaller players.

The affiliates – third-party sites – may carry content such as blogs or articles with embedded links or display ads. Equally, and this is at the big-money end of the market at the moment, the affiliate partner might be a price comparison or voucher site. When the consumer clicks through from affiliate to advertiser and makes a purchase, a commission is paid.

As Mark Havilland, managing director of affiliate marketing company Rakuten Linkshare explains, affiliate networks offer a wonderful way of building partnerships and distribution networks at very low cost; "For larger advertisers an affiliate programme creates a big advertising spread to generate desire for the product." Affiliate schemes rely on underlying technologies track traffic from affiliate partner to the advertiser and attribute sales accordingly. It's a system that makes it very easy to track ROI. Advertisers should also use the data to identify the best performing affiliates. This can help shape the future shape of the affiliate programme.

EMAIL FOR ACQUISITION

In recent years the perception of email has shifted. Once it was seen as an acquisition tool but today it is often considered more useful as part of CRM strategy.

However, as Dela Quist, CEO of email agency Alchemy Worx explains, email can be used to nudge potential customers towards the point where they make a purchase. "The costs of sending an individual email are close to zero," he says. "If you have a customer's email address then a mail campaign is the cheapest way to get your message across."

Typical strategies include inviting interested web visitors to sign up for newsletters, which can then be used to retarget through relevant marketing content.

Ten issues to consider

1 **Content remains a key driver for customer acquisition:** this is true across a whole range of strategies including search, email marketing, affiliate marketing and creating a social media presence. Treat content creation as a publishing operation and work with an agency or agencies on a schedule that will keep material fresh and relevant.

2 **Email can be used to drive that all-important first sale:** however, it's important to get a clear opt-in from the consumer. If working with an agency, choose a supplier that can help build a strong list of opted-in recipients. Measure success across a range of metrics including open rates, click-throughs and shares. Remember increasing numbers of emails are opened on mobile devices. Ideally, landing pages should be optimised for mobile.

3 **Focus social media campaigning:** concentrate on those platforms where your customers can be found. In addition to Facebook, Twitter and YouTube, specialist blogs and emerging platforms such as Pinterest can be useful. Provide content that is of value to the customer. Work with an agency to measure engagement through views, shares and likes. Facebook's newsfeed system filters posts. Use an agency that understands the filtering system to maximise the visibility of posts.

4 **Data matters:** check an agency has the skill-sets to generate, collate and interpret the data that underpins online marketing.

5 **Always ask for evidence:** ensure that an agency or supplier has a track record of delivering on relevant objectives.

6 **Tailor affiliate marketing campaigns:** work with media partners that are in sync with your brand. For instance, if you are selling premium/high-end products that should be reflected in the makeup of your affiliate network.

7 **Consider the relationship between the advertiser and affiliate:** this can be managed in-house but can also be outsourced to the supplier. Indeed, for relatively small retailers, outsourcing to a network may be the best solution. "I appointed an affiliate network to achieve scale far more quickly we could using out in-house programme," says Nick Hill. "As a result, Affiliate sales jumped 103 per cent in the last year."

8 **Fully understand the range of services on offer from suppliers:** for instance, will an email supplier or affiliate network supply effective consultancy and planning in addition to technical facilities? If the business has an international element, consider an agency that has experience working in other markets.

9 **Sympathetic partners:** look for creative teams and account managers that fully understand the company's business model.

10 **Set clear objectives:** ensure the results of any campaign are measured by metrics relevant to your business.

The shock of the new

The online marketing landscape is changing rapidly as retailers adapt their strategies to embrace new channels and shifts in consumer behaviour. For instance, social media has emerged as an acquisition tool in its own right and it is now commonplace for retailers to use Facebook, Twitter and YouTube to post product information. More recently, Pinterest – a social media 'pinboard' on which users share product information, pictures, videos and information with like-minded individuals – has been successfully used as a promotional tool.

Arguably, the most important attribute of social media is that consumers use them in their millions and the appeal of, say, Facebook crosses demographics. For example, SoSensational has found that trends in Facebook usage dovetail neatly with the company's target market. "We use our Facebook page to talk about products and we encourage people to like and share," says Cyndy Lessing. "Our audience is there. Women over 45 represent one of the fastest growing groups on Facebook."

Facebook pages provide a useful hub on which committed fans can feast on product information. However, retailers posting product updates on the company's own pages can't assume these updates will appear on the newsfeeds of all their fans and followers. Facebook filters posts using a system called EdgeRank and if there are 10,000 people on a 'like' list, only a percentage of that number will see every status change. Put simply, only those that regularly check a retailer's page or interact with updates by sharing and liking will receive everything sent. However, EdgeRank favours some forms of content, such as video, and retailers can increase visibility by making promotions filter-friendly. Alternatively, retailers can use Facebook to send promotions to everyone who has 'liked' the company's page.

> **"The most important attribute of social media is that consumers use them in their millions and the appeal of, say, Facebook crosses demographics"**

To get blanket coverage of a news announcement, Facebook allows companies to pay to promote.

The other huge trend is the rise of mobile commerce, with big players in the market betting that as smartphones become ever more user friendly and ubiquitous, paid transactions will increase. James Connelly of mobile agency Fetch, cites the example of eBay. "It is expecting to do 30 per cent of its business via mobile devices," he says. This will be driven by increasing use of apps and mobile advertising.

MIXING IT UP

Social Media and mobile are playing an increasing role in delivering email messages. Twitter feed or Facebook pages can provide a platform for harvesting email addresses. And once communications are sent, share buttons embedded in the email allow recipients to pass on offers and product news to friends, thus expanding the reach of campaigns.

For instance, working with agency Adestra, hotel chain Celtic Manor encouraged recipients of its emails to share on their social networks or forward to friends in return for being included in a prize draw. After one on month the campaign clocked up 459 forwards and 300 shares.

Mobile technology is also affecting email marketing strategies. For instance, according to research company Experian, around 36 per cent of emails are now opened on mobile devices. Helen Taylor, a data analyst on the company's Cheetah email service says retailers can send emails to

customers with offers and vouchers when they walk into stores. "It's not widespread yet, but a few of our customers are doing it and we expect to see growth in this area," she says.

Senders should also bear in mind that significant numbers of commercial emails are opened on mobile devices and this has implications for the click-through experience. Ideally sites and landing pages should be optimised for handsets and tablets.

SECOND CHANCES

Advertising strategies are also evolving. For instance, retailers are increasingly re-targeting customers who have shown an interest in a particular site without necessarily making a purchase. Using cookie technology, ads from that retailer are served to site visitors for a number of weeks afterwards as a reminder of the products they viewed. "Retargeting enables you to reach people who have already shown an interest in your product," says Elliott Parkas, head of marketing and strategy at media buying and planning agency AdConnection. That improves the chances of a clickthrough and ultimately a sale.

Facebook also offers a retargeting service of sorts. In addition to targeting ads according to stated interests and demographic profiles, the social network's Facebook Exchanges serves up creative on the basis of users' recent browsing history.

Smartphones provide yet another ad-serving medium. It's currently an underused channel. "That [unsold inventory] is keeping costs down."

Speaking from experience

Gone fishin'

"You have to fish where the fish are. It is a relatively cheap marketing channel to maintain and we can have a great dialogue with both our existing and prospective customers. We have all the usual channels: Facebook, Twitter and YouTube accounts, plus Pinterest and Instagram. We spend a lot of time maintaining and building our own network of YouTube video reviewers and, as a result, YouTube is our most effective social acquisition channel." **Nick Hill, ecommerce and marketing manager, Proporta**

Keywords are key

"You need to use the right keywords. For example in the jewellery sector, typically people will search for 'designer' jewellery or 'bespoke' jewellery rather than 'luxury' jewellery. You need to use the right keyword." **James Murray, analyst, Experian**

Something for something

"Offer something. When a customer visits your site, offer to spend news of special offers or a regular newsletter in return for the email addresses" **Richard Gibson, director of client services, Return Path**

In summary...

The customer acquisition landscape is becoming ever more complex as tried and trusted technologies and tools rub shoulders with the rapid evolution of social and mobile networking. An effective search strategy is vital as this is where the majority of web consumers begin their product research. Meanwhile, advertising provides a direct response channel, affiliate programmes enable retailers to distribute marketing collateral across third-party sites, and email can help bridge the gap between initial interest and conversion. But these tools do not exist in a static environment and increasingly their effectiveness is being enhanced by mobile technology and social media developments.

The key is to build a campaign that reflects both company resources and the habits of the consumer. Following the marketing mantra 'go where your customers are', social media marketing is an obvious extension to existing search and, say, affiliate strategy. Facebook and Twitter provide a means (potentially) to reach a large audience for very little cost, and both can be used for either acquisition or CRM. However, social media is about content creation and it's important to work with agencies to produce engaging posts and updates.

For smaller retailers, advanced mobile strategies – such as serving offers to customers when they're out shopping – is something for the future but ad campaigns can certainly be extended to mobile if it make sense for the company's audience.

And increasingly all these things are interconnected with, for example, content created for social media feeding back into a stronger presence on search engines. It's important, therefore, to work with agencies that see the bigger picture.

Personalised messaging creates the perfect fit.

The Bronto Marketing Platform is the ultimate solution for retailers to drive revenue through email and cross-channel marketing. With Bronto, it's easy to analyse, target and reach your audience with highly-tailored, truly personal messages that get noticed, get clicks and get orders.

Find out more at **bronto.com/tailored**

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Email marketing improvements

Bronto
Email Marketing for E-Commerce

Moda in Pelle launched in the mid-'70s with a single store in Leeds. It has since grown to be a national boutique brand, with more than 30 stores and concessions situated in prime retail locations across the UK. A high-fashion shoe brand that has been a favourite of British women for close to 40 years, Moda in Pelle combines catwalk-inspired designs with a unique feminine approach and incorporates seductive styles with a modern edge.

Moda in Pelle selected Bronto Software as its email-marketing platform in May 2012, and in only seven months has experienced incredible growth.

THE SITUATION

Moda in Pelle had three main email marketing goals when they signed-on with Bronto: (1) to implement and move data into Bronto quickly, easily and seamlessly; (2) to segment data in order to send targeted email campaigns to smaller proportions of contacts instead of one email sent to all subscribers; and (3) to improve efficiency and accomplish more with limited resources by automating more of the segmentation and mailing process. By reducing the time to create segments and send email campaigns, the retailer could spend more time focusing on the creative and the content that would drive revenue.

SOLUTION AND RESULTS

Immediately upon switching to Bronto, Moda in Pelle saw an improvement in deliverability and a corresponding five per cent increase in open and click rates, as well as two per cent increase in conversion rates.

Moda in Pelle moved quickly to take advantage of many aspects of the feature-rich Bronto Marketing Platform. The company began to test and implement new ideas with each marketing campaign, leading to better results each month, for example, by initiating a welcome series to engage new subscribers. Moda in Pelle created this as an automated program in Bronto, and in just two months the revenue being generated was far more than expected. At the rate it's going, in one year, Moda in Pelle will have generated the equivalent of a whole extra month's worth of revenue – that's like having 13 months in one year! And this is just from implementing one simple series.

Moda in Pelle also began A/B testing in order to increase open rates. Using the simple Bronto A/B testing functionality, the retailer tested subject lines and other message elements, leading to as much as a 30 per cent improvement in open rates.

In addition, Moda in Pelle has begun to re-email subscribers who did not open an email, using a different subject line and email creative to remind them that the offer would end soon. These reminder emails, which are scheduled using automation, have provided as much as a 50 per cent boost in revenue over the initial email. In the company's summer sale, re-emailing generated 12 per cent of the overall campaign revenue.

Looking at these programmes and improvements together, it has been a very successful year for Moda in Pelle. Comparing the seven-month period in 2012 in which the retailer used Bronto to the same period in 2011, Moda in Pelle increased their email revenue by a phenomenal 239 per cent. This is only the beginning. In 2013, Moda in Pelle is looking forward to using the Order Import functionality to be able to access customers' past-purchase data, and to use it for better segmentation and more targeted campaigns and messages.

For more on Bronto Software, visit bronto.co.uk
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Adestra is a leading Email Service Provider. Hundreds of organisations and thousands of users trust us to grow their email marketing strategies. Our global presence spans Oxford, London and New York. So wherever you are, you'll receive consistent email marketing solutions that deliver results. Since forming in 2004, we've worked hard to become one of the industry's most respected names. Our success is driven by our innovative technology, excellent client service and proven deliverability. Adestra's MessageFocus is an enterprise email marketing platform built around a unique, multi-tiered account structure. The innovative system structure allows all our clients' brands, or business divisions to exist together, within one MessageFocus account. Client service is also at the heart of everything we do. Our team of expert Account Managers are on hand when our clients need them with the technical and strategic knowledge they need really deliver results. And the MessageFocus support team are available with expert system knowledge, helping our clients get their emails out the door on time, every time.

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Delivering personalised customer experiences for the world's most popular brands, Certona is the leader for true omnichannel personalisation. Trusted by more than 400 top ecommerce sites, Certona's real-time personalisation platform increases engagement and conversions by leveraging Big Data and serving up individualised content, promotional and product recommendations across all customer touch points. Combined with a flexible business rules engine, marketers can harness the power of real-time behavioural profiling while maintaining control over their recommendation and personalisation strategies. Personalise Anytime Anywhere: Certona.com

"Certona is a true business partner that acts with our interests in mind. Their team proactively suggests new strategies that consistently prove to grow our key metrics and top line revenue." ***Ellen Gooch, Sr. eCommerce Analyst, SoftSurroundings.***

"Certona has helped us grow sales on our site and it has been a very dynamic partner helping us implement and optimize on our new website...Thanks Certona for being a great partner!" ***Frank Van Der Ree, VP Online & Offline Marketing, Utrecht***

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Cross-channel traffic

ECOMMERCE IS NO LONGER CONFINED TO THAT BORING OLD GREY BOX, THE PC, CUSTOMERS NOW SHOP ACROSS DIFFERENT DEVICES AND CHANNELS. THIS PUTS THE ONUS ON RETAILERS TO ENSURE THAT CUSTOMERS HAVE AN OPTIMUM EXPERIENCE HOWEVER THEY CHOOSE TO SHOP, ADVISES **JONATHAN WRIGHT**

If, in the comparatively recent past, retailers could be forgiven for thinking of the era of cross-channel retail as being almost mythical, a time forever just over the horizon, that's no longer true. Over the past year, there's been a huge – and ongoing – growth in smartphone and tablet use within ecommerce. In addition, forward-looking retailers have increasingly begun to bring digital technologies into the bricks-and-mortar store. The cross-channel age has begun in earnest.

For those working in such areas as design, usability, analytics and site performance, this poses huge problems. Where ecommerce design was once all about optimising performance on a single channel, the website, retailers now have to think about the dynamic interplay between different devices and channels. It's a challenge defined by Giles Colborne, managing director at usability experts cxpartners, in the following terms: "The number of devices people are using is increasing, the number of people is increasing. You have to be able to support customers across a multiplicity of devices, but not let your cost base rise too much."

UNDERSTANDING CUSTOMER BEHAVIOUR

So precisely how do retailers go about buying in the expertise and technology needed here without incurring overheads that make the whole exercise prohibitively expensive? One key, according to Catriona Campbell, director of customer service agency Seren, is to put resources into understanding how customers behave across different touchpoints.

> **"Where ecommerce design was once all about optimising performance on one channel, the website, retailers now have to think about the dynamic interplay between different devices and channels"**

While this is still a comparatively new idea for many retailers, it's something the travel industry has been doing for at least a decade, so that a company such as Thomas Cook has an understanding not just of how customers are using its stores, website and call centres, but will also have produced customer-journey maps that encompass Opodo or consumers booking flights direct with airlines.

"Mature customer-service organisations look at every piece of the puzzle," says Campbell, "so they're looking at mapping the external touchpoints, and that's a really key point, because even some [retailers that] are becoming mature don't seem to 'get' things like using smartphones in the engagement."

This kind of customer-journey mapping, it should be added, doesn't necessarily come cheap. However, the alternative may be losing customers, who are put off by poorly designed experiences. "Shoppers are much more demanding than they were a number of years ago," says Andrew Fowler, country manager UK with search specialists Apptus. "They're more informed generally, they're more connected and they have more information at their fingertips, so that if you don't give them the experience on your site, they are generally going to go somewhere else."

THE DESIGN PROCESS

Clearly, though, preventing customers going elsewhere isn't enough in itself, retailers also need to drive sales. Methods employed here may include an increased use of rich content, more personalisation or more emphasis on optimising experiences for different kinds of devices.

But whatever solutions retailers adopt here, it's important to find partners that will see the design process through from planning to ongoing implementation. "You need to do the design and make sure it works across its lifecycle," says Giles Colborne. "Often when someone pitches to you, what you're getting is a sample of pages put together by an art director, whereas when a website is in full operation it won't be put together by an art director but by your junior production staff."

To take a practical example here, photography is becoming a key tool within ecommerce, and increasingly images need to be served up in different formats across different channels – the web, mobile, in-store, even television. If this process is overly complex, an all-too-likely scenario is customers getting images that aren't optimised for the channel they're using.

MEASURING RESULTS

In such a case, it will be obvious that user experience is unsatisfactory, but things aren't always so clear-cut. One of the problems with measuring performance in cross-channel retail is the sheer complexity of customer journeys. How, for example, does a big retailer that's, say, running TV ad campaigns and SEO campaigns at the same time as it's going through a site redesign and revamping its shops measure the relative return from each activity?

This in part explains why companies are looking carefully at the (big) data that underpins modern retail. As Roger Brown, CEO with search specialists Peerius, notes, companies are increasingly asking: "How do you harness big data and get actionable insight out of it? More and more we're seeing that retailers want data, they want to know exactly what their users are doing, how to target their users better."

The new generation of technologies within analytics promises far greater sophistication here, but a certain amount of wariness may be appropriate, especially when retailers are confronted with technology companies that confidently promises increased conversion rates. Dig into these numbers.

"I think experienced commerce managers and multichannel directors need to start digging into some of those statistics to see what they're actually measuring," advises Andrew Fowler, "to work out how you're going to try to measure the ROI afterwards and come up with a plan."

Ten issues to consider

1. **Increasingly, all retail is cross-channel:** retailers have to design and build digital experiences that work for consumers who happily switch from channel to channel and hate it when they hit friction points in these cross-channel journeys.

2. **Keep it simple:** "[During the design process] every single point in the experience needs to be moved from the crafted thing you think you're buying to the maintainable thing you need to put through the mill every week," says Giles Colborne of cxpartners.

3. **Allow time for fixes:** corners always get cut during the design process because of time constraints. Plus there will always be unexpected problems. Build in time to circle back and get things right.

4. **KPIs, however defined, matter:** yes it's tough to track customer behaviour across different channels, but that's no excuse not to try.

5. **Embrace changes in customer behaviour:** customers are working out how they want to use new devices and channels. Retailers can influence behaviour, but in the end it's customers who will decide how they want to shop and retailers are unlikely to deliver a great user experience by fighting this behaviour.

6. **Look for a cultural 'fit' with suppliers:** "If you're going to hand over a lot of the merchandising and customer experience to a piece of software, you have to work very, very closely with [the] organisation [that supplies the software]," says Andrew Fowler of Apptus, "and you need to know that they understand not just about computing and software, but also merchandising and selling online."

7. **Share the love:** seriously consider whether suppliers that propose black-box solutions or projects that rely heavily on experts (see point 2) are being overly prescriptive. "A good question is: what client support do you offer? How often are you actually going to come in and give us some insight?" says Roger Brown of Peerius.

8. **Do suppliers play nice?** "I think suppliers need to be aligned with complementary suppliers a lot more than they currently are, and in so doing be able to present to a retailer a good end-to-end proposition," says Roger Brown.

9. **Think about big data:** remember that back-end information drives front-end experiences.

10. **Speed matters:** customers want 'instant' information. If it's digital and it isn't fast enough, it isn't a good user experience.

Data-driven world

Even in the age of cross-channel, interface design within retail is still primarily associated with websites accessed via desktops and laptops. However, that's changing rapidly as new kinds of devices and technologies come onto the market. This is, in turn, changing ideas around interface design and user experience.

Consider tablet devices. It's all too easy to view these either as cut-down PCs or smartphones on steroids, to build a description around a comparison with other devices. But while neither of these descriptions is wholly inaccurate, neither is particularly useful in capturing what's unique about a tablet: its combination of a relatively big screen and the faster navigation that stems from 'swiping' rather than using a keyboard and mouse. This means pages need to load far more quickly as customers flip through pages and, when it comes to ecommerce, lists of products.

This may not sound too revolutionary, but think about the following: Argos is planning to replace its in-store catalogues with screens, probably tablet-like devices. "You think how fast you can whip through a plastic catalogue in Argos, get to where you want, now you've got to replicate that on a device," points out Andrew Fowler of Apptus. "That's got some serious technology connotations."

> **"The booms and peaks in internet growth always come around the availability of new technology"**

THE NEAR FUTURE

Other developments suggest the same theme. The recent sale of 4G licences, however disappointing this might have been for George Osborne in terms of what it delivered to the Treasury, may ultimately be seen as far important in prefacing real changes in consumer behaviour. That's because, and this is always supposing phone companies make the necessary investments in infrastructure here and get the pricing right if this is to happen anytime soon, it holds out the promise of super-fast broadband on the move.

"The booms and peaks in internet growth always come around the availability of new technology," points out Giles Colborne of cxpartners. "When home broadband came in, the internet stopped being a theoretical thing and started being a genuine tool. When relatively cheap 3G came in plus the device that could browse the internet properly, that's when mobile took off. The use of video technologies in mobile is absolutely dependent on 4G."

Already, says Colborne, he has friends in areas with reliable 4G coverage that have stopped using their home broadband connections. Consumers, it seems, don't have any particular loyalty to the PC when they're presented with other options.

HYPER-CONNECTED WORLD

These kind of scenarios, however, are only the beginning. According to Giles Colborne, we're entering what he calls "the post-mobile world", where our interactions with digital technologies aren't just via devices we consciously choose to use. "We're talking now about the 'internet of things', where so many of your devices are connected that you're interacting with online experiences that are not mediated through a computer screen," he says.

Take a situation such as arriving at the supermarket by car. Already, many car parks have sensors to show whether a space is occupied.

Now take that idea on a stage: what if the car park 'knows' whose car has just pulled up and 'tells' the supermarket, which in turn 'knows' what the customer usually buys and sends individually tailored offers based on this information? It's not as far fetched as it might sound.

"The future is for all that sort of data to be available online," says Colborne. "What that means is we're going to have a world that from today's perspective feels kind of magical – where [the internet] knows where you are, what you want and where you're going next. Your data will follow you around through a highly connected world."

Such a world is probably around about a decade out, yet the direction of travel is clear, and these aren't scenarios that bigger retailers in particular can afford to ignore. That's not to say retailers should be spending vast amounts of capital here in duplicating the work of research labs and futurologists, it's more a case of keeping a weather eye for what lies ahead.

This means choosing partners and technology suppliers that have an awareness of the issues here – and can demonstrate that awareness by talking knowledgably and even perhaps discussing R&D projects – because guaranteeing a consistent user experience in such a hyper-connected world is going to be tough. Indeed, as Giles Colborne notes, the whole area of designing user experiences across different channels is becoming so complex that it arguably needs to be viewed as a full-time and ongoing job, perhaps undertaken with a strategic partner, rather than something to be tackled on a project-by-project basis. ●

Speaking from experience

Social factors

"The age 18-25 demographic buying a flat for the first time, or a car for the first time, are actually resorting to their own networks to say, 'I'm buying a car, what do you think, is it a Ford Fiesta or is it a Polo?' [Retailers need to have this behaviour] as an influence in the customer-journey map." **Catriona Campbell, director, Seren**

Work with the tech

"We can automate a lot of the user experience, but we're not excluding merchandisers and marketers from the process, we're saying they need to be inclusive – the more they invest in terms of time with the technology, the better performance they'll get, ultimately." **Roger Brown, CEO, Peerius**

Sharing data

"If your search tools and optimisation tools aren't linked in with your recommendation tools, you run the risk of both tools recommending the same product on the page. It's very important that some of these key customer experience applications are joined up. Now whether it's one solution delivering all of them or better-integrated vendor solutions, I'm not sure it matters, but it's more beneficial if each of these vertical point solutions are aware of each other's data." **Andrew Fowler, country manager, UK, Apptus**

Dependency culture

"I think the traditional model for a lot of agencies is to make clients dependant on them in some way. If you are going to put together a successful ecommerce site I don't think that approach is legitimate. You have to make the client independent of you." **Giles Colborne, managing director, cxpartners**

In summary...

If there's a central message that comes out of focusing on user experience, it's that customer behaviour constantly changes. Take something as simple as voucher codes. Typically, retailers ask for these close to the end of the checkout process. "At that point it's too late because what they're doing is leaving your site and trying to find a voucher code," says Seren's Catriona Campbell. "If they can't find one, they're assuming you're not offering voucher codes and yet you've got it on your website. They're feeling incompetent because they can't find the voucher code."

In other words, the retailer has introduced a stress point just as a customer was about to part with hard cash. Wouldn't it be better, suggests Campbell, simply to offer a voucher code to all customers if there's one to be found elsewhere because a company is, say, running a promotion with affiliates?

The underlying lesson here is that retailers need constantly to adjust and refine what they're doing. Best-in-class companies that work across the different user experience disciplines – from personalisation to analytics, design through usability – have this deep in the company DNA.

For this reason, if we had one overriding piece of advice to offer when procuring such services, it would be to look for this sense of curiosity about customer behaviour. However, we'd add the following important caveat: it's a sense of curiosity that needs to be allied a strong commercial sense. Understanding a customer's behaviour is, after all, a comparatively straightforward matter compared to changing it.

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RichRelevance powers personalised shopping experiences for the world's largest and most innovative retail brands, including Wal-Mart, Sears, Target and others. Over 850 million times per day, RichRelevance is powering the personalised shopping experiences for consumers shopping the world's largest and most innovative retail brands like Marks & Spencer, John Lewis, CDiscount, Walmart, Sears and Target. Founded and led by the ecommerce expert who helped pioneer personalisation at Amazon.com, RichRelevance helps retailers increase sales and customer engagement by recommending the most relevant products to consumers regardless of the channel they are shopping. RichRelevance has delivered more than $5.5 billion in attributable sales for its retail clients to date, and is accelerating these results with the introduction of a new form of digital advertising called Shopping Media which allows manufacturers to engage consumers where it matters most – in the digital aisles on the largest retail sites in world. RichRelevance is headquartered in San Francisco, with offices in New York, Seattle, Boston, London and Paris.

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SDL Fredhopper is headquartered in the US and has offices in London, New York, Munich, Paris, San Jose, Sydney, Amsterdam and Sofia.

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Retailers turn to Salmon to define the right digital strategies and make the correct investment decisions to improve their online competitive advantage and extend brand loyalty. For many, this centres on the development of effective B2C eCommerce websites, optimising customer experiences and executing multi-channel strategies effectively (i.e. optimisation, coordination, integration and synchronisation). Additionally, businesses are turning to Salmon to help them with their mobile sites and apps as well as expanding their market and eCommerce offering internationally. We implement solutions that centre on two key aspirations - increasing revenues today, and putting in place technical platforms to support sustainable and profitable growth for the future. With a unique combination of technical and business expertise, Salmon provides digital consulting, design, delivery and support services. Our pedigree is clear.
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Search Laboratory delivers profitable search engine marketing campaigns, including mathematical PPC and customer-centric SEO, to clients in 18 countries worldwide. Working in over 35 languages, Search Laboratory can help you deliver more revenue from your existing search marketing or help you tap into new markets overseas. Search Laboratory works with a number of key players in the online retailing industry. It has significant experience of working with ecommerce clients ensuring they improve their presence online in search engines like Google, and ultimately increasing their profits from online retail channels.
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SLI is the leading SaaS-based site search provider and trusted brand to the Internet Retailer Top 500 and Top 1000. Today, SLI Systems' hosted search offerings serve more than 400 ecommerce, corporate internet and other content-rich sites, including Wickes, Boden, B&Q, Lovehoney, Which? and others.

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Webcollage is the world's leading software-as-a-service (SaaS) solution for providing rich product information to retailer ecommerce sites, including optimised mobile commerce content for enhanced multichannel shopper experiences. Our solution offers automated, real-time publishing to a broad global network of retailers and easy-to-use online tools for assembling rich product information for prominent product displays across the retail channel. Webcollage helps manufacturers and retailers provide shoppers with consistent, up-to-date product and brand information at key ecommerce and mcommerce touch points, which have been consistently measured to:

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Customer-centric search

LEARN HOW YOUR BUSINESS CAN CONVERT MORE CUSTOMERS AND GET GREATER CUSTOMER VALUE BY TURNING SEARCH FROM INTO A SOPHISTICATED SALES TOOL RATHER THAN AN ADD-ON AND AN AFTERTHOUGHT. **MARCUS AUSTIN** REPORTS

The mixture of merchandising and search, searchandising, has been around for at least a decade. However, it's only comparatively recently that businesses have started to be more creative and systematic in their use of searchandising. Also in recent years, tools have started to move away from the basics of 'people who bought this also bought this' to tools that can produce real, quantifiable results when used well.

If companies can find the right technology, that is. One of the big problems retailers have with searchandising solutions is that vendors can't agree on consistent terminology. If you search Google for 'searchandising', you'll find surprisingly few articles or products. Ask vendors about searchandising and you may even be told searchandising doesn't exist, and that what you're looking for is 'personal search', or as Joelle Kaufman, head of marketing at Bloomreach describes it, "consumer-focused marketing". The problem for many vendors is with the word 'search' and what it implies. As Kaufman says, the essence of this solution is that it's "not about manipulating search, it's all about being consumer-centric". In addition, there are as yet no one-stop searchandising solutions – and hence any retailer looking for a searchandising solution may find itself with applications from two or three vendors.

The one thing that all the vendors agree upon is that searchandising can – if built in properly to overall operations and used in the appropriate places – provide an effective return. Increases in revenue from applying searchandising techniques range from a few per cent up to 10-30 per cent, depending on who you talk to, the way you measure search and the sophistication of the retailer. As Allyson Tremblay, UK sales director at Fredhopper explains, "We are consistently seeing improvements of 20 to 30 per cent from day one, but that's from a combination of increases in conversion, increases in average order value, and the number of items in a basket – and if you want to tweak it and refine it, then that could be a lot higher."

> **"Increases in revenue from applying searchandising techniques range from a few per cent up to 10-30 per cent"**

Searchandising is not for all companies, it works best with retailers with plenty of products and where the products have many different options. Joelle Kaufman has done the math, which shows the need for some sort of automated solution is required at around "1,000 products or more". While searchandising can work for retailers with a small number of SKUs, according to Kaufmann, "For most smaller retailers it's almost easier, and a lot cheaper, to do the work by hand."

At its most basic level, searchandising solves the basic user problem of too much choice. Kaufman elaborates: "When customers are faced with huge amounts of data, they do what any rational person would do, they'll try to limit things, and they limit on what they are interested in and what their intent is." For example, without searchandising a search for the phrase 'A-line dresses' would produce a list of thousands. With searchandising, customers see a list that has a search navigation panel that allows them to slice-and-dice the options. So a click on the 'red'

option – known as a facet in searchandising – cuts down the number of dresses shown, and a further click on 'size 12', cuts the results down even more.

Searchandising at this level has been around for some time and is either built in to ecommerce packages or it's available as a simple add-on. However, André Brown, CEO of Locayta, warns that just taking the default option is often not enough in itself. "You can implement a system that's basically a black box, you plug it in, and it'll start to spit out recommendations and probably on the whole it will do a good job," he says. "That's great until the marketing director says, 'I don't care what the recommendation algorithm says I want it to recommend this.'"

INVEST FOR FLEXIBILITY

By purchasing a dedicated solution, retailers can add features based on simple rules, for example, is the product in stock? Or only show recommendations with higher margins, show remaindered stock, put newer products at the top of the list. But just applying rules isn't enough. Companies need to be able to be creative with positioning and test constantly. "There's no point in having searchandising if it's not flexible," says Brown, "for example, if you find that upselling works really well at the product detail page but accessory recommendations work better on a checkout page, then unless you have some control on how you filter products by category, price, etc then the effort you have made is wasted."

Elias Moubayed, head of UK business development at Certona, also recommends that retailers should also have different results in different places on the page: "If you have different slots on the page then put the bestsellers in one place and special offers in other places. And as you see the user move through the site you can start to be more predictive. So if they're in the shoe section, then you can start to show results that are filtered to that section, as well as offering more targeted 'complete the look' type recommendations."

Searchandising can also improve navigation choices, as Allyson Tremblay explains. "Search gets talked about a lot, but navigation gets ignored," she says. "When you click around on a site, who decides what products come to the top? The solution is to use your results in your navigation, for example, ranking navigation choices on what converts best on Google analytics."

David Johansson, marketing director at Avail Intelligence agrees: "It's all about usage, you still see retailers just putting search on the product pages and ignoring the category pages."

Lastly, choose a solution provider that doesn't just sell the product and go away until it's time for the contract to be renewed. "Any good searchandising provider will have a really good consultancy," says Tremblay, "and will offer some kind of optimisation programme."

Ten issues to consider

1. **Consider an outsourced solution:** "As a retailer I'd want all of the functionality now and I'd want it cloud based so I'm not paying for things that we don't use," says André Brown, CEO at Locayta.

2. **Consider future needs:** being locked in to using inappropriate technology is self-evidently not a good idea. "It's like buying a car and realising that you should have bought a 4x4 and then extending the car, it's not really fit for purpose," says André Brown.

3. **Constantly refine search terms:** "Users change the way they search, and your data is constantly changing, so your searchandising strategies need to reflect that," says Angel Maldonado, director of innovation at Colbenson.

4. **Suppliers should provide a 24/7/365 service:** "Retailers should look for a supplier who can really manage the service, and be available for long-term support, and scale with the retailer's plans," says Allyson Tremblay, UK sales director at Fredhopper.

5. **Navigation matters too:** searchandising choices should also help model your site navigation.

6. **Think international:** "Most of the growth that retailers predict over the next few years is going to become from international sales so more retailers are looking for a search solution that scales internationally," says Allyson Tremblay.

7. **Add social networks:** while the jury is out about how to do this or how effective social is, it's still worth a look to see if there's a way of adding in Facebook Likes and customer reviews into your searchandising mix.

8. **A single customer view, no matter what channel:** customers need to be able to see the same choices no matter where they are (mobile/at the till/on the desktop).

9. **Mobile will be an essential part of searchandising in the future:** "The real estate on a mobile is much less so you need to be even sharper about what you stick in front of someone," says Elias Moubayed, head of UK business development at Certona.

10. **Add more data:** "Where searchandising goes next doesn't really depend on the software, it really depends on how much more profile information can be fed into the software to make it more effective," says Allyson Tremblay.

Search and mobile

One of the key growth areas in searchandising – and in every other part of the retail ecommerce market – is mobile. And it's a particularly tricky problem for search. One of the biggest problems with mobile and search is the screen real estate on mobiles. Joelle Kaufman, head of marketing at Bloomreach, explains: "The problem with mobile is customers can't refine easily, the speed of the page load is just so much more intense and the size of the screen means I don't want to see six things on that page, because they're tiny and I can't make them out, but also don't also give me the wrong things."

Mobile and cross-channel retail also create other problems for searchandisers, especially in the area of 'personalised commerce'. One of the objectives of searchandising is to produce a solution that fits the user like a glove, so the user only sees relevant recommendations. However, many of the current solutions are missing a way of making sure that recommendations are consistent across different channels. "As a consumer you want all the channels to be aware of who you are," says Elias Moubayed, head of UK business development at personalisation platform Certona. "If you purchase on the desktop you want the mobile app to know that, and to make recommendations based on that, so it's not a completely disjointed experience."

> **"One of the biggest problems with mobile and search is the screen real estate"**

CONTENT COUNTS

Retailers also need to think more widely about issues around content. Providing recommendations for products is one thing, but converting that browser to a buyer may take a little bit more than just a list of products. To take users further along the path to buying, many retailers are looking at including content such as buying guides, video how-to guides and so on.

"A search shows a customer is showing a lot of intent to buy but it also shows they're struggling," says Moubayed. "By combining products and buying guides and video you help them to get closer to the purchase decision. It's like having a virtualised shop assistant without having the pop-up chat window."

Turning to social, on networks such as Twitter and Facebook, amidst the mass of 'likes' and 'LOLs', there's a lot of recommending of products and services too. Some of the more sophisticated searchandising solutions are starting to use this to create better and more relevant recommendations. David Johansson, marketing director at Avail Intelligence, thinks one of the key reasons to use social is to help refine the search results. "Search is about relevance, and recommendations from your friends, and people who you respect, are more likely to be relevant than something that's been selected by your search," he says.

There are several approaches to integrating social: one is to use the networks as another search filter, where the recommendations are based on the number of Facebook likes, or comments about particular brands in posts on forums and so on.

Another solution is to use social networks as a way of gaining extra insight. "By crossing external data such as Twitter social data with internal data you can be more intelligent," says Angel Maldonado, director of innovation at Colbenson. "For example, if a lot of your Twitter followers are talking about Hunter boots and somebody then searches for boots, then they may be more likely to be looking for Hunter boots rather than [generic] Wellington boots." However, searchandising and

social is still a relatively untried and untested path, and many of the experts contacted said the jury is still out on its effectiveness within search.

KEEP IT REAL-TIME

The immediacy of Twitter highlights another key area of growth in searchandising: providing real-time solutions. Most searchandising is based on using data collected about users over a long period of time. However, there are many situations where it helps to know what the user is doing in real-time before you present them with a list of recommendations. For example, if you normally buy mens' clothes, but you're buying a present for a woman then you don't want to be presented with recommendations based on your last search. Likewise, you also want to be able to reflect what people are searching for now. "If there's traffic coming to a page then you are meeting demand," says Kaufman. "If there's no traffic coming to the page then we should get rid of the page. We identify what's relevant to the consumer by looking at the content on the site – including the reviews description and the images – and matching it to data from the web on what people are searching on."

One last trend is towards cloud-based solutions for searchandising. Real-time searchandising solutions and features such as auto-complete all require some serious amounts of data to be crunched and that requires some big servers, which used to require deep pockets and an intimate relationship with the IT department. With a hosted solution, everything is much simpler and cheaper, which is why more and more retailers are looking for solutions to be delivered this way. ●

Speaking from experience

Think mobile

"With the surge in mobile shoppers, retailers should also present localised information so people can easily see where a nearby store may have the item they're interested in." **Marcus Law, UK marketing manager, SLI Systems**

Keep testing and tweaking

"Typically, what we do with clients is we look at search results quarterly, and see what terms don't get very good results and then act on that. For example, in December there are a lot of searches for 'Xmas' but you probably don't have any products with that name. However, you do have 'Christmas' products, so you create a synonym for Xmas to Christmas, and likewise for things like backpack and rucksack, and quite often for that five per cent of extra work you'll get a 100 per cent return." **André Brown, CEO, Locayta**

Look to Facebook

"Facebook no longer has a search results page and instead has a system based on auto-complete and search. That's because auto-complete is a powerful tool to improve searchandising results and many sites are following their lead. There are many sites where there is an 'add to cart' feature with auto-complete rather than a search results page." **Angel Maldonado, director of innovation, Colbenson**

In summary...

Searchandising or personalisation is in essence about getting closer to the customer and understanding the customer better. At a very basic level, it's about segmenting out customers, based on similar user behaviour. While basic search engines and ecommerce platforms can help here, most retailers eventually turn to a solution that's dedicated to searchandising.

At a more advanced level, searchandising is about taking the information a retailer knows about a customer – or potential customer – and using this information and real-time preferences to help the customer make a purchase. This means either filtering down a wide selection of choices into an easily manageable set of results, or improving navigation and initial search results. Once the right product is found, then searchandising can be used to help the customer make a purchase through displaying additional relevant content, and to attract the customer to purchase more goods with personalised upsell and cross-sell opportunities.

While personalisation can automate a lot of what a customer sees there are still things only a human can do, as David Johansson, marketing director at Avail points out, searchandising will never be able to point you at "brands that are cool" and there's a real danger that if you make it too personalised "then the risk is that the shopper will get confused because the site didn't look like it did yesterday, and they can't figure out why, and they can't turn it off. So while customers do enjoy personalisation, they would like the option to going back to the traditional search results – A-Z, priced high to low and so on."

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A business boost

TECHNOLOGY INNOVATORS LOCAYTA ARE DRIVING REVENUE FOR ONLINE FASHION RETAILERS

Recent statistics show that more than 70 per cent of British consumers now buy online, with fashion one of the fastest-growing ecommerce markets. That's great news for fashion retailers, but making the transition to the digital space is not without its challenges.

Particularly in fashion, shoppers expect a sophisticated level of merchandising akin to the high street, as André Brown, CEO of Locayta, explains: "It's not just about changing product selections or search parameters, it's about creating powerful, personal user journeys that inspire shoppers. That demands an intelligent merchandising strategy that can respond to the customer's individual needs and offer them the same enticing shopping experience that they would enjoy in a bricks and mortar store."

Historically, limited functionality has hindered ecommerce performance across search, merchandising and recommendation strategies. But now a prominent group of fashion retailers are working with Locayta to redefine the online shopping experience.

The companies include Nicole Farhi, one of Britain's most influential fashion and lifestyle brands. In 2012, the company shifted the emphasis of its strategy from traffic and acquisition to improving trust and service fulfilment. William North, eommerce manager, explains, "Part of our issue was our categories, they looked stale. We found it very difficult to merchandise them with the systems we had. I wanted to streamline the user journey by introducing intelligent, faceted search."

Nicole Farhi integrated Locayta Freestyle Merchandising®, a unique technology suite that enables retailers to control every aspect of search, visual merchandising and product recommendations via a single dashboard. The results speak for themselves. "After implementing Locayta Search we're already seeing results," says North. "In the first six-month period, we saw conversions rise by more than 50 per cent, with transactions increasing by 30 per cent and a boost in revenue of 20 per cent."

Freestyle Merchandising offers more than 20 tools to control every merchandising discipline – from display advertising to brand adjacency and mobile site management. Locayta Balance Factor®, a bespoke technology, enables retailers to align product placement. not just to the user's search behaviour but also to behind-the-scenes strategic priorities. At the same time, behavioural algorithms collect and respond to user-generated data in real time, delivering an intelligent and personal response to individual behaviour at every touchpoint.

This experience is echoed by boohoo.com, pioneers of the 'online only' fashion store. Former ecommerce manager Catherine Turner appreciated the system's flexibility between manual and automated control when she was heading up boohoo.com's strategy. "Locayta has many automated response functions and that's incredibly useful," she says. "But when a new buzz hits the catwalk, we can opt in and change our visual displays and search criteria at a moment's notice. We can tie our categories and sequencing into a wide variety of trends, colour stories and collections in line with the latest media coverage. Locayta's dashboard is simple to use and enables us to do that at the touch of a button."

Superdry's experience is similarly positive as Chris Griffin, head of ecommerce, confirms. "It's essential that our international sites compete effectively with localised providers. Locayta delivers the same high-grade performance regardless of which country the site is operating in. Since implementing the system our international ecommerce strategy has experienced four-figure growth."

Mark Wakeley, change manager at Tesco Clothing agrees. "Until we launched with Locayta, our systems just couldn't achieve what we needed to do," he says. "The ability to control product recommendations has ultimately increased conversion rates and order values by enhancing the customer experience on our site."

The company's client-service ethic is beyond reproach too, according to North: "I always find that Locayta deals quickly with support issues. The correspondence and visibility between the technical team and support managers is highly apparent compared to others." All in all, it seems that Locayta Freestyle Merchandising is well and truly upping the ante in terms of modern online journeys for the fashion consumer.

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Demandware Commerce is the only digital commerce platform that delivers the speed, agility, innovation and superior economics required to master the new retail reality of constant and unpredictable change. With intuitive applications for both business and technical users, retailers are empowered to quickly execute omnichannel merchandising and marketing, manage operations globally and develop unique capabilities that differentiate their brand. Seamless upgrades deliver a continuous flow of innovation without disrupting business, ensuring that platform functionality is always current.

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"Certona is a true business partner that acts with our interests in mind. Their team proactively suggests new strategies that consistently prove to grow our key metrics and top line revenue." ***Ellen Gooch, Sr. eCommerce Analyst, SoftSurroundings.***

"Certona has helped us grow sales on our site and it has been a very dynamic partner helping us implement and optimize on our new website…Thanks Certona for being a great partner!" ***Frank Van Der Ree, VP Online & Offline Marketing, Utrecht***

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Javelin Group is Europe's leading specialist consultancy in ecommerce and multichannel retail advising retailers, brand owners and B2Bs on their ecommerce and multichannel strategies, operations and technologies, and developing large-scale ecommerce solutions. Clients include 17 of the 20 largest retailers in the UK plus many others across Europe and beyond.

Javelin Group's multi-channel consultancy services, which include international expansion, help retailers, brands and distributors to grow their sales and coordinate their web, mobile, telephone and store channels for maximum profit. Recent clients include Marks & Spencer, ASOS, Waitrose, Matalan, Warnaco and Bosch Siemens. Javelin Group's ecommerce implementation services include development of world-class ecommerce websites on leading platforms, mobile commerce, and other solutions such as PIM. Services also include rapid international roll-out of multi-country ecommerce solutions. Recent B2C clients include Lakeland, Asda, Direct Wines, Mothercare, Tesco and Debenhams, and B2Bs include Rexel, IMI Norgren, Nisbets and Bobcat.

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Traditional search systems are ineffective for sales channels.

Traditional onsite search tools are not optimized for product retrieval and are ineffective for online sales channels. Typically, customers fail to find what they're looking for in more than half of the visits. By not providing customers with the means to easily explore their catalogue, companies are limiting the sales potential of their sites.

If you can't find it, you can't buy it

With customers failing to find what they are looking for in over half of the visits, the key to increasing online sales is to make it easier for people to explore online product catalogues. Today's ineffective search software is a lottery in which most customers quickly lose interest.

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SDL Fredhopper is the ultimate marketing machine for e commerce. SDL Fredhopper's technologies make it easy for online marketers to systematically improve targeting the right content to the right person at the right time – increasing revenue, profitability and customer lifetime value. SDL Fredhopper offers software products for Onsite Search, Onsite Targeting, Predictive Targeting and Targeted Advertising.

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SDL Fredhopper is headquartered in the US and has offices in London, New York, Munich, Paris, San Jose, Sydney, Amsterdam and Sofia.

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RichRelevance powers personalised shopping experiences for the world's largest and most innovative retail brands, including Wal-Mart, Sears, Target and others. Over 850 million times per day, RichRelevance is powering the personalised shopping experiences for consumers shopping the world's largest and most innovative retail brands like Marks & Spencer, John Lewis, CDiscount, Walmart, Sears and Target. Founded and led by the ecommerce expert who helped pioneer personalisation at Amazon.com, RichRelevance helps retailers increase sales and customer engagement by recommending the most relevant products to consumers regardless of the channel they are shopping. RichRelevance has delivered more than $5.5 billion in attributable sales for its retail clients to date, and is accelerating these results with the introduction of a new form of digital advertising called Shopping Media which allows manufacturers to engage consumers where it matters most – in the digital aisles on the largest retail sites in world. RichRelevance is headquartered in San Francisco, with offices in New York, Seattle, Boston, London and Paris.

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SLI is known for providing stellar customer service, and has built a strong reputation for offering the highest level of responsiveness, flexibility, support, and attention to its customers. You will see this for yourself when you work with us. SLI Systems is a privately held company, with offices in Silicon Valley, London, New Zealand, and Australia.

Cut fraud, not customers

OVER-ZEALOUS FRAUD SYSTEMS CAUSING FALSE POSITIVES CAN DETER CUSTOMERS, WHILE DEMAND FOR MOBILE PAYMENT SYSTEMS AND DIGITAL WALLETS GROWS. **PENELOPE ODY** REPORTS

Managing online payments is a delicate balancing act. Put too stringent controls in place to cut fraud and retailers risk declining too many genuine transactions, losing sales and alienating shoppers. Stray too far in the opposite direction, and chargebacks and losses are inevitable. Implement a high-maintenance or expensive solution and the cost could outweigh the fraud savings,

As Julian Wallis, head of sales, UK & Ireland at Ogone puts it: "An e-tailer should look for the right balance between the three cost pillars of anti-fraud solutions: costs directly related to fraud, missed revenues due to false positives, and the prevention costs invested in anti-fraud tools. An ideal fraud prevention approach invests in tools which optimise these three pillars in line with the retailer's business model."

As well as protecting the company's own interests, e-tailers also have a duty to protect customers' personal and card data – and not simply from altruistic reasons or because of data protection legislation. Retailers accepting card payments must comply with the payment card industry data security standard (PCI-DSS). Failure to do so can lead to security breaches with serious consequences for consumer trust as well as potential fines from the payment-card issuers and the inevitable lawsuits from a litigious public.

"As well as protecting the company's own interests, e-tailers also have a duty to protect customers' personal and card data"

The good news is that today all reputable companies offering payment services will be PCI-DSS compliant and it is also possible to outsource all card data processes or use hosted payment pages so there is no need for the retailer ever to worry about handling such information. "E-tailers should be using a level one PCI-DSS-certified payment service provider (PSP) to ensure that all card data is captured, transmitted and stored securely," says Justin Fraser, sales and marketing director Europe at SecureTrading. "If they wish to host their own payment pages, they need to ensure that they have a secure server with a valid Verisign or similar certificate. They also need to ensure that they are PCI-DSS compliant as they will then be responsible for the capture and potentially storage of the card details. They can also outsource the storage to a PSP by using a tokenisation solution that replaces the card number with a token that customers can use on future purchase."

As well as payment service providers, payment tools used on the site – such as shopping-cart extensions and checkouts – also need to be PCI compliant. "Our shopping-cart extensions are built so that either the customer is redirected to the secure PCI-DSS Ogone platform or an alias is created for the merchant to process the payment," says Julian Wallis. "In both cases, the credit card information is never stored by the merchant. For some shopping-cart systems other extensions have been built by

third parties and we recommend to check their PCI-DSS compliance before using the plug-in."

IS A SHOPPER GENUINE?

While the card data may be secure, there is still the problem of identifying whether the shopper is genuine. Basic checks using address verification systems (AVS) and the card security code (CSC – also referred to as card verification value CVV or CVV2) are well established but are not always entirely foolproof. AVS, for example, only checks numerical data and fraudsters have become adept at creating fictitious addresses with the same house number and postcode numerals which will pass this test. The 3-D Secure systems – such as Verified by Visa – also have their critics as shoppers invariably forget their passwords and cannot face the hassle of resetting them, making such systems a leading cause of abandoned shopping baskets.

"Given the evolution of online fraud, it's very challenging for any e-tailer to prevent fraud without a third-party vendor solution," says Dr Akif Khan, director, products and services at CyberSource. "There are different types of fraud screening solutions available, with the most powerful offering single platforms that provide a broad range of anti-fraud tools. Within these platforms, e-tailers can also build in their own customised rules to monitor for fraud."

Equally sophisticated are risk-based authentication systems (RBA), which are rules-based and allow transactions to be scored against pre-set parameters. Typical is WorldPay's RiskGuardian. "This is designed to profile a cardholder's transaction using a set of knowledge-based rules, parameters and complex business logic algorithms," says chief product officer, Phil McGriskin. "E-tailers should also stay abreast of fraudulent trends by gaining insight from industry bodies such as the Merchant Risk Council and industry peers. A good payment and risk provider should be able to help e-tailers access these forums and information."

With growing use of mobile, retailers also need to ensure that they apply the same diligence to m-commerce payments with optimised payment pages capable of using the same security checks as the normal website. "Our recent research found that only 10 per cent of mobile sites were optimised for payment pages," says McGriskin. "So standard security features accepted as routine on ecommerce transactions were not available in the mobile channel. This in itself increases the security risk of mobile transactions."

Ten issues to consider

1 **Remember PCI-DSS:** check out your payment service provider's certification, it should be level one. The same checks apply to any systems used for card payment handling. If in doubt ask for a review by a third party qualified security assessor. More details at www.pcisecuritystandards.org

2 **How much will processing cost?** "Look at the banks that the PSP is integrated to," says Justin Fraser at SecureTrading. "This will give the e-tailer a greater choice of acquirer and therefore better rates and payment terms."

3 **Go for reliability and security:** ask any potential PSP for uptime statistics and check out their security and anti-fraud measures. If the payment system goes down then no matter how many shoppers are on your site they won't be able to buy. Check suppliers with the Merchant Risk Council or the IMRG and ask for references from other retailers.

4 **What about support?** How easy is to get help from the payment service provider 24x7?

5 **Set KPIs:** agree service levels and performance targets in advance. "Agree KPIs around performance and maximum levels of agreed payment page abandonment with the security measures employed," says WorldPay's Phil McGriskin.

6 **Plan for growth:** will the service provider be able to cope with growing volumes or new international markets? "Consider your own growth and expansion plans in the future to ensure that the vendor capability aligns with them," says Dr Akif Khan at CyberSource. "If you are looking to expand internationally, does your vendor offer fraud-management capability for those markets?"

7 **Think local:** "E-tailers can increase their conversion by offering more local payment methods that customers recognise and trust," says Julian Wallis, head of sales, UK and Ireland, Ogone. "Typical examples are iDEAL in the Netherlands, BCMC and bank buttons in Belgium, and Sofort and Giropay in Germany."

8 **Don't forget integration issues:** what options does the PSP offer? How many shopping cart does it integrate with? How easy will it be to integrate the website with the PSP and what about back office and accounting systems?

9 **Look to the future:** NFC and mobile is on the way. How easy will it be for multichannel retailers to adapt store systems to cope?

10 **Educate your customers:** storing passwords or security information on a mobile device that can very easily be lost or stolen is not a good idea.

New ways to pay and protect

With growing use of mobile systems, greater channel convergence, digital wallets and increased use of contactless payment systems, based on near field communications (NFC), payment and fraud options are set to change significantly in future.

Such systems as MasterCard's PayPass, Visa's V.Me and PayPal are already moving from online and mobile to in-store, and many shoppers will soon expect to be able to pay for their goods at a till point in exactly the same way that they pay online. That could involve a digital wallet, NFC technology embedded in the phone, or even some sort of voice-activated application. For cross-channel retailers it will mean that store checkouts are no longer confined to cash, gift cards or chip & PIN, which may mean an expensive till upgrade across the entire estate.

"In the next five years, insiders expect a majority of brick-and-mortar retail transactions to take place via mobile phones," says Dr Chandra Patni, CEO and CTO at YESpay. "NFC phone-based wallets are expected to provide a new way to perform both card-present and remote payments using secure EMV card payments standards."

"In the next five years, insiders expect a majority of brick-and-mortar retail transactions to take place via mobile phones"

Local payment options are also important especially for retailers looking to increase crossborder sales. "As they expand internationally, e-tailers should be open-minded about changing their checkout options for each of their markets," says Dr Akif Khan at CyberSource. "Buyer behaviour varies between geographic regions, and if an e-tailer doesn't offer a preferred payment option they may lose business. PayPal is very well established, but there are challengers on the horizon, including Google wallet and Visa's V.Me. With the coming rise of digital wallets, e-tailers should be prepared for some of these solutions to become regular fixtures on checkout pages."

Justin Fraser, sales and marketing director Europe at SecureTrading takes a similar view: "For customers, paying via a website is no longer enough. They want to be able to make purchases whenever or wherever they are. What's more they will only buy if they can use a payment method they trust and understand in a currency they recognise."

David Hunter, CEO at Ukash, argues that alternative non-card payments can be just as important in markets where cards are the norm: "For e-tailers who want to grow market share, there also needs to be a recognition that there is a community of shoppers that feel most comfortable transacting with cash," he says. "E-tailers therefore need to offer the choice of purchasing with 'cash' online. Adding payment by cash to the choice of payment options available to customers also reduces the risk of basket abandonment. There's no need for completion of credit or debit card forms – and no concern that by sharing this data the consumer may be a risk of fraud."

DEVICE FINGERPRINTING

Fraud tools are also changing. "Research by Mindwave last year showed that device fingerprinting is one of the most important tools merchants want to consider," says Julian Wallis at Ogone. "Bypassing device fingerprinting systems requires increased sophistication from fraudsters."

Phil McGriskin at WorldPay agrees: "Device fingerprinting to validate the authenticity and geographical location of the computer used in

an ecommerce transaction is becoming a key requirement in the fight against the increasing sophistication of the fraudster."

Customer biometrics could also be on the agenda. "These are the most likely next development, potentially linked to mobile devices," says Justin Fraser. "There are already voice-based solutions in the market place, but they are hampered by the lack of take-up from consumers. Whatever the next step is, it has to be convenient to the consumer to dissuade basket abandonment."

So-called 'big data' is also playing a part with number-crunching data pools capable of analysing millions of transactions to identify fraudulent behaviour in real time. "WorldPay is creating such data pools against which to check the millions of ecommerce transactions we see every month," adds McGriskin.

"Fraudsters will often take a very direct and identifiable route to the checkout in a manner that can be patterned and recognised," adds Dr Khan. "By examining the 'clickstream' e-tailers can identify patterns that look like fraud."

For cross-channel retailers, greater use of point-to-point encryption (PTPE) for store-based transactions is now recommended by the PCI Council. "Under the new recommendation data must be encrypted from the PIN encryption device (PED) all the way through to the remote PCI-DSS certified payment gateway," says Dr Patni. "As soon as the card data is read within a PED, PTPE encrypts the data for safe transporting to the payment processor's system within milliseconds."

For cross-channel retailers, such recommendations, combined with customers' preference for mobile, will certainly bring some significant changes to in-store systems in coming years. ●

Speaking from experience

Single platform plus points

"E-tailers should adopt a single fraud management platform that has the ability to integrate multiple sales channels, along with the flexibility to apply different rules to each channel as required. With a single platform, e-tailers can quickly identify suspicious behaviour and repeat purchases between channels." **Dr Akif Khan, director, products and services, CyberSource**

Smartphone risks

"Mobile payments can increase a user's reliance on their device, making m-commerce a 'one-stop-shop' for collecting personal information. This means any potential breach would have a considerable impact on the individual. Less security-conscious users that keep passwords on mobile devices are risking more than just losing a phone – they could be providing a fraudster with access to their bank and card account services." **Phil McGriskin, chief product officer, WorldPay**

Challenging received wisdom

"It is easy to make incorrect assumptions about payment preferences in different countries, and critical to work out what is a barrier to purchase versus a simple preference. One retailer confounded common wisdom that 'you can't launch in Germany without ELV1' by accepting only credit cards, and learnt that ELV was just a preference and not a barrier." **Nick McLean, director of products, eCommera**

In summary...

For many retailers it is far simpler to outsource payment processing to reliable third-party providers, and use hosted systems and tokenisation than to risk storing unencrypted card data within their own systems and falling foul of PCI-DSS rules. As the card issuers strive to keep ahead of the fraudsters, those rules and recommendations are likely to become more complex. Keeping up-to-date can be challenging so it is far easier to leave as much as possible to the experts. However, picking the right PSP is vital. Not all offer comprehensive anti-fraud tools and the range of alternative payment systems they support also varies, so matching PSP capabilities to e-tail growth plans is essential.

Payment processing and fraud management are often managed by different store teams, but since for e-tail fraud is often the result of payment data theft it makes sense to adopt a more integrated approach and look for solutions that cover both attributes – especially where alternative payment systems with different fraud risks are involved.

Looking ahead, digital wallets and greater use of NFC are on the agenda with shoppers expecting to pay in-store using the same systems as are available online. That will mean added complexity at the checkout and the need to upgrade PoS systems. It will also mean a period of confusion as the leading players battle to win consumers. As Dr Khan says: "Which of the contenders in the 'wallet wars' will consumers and e-tailers put their faith in – PayPal, Visa, Google or others? It's going to be an interesting, and hard-fought, battle."

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A special delivery

EVERY ECOMMERCE RETAILER WANTS TO GET GOODS TO CUSTOMERS ON TIME, EVERY TIME. **CHRISTIAN ANNESLEY** LOOKS AT THE OPTIONS WHEN IT COMES TO ENSURING THIS HAPPENS

When someone buys online from a retailer, it's a bit different to buying from a shop. Payment is made, the transaction is confirmed – but no goods have changed hands. Clicking 'confirm' on the checkout page means the customer has bought the promise of an item being delivered but has nothing to show for it bar a confirmation email and perhaps an order print-out.

Making good on that promise is where logistics comes in – and retailers know how much this matters. Time after time, research shows that shoppers won't buy again from a retailer when goods are too slow to reach the doorstep.

The challenge is that e-tailing logistics is a more complicated discipline than the management of traditional supply chains – and many retailers are still in transition when it comes to the demands of cross-channel. A recent survey from property consultancy CBRE found that 63 per cent of retailers expect to have fully-integrated cross-channel operations by 2015, but those numbers illustrate that many – very likely a big majority – still have a way to go when it comes to having fully fit-for-purposes logistics.

"The implications of ecommerce for the logistics requirements of retailers and their distribution partners are profound," says CBRE's head of EMEA industrial and logistics research, Richard Holberton.

> **"The challenge is that e-tailing logistics is a more complicated discipline than the management of traditional supply chains – and many retailers are still in transition when it comes to the demands of crosschannel"**

"Traditional supply chains transport goods from a manufacturer or importer via a regional distribution centre, or local warehouse, to a shop. For online retailing, a variety of models are possible, since there may be several end destination points or combinations of points – including the customer's home, the shop or an entirely separate location, such as a collection locker."

IT'S COMPLICATED

Holberton and others in his sector want to understand the property needs of the sector from here, but what's already understood is that today's ecommerce logistics networks need to enable delivery between small numbers of fixed points in order to adapt to a more fluid set of demands – and it requires the right systems and the logistics partners to bring it all together. Once you add in the likely need for retailers to be able to sell and deliver into new countries too – an obvious extension of activity and opportunity for a UK-based retailer in 2013 – it's easy to see how the logistics challenge is multiplying.

Yet whatever the complexities, the end goal is still easy enough to describe: usually it's UK customers enjoying the benefit of next-day (or even same-day) delivery of their online purchases, and those further afield or buying less highly stocked items getting the goods within a few days.

How do retailers achieve that aim if their logistics operations are still in transition? The obvious answer here is that retailers need to outsource – and of necessity are outsourcing – whatever processes they cannot currently deliver themselves. There is no other way since the world won't wait for retailers' delivery and warehousing infrastructure to catch up.

The pace-setters in deliveries are the third-party logistics operators that have embraced technology and innovation in recent years to deliver the improved services the market now expects. While many items bought online are being delivered by a handful of long-standing parcel carriers, many of the services offered by those carriers have changed beyond recognition in recent years – short, dependable time slots for deliveries, online and smartphone-accessed item-level tracking, and even pre-delivery text messages to customers to improve the chances of a delivery being made.

It's a transformation that is partly a response to the rise of ecommerce and the corresponding rise in home deliveries of parcels, and partly something that's been enabled by joined up and mobile IT systems, by GPS tracking technologies, and by item-level tagging using bar codes, RFID tags and the like.

OLD AND NEW

There are disruptive entrants out there to report on, like same-day courier service Shutl or collection-locker companies ByBox, but at the established end of the courier market things are happening too. For example, it's already four years since the parcel carrier DPD introduced one-hour delivery slots with its Predict service – a direct response to the changing landscape in ecommerce, and the requirements of customers.

DPD's chief executive Dwain McDonald says: "Deliveries on behalf of the ecommerce industry now represent half of our business and we expect this growth in e-retailing deliveries to continue."

One notable change the company brought in recently was to swallow the cost of pre-delivery text-messaging to customers. "Those texts only cost a few pence, but customers like getting something for free," says McDonald. "We've seen the number of texts we send out each month jump from 1 million to 2.5 million in a short time. It's a biggish cost to us, but it's driven uptake of the service sufficiently to cover the investment."

Ten issues to consider

1 **You've no choice but to embrace choice:** what do customers want when it comes to delivery? (And what are they getting from the competition too?) Same day? Next day? In-store or ultra-local collection? Out-of-hours collection?

2 **Don't second-guess the customer:** surveys are one way to find out what's what. Consider a stand-alone piece of research or data collection on the back of a trial of a new service, using customer feedback to deliver a better picture.

3 **The European dimension:** Europe has the potential to be a huge market for UK retailers – but the logistics need to work too. In terms of logistics, how easy or hard will it be to scale the operation and attack new markets? Does a logistics partner have a European operation already?

4 **Think hard about returns as well as deliveries:** how much flexibility and choice is it appropriate to offer customers when it comes to returns? Who's paying when the return issue is fit or personal taste, the customer or the retailer? Is the packaging for all products suitable for reuse for a return or not?

5 **If choosing a logistics partner, ask all the right questions:** not just the European dimension (see point three) but, going back to basics, why choose outsourcing in the first place? What can the partner do that you can't? A partner should be adding value and delivering services more efficiently or in a way that's hard for retailers to match.

6 **Think about service-level agreements:** when it comes to outsourcing partners, retailers may well need a couple of SLAs even for one partner – one for the delivery and one for returns, say.

7 **Get references, too:** ask any prospective logistics partners' current and former clients how the service stacked up. Was it able to flex up and down as volumes fluctuated without any problems or surprises? What about scaling the service into new markets?

8 **Look at who's innovating in customer service:** some logistics companies are really pushing a branded service when it comes to delivery – and embracing social media to emphasise accountability to customers, with dedicated customer-service teams answering and dealing with Twitter queries and other social media interactions.

9 **Look at pricing:** many retailers offer free delivery now and customers are often wowed: it can be a valuable promotional tool when it comes to persuading them to buy. But the numbers have to stack up, too: don't offer something that will likely sabotage the bottom line. Reliability counts too. And paid-for premium services, where customers pay a one-off annual fee for the best treatment, such as Amazon Prime, are also growing in popularity. Is that something to consider offering to regular customers?

10 **Don't forget to review performance constantly:** be sure to deliver on promises. Companies spend a lot of time and money on attracting users to their website and converting them into paying customers, so it's vital that the last step of the process is satisfactory. Delivering on time and as promised will generate repeat business and good word-of-mouth too; get it wrong and the reverse will apply.

You choose, we deliver

What does the future of ecommerce logistics look like? In terms of the customer, the watchword is convenience.

The industry understands now that doorstep delivery is hugely convenient only if a customer is at home. And as many of us aren't in for the bulk of every working day, a market in alternative delivery options has developed and looks set to keep growing.

Click and collect is clearly a growth area for retailers, and some analysts say it's pointing the way ahead in terms of demonstrating the need for convenient pick-up of purchased goods.

Argos is one retailer among many that is in transition, seeing its 'check and reserve' ordering service grow as a proportion of overall sales from 28 per cent to 31 per cent in just the final four months of 2012. Partly the growth is driven by orders being placed online via mobiles and tablets, for time-poor customers to pick up at their convenience.

"The Achilles' heel for online shopping has been that people are not going to be in when the delivery comes," says Neil Saunders of retail analyst Conlumino. "Click and collect is one way of circumventing the problem."

If retailers aren't yet quite ready to turn shops into showrooms and distribution points for online operations, the way things are headed in terms of multiplying choices for customers is still clear. Remember, even Amazon, the online-only giant, has built out its capacity to offer customers the option to collect items at their convenience, offering collection at local shops via CollectPlus as well as from security code-controlled lockers.

> **"If doorstep delivery doesn't work for the customer and a store isn't convenient, alternatives are needed"**

NOT THE DOORSTEP

One lesson in ecommerce is that where Amazon goes others will surely follow. If the doorstep doesn't work for the customer and a store isn't convenient, alternatives are needed – and Amazon's two options of choice are currently the leading contenders in the wider market, and making headway.

Local-shop networks like CollectPlus, which boasts 5,000 convenience stores, are now using those stores as transaction points for customers collecting items as well as dropping them off. It works by CollectPlus delivering a parcel to a particular shop and emailing or texting the customer when it's arrived, so they can sort out pick-up in the certain knowledge the item is there.

The locker option that Amazon has used is similar in principle, with the locker rather than the shop as the transaction point, but the networks are currently less extensive. ByBox is one example that's already out there in the market, using lockers (also called dropboxes) in key locations as a pick-up alternative for customers.

ByBox started out as a service to businesses with mobile workforces, so many of its lockers are located at transport hubs like petrol station forecourts and train stations. But it is in the midst of a £1 million UK roll-out that extends the service into more retail and commercial locations to serve more of the potential service users it has identified.

Inderveer Tatla, marketing manager at ByBox, says the sophisticated locker banks is has developed can not only offer a convenient collection point for online customers but work equally well for returns.

"The primary purpose of the MyByBox service for online customers is to receive items, but the locker is also a transaction point for returns: not just faulty or unwanted goods but for any return – repairs or maintenance or for specialist cleaning."

BETTER CONNECTED?

The future outlook for retailers in logistics isn't just about customer innovations, however. Perhaps one of the biggest challenges with what's happening right now with cross-channel retailing is ensuring

all the different parts of the whole are joined up effectively.

Give customers choices and the choices they make in the real world can and do cause headaches for retailers, and throw up problems and inefficiencies that will need resolving. What happens when a customer buys a fashion garment through click and collect, and then wants to return the item through the same retailer's food stores? Or wants to order an out-of-stock item in store for home delivery later that day – in the right size? Challenges like this should be possible to accommodate, but it's not always easy.

These days, the latest stock-management systems are able to link together different shopping channels, and make website and store inventory visible at all times – but these only work as they should if everyone involved is using those systems and that capability in the right way.

One of the challenges for the year ahead and further out will be one of change management and employee – and outsourced logistics partner – training and engagement. As retailing gets more complex and sophisticated, the demands placed on those working at the sharp end are growing, and any system that is a complex web of channels and in-house capabilities, meshed with outsourced delivery of certain logistics functions, can easy fall over if not used correctly at every turn.

It's a sobering note to end on, maybe, but an important one. Procure the best-of-breed services, of course, but make sure that outsourced accountability (and excellence, naturally) is matched by in-house capabilities too. ●

Speaking from experience

Automation holds the key

"Delivery logistics is about efficient processes – and we are still working hard trying to automate on a grand scale. We've recently developed a scanning system that can scan trailers for item reconciliation, loading instructions, the condition of goods and more." **Rob Gittins, UK sales director, Palletways**

New kinds of convenience

"At Shutl with think there is a big opportunity for a point-of-sale service. That's where a customer comes into store to buy, but wants delivery later the same day. We reckon the likes of John Lewis might like this service for high-value customers." **Tom Allason, chief executive, Shutl**

Welcome to the same-day locker

"Our dropboxes could be used by online customers to pick up items the same day. If popular, high-value items are pre-loaded into lockers then a purchase can be ready for pick-up instantly – the customer just needs the location details." **Inderveer Tatla, marketing manager, ByBox**

In summary...

The challenges involved with delivering (and processing returns) in a cross-channel, multi-country retail environment aren't to be underestimated.

It's noticeable just how much attention e-tailing successes such as ASOS pay to their logistics propositions, particularly when it comes to the dynamics in each country market.

With UK retailers in many respects well-placed to take their propositions to the wider world, the lesson is that logistics is a crucial element in any successful expansion.

ASOS has international sales that account for 60 per cent of turnover, and successful delivery is just one part of the logistics picture.

"In some ways returns is a bigger challenge," says EU services delivery solutions manager Robert Muldoon. "It can take some time to get items back from international destinations, for example, and you can easily miss the window of opportunity to maximise the resale of these items.

"It can get complicated very quickly, with different issues in different markets. So right up front you need to understand the dynamics in each market and ensure communication is good to allow you to deliver just what the customer needs."

In a country such as Germany, which has its own unique returns culture, ASOS has a dedicated online store. "We present ourselves as a local company and deliver for customers on the terms they are used to," says Muldoon.

It's a policy that serves ASOS well wherever it goes: whatever the norm is for delivery and returns in a particular market, the retailer will look to meet or exceed that norm and ensure it is competitive. And it's a mind-set that every retailer needs to adopt as the logistics of retailing will only continue to grow in complexity in the years ahead.

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Our network of 37 national service centres and over 2500 couriers, means we can reach over 81% of the UK in under 60 minutes, delivering to your customers wherever best suits them. Each of our couriers are equipped with a GPS tracking device, so you can track the progress of your delivery in real-time.

Through innovative delivery solutions, available 7 days a week including bank holidays, we support retailers in delivering customer satisfaction in the growing omnichannel environment.

HERMES PARCELNET LTD

Capitol House,
1 Capitol Close
Leeds, LS27 0WH
United Kingdom
Tel: 0844 543 7400
Web: www.hermes-europe.co.uk

Hermes is the UK's largest home delivery courier network handling more than 160 million collections and deliveries each year. Hermes provides a range of flexible and affordable delivery options to home, work, neighbour, safe place, store or ParcelShop that are suitable for the consumer and fit within their increasingly busy lifestyles. This multichannel approach offers a convenient and hassle-free delivery experience that achieves high levels of satisfaction and ultimately creates brand value.

Hermes works with a wide range of leading high street, catalogue and online retailers in the UK including Next Directory, sit-up channels, ASOS, QVC, Tesco, John Lewis, New Look, Debenhams, Arcadia Group, JD Williams, Damart, Lakeland and M&M Direct.

wnDirect

YOUR TRUSTED INTERNATIONAL ECOMMERCE DELIVERY PARTNER

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- Supported by best-in-class, independent delivery partners
- Full tracking and visibility throughout the entire delivery lifecycle
- Automated localised in-country status updates to the consumer
- Can be fully integrated into a retailer's online shopping solution
- Unique fully integrated customs service – paperless solution at the pack bench
- Significant expertise and experience

Email marketing@wndirect.com to talk to an expert about your requirements

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ILG

Logistics house, Charles Avenue
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Tel: 0844 264 8000
Email: sales@ilguk.com
Web: www.ilguk.com

ILG is a fulfilment and courier company and has been operating since 1990. On the fulfilment side we provide a complete third party logistics function for our clients including importation, clearance, warehousing and stock management and a full pick & pack solution. We also provide global delivery services to homes, retail outlets and business locations.

We work with you to gain an understanding of your business, we then implement the right fulfilment solution that is cost-effective, flexible and reliable to achieve your business goals. So whether you are looking to cut costs with outsourced warehousing, or be more nimble or serve clients faster, we help you make that happen.

For more information simply call one of the team on 0844 264 8000 and quote 'IDX' or visit the website www.ilguk.com

M-TECH COMPUTERS LIMITED / AMO

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KATOEN NATIE

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Web: www.katoennatie.com

Katoen Natie is a leading logistics service provider with headquarters in Antwerp, operations in 34 countries and more than 10,000 people, offering integrated logistics solutions. Katoen Natie ecommerce focuses on product fulfillment for cross-border web shops. Katoen Natie offers custom-made solutions in a multi-customer environment. The result is unique flexibility in volume treatment and fast returns processing. We have daily injections in all European countries with multiple transporters. The consumer can count on a full track & trace and the customer on complete process transparency.

The Katoen Natie ecommerce team wants to provide a full consumer-oriented back office for pure players, brands and cross channel retailers with the focus on quality and velocity. Errors result in unnecessary costs and a bad impression. That's why we accept no more than one error in 10,000 items.

METAPACK

12-16 Laystall Street
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Email: info@metapack.com
Web: www.metapack.com

One of the biggest challenges facing online retail is the critical aspect of fulfillment. MetaPack transforms your delivery service into a competitive advantage by reducing costs and improving service levels. We ensure that the complexity of using a multi-carrier network, which gains delivery efficiencies and optimisation, is made simple through automatic carrier allocation. New carriers can be added easily with no integration hassle and standardised label printing is automatic. We allow for proactive customer care through email notification, SMS messaging and complete tracking and reporting for all shipments, all on one screen.

Customers trusting us to send their parcels range from large and multichannel retailers such as John Lewis, ASOS, B&Q, Dixons and Marks & Spencer to many smaller pure-play companies.

NORBERT DENTRESSANGLE LOGISTICS UK

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Web: www.norbert-dentressangle.com

Norbert Dentressangle is an international transport, logistics and freight forwarding company. In the UK Norbert Dentressangle is one of the largest logistics and transport companies, offering a complete range of supply chain solutions. The business is considered amongst the UK's leading providers to the of retail sector, with services including multi-temperature grocery warehousing and distribution, non-food efulfilment, environmental and reverse supply-chain solutions, serving household names.

SANDERSON MULTI-CHANNEL SOLUTIONS LTD

Sanderson House, Manor Road
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Sanderson is one of the UK's leading multichannel retail software providers with over 200 customers using our proven solutions for stores, mail order, ecommerce and supply chain operations.

Elucid is our complete software solution for multichannel retailers that integrates store, web and mail order sales and back office/fulfilment operations. If you're looking for a consolidated view of your sales channels and customers, or are struggling to fulfil multichannel sales orders from multiple stock locations and improve delivery timescales, Elucid helps you to integrate and streamline your omnichannel business.

RIBBLE PACKAGING LTD

Greengate St, Oldham,
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Email: boxondemand@ribble-pack.co.uk
Web: www.ribble-pack.co.uk

Ribble Packaging Ltd is a leading independent manufacturer with over 70 years of experience in the corrugated packaging industry. A 'state of the art' fully automated ribfold downstacker installed in 2013 provides seamless, high quality, endless folded cardboard and has extended the capacity for our customers and new partners this year.

With comprehensive finishing capabilities we are able to provide an extensive range of bespoke products including: glued and stitched cases, die cut cartons, sheet board, ribfold and creased and slotted blanks, available in up to two-colour print.

Ribble is also the UK's sole agent for Panotec's innovative 'Box On Demand' system, allowing you to take control of your packaging requirements. Make what you want, when you want, saving on corrugated costs up to 25%.

Further benefits:

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- Reduce void fill

SCURRI

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Tel: 07706 443081
Email:roryoconnor@scurri.com
Web: www.scurri.co.uk

Scurri provides a cloud-based solution for multichannel retailers and ecommerce merchants shipping physical goods, and that have a need to integrate multiple carriers. The delivery-management platform provides merchants with the tools to tackle and reduce delivery-related shopping cart abandonment. Unlike the competition, because the platform is cloud-based, it's an economical service that is fast and agile to deploy!

By integrating with your warehouse management and order-processing system the Scurri Platform intelligently selects the right carrier service based on your criteria.

The solution provides powerful data and analytics, a unified tracking system and returns management, so that you can better manage your customers' experience and reduce delivery related abandonment.

The Scurri platform harnesses the power of the cloud meaning you can use any of the main browsers, there are minimal integration costs and no supporting/maintenance or management costs.

SPRING GLOBAL MAIL

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Email: spring.uk@springglobalmail.com
Website: www.springglobalmail.co.uk

Spring Global Mail help businesses reach out to their customers all around the world by sending Mail, delivering Parcels and managing Returns.

Spring operate in the international cross-border B2B and B2C mail market and process over 500 million items a year.

Spring's product portfolio includes solutions for international Mail, Packets, Parcels and Returns. Spring is able to create innovative and competitive solutions based on an international mail network that is continuously optimised.

Spring remove borders – and make international business easier.

Spring UK is based in the London area, with representatives across the country. Please contact us, we are happy to tell you more about Spring's unique options for UK businesses to be successful internationally.

Spring Global Mail – creative solutions, reliably delivered.

WNDIRECT

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wnDirect - your trusted international ecommerce delivery partner. We are an international logistics company bringing to market a tailored international delivery solution developed specifically for ecommerce:

- Supported by best-in-class, independent delivery partners
- Full tracking and visibility throughout the entire delivery lifecycle
- Can be fully integrated into a retailer's online shopping solution
- Unique fully integrated customs service – a paperless solution at the pack bench
- Duty Payment and ID Management solutions
- Significant expertise and experience

wnDirect's executive team has unrivalled ecommerce and international logistics experience and understanding – together we bring an offering which is as exciting as the opportunity international expansion represents for UK retailers. The wnDirect team has supported many successful etailers by looking at the challenges and focusing on developing a service which overcomes these.

TNT POST

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Website: www.tntpost.com

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No matter how your ecommerce requirements will develop, we continuously strive to enhance our capabilities, at least to:

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TNT Post is a 100% subsidiary of PostNL. PostNL processes more than 120 million parcels each year.

WOODWAY UK

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Woodway UK are a leading, independent supplier of packaging materials in the UK. What makes us different is our approach and structure, which is designed with flexibility and satisfaction in mind. With expertise in the packaging market, we offer a collaborative and consultative service whether on brand reinforcement, protection of product, environmental considerations or efficiencies through improved processes. Woodway have a dedicated Technical Team to find a 'best fit' packaging solution. This often requires specific design and innovation to maximise protection whilst minimising waste. Several of Woodway's bespoke designs are registered with the Intellectual Property Office. In order to assess the packaging requirements of a specific product, the Technical Team can audit a customer's premises and the supply chain so they can evaluate all the 'touch points' a product goes through before reaching the end user. Our in-house technical team is supported by our on-site manufacturing which enables quick turnaround of samples and bespoke small runs.

How to keep existing customers

GOOD SERVICE IS NOT JUST ABOUT LISTENING TO YOUR CUSTOMERS IT'S ALSO ABOUT ACTING ON THEIR REQUESTS IN REAL-TIME, ADVISES **MARCUS AUSTIN**

In 2012, businesses spent hundreds of billions worldwide on trying to find new potential customers. Strangely, most businesses then did little to stop these customers from leaving, choosing to spend still more money on acquiring still more customers. However, the recession has made businesses think hard about the consumers they already have.

Unfortunately, there's no one-stop solution to customer service and retention problems. The solutions that do exist are split into two distinct groups. There are solutions to try to prevent the problem happening in the first place, such as Sitecore, which has a portal based around the idea of a 360-degree view of the customer. Then there are the solutions that clean up after the event, such as Zendesk and Desk.com, which help manage a business's response to a problem. There are also some solutions that combine the two approaches – such as Klick2connect, LivePerson and Feedbackify – and help elicit a conversation with customers.

Which approach a retailer chooses will depend on budget and available resources. Retailers may also need to consider bespoke solutions. "[Retailers] need to decide what kind of work that they need to do themselves and what they can expect to buy from the software vendors," says Sitecore's chairman, Laust Sondergaard.

One of the key pain points for any customer is associated with the silos that beset so many retail businesses. For most businesses it's the norm to deal with emails, tweets, phone calls and chats on different systems, but the consequence of this is that customers constantly have to explain themselves. The back-to-basics solution to this problem is to create a business that's built to handle customers first, rather than products.

> **"For most businesses it's the norm to deal with emails, tweets, phone calls and chats on different systems, but the consequence of this is that customers constantly have to explain themselves"**

As Sondergaard says, "There's nothing worse than buying a washing machine online, and then receiving an email the next day saying the washing machine has a 20 per cent discount." He adds: "You need to bring all of your channels together in one. You need a 360-degree view and you can then build in some kind of automated intelligence in how you handle that."

THE RETRO-FIX APPROACH

For many retailers, there's not the opportunity to make a complete fresh start, so the solution has to be a retro-fix. Businesses such as Liveperson and Klick2connect are trying to make this easier by taking more and more customer communications into their systems.

Click-to-chat and call-back services are fast overtaking the call centre and email as the channel of choice for retailers. In this context, Ross Sampson, Klick2connect's director, notes: "In our experience every type of business is starting to look at this sort of call-and-chat customer service enhancement, and it's not a price-driven thing this is service and customer driven."

Forrester in its Jan 2012 report, *Understanding Customer Service Satisfaction*, found that online chat had the highest satisfaction levels (62 per cent) amongst all online customer service channels.

At the most basic level a chat and call-back service will offer a click-to-chat button that pops up or appears as the user enters the page. However, this can cause problems, particularly when there are no operators to handle calls and texts. The more sophisticated services can be set to show a call-back button only when there are people available to handle the calls, or to show a button only when, for example, the user has been on the page for a certain amount of time.

Many services are also adding the ability to push video out to the customer. Jeremy Sokolic, VP of marketing at Liveperson, warns this needs to be integrated properly: "Just putting a video link out to the person for them to look at and interact with is effective, but you need to have this integrated in with your platform, so that you know when they've stopped watching, and when to get back to them."

Although click-to-chat and call-back help with sales and product information, there are still unsatisfied customers who can fall through the gaps in the system. Additionally, there are customers who just want to say how wonderful a business is. Most businesses find it hard to deal with this sort of unstructured feedback, which is where systems such as Feedbackify come into the equation. As Adrian Halley, CEO of Feedbackify, explains, getting feedback is not the same thing as a customer survey. "Customers will tell you different things depending on whether you ask them something specifically, or if they voluntarily give feedback."

Good feedback solutions enable retailers to choose where a feedback tab will pop up and when, and many give the option to set questions, including the standard Net Promoter Scores (NPS) that many businesses are starting to use, to both measure customer experience and – where available – compare against other relevant businesses. However, there's a danger that businesses become obsessed with scores rather than reading the feedback. "If the NPS number is going up it's very easy to think that everything is fine, and to not look any further," says Hallety, "but as always the devil is in the detail."

According to Kissmetrics, more than two thirds (68 per cent) of customers leave a business because of the treatment they receive, followed by just 14 per cent who choose to leave because they are dissatisfied with the products and service. It's clear that improving customer support mechanisms is key to retaining customers. But for these to work correctly, the business needs to be committed to the ethos of the customer as king.

Ten issues to consider

1. **Flexibility:** does a click-to-chat and call-back service allow easy intervention if something is going wrong. Can the service be used to upsell and cross-sell?

2. **It's all in the timing:** social media has trained the consumer to expect an immediate response. "Customers now expect whether they are responding on the website, or social media, or through some kind of community or forum, or whether they are emailing, that they get some kind of quick response," says Ross Sampson, director at Klick2connect.

3. **Good customer service will help response rates improve:** this is true for all territories. Ross Sampson notes: "We are not finding any resistance to this as a concept throughout Europe, and the response is similar in terms of conversion throughout Europe."

4. **Use chat to reduce your email problems:** the typical length of an email trail from a 'contact-us' page is seven emails.

5. **Think cross-channel:** "Companies that don't embrace the multichannel aspect of their communication and who don't bring it all together will fall behind," says Jeremy Sokolic, VP marketing at Liveperson.

6. **Can you see how your business is improving –** Dashboards that provide real-time visual displays of customer metrics such as answered calls, calls waiting, average wait and your NPS score can help to keep the customer support role in the minds of the board and employees.

7. **Simplify returns:** can the business make it easier to return goods by offering return to store or offering free returns?

8. **Look for a cloud solution:** cloud-based solutions are quicker to implement, and there is no intrusion into an IT environment.

9. **Mobile is important:** "There is a significant growth in mobile chat, and the expectation is amongst consumers that the same kind of capabilities that you see on the desktop should be available on your mobile, and chat is particularly important in a mobile device," says Jeremy Sokolic.

10. **Get your staffing levels right:** "There's no point in offering a customer support service – no matter how great is – if it can't be fulfilled," says Ross Sampson.

Social factors

One of the key trends over the next year will lie in the click-to-chat and call-back businesses widening the scope of what they do to encompass more channels, and one of the newest channels is on social media.

According to Jeremy Sokolic, VP of marketing at Liveperson, social media is a natural progression for services such as click-to-chat and click-to-call. "We have a number of customers who are starting to utilise an engagement capability on their social sites, because that's where people are going to research and find out information, and the next thing that people want to do is a way to connect with the brand on that channel." He adds: "In a pre-Christmas survey of shoppers' attitudes we found that 40 per cent of respondents said that they would use social media such as Twitter and Facebook to interact with companies, whether it's to tweet a question, post a comment on a company's Facebook fan-page, request customer service, etc."

While the Liveperson survey reveals a desire from the customer for brands to follow them to social media, many brands are finding the move difficult, particularly when communications require an instant response, for example, a tweet can't be left for the day or the five days many businesses think is acceptable for email. However, as Ross Sampson, Klick2connect's director, warns, the need for a speedy reply isn't just confined to Twitter and Facebook any more: "Customers now expect a fast response and that's regardless of if they're responding on a website, or social media, or through some kind of community or forum, or whether they are emailing,"

> **"One of the biggest problems with mobile and search is the screen real estate"**

MOBILE

Mobile is a key area of change for nearly all the customer-support solutions – from customer-centric content management systems through to those offering feedback. Nearly every business we talked to here is ramping up mobile offerings, as more consumers are starting to spend more time on mobile and are getting used to buying online with their mobile. The same pre-Christmas survey by Liveperson also asked users about their use of mobile. It found shoppers want to interact with brands in real-time via their mobile devices, with 40 per cent stating they would use live chat on their mobile device to get real-time help if it were available.

According to Jeremy Sokolic, businesses expect chat to be key on this platform: "The expectation amongst consumers is that the same kind of capabilities that you see on the desktop should be available on your mobile, and chat is particularly important in a mobile device, because it is quick and people are used to sending texts on their mobile device."

However, Sitecore's chairman, Laust Sondergaard, counsels that retailers shouldn't leap into providing chat and should consider some of the alternative ways of providing additional information to mobile users: "You have to adjust and understand the [individual] user's situation, for example, if you're looking for information in-store then it may be easier to use a QR codes to provide additional information to the customer."

SEGMENTATION

Larger businesses are increasingly looking at using segmentation to identify the right channels and approach to the customer. With segmentation, businesses classify customers by the revenue these customers can make for the business, and then

apply this knowledge to the channels they present to those customers. So good customers get to see the business webpage with a customer services phone number, whereas a customer who has less of track record and who has looked at several pages on the website but hasn't moved to the checkout may get a click-to-call button and possibly a real person if there's one available, while the rate chaser gets an email or a form.

While you will see businesses starting to use segmentation, there are as yet no major vendors offering this as an off-the-peg solution and most businesses are using in-house development teams here.

FITTING TECHNOLOGY

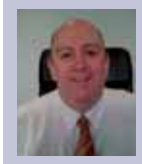
One area of customer retention that is set to change significantly in the next year is in the area of clothing. If you look at clothing sales in the UK, just eight per cent of the total is carried out online. If customers do buy online, then the typical clothing return rate is around 25 per cent. The reason for this is down to size and fit. If you want to see what a book is like you can see an extract, if you're unsure about some music you can hear an excerpt online, but if you're buying clothes then there's no current alternative to the fitting room. As retail analyst Sucharita Mulpuru of Forrester Research says, "Fit isn't a matter of what objectively fits you but what you like and are comfortable in."

However, in 2013, new virtual fitting rooms and 3-D technologies are all set to take off, and suppliers all claim they will reduce return rates and increase take-up significantly. Heikki

Haldre, managing director of Fits.me, says "In the last couple of years, virtual fitting rooms have emerged to provide clothing retailers with a vital customer engagement tool and in the majority of cases they subsequently buy the right size. Hence garment returns have fallen for the retailers and brands that have deployed this form of customer engagement."

Fitting-room technology isn't for everybody. There are sectors within the clothing sector, such as shoes and lingerie, where fitting technology will never replace the fitting room or trying on the goods at home. ●

Speaking from experience



The consumer perspective

"A customer doesn't think about multichannel when they respond to a company, they're just thinking, 'I'm responding in the way that is best for me, and I want the company to respond as quickly as possible.' It's then up to the company to pull the different channels together and create a solution." **Ross Sampson, director, Klick2connect**

Work with what you have

"There's only so much you can do to drive people to a website, so you have to make the most of the existing traffic." **Ross Sampson, director, Klick2connect**

An upside to complaints

"You have a stronger relationship with a customer if they have had a problem with you and you've resolved it quickly. They're a more satisfied customer than if they never had an issue in the first place." **Adrian Halley, CEO, Feedbackify**

In summary...

The internet does not exist in a vacuum. Timescales for customer response on social networks are the timescales that customers then expect when it comes to dealing with a business in any other channel, including email. Additionally, shoppers are also increasingly impatient of any inefficiency and of any failure for a business to deliver what it has promised.

As a result, retailers will need to invest more in proactive support both to help guide self-service transactions and to increase the available product information. FAQs and help pages need to be more comprehensive, easier to find and well maintained. Contact centres also need to respond to customer expectations and preferences.

Click-to-chat and call-back are increasingly becoming the norm in the online world. Here, businesses need to understand the true cost of loss of revenue due to lost custom before dismissing the costs here as too expensive. Kissmetrics found the average value of a lost customer is $243, while figures from Marketing Metrics show the probability of selling to an existing customer is 60-70 per cent, while the probability of selling to a new prospect is just five-20 per cent.

Create a solution that works on mobile: while customers are not yet actively buying on mobile in the quantities they are on the desktop, they are however using mobile to research into products and services.

TOP 50
Solutions for the E-Commerce Customer Experience
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Live chat success

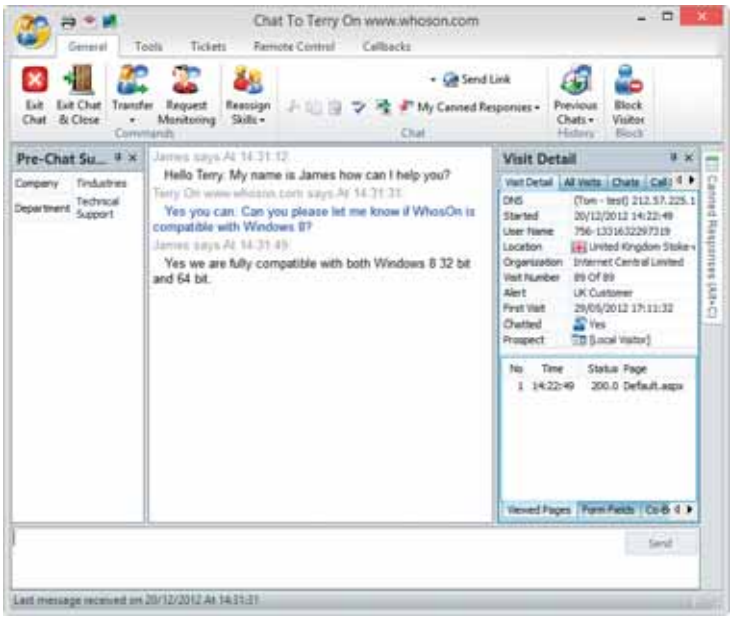
WhosOn Live Chat & Customer Analytics

Founded in 1784, in Matlock, Derbyshire, John Smedley is renowned throughout the world as a leader in the production of fine gauge knitwear products. Still family owned, the company continues to innovate whilst retaining the handcrafted finishing techniques that established its reputation for more than two centuries. Today, John Smedley's products are regularly seen on the pages of the world's leading magazines and newspapers, endorsed by celebrities worldwide for their quality and design.

John Smedley's ethos of history and innovation runs throughout the organisation, including its ecommerce operations. In its quest continually to innovate and evolve, John Smedley identified various online initiatives to improve the company's online customer support whilst also driving additional revenue. Live chat has subsequently played a significant role within these initiatives.

John Smedley went to market to identify a live-chat solution that was intuitive enough to monitor website activity in real-time and also provide historical statistics so the company could track website trends over time. John Smedley wanted to use this information to help it to make continual improvements to the website. The solution the company identified, one that fitted requirements and budget constraints, was WhosOn by Parker Software.

John Smedley selected the hosted edition of WhosOn as an alternative to the on-premise solution. This managed platform has enabled greater control of costs for John Smedley. More importantly, it has meantthat John Smedley can focus on its own core strengths and in-house developments, safe in the knowledge that WhosOn is being managed and maintained independently.



WhosOn was deployed as part of a site re-design. It was first introduced on a trial basis before quickly being adopted by the ecommerce team as a result of positive customer feedback.

Prior to live chat, John Smedley relied on telephony as its main form of customer communication. This channel had a significant impact on the operating costs of the business. Customer calls were taking a long time to complete during the working day. The company also found it was missing valuable customer enquiries outside of normal working hours. Live chat has enabled John Smedley to provide an alternative method of communication for its customers. Since its integration, call volumes have decreased and live chat enquiries increased.

WhosOn web analytics and request-a-call-back feature have enabled John Smedley to track website visitors in real time, and given the company improved insight into the volume of visits and contact enquiries that were being received out of hours. The call-back functionality has enabled John Smedley's website visitors to leave contact details out of hours for agents to follow up with a telephone call the following day, ensuring no enquiries are missed.

Additional features of WhosOn, such as intelligent canned responses, which have improved chat response times, and skills-based routing ensure chats are put through to the correct agent or department on a first-time basis. The ability for an agent to handle simultaneous chat enquiries has resulted in significant cost savings and improved employee productivity.

Comprehensive reports enable the effective management of chat agents. Stored chat transcripts can be accessed at any time, enabling agent review, and also an improvement in the customer relationship with returning visitor chat logs being displayed so agents can see what has been discussed previously.

Since its introduction, online revenues and average order values have increased and the number of chat agents has doubled for John Smedley. Live chat is reducing shopping-cart abandonment, increasing order values and conversions. It has proved to be a convenient method of communication for John Smedley's customers.

WhosOn can be evaluated for free from the company's website as either an on-premise or as a SaaS-based solution. **www.whoson.com**

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Website: www.bybox.com

We deliver 20 million parcels a year into 18,000 lockers all over the UK. Our customers are huge companies with mobile engineers who fix broken machines. Companies like Coca Cola, Sky, Cable & Wireless and Ricoh – very demanding and completely intolerant of failure. In the middle of the night, we deliver critical parcels to thousands of engineers for collection at 8am. And we're now opening up our locker delivery network for consumer deliveries. After all, if an engineer doesn't wait in for his parts, why on earth should your customers? Your customers can collect their online orders at one of our 400+ lockers on convenient locations such as supermarkets, petrol stations and railway stations. The proposition is simple. Shop online. Deliver ByBox. Don't wait in.

EGAIN

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eGain is a leading provider of cloud customer engagement solutions. Trusted by leading brands eGain solutions help design and delivers smart, connected customer journeys across social, mobile, web and contact centres.

DOCDATA

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Strong yet silent

ROBUST RETAIL SYSTEMS SIT AT THE BACK END, ENABLING THE INCREASED CONVENIENCE THAT CUSTOMERS DEMAND THROUGH SERVICES SUCH AS CLICK AND COLLECT AND FROM-STORE DELIVERY, WRITES **CHLOE RIGBY**

The convenience that comes when retailers connect the store to online is proving a powerful driver of sales. Click and collect is already widely adopted, but ship from store and the visibility of stock across channels are also emerging as good reasons to join up points of sale.

The efficiency of such cross-channel services relies on retail systems that power the back end, showing information about products and their location to the sales assistant or shoppers in the store easily as to the internet browser. Among these systems are product information management (PIM) systems, which enable retailers to bring rich, consistent data to the consumer experience, no matter which touchpoint – customer contact centre, point-of-sale or kiosks in the store, or website – they are using. Key retail systems include order management systems, used to track and manage the location of goods both in the supply chain and available for shipping to the end-customer, while warehouse management systems (WMS) are used to organise the flow of goods through the warehouse. At the back end of operations are the database management and web-hosting services that underpin operations.

Buying into such systems is a long-term investment. A warehouse management system (WMS), for example, has a 10-year lifecycle, says Craig Sears-Black, managing director, UK, of Manhattan Associates. While it's important to meet the needs of the business as it is today, it's also crucial to think ahead and ensure systems can adapt to unforeseen future needs.

> **"Buying into retail systems is a long-term investment. A warehouse management system, for example, has a 10-year lifecycle"**

KEEP IT FLEXIBLE

"The biggest mistake that can be made," says Sears-Black, "is to put in a system with insufficient flexibility to change over time. Looking back over the last 10 years, how much has the world changed in internet and online retailing? It's been absolutely dramatic. So you have to change your strategy year by year to make sure you're taking advantage of changes in the market. The most important goal is to have configurability and flexibility."

Ability to adapt is also key when specifying PIM systems. Simon Walker, director of ecommerce innovation at PIM specialist Stibo Systems says: "People tend to underestimate the complexity of product data. Maybe they have a solution but they soon realise it isn't flexible or scalable enough to cope with the demands of multiple channels." He counsels retailers to work with vendors fully to appreciate what systems can do – but says gradual adoption of features can be less daunting than a 'big bang' approach.

Scalability also means being a small business is no barrier to employing the power of these retail

systems. Companies can either buy into WMS systems, for example, through third-party logistics providers, or by paying for a smaller number of users.

Procurement of retail systems is no longer just about ticking the boxes on an RFP. Rather, by working in collaboration with vendors, merchants can gain better insights into the scope of the product and whether it meets their needs. Equally, says Dominic Monkhouse, senior VP for customer experience and managing director, EMEA, at Peer1 Hosting, an RFP doesn't go far enough to tell the whole story of how a vendor might serve a retailer. "It's all speeds and feeds," he says. "But really, who cares when your site goes down if your data centre has certification? It's more are they going to move heaven and earth to fix your problem? You have to go and visit them, meet the people who are going to work on your account. Do they seem to care?"

Seeing examples of similar systems in action, down to details such as the range of channels that it covers and how it exchanges data with back office systems, can also be very useful. "Retailers really need to see proof points that a PIM system can be successfully implemented and deliver the benefits," says Stibo's Simon Walker.

Expect to work closely with vendors or service providers to design and implement the system. Manhattan Associates, for example, operates project teams that include its own and client employees building the system around the specific goals of that business. Effectively, says Sears-Black, this is a knowledge-transfer process that stands the customer in good stead when they later need to work quickly to change the systems. "You want to take that collaborative approach, create a single project team across the supplier and the customer who can transfer the knowledge and leave you in a position where you can adapt and make changes quickly," he says.

Once a solution is in place, measuring it will show whether it's working for the business – or if tweaks are needed. Start by measuring against the business case: has a WMS increased productivity? Has a PIM improved data quality and cut the time taken to go to market or to bring on new products? Has a web-hosting company reduced downtime? Last, but far from least, have the retail systems delivered joined-up shopping and cut costs in other areas?

Ten issues to consider

1. **Think ahead:** "Scalability is very important in a PIM system," says Stibo Systems' Simon Walker – and it's equally important for other retail systems.

2. **Rapid response:** how will a vendor scale up rapidly if necessary? For example, a web-hosting company might be asked to react quickly to traffic spikes.

3. **Going overseas:** as more retailers look for sales growth overseas, ask how a system – and the vendor behind it – will support a move from the UK into Europe, or even further afield to emerging markets such as China.

4. **Consider timescales:** find out how long it will take from purchase until systems are installed. WMS systems, for example, can take upwards of six months to implement, once they're designed. Meanwhile hosting services are best specified well in advance of the date they're needed.

5. **Integration:** retail systems need to be integrated with existing back-office systems and customer-facing platforms. Consider how this will happen and who will do the work?

6. **How much downtime is acceptable?** In the ordinary run of things downtime is, it's hoped, unlikely. But surges in demand and server failure are just two issues that could result in websites going down. Ensuring that never happens can be arranged, but the cost of extra capacity, failover sites and global load balancing gets expensive.

7. **Plan ahead for crises:** preempt confusion at potentially difficult moments with robust service-level agreements agreeing responsibilities in advance. An SLA with a hosting company, for example, can specify how quickly a site should fail over, how to restore it, how to test it – and who will be doing the testing.

8. **How are problems handled?** Speed and accuracy in resolving problems are key. Understand a vendor's escalation process.

9. **Buy or outsource?** Retail systems can be bought, or shared through third-party providers offering a managed service. This enables smaller companies can start by sharing a system before moving into their own. In this field it's still early days for the software-as-a-service approach.

10. **Tap into the vendor's specialist knowledge:** listen to the vendor – they will know the details that retailers may overlook. For example, the license to use an ecommerce platform may mean it's cheaper to use one sort of server over another.

Speed and transparency

Are you geared up for same-day delivery from stores? Most retailers aren't. But it seems that the ability to offer such services is no long-term pipe dream. When Manhattan Associates polled delegates at one of its conferences, it found most expected same or next-day delivery to be standard within a year to 18 months. Such swift delivery is most easily achieved by delivering from stores that are local to where the customer lives – using the ingenuity of retail systems. That puts cross-channel retailers at an advantage to their pureplay peers.

As competition increases, the weight of consumer expectations is likely to hang heavily on retailers. Indeed, says Manhattan Associates' UK managing director Craig Sears-Black, expectation of delivery "is going to go through the roof". But the first – and vital – step to delivering such services is through having total visibility of stock. Such visibility is made possible by warehouse management systems working in tandem with order management systems. "If your stock is in 300 locations and you don't have complete visibility throughout your retail estate and distribution centres, then you can be missing out on sales opportunities," says Sears-Black.

> **"Localised websites involve challenges when it comes to managing product data in several languages"**

But it's a use of technology that has more than one benefit. For example, a retailer with a website that can reliably offer for sale items that are currently on a ship still a day out of port may save a sale that would otherwise be lost. Many shoppers may be willing to wait several days for the right item, despite knowing it's not immediately available. Visibility of stock can also mean retailers can sell items that are in stores on the website, reserving them for sale. "The mantra is, if it's in your supply chain you need to have real time visibility of it," says Sears-Black. "Only when you've got that accurately and in real time are you confident of your ability to maximise your sale."

LOCATION, LOCATION, LOCATION

Product location is also important for the new generation of PIM systems. When they can store additional data relating to where an item is as well as storing customer data, they help to inform individual shoppers where they can most easily find the item they are searching for, and have it delivered in the most convenient way. It's a practical application of personalisation that's likely to boost customer loyalty. This just-emerging way of using such systems is likely to prove a targeted and effective way to save a sale, either on the website or in the hands of an in-store salesperson who's advising a customer. "We've already seen our customer linking product to location," says Stibo Systems' director of ecommerce innovation, Simon Walker. "That helps their customers to understand which store is likely to carry a product. Looking from a delivery point of view, it helps the retailers optimise fulfilment to the customer through mail order and home shopping."

And location is also an issue for retailers who are increasingly likely to be selling overseas as they look

for growth opportunities in new markets. Some are looking to English-language trading opportunities in the USA, Australia, Ireland and Scandinavia, while others are starting to sell into neighbouring European countries, with the range of languages that implies. For traders that have already started to ship overseas and sell through different currencies, localised language websites are the next step. And that involves challenges in managing product data in several languages. Businesses, says Walker, are now "seeing PIM as a way in which they can help control and manage multilingual product data for international?."

As retailers expand internationally, web-hosting services are also likely to be a live issue. The future seems very likely to be one in which retailers trade across the world. Many retailers are now selling in Europe and other English-language countries. And while talk is already starting with regards to selling in China, for most it's not yet happening. But, says Dominic Monkhouse, senior vice president for customer experience at Peer1 Hosting and MD for EMEA: "I think it's an inevitable next step." Such a move does not necessarily mean a retailer already needs servers in that country – or any new market. Rather, he says, many are experimenting with smaller versions of their website on a new platform. "Standing up a front end and using a new distribution system that plugs into their back office system one step removed is how we see a lot of people going into the market," he says.

Looking further ahead still, Monkhouse foresees a future in which retailers may want to buy services such as hosting, software and development in a one-stop shop. ●

Speaking from experience

To see is to control

"So many multichannel retailers are being held back and aren't able to leverage their physical presence because they don't have visibility of the stock that's available in the retail outlet. Their point-of-sale systems are not accurate enough or not sufficiently up to date, or not sufficiently real time. Those that solve that issue and those multichannel vendors that get complete visibility and control of all their inventory will be the winners in the coming few years." **Craig Sears-Black, managing director UK, Manhattan Associates**

Vital support

"Most of our customers have some expertise. They know that although as a hosting company we're only doing the infrastructure piece – the back end, the boring bit – unless you can count on us, if it does go wrong all of the rest of it just falls over." **Dominic Monkhouse, senior VP for customer experience and managing director, EMEA, Peer1 Hosting**

Product data as a service

"I think as well retailers can become destination sites for good quality data on an ongoing service level, offering a user manual for the product bought last year, or warranty information about a product. It's not just about the purchase but the ongoing service level." **Simon Walker, director of ecommerce innovation, Stibo Systems**

In summary...

Consumers have a growing appetite for multichannel services that are made possible by a range of retail systems, from PIMs to WMS and beyond. Since the shape of that consumer demand is still evolving, with, says Peer1 Hosting's Dominic Monkhouse, "lots of people coming together in a very dynamic space at the moment," retailers procuring these systems must take the long-term view. That means considering carefully how their business is likely to develop as their customers search for ever-more convenient buying options. Specifying flexible, scalable and extendible systems is central to this exercise.

Looking to the future, new markets are likely to present new opportunities to retailers in all sectors, bringing challenges of language, design and stock location that retail systems can help to solve.

While these are major investments, they are ones that will enable traders to compete in the future. And because they are for the long term, it's important to start from the right foundations. That's why it's all the more important that retailers have significant allies in tackling these challenges in the vendors they select. Time must be taken in selecting the right partner but once found, a collaborative approach that may involve teams drawn from both the supplier and the merchant will serve the retailer well in developing systems that meet their needs both now and in the future. Such good relationships will also be invaluable in helping to transfer knowledge to traders, leaving them better informed to take decisions when as yet unforeseen future trends and changing consumer behaviours emerge.

Stibo Systems on considering investing in a PIM solution

SIMON WALKER, DIRECTOR, ECOMMERCE INNOVATION, STIBO SYSTEMS

Multichannel is becoming increasingly central to retailers' plans for expansion and, with the growing popularity of smartphones and tablets, we are now seeing more retailers adding an enhanced mobile channel to complement their existing websites, catalogues and high street stores.

In addition, personalisation is shaping up to be a key driver for 2013 and, by managing the knowledge about customers behaviour, retailers will be better placed to give customers a unique and personalised experience.

This means that, with so many channels available to consumers, and with so much data flowing through them, retailers cannot afford to ignore how they collect and present information to a customer, and should consider how that data can be used to inform strategic business decisions.

We've also seen increased interest from online retailers in supporting the internationalisation of their ecommerce operation over the last year. As

they look to expand their offerings overseas, they're considering how to manage international shipping and logistics, local currencies and, more than ever, customer-facing websites in the local language.

With the various types of data flowing through a business as a result of such multi-channel strategies, and the cost and complexity of translating and managing international product information, it is more important than ever that retailers consider employing a Product Information Management (PIM) platform, such as Stibo Systems' STEP, to manage the quality and consistency of their information, across all customer touchpoints.

A wide-ranging term, PIM refers to processes and technologies focused on centrally managing information on products, with a concentration on the data required to market and sell these products through one or more distribution channels. A PIM system can also manage the process of translation, while ensuring consistency and accuracy across all channels, as well as delivering the personal experience that consumers are coming to expect.

However, while investing in a PIM solution may be a prudent means of bolstering and future-proofing a company's technology, it should, like any other major IT application purchase, be given careful consideration prior to purchase.

Retailers should begin by thinking about their overall business requirements, the fundamental reasons why they're considering the PIM solution. It's probably worth looking at what's needed across all of the channels that the solution will apply to, and not necessarily just their online offering. Beyond a retailer's sales channels, PIM can also support customer contact centres, and in-store technology such as PoS and customer ordering systems.

We would advise drawing up a set of business objectives that they would expect their PIM platform to meet; such as seeing an overall improvement in data quality and business performance, a reduction in time to market, and an overall reduction in costs across the business from streamlining existing processes.

There should also be some appreciation of what the solution can offer the end-customer. Ideally, by employing PIM, customers should see a rich, consistent experience across all touchpoints, perceiving the retailer as being pro-active in its offering of new, more relevant incentives and initiatives.

The retailer should work in collaboration with the vendor, fully discussing all of these expectations, both for the business and its customers, in order for both parties to fully understand the scope of the business needs and the full possibilities of the solution.

And the scale of the solution – in terms of complexity rather than size – shouldn't be underestimated, particularly with a view to future-proofing the business. For example, while the chief focus may currently be managing the quality of product data, the business may want to bring in further data domains such as location or customer in the future.

Scalability is important in ensuring that the solution continues to deliver against expectations down the line. Such data could pay dividends in helping with geo-location for sales on mobile, for example, or linking products and location to help give customers a better view of stock levels and delivery times.

Ultimately, we believe that the future of PIM is in the business benefits offered by these multiple domains. For this reason, we would say that, in order to take a fully strategic approach to the purchase of such a solution, due consideration should be given to these key issues of flexibility, scalability, suitability and sustainability, and how the solution is likely to meet the retailer's business needs now and in the future.

Retailers have access to more free and accurate information than ever before with the rapid advent of online, mobile and social. By making the proper consideration, the retailer should be in a position to invest in the PIM solution that will help to ensure it is fully future-proofed in advance of the challenges and opportunities that may lie ahead.

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Our clients include: French Connection, Miss Selfridge, Topshop, The Hut Group, and Wickes.

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Build from strong foundations

GET A GOOD START IN OMNICHANNEL BY FINDING THE ECOMMERCE PLATFORM THAT FITS YOUR BUSINESS, SAYS **CHLOE RIGBY**

Today's ecommerce platform is key to delivering growth as retailers look to boost sales, both through new international markets and a variety of joined-up sales channels. Retailers are most successful when a platform takes into account those business aims, set out in a well-defined strategy, while also reflecting the current demands and future aspirations of their particular group of customers as to how they like to shop.

With sales of tablets and smartphones growing fast over Christmas 2012, retailers that consult their customers first are likely to focus on the fast-emerging omnichannel approach to commerce.

"Ecommerce solutions are basically becoming commerce solutions, for the retailer to give them a way of interacting with the customer, regardless of where they are, and when and how they choose to interact and transact," says Stefan Schmidt, VP, product strategy, at platform provider Hybris.

But this means a step change for retailers with websites that are by and large currently set up to work on PCs, and where there is an ecommerce silo, disconnected from other parts of the business. Buying an ecommerce platform today is not just about finding one that will connect the website, store and a range of other devices. It's also about transforming the business and the way that it operates.

> **"There's no one off-the-shelf solution that's likely to meet the exact requirements of most medium-sized and large retailers"**

In the words of David Hogg, commerce solutions leader, Europe, at IBM: "Ecommerce isn't a separate bit of your business. It's one big retail business and the revenue coming through the 'e' bit is much bigger than the rest of your business."

AN ECOSYSTEM FOR THE BUSINESS

There's no one off-the-shelf solution that's likely to meet the exact requirements of most medium-sized and large retailers. A platform will be customised, and, as new ways of shopping take off, developed further in future. A platform is, says Richard Conyard, technical director of platform provider Colony Commerce and CIO of its parent Red Ant, "almost an ecosystem for your business when you're implementing it correctly. It needs to be considered that way from the outset. It's not a one-off transaction, it's ongoing."

At the starting point, the basic ecommerce platform should include the elements that allow a shopper to browse, choose a product, put it into a basket and pay for it. Product merchandising, content management, search engine, checkouts, support for promotion campaigns, order management, analytics and data capture will all be included. Responsive design, which enables the gestures that are used on mobile devices, is fast growing in importance as mobile commerce

continues to increase. Many retailers will go beyond the basic, supercharging sites to stand out from the competition. That might mean adding on ratings and reviews, product information management systems, and integrating into back-end systems.

Retail is changing fast, and planning for the future also means making sure new devices can be added as they become relevant. A platform, therefore, must be flexible. Think about how relationships between the different suppliers who will feed into this platform will work, and ask platform vendors how they will work alongside other companies.

Key to decisions will be how to buy the technology – and that will depend on in-house technical capabilities. Owned solutions mean a higher upfront outlay but can be more flexible in the hands of in-house developers, while cloud-based software-as-a-service solutions spread the cost, can be faster to market and are updated more quickly. A third way is the managed-service option, where the provider works to customise the chosen solution to the retailer's exact needs. Here, companies may opt for a free solution such as Magento and save budget for development work.

Retailers may also pick and mix solutions, using the cloud to go into an international market, while keeping the main platform in-house.

An ecommerce platform is a hefty investment for any retailer, and cost – and income – will be key when measuring how well a solution is working for the retailer, and whether adjustments are needed. Retailers looking for growth will measure the boost to ecommerce sales, while cross-channel sales can also be tracked and measured to find the uplift that the connected ecommerce platform delivers. When Demandware teamed up with Forrester to investigate the true cost of platform ownership, it found the average came out at about seven per cent of online revenue. To put that in context, it aims to achieve half of that rate. Regardless of decisions on how to buy, this is a useful reminder to monitor costs carefully.

A successful omnichannel strategy also should result in higher conversion rates, since the ability to call on stock across all channels should mean the customer is more likely to find and buy the right item.

Ten issues to consider

1 **Start with the strategy.** "The issue that can be most troublesome is where companies buy when they don't have a strategy laid out," says David Hogg of IBM.

2 **Legacy systems:** few businesses are starting ecommerce operations from scratch. Ask potential vendors how easily their systems integrate into the ones that are already in place.

3 **What's included in the price?** The full price is not the cost of the out-of-the-box solution. It's the cost, in labour and additional software, of having it customised to meet specific needs. But remember, price can be negotiated.

4 **Consider the missed opportunity cost:** ecommerce platforms are not cheap, but neither is the cost of missing out on sales that would come through an omnichannel business.

5 **Take your time:** an omnichannel programme realistically takes five to 10 years to implement. "Smaller functions rolled out over time prove to be much more efficient than trying to build everything up front," says Hybris' Stefan Schmidt.

6 **How long will it take to implement major future changes?** Find out how far ahead vendors are planning when implementing changes to existing solutions. It's no use if work will take just five days but can't be done for 18 months. Think too about how quickly the solution can be extended if demand outstrips expectations.

7 **Look beyond devices when considering how customers might shop:** different types of content are also becoming sales channels. A new Demandware plug-in enables readers to shop directly from a Wordpress blog, for example.

8 **Consider the resilience of the platform supplier:** "As someone who used to buy systems myself, the first thing I look at is not whether the company is functionally brilliant," says IBM's Hogg. "I'm looking for a combination of functional excellence and commercial viability."

9 **Ask other users of the same platform:** don't just read the case studies – arrange to talk to someone else using the platform under consideration.

10 **How easy is it to go international?** Within Europe adding new languages and payment methods is key, while global issues include delivery and a range of alternative currencies. Work out how this will be handled as part of the scoping exercise.

The importance of convergence

Forward-thinking retailers are already planning for mobile as commerce through both tablets and smartphone grows exponentially. "In the space of a couple of years mobile has gone from being a pilot project to a core part of your fastest growing channel," says IBM's David Hogg.

But there's more to come. Soon mobile devices will be connected by 4G services – likened to broadband for the mobile phone – and that's likely to boost both the uptake of mobile commerce and the speed at which it develops.

Those developments are likely to include the evolution of smartphones and tablets, while the motion-sensing capabilities of Microsoft's Kinect technology is already suggesting new ways to use gesture. Emerging devices such as Google Glasses may prove to be all the rage in a few years time, while washing machines that order more detergent are within touching distance.

> **"It's important to remember that all these new devices and channels are simply different ways of looking at the same products"**

PREPARE FOR THE UNKNOWN

There's only one problem. No-one knows exactly what the future will hold. Even where innovations can already be predicted, there's no knowing how popular they may be. And there's no point spending large amounts preparing for innovations that may not take off. But it's possible to prepare for an unknown future by making sure that ecommerce platforms can easily integrate with future devices. "You want to separate your business processes from those devices," says Hybris' Schmidt. "Then whatever device comes along in the future it can be brought into your processes. Make yourself a little bit independent so you're not being pushed by the device all the time."

As retailers connect their store to ecommerce processes, new ways to connect the customer – and customers' mobile device – to the store are set to emerge. Mobile phones may be used as a remote control for the store, managing, for example, virtual shelves that show stock that's not held in store but is available through another sales channel. In-store kiosks will also evolve as they come to serve a similar function. All of this underlines the need to connect the store to the omnichannel ecommerce platform, with its underlying single inventory that is visible from all channels.

"It's all about experiences in the physical or online world," says Colony Commerce's Richard Conyard. "The platforms that you're going to have in the future need to be able to support that. If you have a package that is five years old, in an old siloed box that doesn't talk to anything else, you'll need to move away from that. All of these possibilities are out there, by the time you start connecting people up, in a physical world, what you then can do with these possibilities is up to your imagination."

Retailers will soon be differentiating themselves using software and website features as well as

product selection, says Bob Skeens, regional director, Western Europe, at Demandware. The question he foresees is: "How can they offer a differentiated experience on these devices, whether an EPOS device, instore tablet or blog? Ultimately it's all about software." For him, that means the answer is also about using the cloud to provide these differentiating experiences.

As the store and mobile devices come ever-closer, social will become a more important part of the mix. Skeens says the death of social commerce is "much exaggerated," adding: "We're integrating as many Facebook verbs as we can, from 'like', to 'want' and 'have'."

Social will also aid marketers as they track transactions across channels, thanks to commerce platforms that connect all the different sales channels. That will allow them to reward with discounts and vouchers those whose Facebook friends buy from them. Such tracking could also benefit store staff, whose influence and reach will be more appropriately felt and rewarded.

But, says Hybris' Schmidt, it's important to remember that all these new devices and channels are simply different ways of looking at the same products. "For me they are all just windows into the shopping world," he says. "What you need is the ability to decorate a window as you would a bricks and mortar window. You need to be able to reach out. The fundamental thing that you already have is the internet. That's the service that gets the data to and from all those devices. How it is presented is of secondary nature. It remains to be seen which of those will be the ones that prevail in the future." ●

Speaking from experience

Consider consumers

"Just going for features is probably not going to help. What you need to do is figure out what do my customers really want from me and how can the platform help me deliver that to the customers." **Stefan Schmidt, VP, product strategy, Hybris**

Key attributes

"A platform has to be versionless, evergreen, continually ahead of the customer expectation and up-to-date. That enables brands and retailers to stay ahead of the curve." **Bob Skeens, regional director, Western Europe, Demandware**

Basic considerations

"For the medium to large player, your platform search is looking for the core platform of commerce and order management, and then looking for peripherals that are really important to your business." **David Hogg, commerce solutions leader, Europe, IBM**

Ecommerce on demand

"Ecommerce almost needs to be consigned to the area of utility and function. It should work in the same way that turning on a tap does." **Richard Conyard, technical director of platform provider Colony Commerce and CIO of its parent company, Red Ant**

In summary...

As the technology that we use to shop with continues to evolve, so customers are adapting. Forward-thinking retailers, companies that are helping to shape shoppers' expectations, are setting the pace of that evolution. It's not that shoppers expect retailers to build their retailing infrastructure on omnichannel ecommerce platforms. But it is the case that shoppers expect to move between sales channels easily and seamlessly, whether they're browsing in a shop, on a tablet computer or even reading a blog or chatting to friends on social media. Recognising that fact is a crucial step for retailers to take in order to offer the convenience that their customers now require.

Doing so now will put them in good stead for the future. For this fast pace of development is set to continue – and fast.

Shoppers will continue to want to access information in ever-more convenient, fast and flexible ways. By making sure that strong yet adaptable foundations are in place, retailers can build cross-channel emporiums that impress and delight customers. Such constructions can change and adapt to the future demands of customers, as they appear. At the heart of those foundations is the ecommerce platform. An omnichannel retailer takes five to 10 years to put its systems in place, and many are only starting out now. But by starting from the point that suits the business, retailers will be better prepared for building that future structure.

After all, as Hybris' Stefan Schmidt says: "As a retailer the important thing is to start selling into a virtual room of which you have many, many windows that you present your goods through."

Ghdhair.com: growing success

hybris software
THE FUTURE OF COMMERCE

The ghd brand is synonymous with top-of-the-range hair-styling products. Widely used by hair stylists at the peak of their profession, the ghd range is designed for salon use but easily adopted by women at home. ghd's revolutionary approach has generated a following of loyal customers, including many celebrities, and whilst sales through salons and retail outlets are strong, online purchasing is steadily growing.

Until 2010, ghd relied on a transactional website that did little to help promote the brand, was expensive to maintain and provided limited control over online sales. The company needed a central ecommerce solution that would support its burgeoning international business and developed a digital strategy with key objectives.

THE CHALLENGE

The aim was to match the iconic branding of the products with a destination site that would compel hair stylists and consumers to make regular visits. The ghd team wanted to maintain control over the site, allowing them to implement powerful merchandising and marketing features that would support digital sales. It was also important that the ecommerce project should complement and positively influence sales of ghd products 'offline' in salons and traditional retail outlets.

Stuart Spiegel, chief marketing officer at ghd, comments: "We wanted to go beyond traditional ecommerce not just to market our products online, but to create a place where consumers and stylists could congregate – a community that could both serve and benefit from searches related to hair fashion trends as well as our products."

THE SOLUTION

ghd selected hybris B2C Commerce along with Adobe Digital Marketing Suite for Web Experience Management, both of which were implemented by hybris' partner, Tacit Knowledge. The company wanted to ensure that it would be supported not just short term but as it expanded internationally in the future; and both the hybris and Adobe solutions would allow the online business to scale, as well as enabling business users and community participants to create, manipulate and contribute content.

"Our digital strategy required building a robust brand platform engaging a large network of independent salons and professional hair stylists seamlessly with international commerce," says Spiegel. "We are proud that key brand advocates, professional hair stylists and salons will now have unique tools to engage their clients."

The www.ghdhair.com site was launched in October 2011 with the new commerce area, and a second iteration, the following spring, became a 'feed-based' content zone for professional stylists. The 'Showcase' section features profiles of individual stylists who upload their own images, videos, tips and ideas. This content is stored on the hybris platform, and ghd's editorial team works with the stylists to

ensure quality of content and to help them promote it to consumers and stylists.

Stuart Spiegel comments: "This community is critical. Our products are used and recommended by the best stylists, so we wanted a platform to engage with them. The premise is that our site is a tool for the creative community, and we curate their work to surface on our homepage and build interest for the stylist, the salon or the trend it represents. For consumers we offer a powerful search tool, which means they are directed, via a unique feed, to relevant articles and ideas directly from the stylists, as well as to products."

An average customer may only purchase a ghd straightener every two or three years, so the community, plus a huge gallery of images, ideas and the product catalogue provides an additional draw, encouraging consumers to re-visit and engage with the brand on a regular basis.

THE RESULTS

Already ghd has standardised the online offering and manages 13 'storefronts' from its head office in London. What previously took weeks to set up, now takes just hours, even minutes. This stems from the agility and functionality of hybris B2C Commerce and Adobe.

"hybris is the glue between content management and the community and it has proven to be a very powerful ecommerce system. We have made extraordinary demands of both hybris and Adobe, but the response has been solid at every stage. Tacit has also been important for the success of the integration, setting up an interesting architecture from a blank canvas and the result is truly a best-in-class solution." Spiegel concludes.

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Operating since 1998, neoworks builds market leading solutions based on the hybris platform using a development team with an average of 10+ years of experience.

neoworks helps retailers, manufacturers and wholesalers to merge the gap between technologies and business objectives and provides innovative, agile integrated solutions that help companies gain competitive advantage by engaging their customers across multiple touch points.

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On Tap's prime focus is Magento. We offer design/build, customisation, optimised hosting, training and support. Our development team encompasses both creative and technical disciplines, and our pedigree in delivering best-in-class custom solutions across SME to FTSE 100 businesses, both B2B and B2C, makes us your ideal partner:

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As one of the longest serving Magento Partners, On Tap have built up a formidable amount of experience in all areas of Magento.

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Portaltech Reply is the Reply group company specialising in the provision of ecommerce implementation and multichannel consulting services. The company has gained substantial experience in eCommerce since inception in 2000 by working on some of Europe's largest ecommerce and multichannel retailing projects. Portaltech Reply is 100 per cent dedicated to hybris technology and is the world's most experienced and respected implementation partner with Platinum Elite status and winner of Global Partner of the Year for three out of the last four years. Portaltech Reply customers include Bunzl Group, Costco, Delhaize Group, Iceland Foods, Office Shoes, O2 and TUI Travel.

Portaltech Reply is part of Reply [MTA, STAR: REY], a company specialising in the design and implementation of solutions based on the new communication channels and digital media. Reply services include consulting, system integration, application management.

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Prism DM is a specialist provider of ecommerce platforms including design, build, hosting and content management systems. This is further supported by a 120-seat customer contact centre and on-site distribution centre handling B2B and B2C distribution for any UK or International destination. Prism DM support deep integration with their fulfilment and CRM systems and also have extensive experience of 3rd party integrations. Prism DM are now providing their solution globally including support for retail operations across countries including Canada, United States of America, Germany, Australia and the United Kingdom.

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Are you experienced?

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PUNDITS BLAME THE DEATH OF THE HIGH STREET ON THE INTERNET. IN TRUTH, ARGUES **PAUL SKELDON**, THE SURVIVAL OF BRICKS-AND-MORTAR STORES DEPENDS ON DIGITAL TECHNOLOGIES

With high street stores closing down all over the developed world, it's often said these companies are being killed by the internet and digital commerce. While this is true to some extent, the problem is more one of retail brands not really knowing what their customers want. The only reason people aren't shopping in these stores is because these shops are not offering the combination of goods, price and experience that customers want and are getting elsewhere.

But while the digital world is having a dramatic impact on retailers with bricks-and-mortar stores, these very same digital technologies – the web, mobile, tablets, social media and the new ways in which ecommerce and m-commerce are used by consumers – also hold the key to revitalising the in-store shopping experience.

According to Accenture, 71 per cent of shoppers use their mobile devices in-store to make purchasing decisions, and nearly 50 per cent share deals, reviews and opinions. Smart retailers need to harness that potential and make it work for them.

House of Fraser ecommerce director Andy Harding agrees. "Digitising the in-store experience is key," he says. "Multichannel customers are three to four times more valuable than single channel customer each year. If you can bring the personalised shopping experience you get online into the retail environment then the results would be amazing."

He believes that brick-and-mortar stores are one of the only ways that House of Fraser can stand out against pure-play online retailers such a ASOS, so service differentiation and innovation in-store are necessary to boosting the brand's overall online framework.

> **"The only way to combat becoming Amazon's showroom is to create an engaging mobile experience that is integrated into the store"**

CONVERGENCE NOW

This kind of scenario is hard to achieve. "The big trend to keep in mind is the single customer view," Dan Mortimer, CEO of Red Ant, says. "Where retailers have knowledge of their customers' preferences and buying patterns, and make use of this information to offer an enhanced shopping experience. The brand story is no longer about the website or the in-store shopping experience in isolation. It's a journey defined by the customer, with touchpoints from the moment they start thinking about making a purchase to handing over the cash."

Jonathan Glanz, director of omnichannel retail sales, shares this view. "Another way of looking at it is that we are entering a world of true omichannel, the virtual and physical worlds are converging," he says. "The web, mobile and in store must truly be a consistent brand experience at all touch points along the path to purchase. The advantages of the web include bringing the full assortment to the table, and in a world of just in time and direct order fulfilment that vast sea of choice is growing every day. The key to in-store digital experience must be to bring that endless aisle into the store. but to curate that unlimited selection to the individual in a way that is contextual. In other words the right personal product recommendations, at the right time in the right place."

The key factor in creating this holistic view of the customer across all these channels is in 'digitising' them and the best way to do that is through mobile. Or, as Red Ant's Mortimer puts it: "[The key is] seamless, on-demand delivery across every step of the customer journey – digital channels and in-store – with mobility at its heart as the permanent connection."

Glanz agrees: "The only way to combat becoming Amazon's showroom is to create an engaging mobile experience that is integrated into the store," he says. "All in-store interactive, whether it is digital fitting rooms, tablet apps, augmented reality installations or video screens, will have a mobile component – and the ability to enjoy the in-store experience and take that information with you on your smartphone is essential. Mobile has become the great influencer and a huge percentage of purchases are, in part, being influenced by some sort of mobile research and interaction."

But getting people to think mobile while in store isn't necessarily that easy. One way to engage consumers on mobile in store is to start to use it as a point of sale option, believes Damian Hanson, CEO of One iota. "We see mobile point of sale being an easy solution for retailers to embrace and the impact on the shopping experience is huge, this is a really simple win for 2013 with the right partner in place," he says.

Glanz agrees: "You just need to look at how it works at the Apple store to understand how mobile POS is going to trigger a whole host of new technologies such as Google Wallet and NFC hotspots."

Ten issues to consider

1 **Take it to the top:** digital commerce is a C-level concern – of course marketing and sales matter should be part of it – but it's much more fundamental than just a veneer, or a digital shop front. It needs to be integrated into the heart of the business – it's a fundamental investment in the future of the brand, and should be treated as such.

2 **Have a clear idea:** have a set of goals for the platform from a business point of view and put it out to tender accordingly. Each scenario is different, from digital signage to interactive platforms. Some suppliers can deliver end-to-end packages but most cannot. Recently, several really great consultants have sprung up that can help navigate the waters here.

3 **It's not just the web:** in-store is not just another website channel. Rather, there are many factors to consider here, such as scanning, redemption mechanics, loyalty programmes and new payment methods. If delivered correctly, then application features should always be possible to develop and push live in the future.

4 **Hardware and apps:** consider both the hardware and application sides of in-store technology. Ask questions about the application layer. A high-quality customer experience is the key to driving a return on investment from an in-store solution. Retailers must consider if a provider is capable of delivering the application layer as well as the hardware.

5 **A 360-degree view:** procure a platform that can personalise the shopping experience and give a 360-degree view of the customer, in-store, online and on mobile devices. It also needs to enable customers to find out what they need to know about the brand and their potential purchases.

6 **Pleasing everyone:** ensure in-store systems can be used by as many customers as possible, regardless of the devices they are using or where they are using them. Consider how to 'include' that minority of customers who don't have fancy devices – how can you put signage, tablets or kiosks in store to let them have a richer experience?

7 **Shop around and collaborate:** what a retailer ideally needs from a cross-channel in-store platform provider is a single supplier with solid tech credentials. However, as previously noted, it's not common to find a company with the precise skills a retailer needs, so look at which companies can do what and how well they can work together.

8 **Measuring success:** Include the idea of KPIs and ROIs into an initial business plan and at the tendering stage. Retailers must figure out what success looks like before diving in. Each retailer will be different and have different KPI considerations, but ultimately sales, assisted sales and product discovery will probably be lead metrics.

9 **Keep on keeping on:** budget for the ongoing investment it takes to maintain, refresh and develop content for the system or systems selected. Don't look for bargains nor buy systems that are not scaleable or are at the end of their lifecycles. Remember that new mobile platforms can deliver real-time content, interactivity and multi-platform messaging cheaply and easily.

10 **Beware new channels:** be prepared for the arrival of new channels. Connected TV is going to be a huge online channel, and one that has the potential to link advertising, mobile and ecommerce, all through the all-pervasive medium of the TV set.

The return of bricks and mortar

Digital in-store technology and the tie up between the online and off-line worlds – though hopefully we won't need to refer to shops as 'off-line' for much longer – is at a nascent stage. Many retailers understand the threat the digital world poses, but most do not yet really understand how to use digital technologies effectively in store.

The key thing is to look holistically at how to tie together the digital and physical worlds – which is easier said than done. One thing that is being trialled by Disney is to use digital technology in store to offer consumers an 'experience'.

"Recently Disney stores changed their focus from being completely merchandise driven to the store as a destination experience," says Jonathan Glanz, director of omnichannel retail sales at Certona. "The Disney team created fun, kid-focused in-store digital experiences."

> **"A key consideration for retailers is to look holistically at how to tie together the digital and physical worlds – which is easier said than done"**

Jorg Hackemann / Shutterstock.com

This move is a brave one and won't suit all retailers. Most are driven by sales, not by user experience, so a key trend that will develop in the coming months, many industry experts believe, is in rolling out in-store mobile service on the shop floor. While many advocate this as a replacement or augmentation for point of sale, there are also those that see shop assistants – or retail associates – playing an even more key role in the process.

"Store designers are thrilled to be getting back all the real estate that cash wraps and queues have taken up." says Glanz "And we now have a way to help associates make the right decisions in guiding a sale by giving them mobile devices. We also can communicate with our store staff to help them with product descriptions, stock information, what's trending, what needs to be pushed and even where in the store products are."

He continues: "Store associate mobile devices will also soon allow us personally to identify customers as they walk into the store. As customers agree to sign into wi-fi systems, store associates will be alerted to who has just walked into the store and geo-location systems will be able to locate that individual. When a premier customer walks in, store managers and associates will know it and be able to greet them personally."

TIME TO TALK

A study by German retailer Neiman Marcus found that consumers who interact with the same member of staff three times are 10 times more likely to make a purchase. As a result, they created an app that allows customers to locate members of staff in the store.

"If they can offer customers a personalised relationship with a staff member then the sales uplift will be dramatic," says Andy Harding, House of Fraser's ecommerce director.

This is only the start of the personalisation approach to delivering the benefits of digital commerce to the in-store environment.

"The biggest trend we see is personalising the experience," says Glanz. "We can now use digital

technology to foster the individual relationship with the brand and the customer. We can provide help in choosing, make people feel special, deepen the bond between the retailer and the customer and finally help in the most important goal: to sell product."

Part of this personalisation paradigm is the increasing use of social media. While House of Fraser's Harding sees Facebook as making something of a land grab in social retailing, traditional retailers can start to integrate social into their retail experience, allowing consumers to rate and share and tag gods, services and retailers. They can even become friends.

Harding highlights Shopcade as an innovative use of social shopping, as it allows consumers to monetise their shopping experience by creating product pages that let them effectively act as affiliates.

Similarly, Facebook app Wrapp has the potential to be important to retailers as it allows them to target users with free vouchers to drive people into their stores.

Already mobile vouchers are being socially shared and mobile services such as QR codes are starting to gain ground, because of their current novelty value if nothing else. The next generation of these services could well be tied together by things such as augmented reality, that can overlay the detail of the web – the social reviews, the progeny of goods, technical specs and so on which will then truly bring together the physical world's touchy feely-ness and the detail, opinion, personalisation and ability to order stock that the web has to offer. Handled correctly by retailers, the physical shopping experience could well rise again, helped rather than hindered by the web. ●

Speaking from experience

Connecting channels

"'Anytime, anywhere' shopping is becoming the norm, and mobility is the key. Any commerce solution should be smart enough and flexible enough to connect the in-store, web and mobile/tablet experience, through both technology and insight into consumer behaviour throughout the buying process – increasingly, it's what customers expect." **Dan Mortimer, CEO, Red Ant**

Questions, questions...

"The overriding goal is always the same, to ring the cash register and to grow the brand, but how you get there and how you measure success as well as all the investment it takes needs to be truly thought out. Is the reason for the installation ambiance and part of the brand aesthetic? Are we creating experiential retail in which the store becomes a place to play? Or will the installation be merchandise and promotion driven? Or is it a blend of all these things?" **Jonathan Glanz, director of omnichannel retail sales, Certona**

In-store tech considerations

"Overall consideration needs to be made to both the hardware and application side of in-store technology. We have seen many examples of hardware solutions that are simply rendering existing websites with no attempt to provide a considered user journey. Ensuring the user experience and secure chip-and-PIN payments are possible will really drive conversions so is well worth the time spent getting this right." **Damian Hanson, CEO, One iota**

In summary...

While the retail sector is being hit by both a tough economic climate and drastically changing shopping habits, help is at hand – perhaps even from the technology that many see as threatening the future of bricks-and-mortar stores.

Mobile almost certainly holds the key, and one area where it could really come into play is through using mobile to help people find what they are looking for – or be helped using social media – and by helping them pay for it.

As House of Fraser's Harding sees it, mobile payments and loyalty will be the next game changer, making cards and NFC cards obsolete within three years, and not only letting people pay more easily, but also opening a digital line of communication to the consumer. "For us it's a huge issue as we have to reinvest in all our store infrastructure," says Harding. "But we can then give consumers digital receipts, which presents a huge opportunity as we can use that data to market to customers and link offline and online purchases."

It also generates valuable data for retailers – and data is going to be key to personalising the shopping experience across whatever channels the consumers wants to interact with you. "We see data-backed personalisation as a ground-breaking paradigm," agrees Certona's Glanz. "All retail experiences on the web, in store, on mobile devices and in call centres will use this proven concept of personalisation to drive the experience."

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"Certona is a true business partner that acts with our interests in mind. Their team proactively suggests new strategies that consistently prove to grow our key metrics and top line revenue." ***Ellen Gooch, Sr. eCommerce Analyst, SoftSurroundings.***

"Certona has helped us grow sales on our site and it has been a very dynamic partner helping us implement and optimize on our new website...Thanks Certona for being a great partner!" ***Frank Van Der Ree, VP Online & Offline Marketing, Utrecht***

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hybris helps businesses on every continent sell more goods, services and digital content through every touchpoint, channel and device. hybris delivers OmniCommerce™: state-of-the-art master data management and unified commerce processes that give a business a single view of its customers, products and orders, and its customers a single view of the business. hybris' omnichannel software is built on a single platform, based on open standards, that is agile to support limitless innovation, efficient to drive the best TCO, and scalable and extensible to be the last commerce platform companies will ever need. Both principal industry analyst firms rank hybris as a "leader" and list its commerce platform among the top two or three in the market. The same software is available on-premise, on-demand with managed hosting, giving merchants of all sizes maximum flexibility. Over 400 companies have chosen hybris, including global B2B brands. hybris is the future of commerce™.

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Javelin Group is Europe's leading specialist consultancy in ecommerce and multi-channel retail advising retailers, brand owners and B2Bs on their ecommerce and multi-channel strategies, operations and technologies, and developing large-scale ecommerce solutions. Clients include 17 of the 20 largest retailers in the UK plus many others across Europe and beyond.

Javelin Group's multi-channel consultancy services, which include international expansion, help retailers, brands and distributors to grow their sales and coordinate their web, mobile, telephone and store channels for maximum profit. Recent clients include Marks & Spencer, ASOS, Waitrose, Matalan, Warnaco and Bosch Siemens.

Javelin Group's ecommerce implementation services include development of world-class ecommerce websites on leading platforms, mobile commerce, and other solutions such as PIM. Services also include rapid international roll-out of multi-country ecommerce solutions. Recent B2C clients include Lakeland, Asda, Direct Wines, Mothercare, sit-up, Tesco and Debenhams, and B2Bs include Rexel, IMI Norgren, Nisbets and Bobcat.

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Red Ant is a digital experience and technology company focused on maximising business results.

Built from our roots in 1999 as a technology company, we create effective ways to help clients win in the race to digitally connect with their customers in a rapidly changing digital world.

With offices in London, Geneva, Rio de Janeiro and Shanghai, we specialise in digital commerce, bringing together the retail experience online, instore and on smartphones and tablets, to deliver an immersive, enriched shopping experience with mobile at its heart as the connecting technology. We have developed market-leading digital commerce solutions for major high-street brands including Topshop and Toys R Us.

We are experts in end-to-end retail experience from engagement through to purchase and, as a Hybris implementer, we offer full tier 1 and 2 end-to-end solutions across digital multichannel commerce.

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RichRelevance powers personalised shopping experiences for the world's largest and most innovative retail brands, including Wal-Mart, Sears, Target and others. Over 850 million times per day, RichRelevance is powering the personalised shopping experiences for consumers shopping the world's largest and most innovative retail brands like Marks & Spencer, John Lewis, CDiscount, Walmart, Sears and Target. Founded and led by the ecommerce expert who helped pioneer personalisation at Amazon.com, RichRelevance helps retailers increase sales and customer engagement by recommending the most relevant products to consumers regardless of the channel they are shopping. RichRelevance has delivered more than $5.5 billion in attributable sales for its retail clients to date, and is accelerating these results with the introduction of a new form of digital advertising called Shopping Media which allows manufacturers to engage consumers where it matters most – in the digital aisles on the largest retail sites in world. RichRelevance is headquartered in San Francisco, with offices in New York, Seattle, Boston, London and Paris.

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Retailers, wholesalers and manufacturers turn to Salmon to define the right digital strategies and make the correct investment decisions to improve their online competitive advantage and extend brand loyalty.

For many, this centres on the development of effective B2C and B2B eCommerce websites, optimising customer experiences and executing multi-channel strategies effectively. Increasingly, businesses also ask Salmon to help them with their mobile and tablet offerings, to help them expand their eCommerce offering internationally or to develop multi-brand solutions.

We implement solutions that centre on two key aspirations – increasing revenues today, and putting in place technical platforms to support sustainable and profitable growth for the future. With a unique combination of technical and business expertise, Salmon provides digital consulting, design, delivery and support services. Our pedigree is clear. Our customers include Akzo Nobel, Argos, DFS, Halfords, Homebase, Hotter Shoes, Game, Jacques Vert Group, Kiddicare, Morrisons, Pets at Home, Selfridges and Premier Farnell, each of whom has chosen Salmon due to our retail domain experience and technical expertise. We are after all – award winners.

Moving on

Credit: pio3 / Shutterstock.com

THE ERA OF MOBILE COMMERCE REALLY IS HERE AT LAST, BUT RETAILERS STILL FACE SIGNIFICANT CHALLENGES IN MAKING MOBILE OFFERINGS EFFECTIVE, ADVISES **PAUL SKELDON**

It has been said many times before, in many years, but in all the most significant ways 2012 was actually the year of mobile. No, really, it was. According to IMRG and eDigitalResearch's figures some 20 per cent of UK online sales happened through mobile in 2012, taking some £15.5 billion of the £77 billion spent online. The run up to Christmas 2012 also crystalised the use of mobile, especially tablets, as a key, rather than niche, shopping channel with Affiliate Window finding similarly that a fifth of ecommerce traffic in December 2012 came from mobile devices, while Deloitte believes that some £3.5 billion of sales around Christmas were influenced by mobile.

But while the consumer volumes using mobile are becoming significant, there is still a long way to go within the retail community to really capitalise on the hunger there clearly is out there for using mobile devices around retail.

According to TradeDoubler's *Mobile Devices & Behaviour* report, published in December 2012, retailers still need a real understanding of how a shopper's path to purchase is influenced not only by the channels they have available, but also the specific device and operating system they have – and this lack of understanding not only complicates the procurement process for mobile technology, but is also failing consumers.

Despite the success of mobile commerce, 41 per cent of US shoppers still don't purchase things on mobile. That's 104 million consumers locked out. Much of this is to do with their age – anyone older than 50 is reticent to purchase on mobile – but according to research in the States by BIO Agency, poor experience is a big factor here too.

> **"Delivering the right mobile experience as part of a cross-channel service is going to the vital issue for retailers in 2013"**

This is backed up in the UK by research from eDigitalResearch, where consumers said that they would do more mobile shopping if offered a better experience, and so delivering the right mobile experience as part of a cross-channel service is going to be the vital issue for retailers in 2013.

However, delivering this experience is extremely complicated as it requires tapping into new technology and existing legacy systems, as well as understanding what consumers do with different devices and how that all fits into an overall company ethos.

"If you are in charge of delivering your company's mobile strategy, you are more than likely receiving multiple differing views on the subject from many different people," says Phillip Clement, sales and marketing director at Bemoko. "Should you go responsive, should you use a separate mobile site, should you use a platform to deliver mobile sites or should you write a separate site for each device – okay, so that last one is extreme, but I've seen it done – there are a huge variety of different options, all with their pros and cons."

In Clement's view, meeting all these demands is essentially a compromise, it is just a matter of what you compromise to achieve it.

THE RISE OF RESPONSIVE DESIGN

One key trend in mobile site design to emerge in 2012 is adaptive or responsive design. This technology allows you essentially to create one website and have

it adapt to the device on which it appears on the fly. On paper this appears to be a magic bullet, but is it?

"Sorry to disappoint, but I'm afraid it's a compromise," warns Clement. "Responsive seems to make perfect sense and the idea that you can have your site respond to different devices (primarily based on screen width) and only need to develop one site sounds like a better-than-sliced-bread moment. It's when you stand back and think about the context of mobile where you find the compromise. Yes, it's great writing one site and delivering to all screen widths, but is that really understanding mobile context? A mobile user with a touch interface has different needs to a PC/desktop user with a keyboard and a mouse. The navigation of the site should be different for these contexts."

This problem is being compounded by the fact that tablets are now becoming even more prevalent as a shopping medium. This presents a growing raft of devices – think not just iPads, but Kindle Fires, myriad Android tablets and, of course, Microsoft's surface and other Windows 8 devices.

"Tablet will start becoming the de facto for browsing – retailers are starting to see these devices take 20-25 per cent of traffic already," says Julian Douch, associate partner, Open Reply UK. "Having optimised sites will become more common place. Open Reply have done this for Monsoon, which has already lead to increase in conversion rates. In-store use of tablets with customer advisor apps will also become more common place."

In-store enterprise is another area where mobile is increasingly becoming prevalent, and developing mobile infrastructure and services to accommodate this is something that retailers are also having to tackle, often separately from developing customer-facing mobile offerings.

Ten issues to consider

1 **Know what to ask:** it may sound like something that George W Bush might have said, but most retailers don't know what they don't know and so it is difficult to ask the right questions. Every digital agency is now a 'mobile expert', allegedly, so be sure to do a considerable amount of due diligence.

2 **Know what you want:** the heart of any brief for a mobile project should be its clear objectives – what specific customer problems the brand wants to solve, and the business benefits that will accrue from doing so. Without that, it is impossible to make a rational 'apples-vs-apples' decision.

3 **Know what you have got:** as the trend in mobile is for its integration into all aspects of the business, it is key to know what systems are already in place and how these may help, or indeed hinder, what the company is trying to achieve. The commonest problems are with integration of new services into POS, ERP and CRM platforms, but even in-store wi-fi could be an issue.

4 **Know the know-how 1:** as mobile projects get more complicated, retailers have to ask if one company can actually deliver all that's needed. Many claim to be able to do 'soup to nuts', but are they able to do that as best of breed? Equally, if choosing several providers, what pedigree for co-operation do they have?

5 **Know the know-how 2:** retailers must be sure to drill down into suppliers' technical ability. Ask suppliers difficult questions, assess what stance they take on issues such as adaptive design, and ask them to justify their views. Look at mobile and omnichannel services that may provide an appropriate model, and find out which suppliers worked on them.

6 **Know who owns the know-how:** find out from prospective suppliers who actually owns the technology they are planning to use. There is nothing wrong with supplying other people's kit or outsourcing parts of the project to trusted third-parties, but perform points four and five above again on these new suppliers. Talk to these companies too.

7 **Know the vision:** ask prospective suppliers about their vision of what needs to be achieved, as well as getting them to put it in the wider context of their vision around mobile. Also find out how much mobile expertise the supplier has. This applies particularly to enterprise-mobility projects.

8 **Know the cost:** price is obviously going to be key, but the most expensive – nor indeed the cheapest – supplier is necessarily the best option. It is more about assessing how best to deliver objectives (see point 2). It is also important to look at the ongoing costs of the project.

9 **Know how confident suppliers are:** look at how some or all of the project costs can be paid based on performance. As Velti's Cockett says: "If I was sitting in the other chair, I would be interested in companies that were able to offer performance-based commercial terms. M-commerce or mobile marketing for example are very trackable – you can link a text promotion right down to a customer and a sale."

10 **Know the customer:** look at what customers are doing with mobile and tablets, where they are doing it, what different devices are being used at different locations, times of day (or night), and what sorts of information they are searching for. Mobile retail is still, currently, a consumer-driven business. Understanding this customer behaviour will help create the right sort of mobile offerings.

Ever-changing modes

Despite 2012 being the year where mobile proved itself, the year ahead is going to continue seeing developments in mobile move rapidly, and retailers have to be on top of the technology trends that are going to impact on doing business when considering what needs to be done in terms of implementing mobile strategy.

The key developments are likely to take place around tablets, integration of mobile into the omnichannel offering, development of mobile enterprise solutions and in better use of mobile for marketing and brand development. Oh and 4G networks, if anyone can get them to work indoors.

"The next evolution of mobile web will be very prominent with a large focus on tablet optimised solutions," says Open Reply UK's Douch.

Matt Cockett, VP Business Development, Velti, agrees. "If 2012 was the year of mobile, then my view is that 2013 is surely the year of the tablet. According to Mary Meeker's most recent report, last year tablet ownership in the US went from two per cent to 29 per cent in under three years. Many of these tablets such as the Kindle Fire HD are keenly priced and 'commerce enabled' out of the box. That has the potential to be transformative for the retail sector."

US-based ecommerce solutions provider Monetate, in its *Ecommerce Quarterly* report for the third quarter of 2012, found that for the three-month period ending in September, tablets accounted for 8.37 per cent of all website traffic, up from 3.16 per cent in 2011. Figures for m-commerce traffic and sales in December 2012 from Affiliate Window suggest that tablets accounted for 59 per cent of mobile commerce sales.

> **"While tablets are taking the limelight in the retail press, there are many other trends afoot that will have a huge impact on mobile and omnichannel retail"**

"And the story in the UK is following a similar trajectory," says Mark Inskip, UK managing director for Group FMG. "In July 2012, Screen Pages research showed that 20.8 per cent of visits to ecommerce sites were coming from mobile devices, and of that 84.5 per cent were from Apple devices. Within this, iPad usage increased to 54.9 per cent from 46.4 per cent, while iPhone usage dropped from 35.5 per cent to 29.6 per cent. Most interestingly though, iPad shoppers buy more; average conversion rates on iPads are 22.5 per cent higher than on other platforms."

While tablets are taking the limelight in the retail press, there are many other trends afoot that will have a huge impact on mobile and omnichannel retail strategy in the coming year.

"There will be further investment in better incorporating mobile into every customer touchpoint," says Douch. "Retailers who are alive to embracing mobile/digital into a consumers shopping experience (and not seeing it as the death of high street) will further cement their position."

Douch refers to this as proximity commerce – forgetting multichannel as a concept of having 'n' different channels, but working from a concept that you have single conversation with a customer. This may incorporate many channels "such as using mobile in-store to scan, market to, checkout using that stores stock rather than that associated to online".

FUTURE TECHNOLOGY NEEEDS

This is going to see some big changes in how retailers structure technology to deliver the services customers want. "Uncoupling of systems like content management systems and ecommerce platforms being replaced with dedicated systems for rendering, commerce and content management are going to be big trends for retailers this year," says Bemoko's Clement – something that both Forrester and Gartner are also predicting.

Clement also believes that many retailers will start to see how responsive design will become a "massive overhead for those that choose it and will slow their business down".

Douch predicts too that "with ecom technologies evolving their mobile offering, other mobile specialist technologies evolving, there should be a reduction in scraping technologies such as usablenet, which typically have inherent operational issues."

The answer instead, believes Clement, is the use of dedicated mobile platforms that will "deliver faster and more flexible solutions to companies and companies that use them will lead the way".

Marketing and brand development through mobile is also going to be of great importance to the retail industry, as it brings together the existing channels and mobile, in addition to shaping the whole business strategy for the company.

"Mobile will have a huge impact on every facet of the customer journey," says Phil Gault, director of strategy at Sponge. "Deloitte has estimated that for every pound in m-commerce sales, mobile will directly influence £23 of in-store sales, so it's clearly misguided to think of mobile in a silo. Great things can be achieved if you make mobile integral to your proposition. Look at Starbucks or Domino's."

Enhancements in networks – not only the arrival of 4G in the UK this summer, but also better and more prevalent wi-fi – is also going to mark a shift in how retailers approach mobile. Better networks are going to offer the chance to build in much richer offerings featuring video and 'gamification' services, these are going to enhance both the customer experience and the brand perception – all of which should lead to enhanced sales for those that get it right.

As Douch says: "Most retailers now have a mobile optimised presence. However, we foresee the leaders moving toward an evolve/exploit position where technology advancements – new, more powerful phones, 4G etc – support new ways of presenting more engaging content such as HTML5 (canvas), animation, video and so on. This evolution will be drive greater brand differentiation on mobile + the ambition to better drive conversion on mobile." ●

Speaking from experience

Poor old moggy...

"In mobile – perhaps more than any other area of communications – there are numerous different ways to skin the cat. These factors impact on cost, on timing, on security, on reliability, on scalability, on flexibility – as well as on quality. It may be that the lowest cost solution is the right one for your business, but that is far from being inevitably or universally true." **Phil Gault, director of strategy, Sponge**

Analytical model

"Analytics will and must drive evolution and exploitation of mobile solutions. Anyone with a mobile presence who ignores this will neither understand how their customers are shopping on mobile, nor will they ever – removing the element of luck – fully exploit the potential of mobile." **Julian Douch, associate partner, Open Reply UK**

Look ahead

"Think about the long-term goal. Think how not just mobile but think about 'the internet of things', think about how the web is changing the way consumers buy, interact and get information about your brand. The speed and level of information that is available can be as damaging as it is an advantage." **Phillip Clement, sales and marketing director, Bemoko**

In summary...

Mobile is well and truly entrenched in the mindset of retailers and consumers, but thus far we have seen only siloed forays into using it. The challenge ahead fully to exploit mobile is to see it integrated into every facet of the business.

Mobile is about the whole journey from marketing and branding to engagement, to sales to follow up, and making that happen is the real technological and strategic challenge all retailers face – and retailers have to do this on a budget while not cannibalising existing sales channels.

Phil Gault, director of strategy at Sponge, sums up the challenges ahead: "Sponge has spent a massive amount of time over the past decade preaching, 'Why mobile?' For the vast majority of brands, especially in retail, I think that case is now made. So the question is now: 'How mobile?' Things aren't going to change overnight, but the transition I hope and expect to see is mobile moving out of a standalone silo, and becoming an integral part of the omnichannel proposition. Specifically, I think we'll see a dramatic evolution in location-based and other context-based solutions; to the point where these become fundamental to brands' customer acquisition and retention strategies. Equally, we'll begin to see the next generation of mobile sites, with a much greater emphasis on enriching the customer experience in-store."

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Javelin Group is Europe's leading specialist consultancy in ecommerce and multichannel retail advising retailers, brand owners and B2Bs on their ecommerce and multi-channel strategies, operations and technologies, and developing large-scale ecommerce solutions. Clients include 17 of the 20 largest retailers in the UK plus many others across Europe and beyond.

Javelin Group's multichannel consultancy services, which include international expansion, help retailers, brands and distributors to grow their sales and coordinate their web, mobile, telephone and store channels for maximum profit. Recent clients include Marks & Spencer, ASOS, Waitrose, Matalan, and Bosch Siemens.

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Opportunities for growth in overseas territories

BUILDING CROSS-BORDER SALES IS A KEY GROWTH TARGET FOR MANY RETAILERS, BUT SUCCESS DEPENDS AS MUCH ON RESEARCH AND PLANNING AS CHOOSING THE RIGHT SERVICE PROVIDERS. **PENELOPE ODY** REPORTS

With many in the Eurozone still battling with austerity and unemployment, and with domestic markets stagnating, it is hardly surprising that retailers are looking for international growth and turning their attention to developing and emerging markets.

Cross-border sales within Europe have generally been regarded as an easy first stage for building international operations, although handling VAT can be challenging once national thresholds are reached. For UK retailers, at least, selling to other English-speaking markets, such as Australia and the USA, has also proved fairly straightforward and both currently account for around 14 per cent of UK overseas e-shipments, according to IMRG/MetaPack studies.

Key to developing successful cross-border operations is research: understanding which markets are most likely to buy from your website, and identifying local cultural nuances and regulations that can mean the difference between success or failure. Early indicators can come from those chance orders which land on the domestic website from overseas customers, while setting up an e-shop on eBay or Amazon Marketplace can also suggest possible geographies for future expansion.

“Key to developing successful cross-border operations is research – understanding which markets are most likely to buy from your website”

Language is also important, but simply translating the site verbatim is unlikely to prove successful. “Crucially, it’s not just about rolling out your own website to other countries,” says Mark O’Hanlon, manager, Kurt Salmon. “For example, although there is huge demand in China for British brands, there are advertising restrictions associated with .co.uk websites – you must have a Chinese domain. Equally as important is to define the user content in each country. The user content of websites in Russia or Poland is very different from that in the UK. So you need to make it relevant. Language is a critical success factor and as such you must have native speakers for each country in the team. Content must be written by and updated by native-speaking and local residents of the country in question so that nuances are accurate. Local people are very important as language evolves quickly.”

Having the right languages available at the call centre to handle customer service queries is just as important, as is a local phone number and local returns address. “It is easy to open a webshop for a country and fairly easy to do the language,” says Stuart Hill, managing director and co-founder, wnDirect. “The barrier is sending the parcels to the customers.”

wnDirect, which started operations in January 2012, consolidates consignments from a number of

retailers in the UK and then bulk-ships to specific countries where the parcels are transferred to local carriers – most often the national post – for final delivery. "Using an in-country carrier can help develop customer confidence," says Hill. "Brand recognition is important."

International carriers, such as TNT Post and DHL, will also provide a raft of in-country services for local delivery, warehousing or returns processing essential for any retailer looking for cross-border sales. "For large businesses, we can offer end to end supply chain support in overseas markets," says Dean Wyatt, VP business development, retail UK at DHL. "For small businesses, we will help them to select the right shipping service, take care of customs handling and offer full visibility on the status of shipments at all times."

FURTHER AFIELD

Choosing the right logistcs partner is essential for streamlined and efficient services, and even more crucial when entering some of the more challenging geographies where infrastructure is not well established. "Some new markets may have a less mature transport infrastructure that could disrupt business," says Wyatt, "with poor roads, power outages, and capacity shortages."

All these factors can delay deliveries so understanding the limitations is important when suggesting likely arrival times of online orders to customers.

As well as language and logistics would-be international retailers also need to grapple with customs, an array of local regulations and the variety of preferred payment options in different geographies. Companies such as MetaPack can provide online duty calculators to help retailers alert customers to likely duty charges at the time of purchase, for example; while for in-bound orders, TNT Post has partnered with Deloitte and Ernst & Young to develop eYouPack which provides US websites shipping to the EU with a total landed cost at the point of purchase.

Payment service providers can also advise on the best options for different markets. "It is vital that e-tailers have access to alternative payment methods that consumers in different territories trust and understand," says Justin Fraser, sales and marketing director, Europe at SecureTrading. "There can be a lack of trust in credit cards in places like Germany or tax laws that must be complied with in South America."

International sales can be a profitable route to growth – but only if markets are well researched and expert help sought.

Ten issues to consider

1 **Sign up to the relevant trade association:** the UK has the IMRG (www.imrg.org) while national organisations from Belgium, Denmark, Finland, France, Italy, The Netherlands, Norway, Sweden and Spain are represented at Ecommerce Europe (www.ecommerce-europe.eu). The European Multichannel and Online Trade Association (www.emota.eu) – another pan-European grouping – is a good source of information about EC developments. EuroCommerce (www.eurocommerce.be) represents Europe's major retail trade associations and aims to raise the profile of retailing at an EU level.

2 **Brand awareness is key:** that's easy if a company is internationally well known but it's rather more difficult to build market trust in geographies where nobody has heard of the brand. "Try a targeted social media strategy to drive interest to your brand," suggests Mark O'Hanlon at Kurt Salmon.

3 **Offer the right payment options:** some countries like cash on delivery, others real-time bank transfers and not everyone wants credit cards. "E-tailers' most common mistakes include a failure to meet local customer expectations and inadequate refund measures," says Phil McGriskin, chief product officer at WorldPay. Choose a payment processor capable of dealing with the alternatives.

4 **To return or not?** It is rarely worthwhile paying for the return of low-value unwanted items from overseas. For anything £10 or less, dispose of locally.

5 **Think local:** not just language but content and site design need to reflect local culture and preferences. Enlist native speakers or form partnerships with local firms. Google Translate really isn't an option.

6 **Stay on track:** overseas shoppers are more likely to be worried about delivery. "Having tracking available for the whole shipping process helps to mitigate the fear of will it arrive," says Terry Man, international product manager, MetaPack.

7 **Prepare for the unexpected:** local laws are a minefield. It is illegal to send pairs of shoes to India, wheelbarrows to Nigeria, or dental products to Algeria while three for two offers are illegal in Germany. International logistics providers and payment processors can often advise on potential issues.

8 **Think data:** make sure your product files are up to date with the correct HS codes (www.hscode.org), country of manufacture, weights, content etc to streamline customs processing.

9 **Do your homework:** research potential markets thoroughly. Test market your goods via Amazon or eBay to gauge demand and if the local retailers can offer similar lines at a lower price then look elsewhere for your cross-border sales.

10 **Hasten slowly:** take one country or region at a time and develop a specific plan based on that market's needs, preferences and problems. For example, fraud can be an issue in Russia, product registration is difficult in much of Asia, while customs tariffs have a low threshold in most of South America.

Choose the right markets

While European retailers may be looking to increase sales to the 'BRIC+M' countries – Brazil, Russia, India, China and Mexico – US retailers are just as intent on targeting European consumers. At around €300 billion, the total European e-retail market already exceeds that of the US and, while the UK is a mature market that can be difficult to enter, the potential in other EU countries is considerable.

According to EMOTA, ecommerce turnover in France and Germany is currently half that of the UK and while UK ecommerce sales increased by 14 per cent in 2012, those in both Germany and Eastern Europe were up by 27 per cent. while Spain and Italy were both around the 20 per cent mark. These European markets present far fewer problems in terms of logistics, payments and fraud than the BRIC+M countries and can be worth investigating.

For those with their eyes on the emerging markets then luxury goods have obvious potential. Top designer labels in apparel and jewellery are among the 'must haves' for the growing middle class elites in these geographies. "There is also potential for the CPG producers setting up direct selling models that will be able to leverage the brand equity and existing trust in the brand," says Mark O'Hanlon, manager with Kurt Salmon.

> **For those with their eyes on emerging markets then luxury goods have obvious potential**

"We see worldwide sales across all of our categories," agrees Chris Poad, director merchant services, UK, Amazon. "The real competitive advantage comes not from one particular 'category' but rather from offering a product that is not available or only has limited availability in a given marketplace. Brands and products that expand the selection on Amazon's different sites are where we focus."

Targeting markets where the choices in your particular product sector are limited is also an advantage: "ASOS enjoyed a 46 per cent rise in annual sales to Australia last year as a result of a lack of local online competition and strength of the Australian dollar," says Dean Wyatt, VP business development, retail UK at DHL.

ASOS has been able to drive international business by offering free delivery: not quite as generous as it may seem since the company charges VAT on export sales, which covers the cost of shipping and any payable import duty.

As Wyatt also points out, a recent study by Accenture, conducted on behalf of the European Retail Round Table, suggested that a quarter of the 146 retailers interviewed in seven countries believed that online revenues could increase by 25 per cent through increased cross-border sales. These retailers did not see returns issues, logistics implications or trade regulations as a deterrent to international operations.

But while retailers may be enthusiastic about international opportunities, persuading shoppers to buy from abroad is not always so easy. As such companies as ASOS and cycle specialist Wiggle have found, where the local market is deficient, sales can be extremely good – but currently fewer than 10 per cent of online shoppers are likely to buy from sites beyond their home market.

CUSTOMER SERVICE COUNTS

Presenting your site as a local operation with fluent translation, suitable presentation style, local domain name, local telephone number for customer services and a local returns address can help. As Andrew Starkey, head of e-logistics at the IMRG, points out, he had been buying sailing kit from www.compass24.com for years before he discovered the company was actually based in Germany. "I started buying from them by accident and they were always efficient," he says, "and it wasn't until I

had to phone up about something that I discovered they were not based in the UK. If I'd known that initially I'd probably have had doubts about ordering, but customer service was a UK number and there was a local address for returns so it all looked like a UK site."

Compass's other European sites are similarly localised with separate domain names, which may be a more successful tactic than simply offering pull-down lists of language, currency and delivery destination options via a single URL.

International retailers can also expect greater diversity of payment options in future. WorldPay sees growth in alternative payments in almost all sectors over the next few years, with the continuing dominance of such options as cheques, cash on delivery or real-time bank transfers in many geographies.

On the logistics front, wnDirect's innovative model has already had significant impact. Turnover in its first year of operations reached £20 million. "Carriers have traditionally been centred around C-to-C, as in the postal service, or B-to-B with couriers," says managing director Stuart Hill. "Internet retailers have a choice of using the mail, which generally doesn't offer tracking or express parcel services which are expensive. What e-tailers want is a low cost international service, with tracking and three to five day delivery – which is what we are providing."

Given WorldNet's initial success it is possibly a model which other logistics providers may be keen to develop. ●

Speaking from experience

Lessons from Amazon

"E-tailers commonly underestimate the complexity of doing business internationally. This means that they may not do sufficient planning. For example, they might not fully check out the suitability of their product on another marketplace or the competition or seasonal or cultural differences. They might not develop the language skills or necessary local knowledge." **Chris Poad, director merchant services UK, Amazon**

Collection lockers

"Looking ahead to 2013/2014 I think we will see a more active role for collection lockers versus home delivery, where the buyer has the option to ship to a locker and pick up at their convenience, and also making it cheaper for the retailer to deliver in bulk as the final mile of the shipment is the most expensive." **Terry Man, international product manager, MetaPack**

Emerging opportunities

"The growth of emerging markets is outpacing that of developed markets, particularly in Brazil, China, India and Russia. These emerging markets have characteristics that are different from developed markets. Local payments methods are prevalent and complex regulatory issues often require market entry through partnerships." **Phil McGriskin, chief product officer, WorldPay**

Local knowledge

"Retailers need to be reaching out to every possible source of local information to improve their chance of success in each market. For smaller organisations, that can mean working with experienced consultants or government trade bodies which are trying to encourage investment in their own countries. Larger organisations may have their own in-house international expansion teams." **Mark O'Hanlon, manager, Kurt Salmon**

In summary...

While for many retailers, the initial move into cross-border trade can be a matter of serendipity when the first overseas order lands on the site, success really depends on more focused research and planning.

Localisation is key for contact numbers and a returns address as well as language and content. Getting the content and presentation right can be just as challenging for English-speaking regions: sites that go down well in Sheffield may be viewed rather differently in Sydney or San Francisco. Choosing the most appropriate payment methods and fulfilment options are also essential, so it important to work with service providers who have practical experience of the target market and a suitable support infrastructure in place.

Cross-border also works two ways, and currently UK shoppers choosing to buy from outside the EU are faced with a 20 per cent VAT surcharge and a low duty threshold, with the duty calculated on a CIF (cost, insurance and freight) basis, so use of premium courier charges adds to the total duty bill. It is a similar story in much of the EU although for some product categories – notably electricals and computer software – it can still be cheaper for customers to buy from the USA.

As orders grow, retailers may consider setting up local warehousing with regional stockholding. This can be an expensive option but worth considering especially where there are multichannel operations in the region and stores to be serviced. Shipping direct from producer – especially where goods are made, and are also to be delivered, in the Far East – is also on the agenda, although that raises issues of quality and brand consistency and is clearly not an option to be considered lightly.

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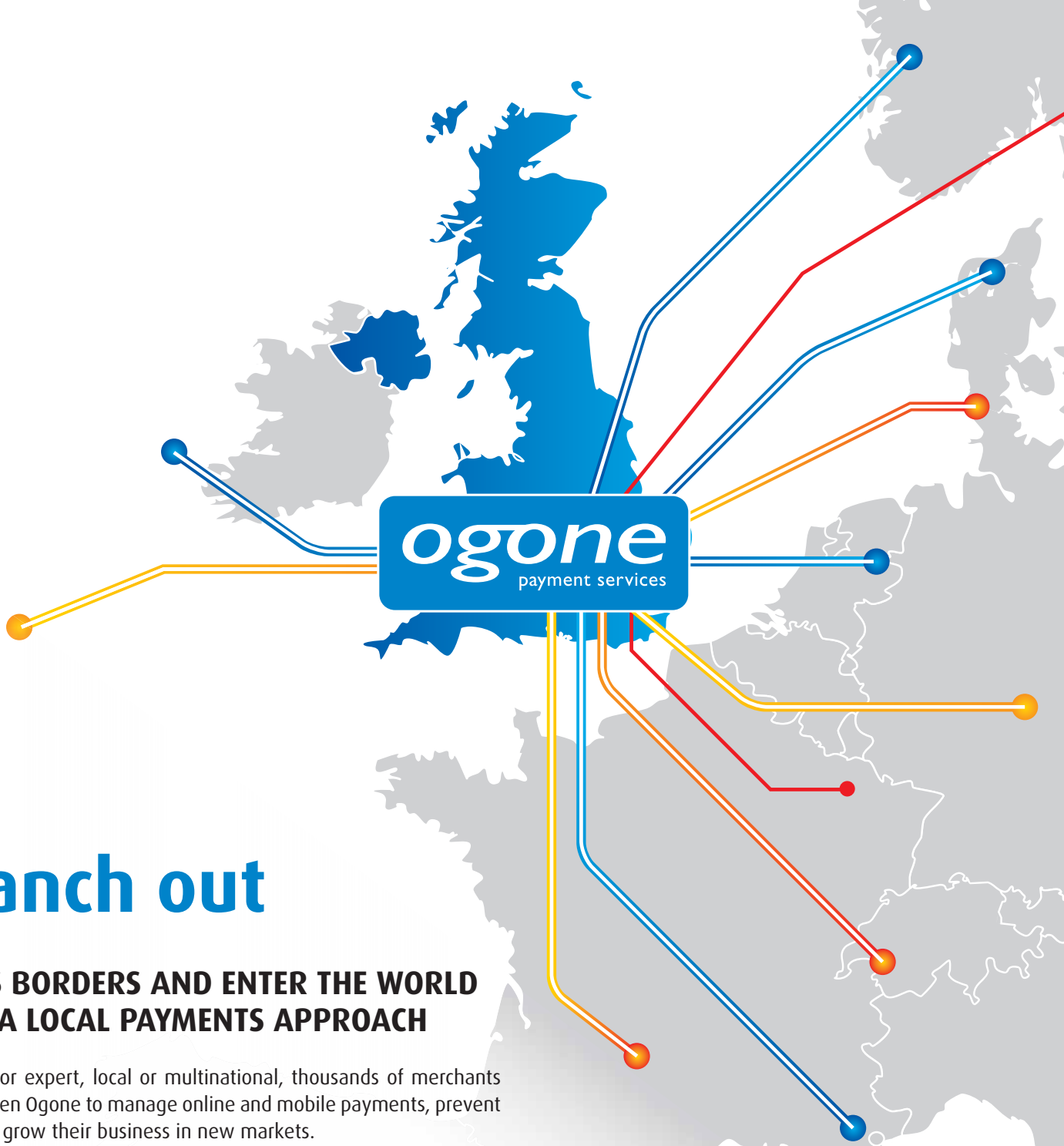

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