e-tail detail

OMNICHANNEL CLOUT
Heightened Shopper Expectations Force In-Store Evolution

Heightened shopper expectations are forcing stores to transform their identities, thinking and in-store endeavors. While initially some industry pundits and retailers themselves perceived stores to be a liability, they are today at the core of one's omnichannel vision.

October 8, 2015

Quick Links:

THE DETAILS

Retailers must make important choices about the services they offer, the underpinning technology that supports shopper needs, as well the technology that will be utilized in the stores to provide superior shopping experiences. The role of the associate has also changed and shoppers welcome a more informed associate where cultures and training must now be put in place to meet the demanding needs of their dynamic customers.

This will not be accomplished overnight, but rather something that will take place over a longer span of time. Success will be predicated on an organization that is strategic in its thinking, having both a clear understanding of their brand and respective customer bases. The only certainty is that this is a work in progress that requires time and the perseverance to create cultures and infrastructures that can fully realize omnichannel' s potential.

Retailers must assert CLOUT with their customers in order to thrive in today's retail business climate.

OMNICHANNEL CLOUT

THE TRENDS

RETAIL APPS

Apps are multi-purpose as shoppers preview before making store trips but also utilize during those visits. Apps can serve customers well as they connect to stores in search of inventory and product information with access of their account or profile details inherent in that process. According to our own consumer research, 93% of shoppers believe it is desirable to be able to locate products prior to making a store visit. Additionally, 84% believe that having an option to pick up merchandise in store is desirable as well. Thus, the app can play an important role in both regards as can be seen in the Dick's Sporting Goods example.

THE STATS: STORE PRODUCT LOCATOR VIA APP

	EG OMNI30
	Based on 24 retail apps
In-stock status when previewing product (In-Stock, Available)	91%

Show an exact quantity on hand (low on hand, 3 available)	36%
Include store mapping to locate exact in-store location	18%

DICK'S SPORTING GOODS: INVENTORY PRODUCT PREVIEW

Retailer Clout: Apps Store Connectors (Pre-Store Visit)

- Stock status a must
- Showing actual quantity of product available a value add
- If heavy sku count and/or large store footprint, mapping matters to shoppers
- Promote store pickup/reserve as part of the overall shopping experience
- Include information in customer service/help

B. IN-STORE PICKUP: ORDER PREVIEW

Shoppers are in a hurryselecting retailers based on available inventory and ability to secure product. With most showing in-store status, customer confidence will be high and conversion forthcoming. 1 in 3 retailers had same day pickup ensuring high shopper satisfaction.

The Stats

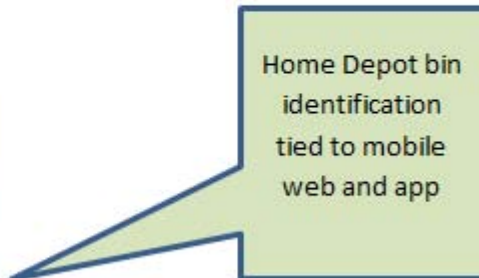|	EG OMNI30
Enterprise Inventory Access	
Inventory Shown As In-Stock Across Enterprise	93%
Inventory Shown As # Units	13%
Inventory Shown for Multiple Stores	90%
Actual Time Order Was Available For Pickup (28 merchants sent pickup alerts with status)*	
Same Day- Under an Hour	50%*
Same Day- 1 Hour-24 Hours	32%*
2 or More Days	18%

Retailer Clout: Order Preview

- Show inventory status where all nearby stores with availability are presented
- State time frame accurately for store pickups and list on both product pages and shopping cart
- Allow shoppers to designate pickup person
- Ensure pickup details are comprehensive including store hours, phone #, distance from location and mapping capabilities

C. IN-STORE PICKUP: STORE EXPERIENCE

When shoppers reach your store, signage must be forthcoming that directs them to store pickup and related omnichannel services. Time is of the essence as locating and checking shoppers out should be a rote process where product is simply ready and waiting. The associate's role is integral to success so ongoing training in omnichannel tools and systems should be mandated from top management.

Retail performances were strong ranking 2.53 out 3 where 3 were best. This bodes well for continued efforts in this area. Signage was in place for 40% of retailers. Designated counters are rare (13%) and the majority of retailers tend to use general cashiers (57%). Locating merchandise is a mixed bag and positively, personnel are knowledgeable. The Home Depot delivers a superior experience tying mobile mapping to locations in the store saving shoppers significant time.

Home Depot bin identification tied to mobile web and app

The Stats

IN-STORE PICKUP EXPERIENCE	EG OMNI30
Overall In-Store Pick Up Experience (1-3 3=Best)	2.53
Pickup Location And Type	
In-Store Signage For Pick Up	40%
Designated Pick-Up Counter	13%
General Cashier	57%

Time For Associate To Locate Merchandise: Less Than A Minute	43%
Over 1 Minute	57%
Mood Of The Associate	
Associate Was Involved In Multi-Tasking	20%
Associate Knowledgeable/ Helpful	93%

Nordstroms' Service Bar with an array of consumer activities from online orders to store pickup

PetSmart "Buy Online Pick Up In Store cabinet near checkout

Toys 'R Us store signage including instructions for picking up merchandise.

Retailer Clout: In-Store Pickup Experience

- Signage directing shoppers to a specific location that is easy to find is ideal
- Ensure product is ready and waiting and can be found within a few minutes
- Competence is critical along with a good attitude
- Be friendly,avoid multitasking and be helpful to all guests

D. IN-STORE TECHNOLOGY

Consumers perceive in-store use of technology as valuable across many dimensions. Customers are not experiencing much of that desired technology when visiting retailers. Certainly we expect investments will be forthcoming and a monitoring of this is warranted.

The Stats: In-Store Experience: Signage + Technology

Omnichannel signage comes in a variety of approaches as seen below from Crate & Barrel's mobile access and features to REI encouraging shoppers to download their app. Use of scanners and tablets were at a minimum however, though value could be seen when used smartly. Sports Authority employees have embraced tablets to help their customers while the multipurpose nature of the Kohl's kiosk serves both shoppers and internal needs as well. 3 out of 4 retailers were capturing emails, taking advantage of this in-store visit to build a relationship with the customer. Offering same day delivery (7%) indicates that the retailers must catch up with consumer demands and find a profitable way. TopShop's window lets customers quickly see that they are forward thinking in this regard.

| In-Store Content & Signage	EG OMNI30
Omnichannel Signage	70%
Checkout	
Mobile POS	23%
Email Capture	73%
Associate Scanner	33%
Tablet/ iPad Usage	27%
When Product Out of Stock Order Can be Placed for Customer	90%
Same Day Delivery Available	7%
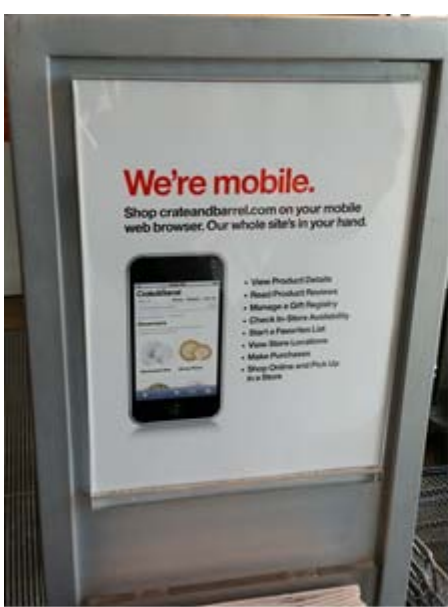
Crate&Barrel signage reinforcing mobile access and corresponding features

Shelf signage suggesting app download and feature set

Sports Authority associate using tablet to aid shopper
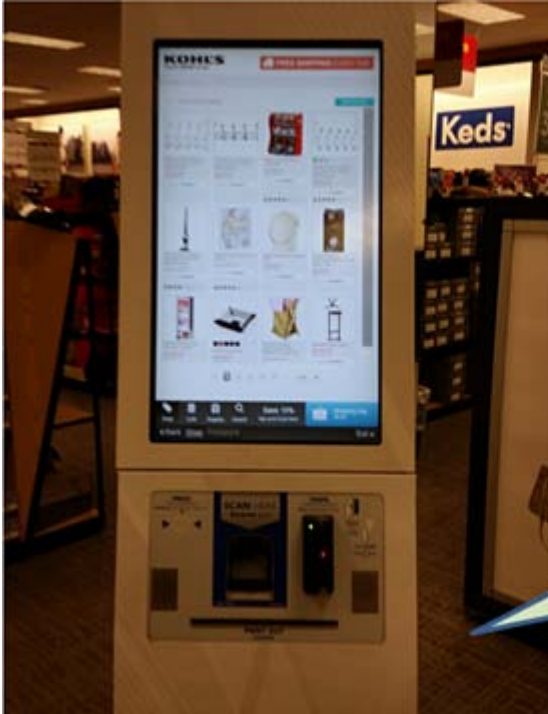
Kiosk at Kohl's seen being accessed by associates, shoppers and Google Express

Topshop free home delivery advertised on store window

Retailer Clout: In-Store Experiences: Signage + Technology

- Omnichannel signage should educate your shopper and is a competitive differentiation
- Guides and tools reinforce knowledge prowess
- Price matching builds buyer confidence for in-store purchasing
- Mobile POS services shopper needs particularly in peak shopper periods
- Take advantage of customer purchases and capture email
- Send email receipts giving another chance to capture email
- Test payment options
- Determine technology needs from customer accessibility (PC's, kiosks, tablets) and how they best serve brand
- Empower associates with multi-purpose scanners

⊘ THE CHECKLIST

⌇ THE COMPANY

The e-tailing group, inc. serves as the multi-channel merchant's eye, bringing a merchant's sensibility to evolving the multi-channel shopping experience. A Chicago-based consultancy, they provide practical strategic perspectives and actionable merchandising solutions to merchants selling online as well as to enabling technology firms.

For more background about this research study, including a list of merchants surveyed or for additional information on the e-tailing group, inc. please contact Lauren Freedman at LF@e-tailing.com or visit the e-tailing group website www.e-tailing.com.

⌂ THE STUDY

A Full report of the Omnichannel Clout research can be downloaded here.

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