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RETAIL MULTI-CHANNEL FULFILLMENT STRATEGY

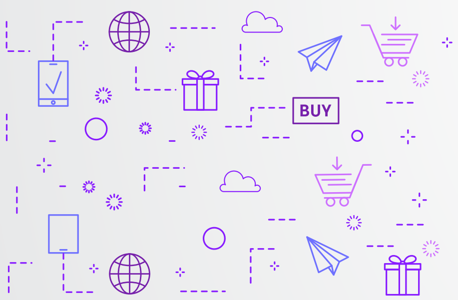
How can Retailers differentiate themselves?

ABSTRACT

Popular belief holds that customers have absolute control over the choice of shopping experience and retailers are helpless with no option but to bow down in front of customer whims and fancies. But contrary to the majoritarian view, retailers can drastically influence customer actions in ways that were previously unimaginable. Thanks to groundbreaking advances in technology and transformative concepts in areas like Marketing and Supply Chain and Logistics, retailers have all the necessary ammunition to increase traction and realize higher revenues that too at ever reducing costs. But like all dramatic turnarounds, this one too is not without its share of obstacles and complexities. The real test for any retailer is to focus and transform not any particular but all business functions ranging from Procurement, Inventory Management to Marketing and Logistics.

Customers look at the brand and not any specific channel when they form perceptions about the overall experience and any non-optimized domain can prove to be a bottleneck, the difference between a resounding growth story setting industry beating records and a tragic demise witnessing a rapid shift of customers to more agile and customer focused organizations. This paper leads the audience through some of the areas and concepts which can enable retailers to make this shift and leapfrog the entire customer journey.

CHANGING CUSTOMER LANDSCAPE

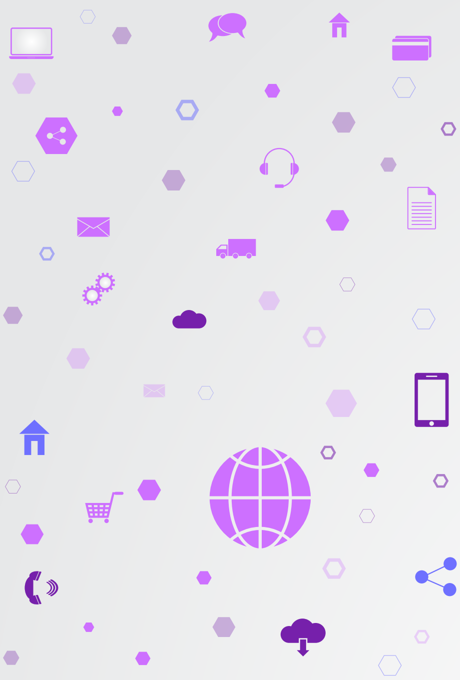


We are witnessing 4th Industrial Revolution i.e. Information Age. This era is marked by ubiquitous data availability related to literally anything which we can dream of. Customers have unprecedented power at the tip of their fingertips where they can browse data about any Retailer and transact on almost all the devices and channels ranging from a website, marketplace to social media. This age is marked by numerous changes in the landscape and some of them are mentioned below.

RETAILERS HAVE EXPANDED TO MULTIPLE CHANNELS

Gone are the days when retailers had the luxury to select the channel of their choice and be assured of footfalls. Nowadays, customers have a wide range of channel options at their disposal eg. Gen Z flocking to social media and photo sharing apps, Millennials present on social media and mobile, GenX preferring to physical stores etc. For the same reason, majority of big and small retailers have registered their footprints on both physical and digital landscape. Any big and small retailer has a web portal (along-with a traditional store) where customers can look for a product and place an online order. But this development also brings with it, its own set of challenges and pain-points like failed orders due to stock outs, delayed delivery due to little sync between retailer and logistics partner and lack of product assortment. These are critical success factors and can make or break any retailer's reputation.

DIFFERENCE BETWEEN MULTI AND OMNI-CHANNEL STRATEGY



Omni-channel retail 'strategy' insists that retailers should be everywhere – all possible channels like mobile, web, etc. This basically means expansion just for the sake of it. In this retailers do little assessment of their customers and their medium of interaction. Multichannel, on the other hand, focuses on only selling where your customers are. It's up to retailers to understand their needs. So while Omni-channel strategy is adopted just to keep up with competitors and need deep pockets which negatively impacts the returns harvested by the retailer. In short, it's more a big boys' game and usually taken up by global majors who can afford leisure spending. Multi-channel is more focused and long term which needs a deep insight into customer psyche. This requires painstakingly studying the customer landscape and extracting parameters which determine customer behavior. Consequently, this requires deep expertise in Big Data, Analytics, Machine Learning as well as a complete overall of IT systems and platforms. But like all dramatic transformations, these short term pains lead to far greater returns in terms of higher growth and Profitability.

LEAD TIME AND CUSTOMER PATIENCE LEVEL HAS REDUCED DRASTICALLY

With the advent of "On Demand" business model, customer expectations have skyrocketed. Customer attention span and patience level is a continuous dropping curve with new levels being set almost everyday. Customers expect instant gratification and they don't care for the channels they transact on. Hence, even when a customer is transacting online, his expectation with respect to assortments, diversity of offerings, availability and delivery time is more or less the same when they hop around in a store. Same day delivery, next day delivery etc. are the outcomes of this emerging trend and so are the wide range of business models and innumerable startups promising unprecedented customer experience. And the industry which has been on the frontline of this landscape shift is Retail. In a scenario where Amazon has launched completely new Warehouse models and is opening up cashier-less stores in the form of Amazon Go, where Walmart uses Cross Docking to transform logistics space and where Target has deployed flow stores for instant store replenishment, no Retailer can rely on its brand and reputation to lure in footfalls. The need of the hour is not only to act but to do so in the right direction.

CROSS CHANNEL OPERATION-CUSTOMER HAS NO CHANNEL-WISE LOYALTY

Today, a customer has multiple options at his disposal. While lack of options was the challenge not so long ago, nowadays multiplicity of resources is the cause of headache for almost every retailer. Single channel transactions mean transaction in a physical store, transaction on retailer's webpage, online marketplaces, social media etc. Two channel transactions involve browsing products in store and ordering online or vice versa. Three way traffic would involve doing research on multiple channels and transacting on some other one. Hence all possible channel combinations

where your customer is. A retailer can leave out gaps in any channel only at his own peril. Opportunity cost or cost of shifting to a competitor is declining rapidly and customer can switch between multiple players with almost no discomfort. Its critical for any retailer to ensure that all channels are integrated and there is seamless and real-time data flow across all systems with actions being taken instantly. To summarize, they have to combine data transparency with operational agility.

WHY THE RIGHT MULTI-CHANNEL STRATEGY IS SO IMPORTANT?

An emerging trend that is resonating across multiple geographies is the shift in retail investments towards multi-channel fulfillment. This is increasingly becoming a focus area for retailers across the globe and is being rightly looked upon as a critical success factor to retain as well as bring in new footfalls. But a majority of retailers are only concerned about registering their presence on multiple platforms but "forget" to integrate these diverse platforms wherein each channel complements the other.

Some key points that are crucial for making any multi-channel fulfillment strategy successful are as follows:

CHANNELS COMPLEMENT EACH OTHER'S SALES AND DON'T CANNIBALIZE

A common mistake that many retailers commit is that they believe that by promoting their online channel they would cannibalize their store based sales. This was the reason that giants like Barnes and Nobles, Blockbuster etc. didn't venture into digital medium before it was too late. But with enough hindsight, it would be fair to say that more often than not, this serves as a Kodak moment wherein ignoring a critical emerging trend eventually leads to one's demise. There is enough market evidence to show that an integrated landscape wherein channel specific data is instantly available and deployed to provide a "One View" to users can generate awareness about stores from web portals and vice versa. Often when a product is out of stock online, customers can be steered to stores by nudging the customers towards nearby stores and incentivizing him too in the process.

DIGITAL AND PHYSICAL MEDIUMS ARE INTERLINKED AND NOT IN SILOS

Opposed to the popular notion, digital and physical channels are not separated with clear boundaries defining their territories. Rather the boundaries have disappeared with considerable overlaps defining their very nature. A simple case in point would be the stores of today where giant online kiosks have become a common occurrence. Customers are provided with the option to transact online while standing in a store which would help them avoid standing in long queues just to place an order. Reasons for online order in a store could be product unavailability, a wider range of options online and store-to-home delivery of white goods. Similarly order online and pick up from stores, return order to stores etc. are some use cases where this happens in reverse. Hence when customers are not differentiating between physical and virtual worlds, it's but only natural that retailers also knit their Physical and Virtual worlds tightly and carefully together.

CUSTOMERS HAVE "ONE SINGLE" VIEW OF RETAILER

When customers think of any Retailer, their perception is towards the brand as a whole rather than towards individual channels. A retailer can be exceptionally good in brick and mortar model but if it renders unsatisfactory service levels in online model, it will lose a substantial piece of customer's mindshare. Delayed order delivery and broken customer care can do irreparable damage to retailer's reputation with the customers skeptical to give even a second chance. A single bad experience can majorly influence a customer's decision to transact with the retailer in the future. In a scenario where new players and business models are emerging every now and then, no retailer can afford to overlook an integrated order fulfillment and customer service model. Loyalty and dependency on retailers has drastically reduced with the new benchmark being "Choice" and "Convenience". Customers no longer wish to spend long hours doing transactions and hence they would flock to any retailer that provide them the above two combinations. Hence it is in the interest of retailers to strategize their fulfillment along all the channels and perform optimum and deep rooted integration among them. Integration also brings along with it other advantages like "one customer" view, accurate need assessment, personalized products and services and cost optimization.

STRATEGIC LEVERAGING OF DATA CAN HAVE HUGE REVENUE IMPACT

In this age, data is the most important asset for any organization. With the advent of big data, almost every global behemoth is sitting on huge data reserves. These reserves relate to customer transactions, customer behavior, product/SKUs, geo-based trends, operational efficiencies etc. But piling up data is not important; what does the retailer do with that data holds the key. Customers are more than willing to share private data with retailers but they also want to see how that data is utilized. They expect more personalized services, better recommendations, reduced delivery time or any other change in experience that makes them feel they are getting a good return. But most of the times they are shortchanged with shoddy service levels. This makes them feel disgruntled and untrusting of the retailer.

But retailers who dedicate time and resources to extract meaningful customer patterns from this data and then incorporate these patterns in their customer targeting and fulfillment model gain immensely in terms of high revenues and retention/acquisition rate. This is not easy as it sounds and requires significant changes in IT infrastructure as well as consistent focus and commitment of senior management. But every success comes at a cost and it cannot be emphasized enough that this cost shall serve as the decisive factor for any retailer.

DEVELOPING THE MULTI-CHANNEL FULFILLMENT FRAMEWORK MODEL

While no Multi-Channel fulfillment strategy is perfect and there is no single formula for success, the framework described below attempts to capture most of the key themes that form the cornerstone of a winning business model. Through phase-wise methodology, this framework aims to take the retailer through the complete transformation journey thus ensuring that it doesn't leave out any aspect and be half prepared for customer orders and service requests that keep pouring in.

PERSONALIZE	Analyze the behavior of individual shoppers and develop the understanding that each customer is different with his/her own set of requirements
INTEGRATE	Integrating disparate processes with their separate set of complexities into a centralized and coordinated structure so as to have a single customer profile and engage in one conversation
STANDARDIZE	Common IT system that unifies divergent applications, protocols and data sources so as to ensure seamless data transfer and facilitate decision and risk mitigation in real time and engage in one conversation
PARTNER	Build strong alliances and partnerships in strategic areas with the goal to stay committed to and enhance the customer value proposition

PERSONALIZED CUSTOMER BUCKET

Customers of any mid to large size retailer belong to a very diverse group, with divisions across sex, geography, education, income, job profile etc. This diversification becomes much more complex for a global retailer which caters to customers from different countries, states and localities where culture brings in multiple dimensions. For this reason, many retailers avoid taking the trouble to delve into the requirements of individual shoppers, instead taking refuge in the age old segmentation methodology. Though customer segments provide critical insights to a retailer regarding customer nuances in any particular segment but that serves as a more standardized approach. It keeps the retailer away from getting into individual customer habits and preferences thus offering him/her relevant products/services.

While in the past this was extremely complex with huge volumes of data being mostly manually analyzed, today there are sophisticated analytics and Machine Learning models to automate the analysis of terabytes of data in minutes. The key is to have well organized data formats and proper structuring of heterogeneous data fields. With the right set of analytical tools and BI dashboards, retailers can have a consolidated view of customer metrics with the actionable points clearly visible. This doesn't get right in the first instance but it's important that the retailer stay on course and keep improving customer behavior models.

INTEGRATE DISPARATE PROCESSES

Physical and online channels need to be integrated so as to develop a holistic view of customer and products. Having a centralized structure entails following advantages:

- Consolidated view of inventory through seamless data transfer between inventories for stores, web, mobile, wholesale etc.

- "One Inventory" view facilitates substitutability through fulfilling of online orders from store specific inventory and vice versa as per priority thus preventing stock-outs

- Steer customers to another channel in case of product stock-out in the other thus mitigating the risk of cancelled orders

- Real time and detailed insights into the performance of products, categories, schemes, promotions etc. thus help refine customer targeting strategy and generate better ROI

Channel integration involves a lot of infrastructure upheaval, process transformation and people management and hence it helps to define a methodology to guide the retailer.

FRAME A COMMON GOVERNANCE MODEL

For a multi-channel retailer, it's highly likely that each channel has its own set of policies and objectives. While there might be overlaps, the dissimilarities would be too high to ignore when they need to be knit together under one consolidated business model. Some of the challenges can be termed as:

- Differences in culture, training, operational metrics, talent and performance management

- Each channel has its own specific promotions, discounts, loyalty and other customer related policies and one might not be applicable in the other

- Responding to situations like stock-outs and product allocations in a manner that it boosts overall corporate profitability and service level agreements

- Strive to meet corporate financial goals without undue penalization of any specific channel

- Wrong incentive policy can lead to employees only pushing customers to their respective channels rather than working in an organization's interest

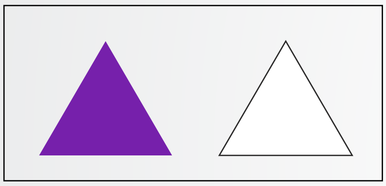
In addition to this, it's important to fix the responsibility with respect to vendor relations, P&L and demand forecasting when there are individual channel managers dedicated to different channels. Overcoming this challenge requires consistent effort on the part of retailer and involvement of relevant stakeholders from different functions i.e. Product Category, Vendor Relations, Supply Chain, Customer Service etc. A steering committee with representatives from above functions should be formed to frame a clear and comprehensive policy encompassing all domains. Alongside this, it is equally important to have the support and oversight of leadership to ensure that the program stays on track.

CONSOLIDATE EXISTING PROCESSES AND FORM NEW ONES

Instead of maintaining separate warehouses for each channel, it makes more economic and operational sense to have a common warehouse with a common inventory for all channels. This shall lead to drastic reduction in storage, disposal and transshipment costs as well as reduce stock-outs. Better utilization of floor space shall not only save real estate costs but also lead to higher productivity for all stakeholders i.e. warehouse staff and third party logistics. But this entails better employee skillset level in terms of scheduling orders by channel, picking orders from the right inventory and directing the right orders to logistic parties. Hence clean inventory categorization and experienced staff are imperative to make this strategy a success.

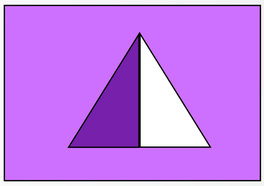
The two inventory strategies can be depicted with a simple diagram as shown below.

WAREHOUSE LOCATIONS SEPARATED BY CHANNEL



IT REQUIREMENTS FOR CUSTOMER ORDER STEERING

JOINT WAREHOUSE(S) FOR ALL CHANNELS



ADDITIONAL ADAPTATION OF WAREHOUSE OPERATIONS NECESSARY

BRICK-AND-MORTAR WAREHOUSE　DIRECT-TO-CUSTOMER WAREHOUSE　FOCUS OF THE DISCUSSION

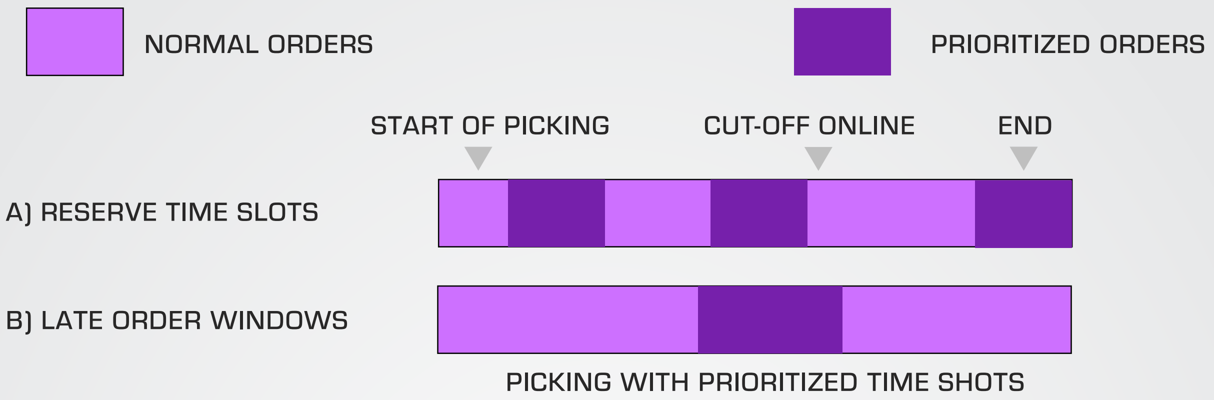
However, there are many nuances which have to be taken care of when dealing with integrated channel operations. In a scenario where the inventory for all channels has been collected at one single source, errors are highly likely and a single mistake can lead to a customer dispute. To illustrate with an example, online orders are preferred over store because in the former case customer has already paid whereas the latter is mostly related to supplements or replenishments.

Hence warehouse operations can be organized through three different operational models:

1. PRIORITIZED PICKING LIST: This refers to creating rules based on customer segmentation and channel segmentation. Order pick-up is usually organized by sequence. Hence a retailer can create his own set of custom rules to decide which set of customer segments and channels should be addressed first and then direct the warehouses to follow that rule.

2. PRIORITIZED TIME SLOTS: During a particular day, time slots are assigned for order pick-ups. Time slots are divided on the basis of online, store, priority, delayed etc. This ensures that prioritized orders are addressed on the same day can be immediately shipped for on-time delivery. Also for late orders, assigning a specific time slot ensures that no order is left unattended.

This approach brings about stability in order delivery and capacity planning and is a more organized methodology. As has been mentioned before, it carefully incorporates all order types and channel mix. A visualization of this approach can be seen below:



3. SMALLER BATCH SIZE: This involves reducing the batch size for order pick-up so as to enable more frequent pick-ups and help incorporate any change in plans. Having a smaller batch helps the staff cater to priority demand that arrives impromptu and meet promised service levels which might not be possible in the above two modes of operation. But this also involves higher costs and lower productivity levels due to more resource movement for pick-ups and delivery.

SEAMLESS EXECUTION ACROSS CHANNELS

A smooth and non-disrupted order movement across channels is only possible when the channels can source inventory from each other. Though separate inventory levels are maintained across channels, the process should have enough flexibility to route stocks from stores to online fulfillment and vice versa. This shall save both time and costs but at the same time has a set of pre-requisites as follows:

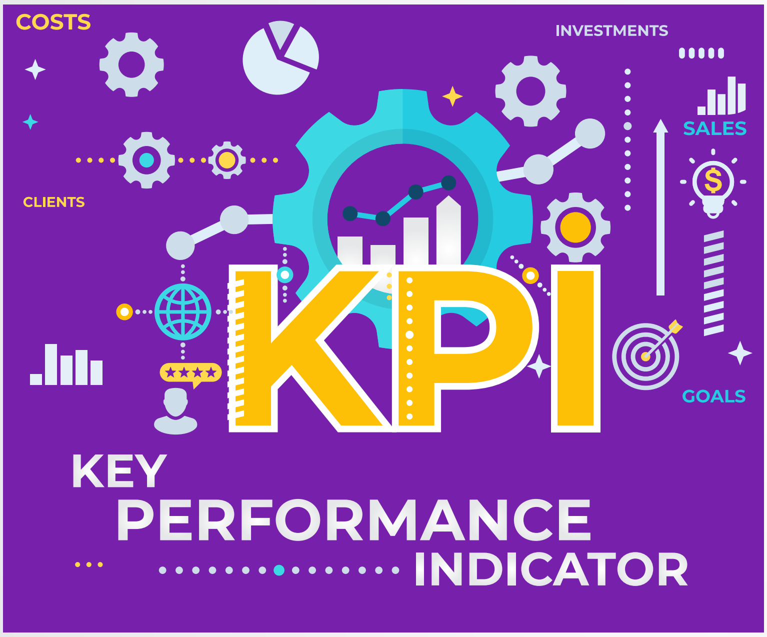
- Real time visibility of stocks across channels as well as a unified view with credit/debit made as soon as transaction is performed
- Data related to nearby stores and associated inventory levels with how much to spare
- Each channel has two inventory levels – channel specific and cross channel with stock levels decided for each
- Analytical models to study the inventory levels and customer demands and predict diversion of stocks from one channel to other

Stock substitutability from one channel to other is extremely important in this scenario where depending on customer demands, stock levels can be increased or decreased. This shall enable better utilization and more realistic service levels thus hugely impacting costs and revenues. This can be summarized with the help of a matrix structure that can help retailer work on the right strategy.

IN ONLINE SHOP		STORE INVENTORY	STORE & ONLINE INVENTORY
	ONLINE & STORE INVENTORY	TYPE 2: CROSS CHANNEL ONLINE SHOPSTEERING TO STORE	TYPE 3: OMNICHANNEL STEERING THROUGH ALL CHANNELS
	ONLINE INVENTORY	NO STEERING	TYPE 1: CROSSCHANNEL STORE STEERING TO ONLINE SHOP

IN STORE

CONTINUOUS MONITORING AND IMPROVEMENT



Every channel has its own set of KPIs which help monitor its performance and guides its future course. Channel integration involves developing new set of KPIs as well as incorporating existing ones and tie them up with corporate's business and financial goals. This doesn't mean that channel specific focus shall cease to exist or individual KPIs shall be eliminated. These shall remain but they would be linked with overarching set of metrics that shall guide corporate actions. One more dimension of this stage is to assign responsibility for the decided set of KPIs. For instance, if demand forecasting for store channel is not up to the mark, the demand planner shall be responsible to investigate and find out the reasons for this anomaly.

STANDARDIZE IT INFRASTRUCTURE

As channels are mostly managed as independent business units, they maintain their own applications, networks and technology protocols. Communication between channels exist but mostly through APIs with deep rooted integration a rare occurrence. Let's imagine a scenario where a customer places an online order and the backend system performs a multidimensional search across logistics and stores.

At the same time, the algorithm ensures product availability in the warehouse, assigns the optimum warehouse for order pick-up, searches for the best carrier, availability of delivery personnel in coming days and decides the best time slot to deliver the order. Not only this, the algorithm also searches the nearby stores and their inventory levels, decides if the order can be catered to by the store instead of warehouse and the option of store pick-up for the customer. All these actions have to be done in parallel and along-with speed require in-depth integration across applications with standardized set of protocols to guide data movement. Hence IT serves as the backbone for any multi-channel strategy.

Following is the step by step methodology that can aid retailers in standardization of IT infrastructure across the length and breadth of the organization:

- **IN-DEPTH TECHNICAL AND ECONOMIC FEASIBILITY:** Before attempting to integrate IT, a careful feasibility analysis should be planned for each business function i.e. Order Management, Vendor Management, Supply Chain, Procurement, Logistics etc. Both technical and economic feasibility is important and any gaps identified herein be noted and collated. Thereafter strategy for integration be curated with due attention be given to overcoming the gaps.

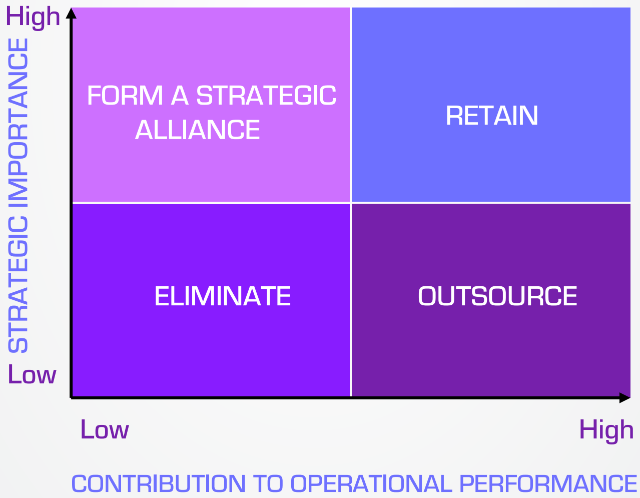
- **PILOT THE SOLUTION ON A LOW RISK PRODUCT CATEGORY:** Rather than starting with a big bang, it makes more sense to perform the integration on a low risk merchandize category. This shall help the retailer absorb any chaos or reduced service levels that invariably occur when centralization takes place. It also avoids any significant IT investments before the requirements are properly understood. Hence it reduces rework, investment costs and enhances ROI

- **SCALE UP AND INDUSTRIALIZE:** Based on the learnings from above, the organization can scale up and deploy the integration across multiple categories. But again this should be a phased approach with successive deployments and learnings incorporated in future implemenations. It's equally important to decide on relevant KPIs and continually monitor the performance. KPIs might also need to be revised based on the learnings gained from successive integrations.

FORM STRATEGIC PARTNERSHIPS

No retailer can be equally competent in all functions, nor does it make business and economic sense to have all the functions in-house. Retailers should focus on their core or strategic areas like Merchandizing, Supply Chain, Procurement etc. and outsource non-critical areas to domain experts. This shall serve the retailer in two ways. First, it shall allow the retailer to be solely concentrated on their most important assets thus helping them derive better ROI as well as mitigate any unplanned crisis in a much better way in considerably reduced timeline. Second, outsourcing non-strategic assets to domain specific organizations help reap rich dividends in terms of continuous declining costs and increased productivity and utilization levels. Function specific companies possess a better learning curve and economies of scale and hence provide better service levels to retailer’s customers.

Outsourcing decisions are tough, hence it would be extremely useful if we can form a matrix to guide a retailer’s decision. This matrix can serve as a guideline and in no way represent a complete outsourcing plan. In-depth investigation and analysis always hold the key in these decisions and help mitigate the operational and business risks that normally form a part of these strategic decisions.



- **STRATEGIC ALLIANCE**: Processes which hold enough strategic importance but doesn’t contribute to day to day operations of the retailer. Hence they could be entrusted to a suitable partner in this space. This requires a high level of skillset, hence the retailer should be extremely careful in selecting the business partner. Inefficiency in these processes would not affect much the daily service levels but can have a huge impact on the long term brand image. A good example would be a marketing or branding function.

- **RETAIN**: These are the most core functions of the retailer and hence it makes sense for them to manage it in-house. This would enable them to have more control as well as continually improve their strategic assets generating better ROI. A good example would be merchandize function

- **OUTSOURCE**: These functions are key to operations of the retailer but hold low importance when we look at its contribution to organizations' strategy. Hence they can be outsourced to domain experts and usually the market is filled with a large number of companies that provide these services. Hence the retailer can take advantage of this "perfect competition" and drive down costs. But again, extensive research into vendor's capabilities is significant in this scenario too. Functions like Customer Service fall under this category

- **ELIMINATE**: These processes have low importance both from a strategic and operational perspective. Hence the retailer can look at eliminating them completely but this should be done after detailed investigation as to the impact of this elimination on customer experience. A good example would be a promotions scheme that doesn't have enough subscribers.

CONCLUSION

At present, the retail industry is being transformed in a manner that has never been witnessed before. Completely new business models are emerging everyday and replacing the age old wisdom and practice. The speed at which retailers scale up has increased exponentially with a start-up capturing a significant market share in record time. If we have to name one thing that is driving and feeding these headwinds of change, it would be customer behavior. Customer behavior has seen a remarkable change in the last 50 years with "Convenience" emerging as a key theme. Gone are the days when the customer shall stand in queues or wait for days to get the product of his choice. The model has shifted to a "Click" based economy where the customer can order anything with just the click of a button. In addition to this, customer patience level is also declining continually.

In response to this, it's imperative that retailers service their customers in reduced timeframes and resolve their challenges in real time. A major challenge to this is customer's presence on multiple platforms. Customers transact in stores, online, mobile, social media etc. It may also happen that one channel triggers purchase and finally the order is placed on the other channel. Hence if the retailer is weak in a particular channel, it is losing a major sales opportunity. In addition turnaround time for order deliveries can be reduced if we service online orders from store inventory and vice versa. This brings the concept of "Multi-channel fulfillment" which can completely transform the customer experience of a retailer. But this is much more than a simple integration of channels. The retailer needs to delve into customer's mindset and see him as an individual rather than a member of a segment. In addition, a complete structural and technology infrastructure overhaul is required. And this brings us to the 4 pillar framework i.e. Personalize, Integrate, Standardize and Partner. While this shall serve as the strategy framework, it cannot be emphasized enough the significance of deep dive analysis and involvement of the right stakeholders.

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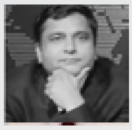

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