

Digital Solutions per il Retail 4.0

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Plan to deliver™

Agenda

- Omni-Channel and Retail Innovation
- Opportunities for Retailers and Manufacturers
- Conclusions



Disruption is the new normal



ORDER PICKING

5

ORDER # 298103



jda.



EMEA Retailers moved to Click & Collect Offers



Consegne illimitate in 1 giorno senza costi aggiuntivi

Su oltre 1 milione di prodotti, sulla maggior parte dei CAP italiani



amazon
fresh.

amazon Prime

AT&T 2:15 PM 92%

ebay
now

shop from your nearby retail stores.

pay just five bucks for store-to-door delivery.

relax as our valet brings your items to you in about an hour.

start shopping now

and now the bar has been raised, again...

Consumers want a unique and personalized experience with brands...

Hyper-Product Personalization

Children >> Create Your Own for Boys

CREATE YOUR OWN CLASSIC POLO BOYS 2-7
ADD YOUR PERSONAL TOUCH TO SIGNATURE RALPH LAUREN STYLES

STEP 1 SELECT YOUR SIZE
SIZE: 3 T Find the Perfect Fit

STEP 2 SELECT YOUR COLOR
AVAILABLE COLORS: White

STEP 3 MAKE IT YOUR OWN
CREATE YOUR MONOGRAM (OR) PICK YOUR PONY COLOR

STEP 4 CHOOSE YOUR FONT
AVAILABLE FONTS: Deco

CREATE YOUR OWN
2-7 Short-Sleeved Polo

- Short-sleeved polo in our breathable and durable cotton mesh, seen on the Today Show as the best monogrammed children's gift.
- Two-button applied placket, ribbed polo collar and armbands, uneven vented hem.
- Choose from two options: our embrodered pony at the chest with matching vintage year at the hem or embrodered monogram at the chest with matching pony at the hem.
- 100% cotton. Machine washable. Imported. All of our

Personalized Hershey's Kisses

DAVID'S BRAND

Background Color (Background color changes based on color selected)

Design & Personalization (*Prints in white ink only*)

Text Line 1 (18 characters)

Text Line 2 (18 characters)

Pick an Exclusive Background Color
Note: All Personalization prints in white ink only

Oasis	Marine	Lapis	Plum	Apple	Raspberry
Clover	Horizon	Regency	Wine	Cherry	Begonia
Meadow	Cornflower	Bouquet	Sangria	Punch	Guava
Mystic	Pacific	Wisteria	Quartz	Petal	Persimmon
Mercury	Malibu	Hydrangea	Biscotti	Tickled	Tangerine
Pool	Ice Blue	Iris	Champagne	Violetta	Sunbeam
Spa	Capri	Mint	Ballet	Bellini	Canary

Portobello Truffle Black

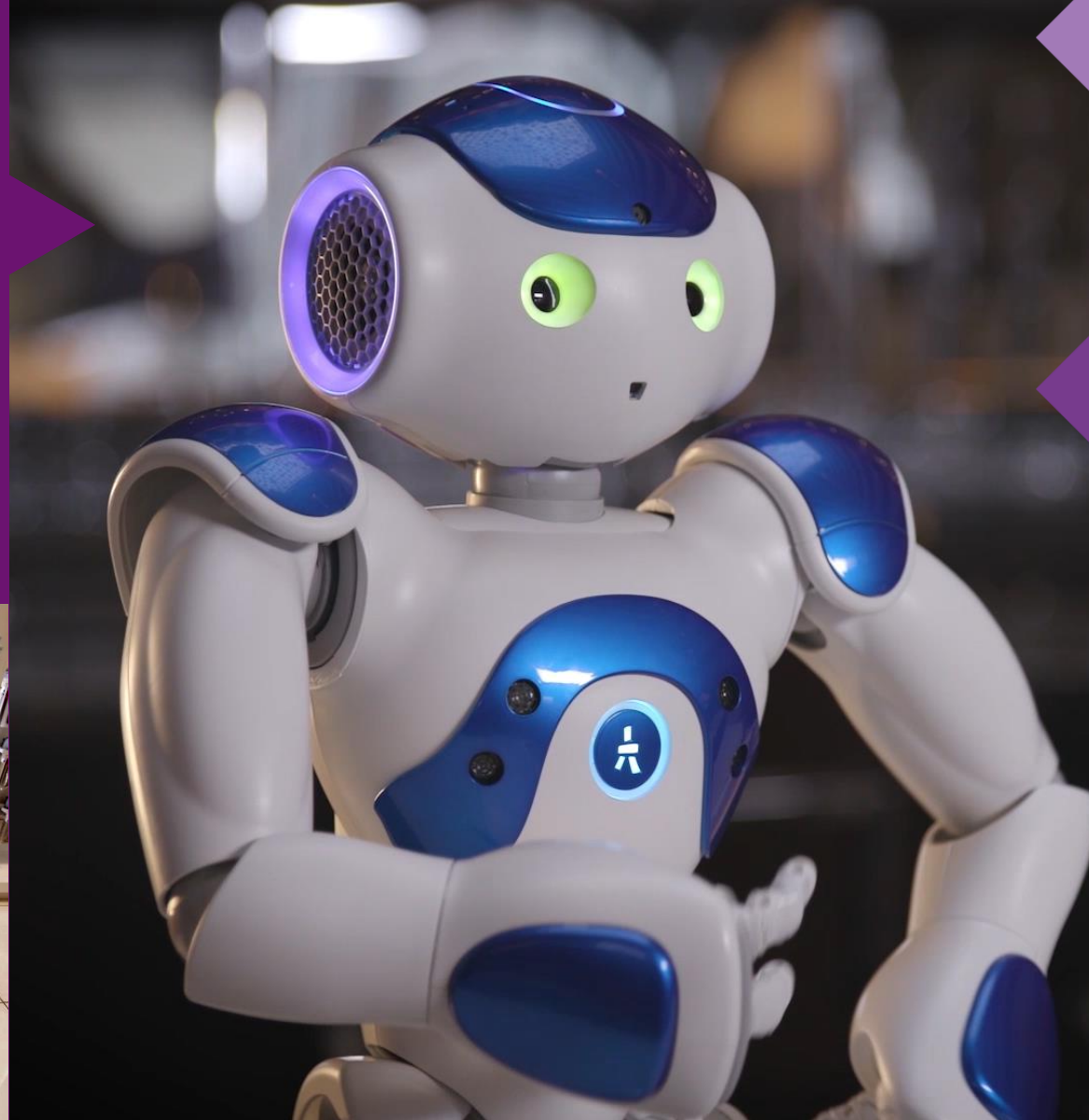


The world's largest Starbucks will open in 2018 and promises 'coffee as theater'



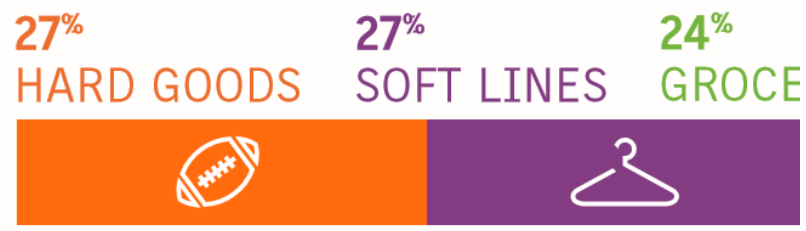
Robotics will change existing workforce management models...

The New Store Associate?



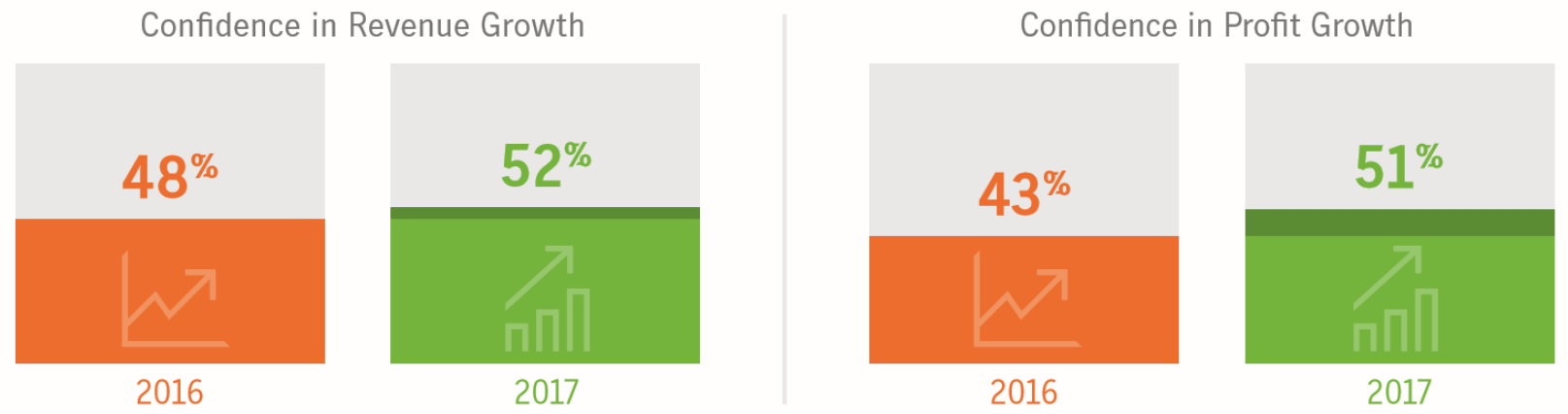
JDA CEO Survey 2017 - in Partnership with PwC jda.

THE RESPONDENTS



CONFIDENCE

Overall confidence in revenue and profit growth is up among 350 Global CEOs.



Online biggest area of confidence in revenue and profit:

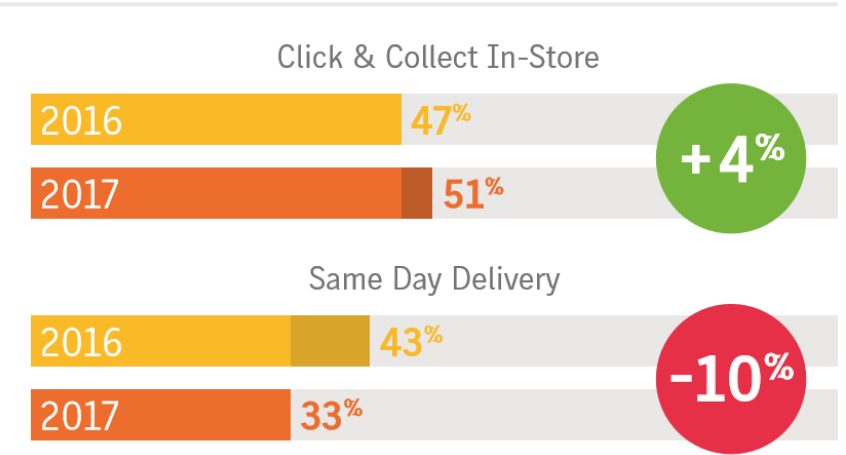


Digital transformation strategy

Digital Transformation becomes the highest investment priority



CUSTOMER ORDER FULFILLMENT INVESTMENT



Profitability is the Key imperative

PROFITABILITY

Profitability continues to be a key performance indicator, but supply chain issues are impacting profitability.

Percentage of CEOs who ranked the following as #1 priority:



25%
OUT-OF-STOCK

17%
RISING COSTS


13%
INVENTORY ACCURACY

20%
INVENTORY

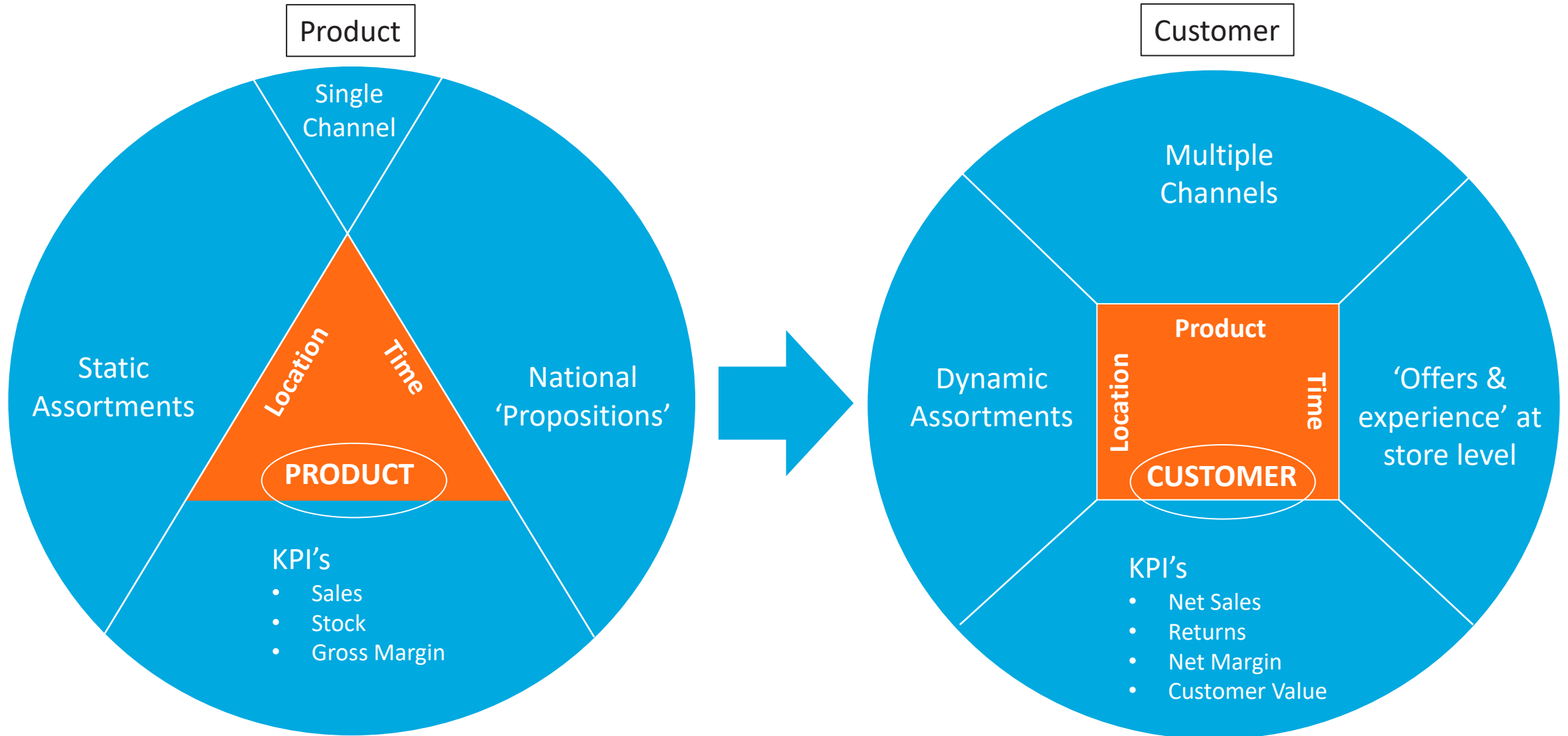
15%
FULFILLMENT MISTAKES

10%
CAPACITY FOR ONLINE GROWTH

Customer Centric Planning
Changing role of the Store
Changing role of Supply Chain

A world map is shown in a dark blue color, overlaid with a complex network of glowing blue lines and dots. The lines represent connections between various geographical locations, suggesting a global supply chain or network. The dots are placed at various points on the map, and some are larger and brighter than others, indicating key nodes or hubs. The overall aesthetic is futuristic and technological.

Customer-Centric Planning & Profitable cross Channel Planning



Innovation based on Google Platform (example in Fashion)

Customer Segments, Score Assortments, Ranging opps, Financials....



EMILY Casual Sho X customer

DESCRIPTIO

ATTRIBUTES

Colors

Materials
Cotton & Polyester

Brand Affinity

Classic+
Brog
Zafi
X & Y
H

Other Attributes
Long sleeves, Fit C

~2 transactions

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Assortment List > May-June 2017 Golf

STRATEGY SELECT

38 products

Score ↓ Image Descr

Product Distribution
All Customers 100%

Financial Strategy > AW 2017 Sporting Goods

REVIEW SALES PLAN MARGIN PLAN INVENTORY & RECEIPTS

Sales Plan for: Athletics AW2017

Sales Retail	2,900,000	Margin	60.00%	Receipts Units	110,000	GMROI	2.32
Var LY	+28.56%	Var Last Approved	+3.00	Var LY	+12.82%	Var Last Approved	+0.34
LY	2,255,745	Last Approved	57%	LY	97,500	Last Approved	2.20

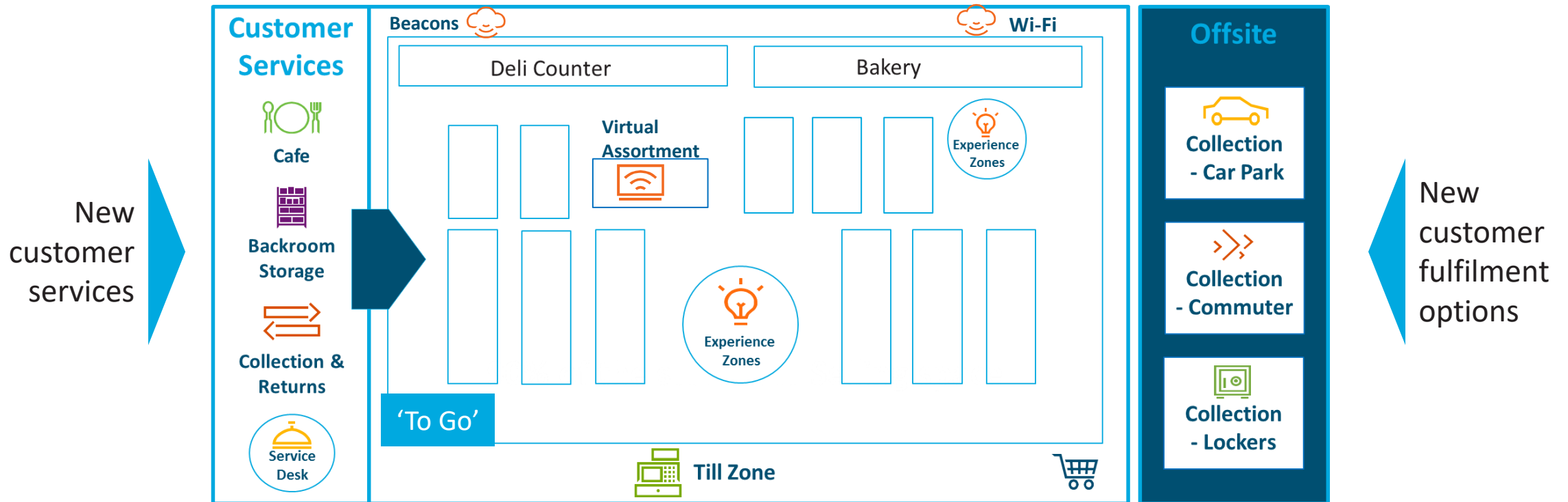
Show Metrics : 6 Selected Compare Against: Last Year

		Aug 2017		Sep 2017		Oct 2017		Nov 2017		Dec 2017		Jan 2017	
		Value	Var	Value	Var	Value	Var	Value	Var	Value	Var	Value	Var
Sales Retail	Plan	412.5K		495K		660K		605K		380K		347.5K	
	Last Year	345.8K	+19%	345.8K	+39%	506.4K	+30%	573.7K	+5%	248.1K	+53%	225.5K	+54%
Margin	Plan	58.75%		61.34%		62.00%		58.97%		60.56%		58.90%	
	Last Year	51.90%	+6.85	49.89%	+11.45	51.00%	+11.00	55.00%	+3.97	52.67%	+7.89	49.78%	+9.12
Opening Inventory	Plan	55K		50.8K		45.9K		32.3K		26.2K		24.8K	
	Last Year	45K	+22.22%	43.1K	+17.88%	42.7K	+7.35%	36.2K	-10.91%	37.7K	-30.37%	35.3K	-29.89%
Closing Inventory Retail	Plan	50.8K		45.9K		32.3K		26.2K		24.8K		20.0K	
	Last Year	43.1K	+17.88%	42.7K	+7.35%	36.2K	-10.91%	37.7K	-30.37%	35.3K	-29.89%	29.5K	-32.11%
Receipts Retail	Plan	16.5K		19.8K		19.4K		24.2K		17.5K		12.6K	
	Last Year	14.6K	+12.82%	16.5K	+19.46%	17.6K	+10.07%	21.4K	+12.82%	15.6K	+12.18%	11.6K	+8.39%
Stock to Sale Ratio	Plan	2.67		2.06		1.39		1.07		1.38		1.43	

Intelligent Store serving Physical & Digital Shoppers

Customer-experience focused

New customer experiences



Multiple customer missions

Next-gen In-store Experience with the Intel® Responsive Retail Platform **jda.**

RFID/IoT ● Sonar ● Weight ● Temperature ● Video

<https://jda.com/knowledge-center/collateral/inside-intelligent-retail-video>



Smart retail informed by multiple, integrated data streams.

New services that bridge online and in-store experiences.

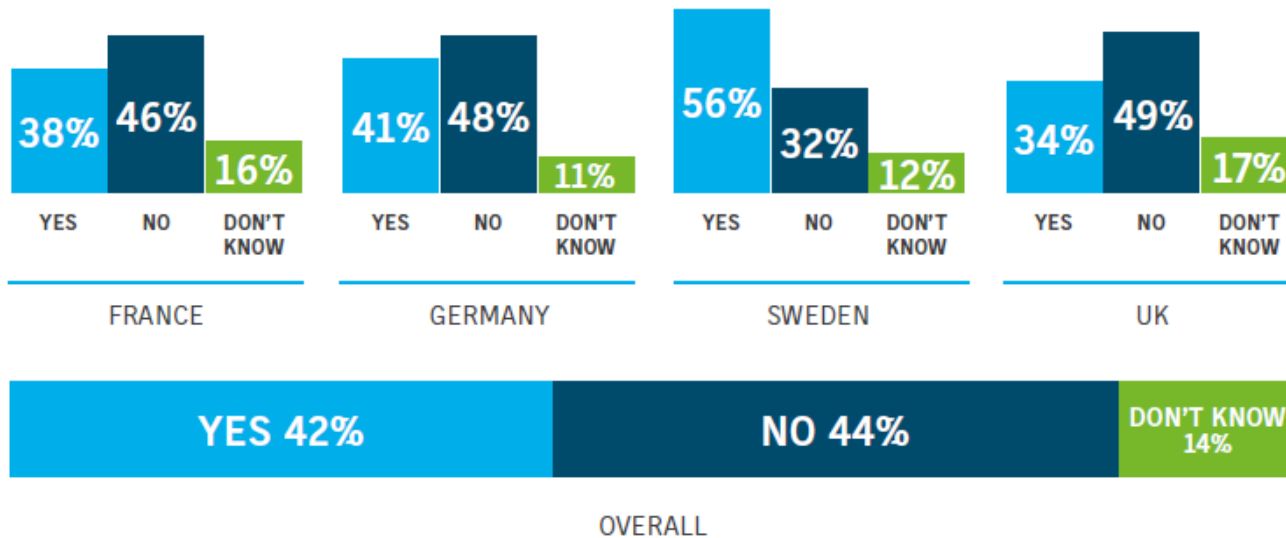
Deep insight from near-real-time and historical customer data.

One platform with 360-degree vision. Amazing insights and customer experiences.

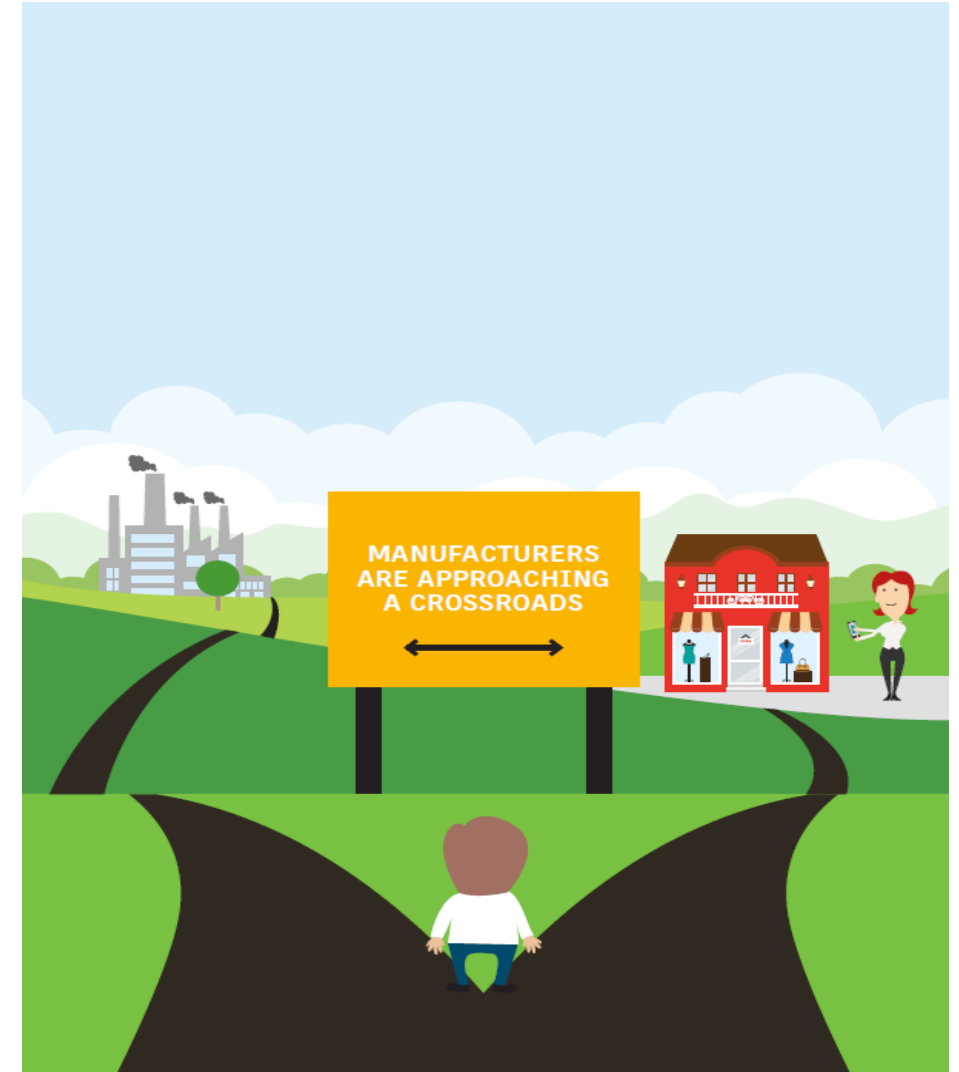
intel.com/retail

Direct purchasing with Manufacturers is becoming a significant opportunity

Have you bought any products directly from a manufacturer in the last 12 months?



“Nearly a third (30%) of European adults online stated they buy more products directly from a manufacturer now, compared to five years ago.”



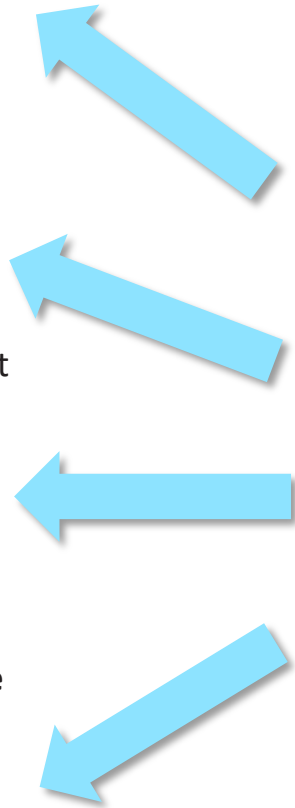
The digital market needs a digital Supply Chain where **synchronization** is a must have

Demand signal becomes more articulated. Need to capture **consumers** buying behavior.

Demand **fulfilment** must ensure **profitability** of direct delivery at **single order** level

Supply Planning must account for the new **digital segments** which require higher **responsiveness**

End to end supply chain synchronization becomes the **only way** to ensure **responsiveness** while maintaining the business **profitable**





Waitrose uses warehouse management software to optimize store picking



Facts for Castle Donington

- 81,000m² is designed to hold boxed goods and hanging garments
- Acts as NDC for Retail Slow Moving Goods & extended assortment (shipped to RDC's for x-dock to store)
- **Supplies all e-commerce customers holding entire GM Assortment of 250,000 skus**
- **In excess of 21,000,000 units in inventory**
- **At peak over 1,000,000 units per day**
- **170,000 e-commerce orders per day**
- **5,350 store orders per day**
- **126 Vehicles per day**
- **760,000 reports and labels printed per day**

Leverage These New Thought Leadership Assets in 2017!

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Digital Supply Chain

for **dummies**
A Wiley Brand

Features:

- Caeptis voluptassunt qui quostotaquis ut od
- Caeptis voluptassunt qui quostotaquis ut od
- Caeptis voluptassunt qui quostotaquis ut od

Compliments of jda. JDA Software Special Edition

Profitable Omni-Channel
FOR **DUMMIES**
A Wiley Brand

Learn to:

- Understand the demands of the omnichannel
- Locate profitable omnichannel opportunities
- Drive superior customer experiences with omnichannel strategies
- Develop omnichannel strategies that align with your supply chain fulfillment capabilities

Wayne Urie
Lee Gill, Glen Centza,
Vali Feyen

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Supply Chain
FOR **DUMMIES**
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Learn to:

- Leverage your supply chain to drive business value
- Profitably address customer demand through segmentation
- Break down silos with better collaboration
- Take your supply chain from good to great

Rizat Goswami
Prashant Bhatta
Madhav Durbia

SCM World
Shaping the Future of Supply Chain

eft

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How to Thrive in a World of Commoditized Logistics

JDA & Centiro
Christmas Customer
Pulse Report 2017
Voice of the online customer

Merchandising 3.0
Why Retailers Need to Find the Perfect Blend of Art + Science to Be Relevant to Shoppers Again.

DISCOVER. SHARE. EVALUATE.

EKN

Manufacturing Pulse

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