

The Retail Landscape of 2021...

Who Wins and Why?



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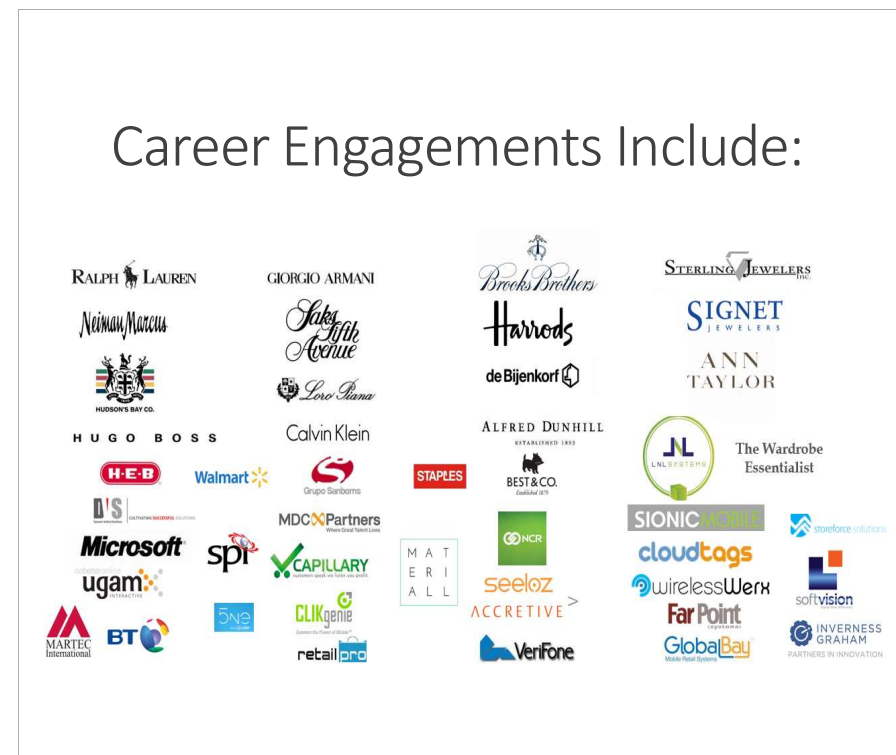
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Who we are...

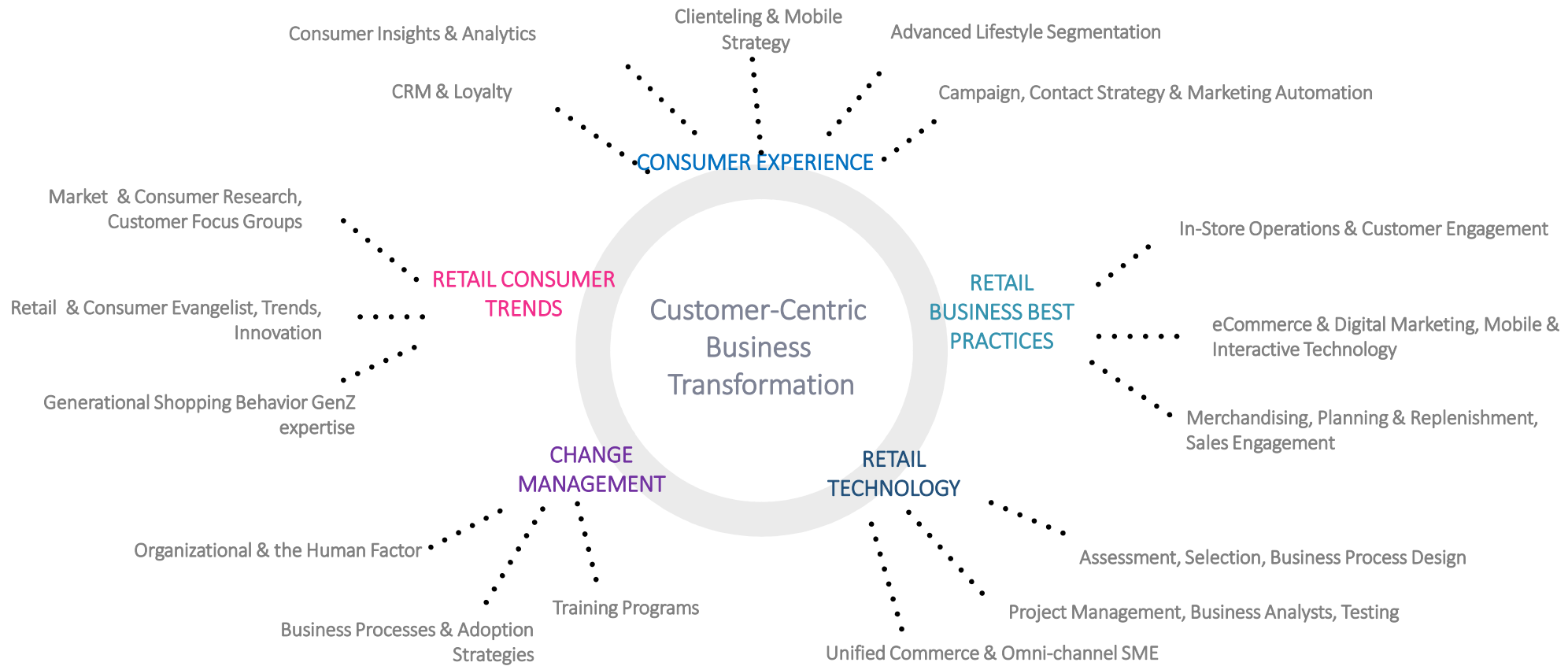


- Clientricity is led by Bryan Amaral, an accomplished retail executive, visionary customer-centricity entrepreneur, retail tech expert.
- Lead strategic, transformational consulting engagements and designed, implemented and marketed next-generation customer-focused technology solutions for global retailers and software & service vendors.
- Decades of **Retail Expertise** in the luxury and mid-to-high service retail sectors working with top retailers on Clienteling, Loyalty, CRM, Assisted Selling, IoT, AI, Personalization and Mobile Ecommerce initiatives.
- Clients include Retailers, Technology Vendors and M&A Advisory



* Includes both direct and indirect engagements

Real-World Retail Expertise



The Digital Retail Transformation

The retail industry is being redefined as traditional brick and mortar retail makes the shift from “doing digital” to “being digital”.

Retailers are creating new engagement approaches and business models that expand what it means to be a retailer.

They are adding a digital layer to their physical stores that delivers personalization and relevancy, enhanced product visibility, improved operational workflows and greater management insights.



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“Every journey begins with the first step of articulating the intention, and then becoming the intention.”

- Bryant McGill -

A person in a dark suit and tie is shown from the chest up, with their right hand raised and fingers spread. The background is a vibrant blue with a subtle grid pattern and a bright light flare behind the word 'Retail'.

Retail

**Everybody talking
about the digital
transformation,
but what does it
mean?**

Retail is trying to get its shift together...

Merchant Centric



Customer Centric

**Meeting Retailers
Needs**



**Meeting
Customer Needs**

**A Portfolio of
Products**



**A Portfolio of
Customers**



The first step on the journey...

...What does the data tell us?

CUSTOMER
ASSOCIATE
PRODUCT
PROCESSES
CONVERSION
LOCATION
TIME
DESIRES
PURPOSE
PREFERENCE
CONSTITUENTS
INFLUENCES
ONLINE & OFF
PATHING
DWELL

Transformation by the numbers:

“75% of consumers are more likely to make a purchase from a company that knows their name and purchase history and recommends products based on their preferences”.

55% of Retailers
Lack Single View of
Inventory.

78% Don't have
Real-Time View

\$40M - \$75M
is Lost per \$1B in
Revenue due to
Out-of-Stock

85% of Decision
Makers Say
“24 Months to
Make Inroads” or
Suffer Financially

Inadequate
Enablement of
Frontline
Workforce Costs
11% of Annual
Revenue

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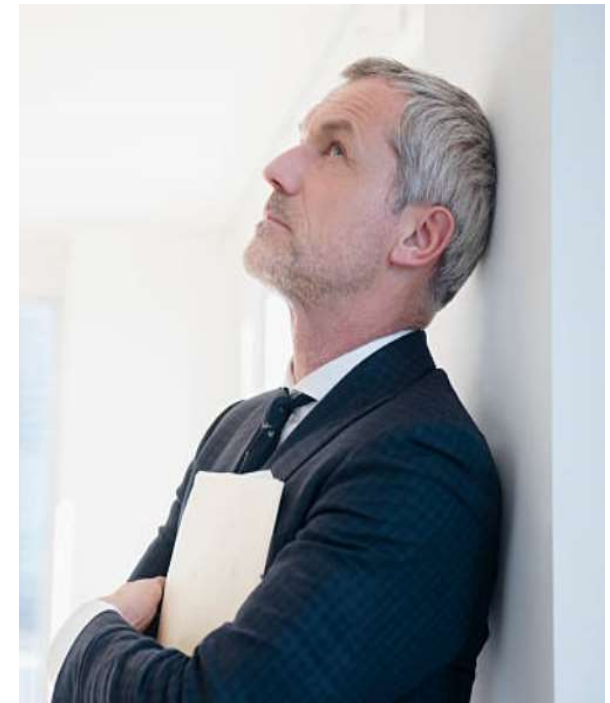
13 Ways Retailers are Failing to Make the Transition...



1. **Lack of Clarity** for What “Good” Looks Like.
2. **Culture** is not driven by data insights. Rely on myths based on outdated knowledge.
3. **Fiefdoms** and disparate systems make it impossible to establish one version of the truth.
4. **An ROI mandate** that doesn’t take into consideration learning something new about customers or engagement. No budget.

13 Ways Retailers are Failing to Make the Transition...

- 5. Risk Adversity.** Lack of internal leadership related to innovation and business model reinvention. Current executive management aren't digital natives and are reticent.
- 6. Protect the organizational structure** leading to dysfunction, lack of alignment, limited collaboration, bad process, and competing agenda
- 7. Lack of Expertise.** Limited store-side CX insight or expertise. Inability to execute CX strategy across channels because of organizational silos and lack of alignment.
- 8. Failing store level execution.** Lacks top-down mandate and real-time bottom-up transparency



13 Ways Retailers are Failing to Make the Transition...

9. **Underinvest in Tech** – Not viewed as an enabler. No unified technology strategy and an overburdened IT group. Minimal innovation or money to try new things... But without tech, retailers cannot build an insight driven organization.
10. **No single view of what is happening** with disparate systems. Inconsistent, unreliable/fractured data. Lack of insights and response.
11. **Aging systems.** Expensive to maintain legacy enterprise systems need to migrate to cloud – Lower TCO & complexity.
12. **Lack of capital** to acquire systems and personnel to adequately address omni-channel customer centric workflows and opportunities.
13. **Hoping technology alone will solve the problem.** Need more than point solution. A platform underlying a transformation of operating models and business processes. New “Kaizen”



A New Organizational Manifesto for Retailers

- **The truth will set you free! Start with Real World Data...**
- **Lead boldly, tear down convention, hire CX skills, create new customer value and execute “top down” flawlessly!**
- **Don't just DO digital...BE digital!**

A New Customer Manifesto for Retail

- **Make it easy!** Fast, efficient, frictionless & flexible. – Unified View of Inventory and Customer, OMS, Ease of Payment. Make it happen on my device and yours!
- **Tell Me What I Want to Know! Don't Abuse My Data!** - Provide transparency into orders and delivery, share the truth about products, use my data only to enhance my experience.
- **Make it Mine!** Express my individuality and identity through your brand and products. Customized, personalized and unique offerings.
- **Engage Me in Fun, Memorable Experiences!** Create novel and innovative “phygital” experiences using AR, VR and interactive technologies. Make the exploration fun!

A New Customer Manifesto for Retail

- **Let me Drive! But be there when I need help!** Don't be intrusive but incorporate the best concepts from online and enable in the store. Bring self-serve, wayfinding, digital display and content, wardrobing, and support to B&M via my device and yours.
- **Know my "Shopper DNA" and what it takes to make me happy!** Learn from every interaction and curate products and offer clienteling-like experiences that wow me!
- **I'm social, I'm digital, I'm always on...you should be too!** Be a pervasive presence (D2C) on digital platforms and make engaging and transacting part of their normal daily experience.
- **Let me become part a community of wildly passionate advocates!** Create experiences and formats that connect people and immerse them in the brand narrative. Leverage social channels and allow customers to have a voice!



New Formats & Operating Models

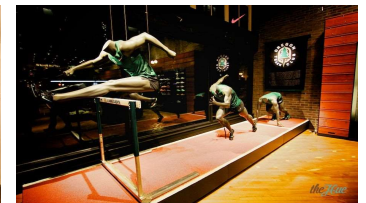
What's working and why?

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New Formats and Models

- Showrooms and Discovery Zones
- Personalized & Customized Products
- Storefront as a Service
- Immersive “Phygital” Storytelling



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What We Can Expect in 2021?

What should we look for in the
retail winners of tomorrow?

Thank You...



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