



POS & CUSTOMER ENGAGEMENT REPORT

24TH ANNUAL



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POS & CUSTOMER ENGAGEMENT REPORT

WEATHER THE STORM:
WHAT'S RETAILING WITHOUT
A CHALLENGE?

WHAT'S INSIDE?

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INTRODUCTION

Today's retail climate remains challenging, as retailers continue to wrestle with ongoing supply chain issues, economy concerns, inflation, bloated inventories, a constricting work force, and increased levels of returns. Despite the economic uncertainty, consumer consumption has persisted as overall retailers remain resilient. It remains to be seen how continued inflation, increasing cost of debt, and the resumption of student loans payments will affect consumer spending power, especially amongst younger and lower-income households. Amid this uncertainty, agility is paramount and leading retailers are pivoting to be prepared for the ever demanding and changing aspects of retail.

Although the customer journey is no longer linear (was it ever?), retailers are striving to deliver a seamless, unified experience across all channels. This includes, while only scratching the surface, real-time inventory visibility, advance order orchestration, and a single view of the customer – all of which are top priorities for retailers going into 2024. Retailers are more focused than ever on combining these capabilities to deliver a differentiated customer experience that fosters brand loyalty.

Digital commerce continues to expand, and retailers are taking advantage of the many ways to connect with customers and enable commerce via various digital and social media platforms. Over the last 3 years, our research and practice have reinforced this point: retailers are prioritizing digitalization and have increased investments. These investments aim to build brand loyalty and a consistent message across all channels.

Inside the store, successful retailers are continuing to tailor the customer experience by leveraging their digital assets like enterprise view of real-time inventory and digital customer profiles to create engagement that is seamless. Retail stores are still a priority as they represent over 75% of total retail sales, and many stores are being redesigned to provide more experiential, high-touch events. Big box stores are testing smaller store formats while department stores are pivoting to more localized, curated, formats and assortments. Specialty retailers are redesigning the "checkout desk," and in some cases removing it altogether. Beyond new designs and fixtures, services like BOPIS and BOPAC are now fundamental service offerings further impacting the store design and staffing models. Additionally, stores provide convenience to customers by acting as fulfillment centers to enable faster delivery times and cheaper costs to retailers.

Finally, we are seeing the true emergence of artificial intelligence (AI) as retailers are increasingly experimenting and piloting innovative solutions that are sure to reshape traditional business process and legacy technology assumptions.

Acknowledging these market changes, let us explore these themes and the leading retail trends that are driving customer engagement, stores, digitalization, and in-store technology.

POS & CUSTOMER ENGAGEMENT REPORT

KEY FINDINGS

TOP POS PRIORITIES

54% Add / enhance OMS / real-time product visibility

46% POS software upgrade / replacement



54% Omni-channel capabilities / Integration, like BOPIS / BOPAC

46% Add extensibility to POS

38% Unified or single payment platform

TOP CUSTOMER ENGAGEMENT PRIORITIES

71%

Reducing friction of existing store fulfillment for digital sales

54%

Personalizing the customer experience

33%

Enhancing customer communications and marketing

33%

Enabling mobility for store associates

TOP IN-STORE MOBILE PRIORITIES

63%

Mobile Endless Aisle

54%

Clienteling

42%

Mobile POS



TOP BUSINESS PRIORITIES

UNIFIED COMMERCE | Nearly 80% of retailers have or plan to implement a unified commerce platform (up from 71% LY)

SELF SERVICE | 40% of retailers have or plan to implement self-service solution

AI | Nearly 30% of retailers plan to implement AI solutions within the next few years

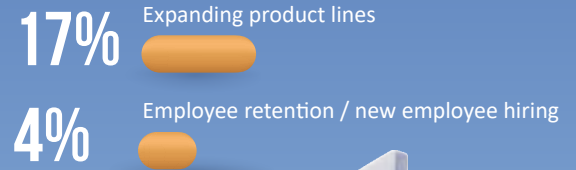


80% Grow / enhance digital commerce

71% Improve / optimize supply chain

67% Expand / enhance customer experience & capabilities

TOP BUSINESS PRIORITIES



Shopping traffic was steadfast over the last 12 months, both digitally and in-store. Inflation reached 6.4% in the beginning of the year before coming back down to 3% (US Bureau of Labor Statistics) but that did not curb spending. There was almost no change to consumer spending other than an increase in credit and decrease in consumer savings (Cocheo, 2023) to support normal shopping habits. Stores remain the central hub for spending with digital commerce continuing to gain a larger share of the overall customer's wallet. The convenience, immediacy, and availability of goods drive the utilization of shopping online.

Looking to 2024, retailers have prioritized the following as most important: enhancing digital commerce, streamlining supply chain operations, and improving customer experience in-store and online. All with a focus to drive differentiation and build loyalty.

DIGITAL COMMERCE REIGNS

For the 3rd year in a row, most retailers, 79%, have indicated that growing or enhancing their digital commerce offerings is their top priority. The customer journey begins online for many, whether it is seeing a product while scrolling through a social feed or reading products review while browsing various market-places. In addition to those platforms, there are a never-ending number of digital touchpoints that encourage connectivity and curiosity: particularly in the mobile space. It is imperative that the experience on each channel is seamless, connected, and complements the in-store brand experience. For example, implementing a single view of the customer (SVC) allows access to customer history (sales, returns, communication preferences, and suggestions) across all shopping channels. Also, while a customer is browsing online, retailers are increasingly enabling clienteling by offering suggested items based on the customer's cart or directly connecting them with an in-store associate who can view their digital cart. This associate can provide pointed suggestions but also form a branded, human, connection with the customer – bridging the in-store / digital experience. Digital commerce depends greatly on inventory visibility. When

shopping online, having the ability to see a store's inventory is crucial. This allows customers to visit the store to try on products before purchasing, experience the brand physically, and can significantly reduce returns. Retailers have struggled to gather a truly accurate pulse on what inventory exists in the store, along with keeping it updated and sharing that information with the customer in real-time. Properly defining in-store inventory availability and communicating that to customer helps to prevent disappointment, and creating a consistent experience across all channels, especially digital, reinforces branding to the customer.

OPTIMIZING THE SUPPLY CHAIN

Long delivery times, out of stocks, cancellations, and other supply chain pain points that were experienced during the last 2 years have mostly dissipated. Many businesses, who are still servicing customers, have caught-up on supply chain blockages but still see the optimization of supply chain processes and technologies as one of their top 3 priorities of 2023. 71% of retailers stated they are improving and expanding their supply chains. Out-of-stock and long wait times result in a very dissatisfied customer, that ultimately disintegrates customer relations and brand loyalty. To combat this, many brands overordered inventory expecting pandemic and post-pandemic shopping demand to continue – it did not. The pandemic challenges drove retailers to further integrate their supply chain into the selling experience by enabling order management systems to accept consumer orders against orders that are in transit or even further out in the supply chain. Some retailers are left with a surplus of out-of-season inventory (Berthiaume, 2023). This excess inventory damages margins and reduces placements for new stock, both in warehouses and in-stores. Improving inventory visibility and placement allows retailers to place products in the correct locations where they will be sold the fastest and reduce losses to margins.

CUSTOMER EXPERIENCE DEFINES RETAILERS

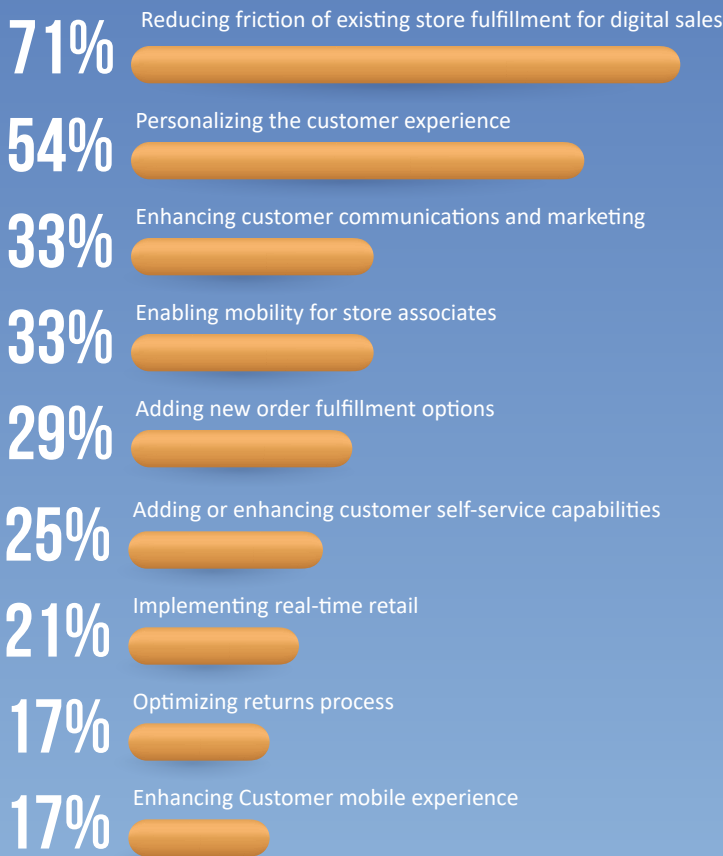
Customer experience is more than a point-to-point transaction, it is about the holistic experience and the journey before, during, and after. Customers want accessibility anywhere, anytime when shopping and want an omnipresent digital experience, as we have seen with online retail now being almost 25% of total retail sales. Sought out or not, to build a loyal customer, retailers have to provide a distinguished and personal experience to have customers return. 71% of retailers surveyed see the value of building unique customer experiences and have stated this is a focus of theirs heading into 2024. It is not all about the product, but how one interacts with and without the product or service. Surprise and delight by making customer interactions engaged and theater.

71% OF RETAILERS

SAY THAT REDUCING FRICTION DURING STORE FULFILLMENT FOR DIGITAL SALES IS THEIR TOP PRIORITY.



TOP CUSTOMER ENGAGEMENT PRIORITIES



Customer experience is still the most decisive test of success and failure amongst retailers. With the use of technologies mixed with human and non-human interactions, retailers can curate the customer experience in a variety of flavors. All with the ultimate goal of creating a loyal customer and a unique brand image across all channels. Retailers see that the following priorities will improve customer satisfaction the most: reducing friction amongst omni channels, personalizing customer experience, enhancing customer communications, and creating in-store mobility.

REDUCE OMNICHANNEL FULFILLMENT FRICTION

Retailers continue to accelerate “buy anywhere, fulfill anywhere” initiative. Experiences like BOPIS or BOPAC are now table stakes with customer convenience driving the need for retailers to include them in their service offerings. For the 2nd year in a row, 71% of retailers are reporting that reducing friction during store fulfillment for digital sales is their top customer engagement priority. Patchwork effort was done during the pandemic to set up these systems but since 2021, there has been an ongoing effort to refine these systems. Enhancements like more timely fill rates, improved visibility to order status, and more efficient picking in-stores and labor allocation are being designed by retailers and software vendors. All with the goal to streamline associate tasks and smooth the customer experience. The continued challenges in the workforce are a major factor in keeping this as a top priority for retailers.

PERSONALIZATION IS HERE TO STAY

Do you know who your customer is? Where has she recently shopped? How often does she open your email or SMS? Do you know her click-through rates when browsing? Many retailers, while not proud, are unable to answer these questions. Personalization comes in many forms: campaigns tailored to shopping preferences and patterns, suggestive selling online and in-stores, identification via cookies when online or with beacons ping off of mobile devices when the customer is in-stores, or even store associates having the ability to locate past customer purchases. Our survey shows, for the 3rd year in a row, over half (54%) of retailers are prioritizing tailored experiences to identify and connect with customers.

While most retailers pivoted from experiential retail in-stores due to loss of foot traffic during the pandemic, new concepts and high-touch environments are being reintroduced. Large big box stores are opening smaller concepts, department stores are offering more tailored, localized assortments, off-price is slowly testing selling product online, and digital-native brands are opening focused small formats stores. All looking to differentiate their brand and improve the customer experience.

To achieve all of the above, retailers will continue to invest in identifying the customer when she shops, browses and makes any other contact. Having the ability to identify her early and enabling the in-store experience to be informed by her past purchases and preferences continues to become more important to retailers. Having this data in an accurate and comprehensive database will be a foundational element of a successful AI strategy in the future.

PERSONALIZED COMMUNICATIONS

Check your inbox – have you received a marketing email from a brand you have shopped at in the last 6 months? How likely are you to open that email? Unlikely. Our survey shows that 33% of retailers have identified this as a pain point for the customer and have prioritized enhancing customer communications and marketing campaigns. Today, consumers are flooded with non-personalized emails and text communications from retailers. Retailers are blasting consumers with many generic communications in an effort to have them shop again. This effort has shown to be too much, and the opposite of what is expected occurs, the consumer becomes fatigued and overwhelmed by the communications and unsubscribes from the retailer.

To prevent this, marketers must provide each consumer with a unique experience: one that based on browsing data, purchase history, demographics, location, and insightful data gathered via segmentation (Adobe Experience Cloud Team, 2022). The magic number of connected and personal communications that ignites a purchase is science and art. Marketing teams need transformed, detailed, and segmented data to design insightful, personal campaigns. Having an integrated customer data platform with an in-store customer relationship management (CRM) system enables structured data to be shared with various business teams. When done correctly, personalize communications results in brand loyalty and high ROIs on marketing campaigns. This is where we have seen an AI immergence, sifting through demographic data, communication history, purchase history and other pertinent data, AI can significantly improve customer engagement by offering targeted and personalized communications. At its core, AI helps businesses reduce email clutter, identify high value conversions, and tailor communications which leads to increased customer satisfaction and loyalty.

33% OF RETAILERS
HAVE PRIORITIZED ENHANCING CUSTOMER COMMUNICATIONS.

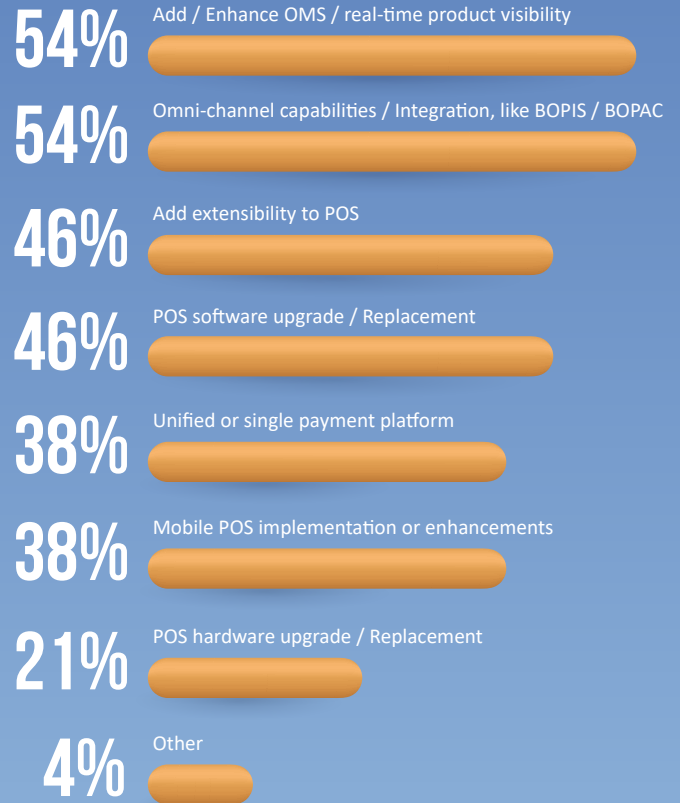


ENABLING MOBILITY FOR STORE ASSOCIATES

This year 33% of retailers identified that enabling mobility for store associates is a top priority; this is down from 44% last year. We attribute most of this decrease to the progress retailers are making towards enabling mobility. The usage of mobile devices has expanded beyond consumers. Retailers have historically utilized mobile devices to support non-selling functions. Activities such as task management, restocking, markdowns, put-aways, signage compliance, and product placement were all managed via a mobile device. Today, we are seeing retailers prioritize mobility to support non-selling functions to enhance their mobile offerings for selling staff. The most immediate example of this is mobile POS (mPOS). Omnichannel shopping does not need to be tied to a fixed till. mPOS allows associates to access inventory and transact from anywhere in the store: outside fitting rooms, floating in-between aisles, or breaking lines when cash wraps are at capacity. Mobile solutions provide a more comfortable end-to-end experience and increase conversions.

As we can see in several areas in this year's survey, the drive towards an improved customer experience with mobile hardware, upgraded enterprises' OMS, and centralized POS software and hardware all point to the need to have enterprise wide, real-time, actionable views of inventory to deliver an endless aisle experience. These inventory efficiencies combined with an improved customer experience will result in improved margins, sales, and customer retention. Together, these

TOP POS PRIORITIES



strategies can reduce the cost of new customer acquisition.

As we are nearing 2024 there is a shift in POS priorities, resembling what we saw in 2021. Retailers have reported that their POS priorities are enhancing OMS integration and improving omni-channel capabilities. These priorities stress retailers' aspirations of creating a seamless integration amongst physical stores and digital channels; offering the customer a unified experience.

ORDER ORCHESTRATION TAKES PRIORITY

Up from 36% in last year's survey to 54% this year, digital commerce continues to grow in importance for retailers, accounting for a larger part of total retail sales. Retailers are increasingly recognizing that omni-channel transactions increase order sourcing and routing complexity. To do this effectively while serving all customers equally, retailers must have a robust OMS. A robust OMS can consume orders from multiple channels, determine the best location, DC, 3PL, or store to source individual items or an entire order, and the best method to distribute said order. When working correctly, the OMS harmonizes and acts as a centralized component for order distribution and inventory visibility helping retailers minimize costs (e.g., packaging, shipping, and store labor) and reduce out-of-stocks, item replacements, and fulfillment delays. 54% of retailers have recognized this need and have prioritized enhancing OMS integrations as their top POS priority.

OMNI-CHANNEL INTEGRATIONS

Over half, 54%, of retailers have stated that improving omni-channel integrations and capabilities is one of their top POS priorities. Every retailer's technology stack is complex, composed of best-of-breed solutions, point solutions, in-house developed applications, and legacy apps and hardware that may or may not be supported by the vendor. Disparate systems result in high maintenance costs, manual processes, data leakage, decreased performance, and technical limitations (Red Iron Tech, 2023). No fear, through the use of open integration standards and microservices technology, modern architecture platforms can more effectively scale and more quickly add capabilities than traditional, legacy approaches.

Omni-channel integrations should aim to create a unified commerce platform: a modern architecture to deliver on the promise of creating a common, centralized, real-time platform for all customer engagement points. All integrations and technology implementations should have the customer experience at the forefront: how they will impact and improve the customer's journey.

POS EXTENSIBILITY

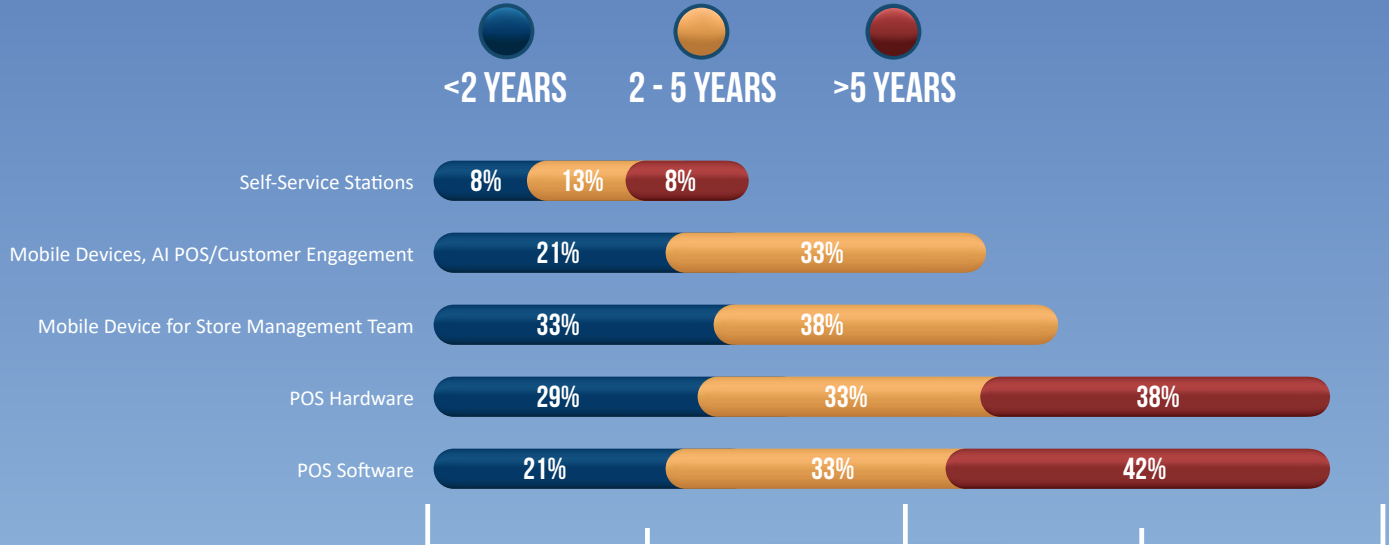
46% of retailers reported wanting to add extensibility to their POS. Many POS vendors today meet the basic needs of retailing today but

each retailer has unique, distinguishing requirements that reflect their methods of service. Requirements such as unique pricing and promotion rules, layaway, private label credit cards support, or advance catalog search features at the POS. These factors all serve as inputs into the customer journey and cannot be absent from the POS. POS solutions can be extended via customizations and, or software development kits (SDK) that allow retailers to enhance and modify out-of-box functionality, add validations, or add custom features in defining the POS user experience. Extensions can be packaged, designed, and deployed based on a retailer's needs but the customer experience should drive all decisions.



RETAILERS HAVE EXPANDED IN-STORE TECHNOLOGIES BY OFFERING MORE CUSTOMER FACING SOLUTIONS

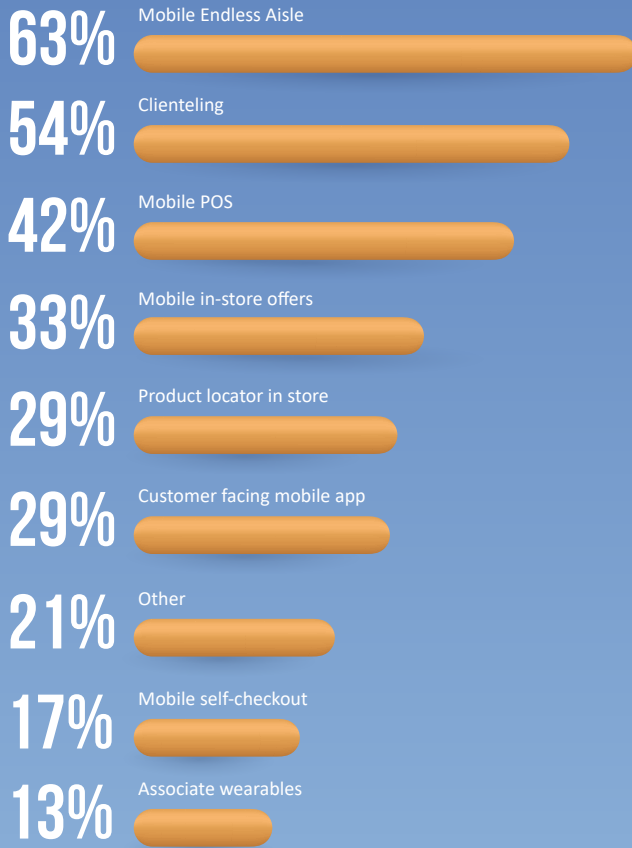
CURRENT STATE OF STORE TECHNOLOGY



Point-of-sale solutions continue to be the centralized technology utilized in stores today. This has evolved from associates being tied to cash wraps to mobile solutions, to advance self-checkout options that includes RFID or biometrics recognition. Today, a fast and easy checkout experience is tables stakes; long lines and slow transacting times can sour the customer's entire experience. Over the last 5 years, POS has been an area of significant investment for retailers. However, over 42% of retailers are still trying to deliver an omni-channel experience with POS software that is older than 5 years. This is more than a 10% decline from last year. Retailers have acknowledged the need to have both POS software and hardware that is agile, composable, and up to date with how consumers shop.

Beyond POS, retailers have expanded in-store technologies by offering more customer facing solutions to create an experiential, high-touch retailing experience. For example, apparel retailers have included AR enabled virtual mirrors in fitting to expand endless aisle, interactive kiosks to help retailers verify customer's identity streamlining BOPIS, or enablement of beacons to identify the customer when in store and provide more personalized communications. Connecting with customers and providing unique experiences helps retailers differentiate and build brand loyalty.

TOP IN-STORE MOBILE PRIORITIES



MOBILITY EVERYWHERE

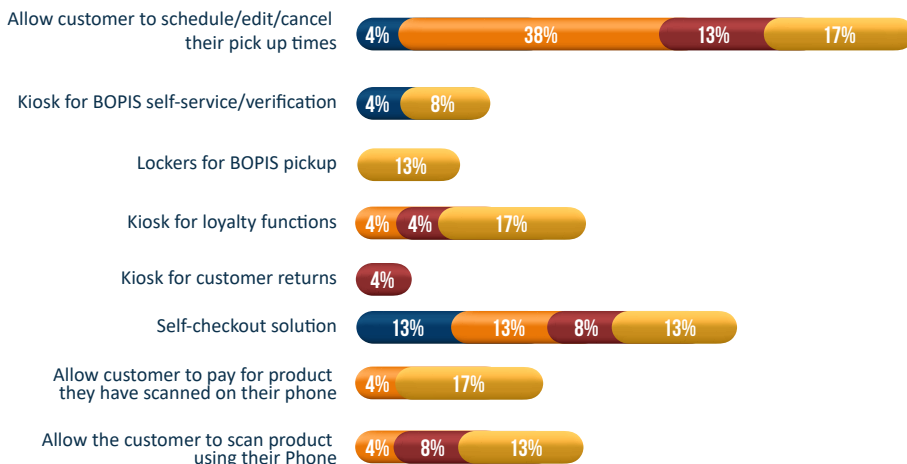
Our survey indicates that 54% of retailers have mobile POS and mobile customer engagement devices. Mobile devices provide retailers with flexibility and agility across various functions within the store. Retailers stated that their three leading priorities for mobile devices are: extending endless aisle, improving clienteling, and enabling mobile transacting via store mobile or customer device. All of these are foundational to delivering a great customer experience while increasing margin and reducing inventory levels.

Mobile devices are feature rich, cost effective, and break down walls resulting in unmatched services to the customers today. Store team members can start engaging with customers as soon as they enter the store and throughout their entire customer journey. There is no longer a need to wait until the customer gets to the cash wrap with the improved mobility mPOS provides. Fixed POS terminals take up a lot of space and make customer-associate relationships very transactional. mPOS introduces conversations and fosters clienteling. All these factors contribute to the improved store layout and experience we identified earlier.

Every survey respondent that had mobile devices indicated that their mobile devices are less than 5 years old, matching previous survey results. As we have seen with our personal mobile phones, advancements in mobile technologies occur quickly. We exchange our phones for the newest model every 2-4 years with retailers matching the same frequency for mobile devices in-stores. Battery life increases with new OS releases and overall performance improves, triggering replacements. Frequent replacements can be costly; however, retailers are able to stay current and service the customer more effectively. Ultimately, providing better customer engagement.

However, this is a considerable budgeting challenge for store operations and POS managers who are used to purchasing hardware and expecting it to last 7-10 years at a minimum.

SELF SERVICE OPTIONS



AUTONOMY VIA SELF-SERVICE

Self-service options saw a steep rise in usage during and following the pandemic. During the pandemic, customers distanced themselves from high-touch areas like self-checkout and fitting rooms to reduce getting infected. While customers are back in-store, happily engaging with high-touch services, some customers still value the convenience and ease enabled by self-service options. 40% of retailers have implemented or are implementing self-service solutions like self-checkout (SCO), scan-and go, pick-up lockers, or kiosks for returns. These solutions provide a distinguished service option to customers, reducing labor costs and mitigating the limited work pool challenges retailers face. Instead of having 6 POS terminals staffed by individual associates, a retailer can now have 4-5 SCO terminals with one associate supervising the area. Self-service will not replace staffed services, but complement and enhance the customer experience by providing a choice.

The costs of self-checkout solutions have had a steady drop that is cumulatively significant compared to the cost of self-checkout 6 years ago. Additionally, the number of self-checkout options available to retailers has increased dramatically.

ADDITIONAL FINDINGS

ARTIFICIAL INTELLIGENCE (AI)

AI is starting to make a more significant impact in retail than in the past and will continue to impact retailers, budgets, CX and the ability to deliver a competitive experience. The initial savings and benefits are being seen in the areas of customer support centers and product information management (PIM). With systems such as cloud call center software, chatbots, and virtual assistants, retailers can improve their customer interactions. Initial implementations focused on routine/repetitive calls, but AI can now be trained to identify facial expressions, a customer's vocal tones and other human emotions expanding its capabilities to take on complex calls in a contextually appropriate manner.

PIM solution providers are adding AI to their offerings to aid in the enrichment of product attributes, image recognition and eCommerce product copy. Within seconds, multiple product descriptions are generated for the merchant to choose from, with sliding bars to create a more edgy or sophisticated story at the complete control of the retailer.

This is just the beginning, AI will be helping retailers realign their supply chains, recognize dynamic demand, market trends, pricing optimization, forecasting and more.

RETAIL'S PHYSICAL FOOTPRINT

The physical footprint of retail continues to evolve with the flexibility of mobile devices and the increased flexibility provided by centralized/cloud POS Software. Retailers remain confident with almost 80% of the survey respondents saying that they plan to expand their footprint with new locations. This is clearly a small bounce back from the significant cutting that many retailers made during the pandemic. Also, it is important to note that 12% of the survey respondents intend to evaluate finding the right partner for a store within a store concept. Of equal importance, none of the retailers intend to enable a black site for pure fulfillment. The rise of 3PLs and the plethora of available warehouse space at reasonable

**AI IS STARTING TO MAKE
A MORE SIGNIFICANT
IMPACT IN RETAIL**



PHYSICAL FOOTPRINT PRIORITIES

79% Brick-and-mortar stores

25% Outlet Locations

17% Special event hosting/event venue

13% Cafe/restaurant/bar (food/beverage offering)

13% Store-within-a-store (i.e. small footprint within dept store)

13% Regional fulfillment centers

8% Showrooms



CONCLUSION

The retailing landscape continues to be a challenge, but those that can pivot and adjust quickly will continue to thrive and grow. Consumers continue to seek personalization and connection while retailers strive to offer differentiated services both in-stores and digitally. The customer’s journey is an interconnected web that blends both digital and in-store experiences; radically pushing retailers to offer unified commerce experiences that deliver a consistent message across all channels.

Stores remain the focal point for many brands, as utilization of the space continues to evolve and serve multiple purposes. Retailers are forging ahead with big plans for stores, focused on creating unique customer experiences, defining order distribution and inventory visibility, and carefully considering the in-store and digital technology decisions to enable and support a holistic customer experience and create brand loyalty. We predict in the next couple of years, we will see significant investment in the utilization of mobile technology that drives agility and flexibility, enables digitalization, and positions brands to win.

Thank you for reading and, as always, we welcome your feedback from our 24th Annual POS & Customer Engagement Survey.

SURVEY METHODOLOGY

Through an online survey system, RCP conducted the 24th Annual POS/Customer Engagement Benchmarking Survey in the first half of 2021. The goal was to gain understanding of retailers’ planned initiatives, priorities, and future trends by contacting the top North American retailers.

This report summarizes the results and key findings of the survey, offers insights based on our client engagements and overall retail experience, and identifies current and future trends in the industry. These insights are intended to help retailers evaluate their customer-facing operations and technology and enhance their roadmaps for improving customers’ experience.

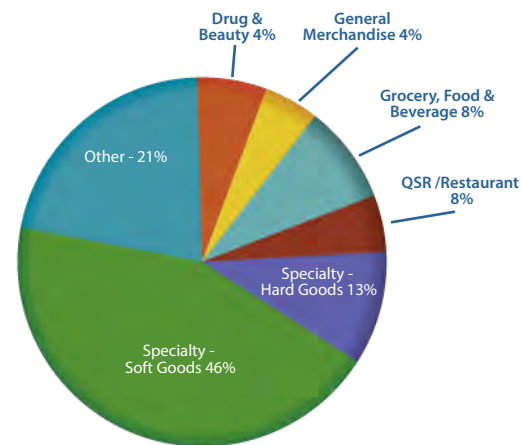
The primary retail segments of the survey respondents were from specialty soft goods with 45% and specialty hard goods with 12% of respondents. The remainder fell into various other categories such as general merchandise and grocery, food and beverage. The focus on the specialty retail segment remains consistent with 57% of the overall retailer responses compared to 56% last year.

Of the retailers surveyed, the breakdown in size is based on gross annual revenue including a broad selection of Tier 1, 2 and 3 retailers, with 58% of the retailers having more than \$1B in sales compared to 56% last year.

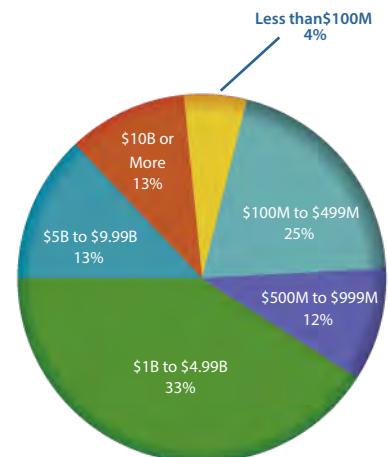
The specific respondents for each company were primarily vice presidents and directors of store systems or IT, and C-level executives.

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COMPANY CATEGORY



COMPANY REVENUE



ABOUT RETAIL CONSULTING PARTNERS

Retail Consulting Partners (RCP) is a comprehensive retail management consulting firm dedicated to providing superior service and enduring value to our clients. RCP combines our consultants' deep retail business knowledge and cross-functional capabilities to deliver superior design and implementation of strategy, technology, and process solutions. Our firm's unique combination of industry focus, knowledge-based approach, and rapid, end-to-end solution deployment helps clients to achieve their business potential by leveraging our proven methodologies. RCP's consulting services include:

| | | |
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Retail Consulting Partners contributions in creating this research and report was a team effort.

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