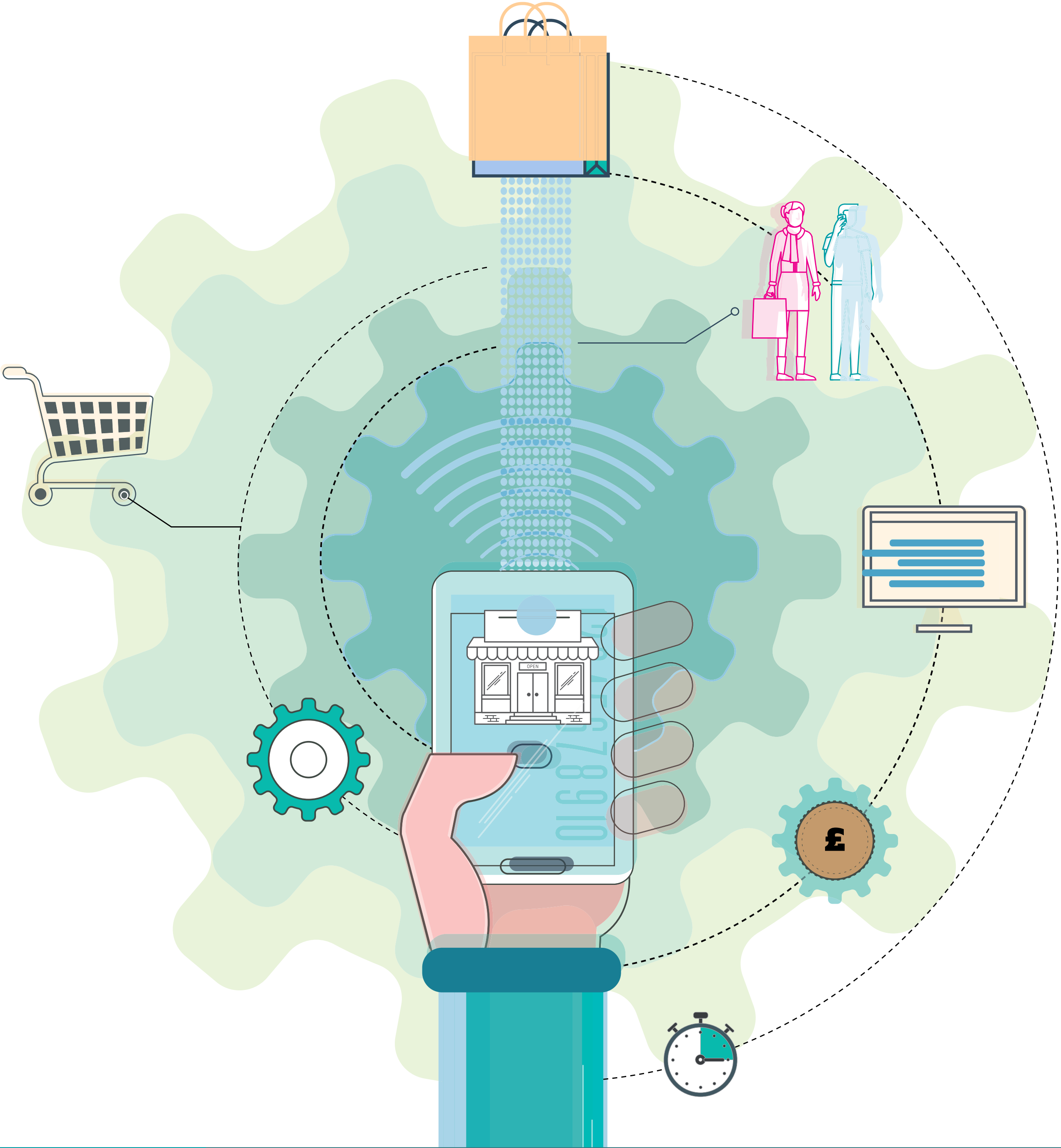

RetailWeek CONNECT

REPORTS

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More bang for your buck

How technology can solve the productivity conundrum

RETAIL WEEK FOREWORD

NICK HUGHES

REPORTS & COMMERCIAL PROJECTS LEAD, RETAIL WEEK CONNECT

Cast your mind back (and really not that far) to when retail was 100% physical. Retailers wanting to measure their productivity could, at the most basic level, take the revenue generated by a store and divide it by the number of employees. Simple.

The digital revolution put paid to all that. The path to purchase is no longer linear. Every customer journey is different and consequently many of the old KPIs for measuring productivity have become obsolete.

For retailers this has layered a new problem on to an existing problem. The sector already had one of the lowest rates of productivity of any industry before the shift to multichannel shopping added even greater complexity to the task of measuring and optimising output. It's hardly surprising, therefore, that for a majority of retailers productivity is now higher on the boardroom agenda than it was a decade ago.

Thankfully, the same technology that has disrupted old business models is creating a new set of solutions. Along the supply chain, tech innovations are coming on stream that are enabling retailers to drive efficiencies and boost productivity, be it through automation, process improvement or data analytics.

There are signs too that retail is beginning to shed its tag as one of the poor men of the productivity world. New BRC data shows retail productivity in the year to Q3 2016 climbed sharply and ahead of the wider economy. Investment in technology is a key reason for the improvement.

In a fiercely competitive market shrouded by economic uncertainty, the need to get maximum 'bang for your buck' as a retailer has never been greater.

Rather than curse technology for increasing the strain on productivity, retailers must embrace it as a solution to the productivity conundrum.

"The need to get maximum 'bang for your buck' as a retailer has never been greater"

RETAIL WEEK CONNECT: MORE BANG FOR YOUR BUCK

Reports & Commercial Projects Lead
Nick Hughes
nick.hughes@retail-week.com

Commercial Production Editor
Emily Kearns 020 3033 2901
emily.kearns@retail-week.com

Contributors
Rebecca Dyer, Dan Harder

Production Manager
Jo Lambert 020 3033 2677
jo.lambert@emap.com

Account Director
Julia Jones-Collins 020 3033 2952
julia.jones-collins@retail-week.com

PARTNER VIEWPOINT

DAVID DOBSON
SENIOR INDUSTRY ADVISOR, INTEL

Retailers facing the challenge of blending their physical and digital stores know that the need for intelligent operations and inventory has never been greater.

Companies have more collections and campaigns to manage than ever before, but many lack accurate and real-time cross-channel data, and therefore struggle to engage customers with personalised experiences.

At the same time, customers expect a seamless retail experience that connects their online and offline behaviour, so that items they discover online will be available in their preferred size, style and colour in store within hours, or shipped directly to their home. They also expect quick and engaging customer service, with Intel research showing that almost 90% of consumers would like to receive personalised offers*.

Every product, every process, every person and every place leaves a data trail, and that data trail can be captured, tracked, shared, combined, mined and analysed. Data aggregated from multiple sources and devices can be turned into real-time, actionable insights.

Advanced analytics provides retail companies with a strategic opportunity to gain a better understanding not only of their own operations, but also of what consumers want, what they need, how to offer it to them and what they are willing to pay for it.

The transformative effect of technology requires companies to actively create and continuously develop an omnichannel strategy.

Technology leader Intel, together with multiple partners, provides technologies and solutions that help to scale new services, such as always-on assistance, intelligent transactions and on-demand delivery, thereby optimising productivity and making the path to purchase as seamless as possible without sacrificing margins.

It's a huge opportunity. Companies can either grasp it, or wait for other players to do so.

> **"Customers expect a seamless retail experience that connects online and offline behaviour"**

*SOURCE: US DIGITAL SHOPPER TRENDS: INTEGRATED INSIGHTS FOR INTEL CORP, APRIL 2016

ACTION POINTS

- Engage with your customers. With a better understanding of consumer behaviour patterns and preferences, you can optimise product placement, merchandising and in-store promotions.
- Data analytics is changing the shopping experience on both sides of the counter. The challenge is moving from dashboards and reports to providing actionable insights for your business.
- Improve inventory availability and visibility. Allowing your customers to see stock levels in store is key to driving traffic, which enables stores to compete in an omnichannel retail world.

Intel retail technologies combine the Internet of Things sensing capabilities, existing computing platforms and data centre technologies to enable retailers to improve the way they both engage with their customers and manage their business. Take advantage of the latest artificial intelligence technologies and the continued reduction in the cost of computing to optimise your product mix, pricing and inventory levels, as well as providing new and exciting shopping experiences for your customers.
Let us know how we can help you. Contact david.dobson@intel.com.

EXECUTIVE SUMMARY

INTRODUCTION

Productivity is increasingly being seen as the most significant economic challenge of our time. The question of how to get greater output from fewer inputs has rarely been more pertinent in the UK. Not only are inflationary and currency pressures impacting the cost base of businesses, but the speed of technological progress means that traditional business models are being disrupted in ways arguably not seen since the Industrial Revolution.

In few sectors is this more true than retail where technology is unlocking new sales opportunities by changing where, when and how shoppers interact with a brand.

From same-day delivery and click-and-collect to personalised offers and self-service checkouts, new technologies are leading to a step change in delivery, product and experience and helping to create seamless paths to purchase that put the consumer at the heart of the shopping experience.

But with great progress comes great expectation. Nowadays, consumers are more willing to shift brands in a split second if they are not delivered a frictionless service.

These demands have exacerbated pressures on retailers' bottom lines and put the emphasis on businesses to improve productivity in order to maintain competitiveness and meet consumer expectations.

New technologies are enabling retailers to do just that; yet there is a challenge in navigating the raft of available technologies and finding the right fit for your particular business.

This report, produced by Retail Week in association with Intel, explores the role technology has played in creating heightened expectations among consumers.

Using exclusive insights from a survey of retail executives from a range of sectors, and spanning ecommerce and bricks-and-mortar stores, it will look at the opportunities technology has created to offer a more personalised, seamless experience and contrast this with the cost pressures that new modes of consumer behaviour have placed on retailer operating models.

Finally, it will identify the technologies that enable retailers to drive efficiencies and boost productivity, and consider whether it is here where retailers will focus their investment in the years ahead.

"WITH GREAT PROGRESS COMES GREAT EXPECTATION. NOWADAYS, CONSUMERS ARE MORE WILLING TO SHIFT BRANDS IN A SPLIT SECOND IF THEY ARE NOT DELIVERED A FRICTIONLESS SERVICE"

CHAPTER OUTLINES

MORE BANG FOR YOUR BUCK

CHAPTER ONE: SETTING THE SCENE

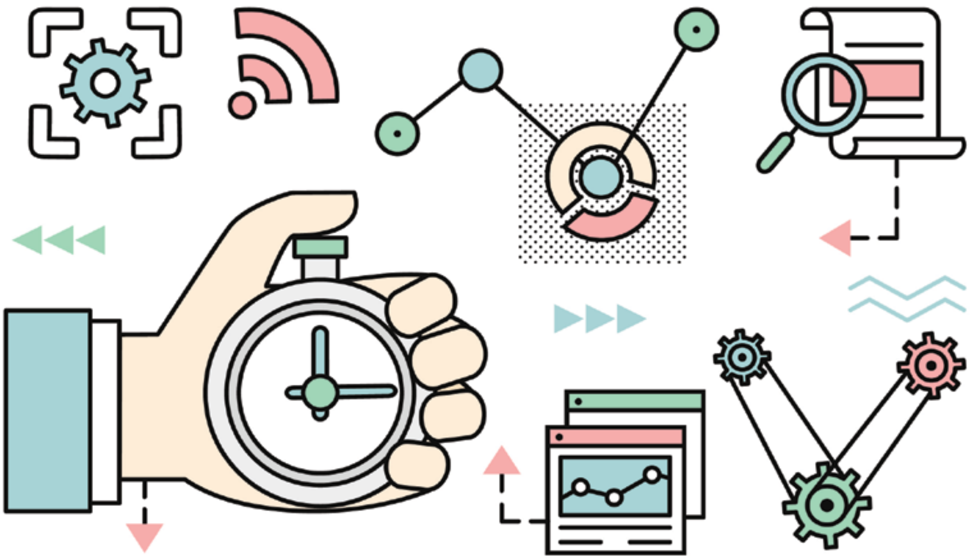
- A dramatic shift in the path to purchase has created new opportunities to sell to customers
- 80% of survey respondents believe consumer expectations of the retail experience have increased significantly in the past decade
- Almost a third say technology is the most important reason for heightened expectations, while 64% say it is a contributing factor.

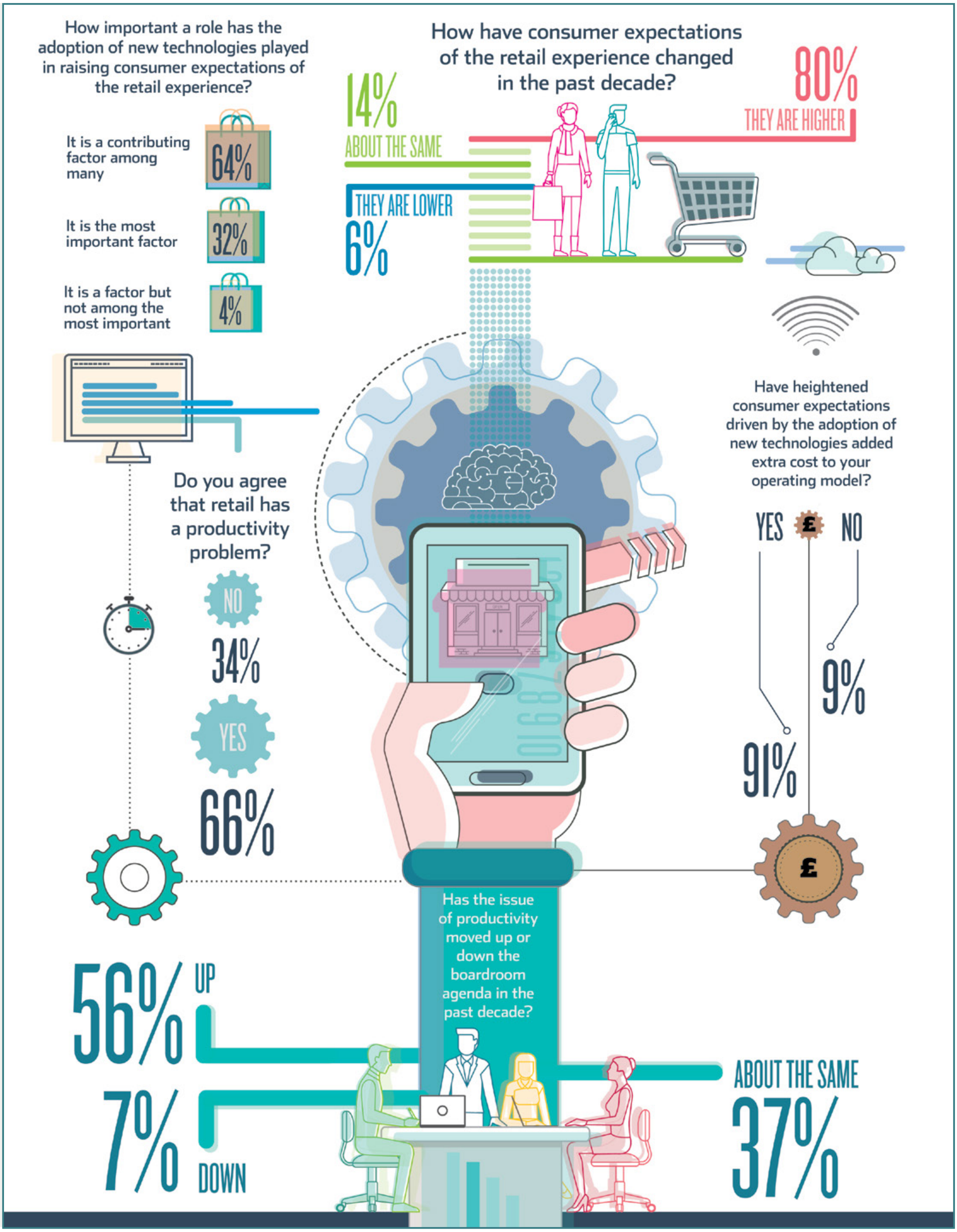
CHAPTER TWO: MANAGING COST PRESSURES

- Over 90% of respondents say the adoption of new technologies has added cost to their operating models
- Two thirds of retailers believe the sector has a productivity problem, while over half say productivity has moved up the boardroom agenda
- The shift to multichannel retailing is forcing retailers to think differently about their KPIs.

CHAPTER THREE: TECHNOLOGY AS A SOLUTION

- Most retailers see ecommerce and data analytics as the area where technology can most help drive efficiency gains and boost productivity
- New technologies have the potential to improve productivity within the supply chain and in store
- 44% of respondents are investing in technology with the specific aim of driving improvements in productivity, while for 50% this is at least a part of the rationale.




How important a role has the adoption of new technologies played in raising consumer expectations of the retail experience?
It is a contributing factor among many
64%
It is the most important factor
32%
It is a factor but not among the most important
4%
How have consumer expectations of the retail experience changed in the past decade?
80%
THEY ARE HIGHER
14%
ABOUT THE SAME
THEY ARE LOWER
6%
Have heightened consumer expectations driven by the adoption of new technologies added extra cost to your operating model?
YES
NO
9%
91%
Do you agree that retail has a productivity problem?
NO
34%
YES
66%
Has the issue of productivity moved up or down the boardroom agenda in the past decade?
56%
UP
7%
DOWN
ABOUT THE SAME
37%

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CHAPTER ONE

SETTING THE SCENE

80% of respondents believe consumer expectations of the retail experience have increased significantly in the past 10 years

Rewind 20 or even 10 years and if you wanted to purchase a television you would most likely spend a day visiting several shops, comparing models and prices, asking staff for demonstrations before going home, reflecting for a few days and finally returning to make a purchase.

Nowadays, that same process may begin online in the morning with some research into the latest models. Maybe you'll digest some online reviews, before running a price comparison to find the best value retailer and searching for suitable delivery options. By mid-morning your new TV is ordered and scheduled for delivery the next day with no need for you to set foot outside the house.

This radical shift in the path to purchase has given more retailers more opportunities to sell to the end customer. It has also meant there is precious little room for error if you are to secure the sale, such is the ease with which the customer can switch to a competitor.

Last year, a report from the Fabian Society – *At the Crossroads: The Future of British Retail* – chaired by former Morrisons HR director Norman Pickavance, concluded: "In short, customers want goods and services faster and cheaper, without compromising on quality or service."

"IN SHORT, CUSTOMERS WANT GOODS AND SERVICES FASTER AND CHEAPER, WITHOUT COMPROMISING ON QUALITY OR SERVICE"

Fabian Society – *At the Crossroads: The Future of British Retail*

"A NEW RETAIL LANDSCAPE IS BEING CREATED BY THE COMBINED EFFECTS OF A SERIES OF POWERFUL FORCES FOR CHANGE. CONSUMERS ARE DEMANDING MORE SERVICE, A MORE TECHNOLOGICALLY DRIVEN OFFER, AND MORE ENGAGEMENT AND PERSONALISATION"
British Retail Consortium – *Retail 2020*

The report noted that the internet means more information is available than ever before to the extent that customers often know more about individual items of stock than retail staff do. The upshot, argued retail experts Alan Treadgold and Jonathan Reynolds, is that the availability of information has changed the relationship between the customer and the retailer forever, forcing retailers to be more responsive to the wishes of customers.

1/3
Amost a third of respondents believe new technology is the most important factor in raising consumer expectations of the retail experience

This conclusion is reflected in the views of our own survey respondents, 80% of whom believe that consumer expectations of the retail experience have increased significantly compared with a decade ago.

Anyone looking for a single word explanation for this phenomenon would most likely land on 'technology'. Almost a third of respondents say that new technology is the most important factor in raising consumer expectations of the retail experience, while 64% say it is a contributing factor among many.

Indeed, the recent *Retail 2020* report from the British Retail Consortium (BRC) noted that: "A new retail landscape is being created by the combined effects of a series of powerful forces for change. Consumers are demanding more service, a more technologically driven offer and more engagement and personalisation."

Although price remains the number one differentiator for why consumers choose one retailer over another, the ability to shop seamlessly across multiple channels is identified by retailers as the second greatest differentiator, followed by the quality of the in-store experience, being able to offer a wide variety of delivery options, and the ability to personalise. Technology, in its many different forms, can play a leading role in creating each of these points of difference.

CHAPTER TWO

MANAGING COST PRESSURES

91%

of respondents believe the adoption of new technologies has added extra cost to their operating models

The ability of technology to improve the quality of the retail experience comes at a cost. The vast majority of survey respondents (91%) believe that the adoption of new technologies has added extra cost to their operating models.

Take home delivery as an example. The Fabian Society report stated that: "Serious questions have been raised as to whether or not current models of home delivery can be profitable for retailers."

This observation is supported by the experiences of a senior executive at one department store who notes: "More and more goods are being delivered to customers rather than collected in shops, so that's the trend and again increases the cost to serve. There are very clear pressures on cost, and so to defend profitability there has to be a focus on productivity."

Siobhán Géhin, managing director of Kurt Salmon, part of Accenture Strategy, agrees that the need to offer a seamless shopping experience across all channels is having a significant impact on profitability for most retailers. "Since all the growth in the industry is coming from ecommerce, store sales are declining and that is impacting store profitability," she says.

As a consequence, Géhin notes that the role of the store is changing. "Retailers are having to invest in stores to reconfigure them for a new role, which might be to provide inspiration to customers or visibility to online ranges, or to serve as a mini-distribution centre for click-and-collect orders."

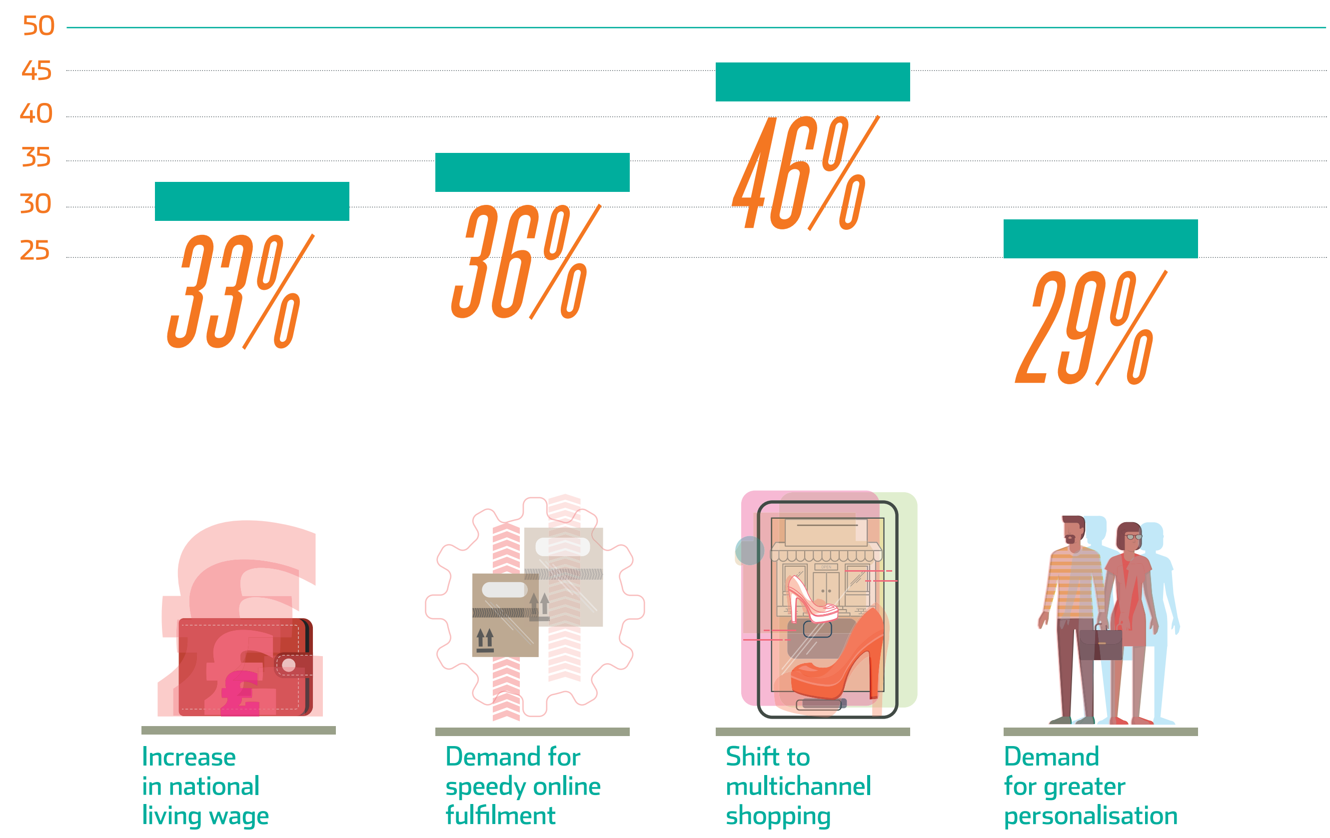
One consequence of this shift is that measuring the profitability of individual stores has become extremely challenging since sales that may not have been possible without a customer visiting a physical store end up being recorded online. In this scenario, old models that look at the cost of running the store versus the volume of sales it generates are no longer as applicable when considering profitability.

At the same time, Géhin says that retailers are having to invest in their growing online and mobile businesses, which is absorbing cash as technology and customer demands evolve at speed. "The end result is declining net margins for the vast majority of retailers," she adds.

Among our survey respondents, technology-related cost pressures are being felt most keenly in ecommerce and data analytics, although they are also coming to bear in store and to a lesser extent in warehousing and logistics.

For some this is having an effect on their willingness to

WHICH OF THE FOLLOWING IS PLACING THE GREATEST STRAIN ON PRODUCTIVITY?



commit to new technology spend. Although 27% say they have no hesitation in investing in new technologies, 56% say they are hesitant to do so but continue to anyway. Only 17% have cut back due to the high cost of investment.

More than half, meanwhile, say they spend between 1% and 5% of their turnover on integrating new technologies into the business, with 34% spending between 5% and 10%, and 6% spending more than 10%. Only 7% spend less than 1% of their total turnover on new technologies.

By incurring additional costs, retailers are putting themselves under pressure to raise output by at least the same level if productivity is to increase or remain the same. In a sector that has historically suffered from low productivity relative to other industries this often proves a challenge.

Retailers are not alone in seeking answers to the productivity conundrum. In 2015, the UK government launched a plan titled *Fixing the Foundations: Creating a More Prosperous Nation*, with the specific aim of boosting the UK's productivity. The report identified retail as one of five sectors – along with financial services, ICT, professional services and wholesale – that make up 40% of the economy but have accounted for around 65% of the productivity shortfall.

Two thirds of retailers are in agreement that the sector has a productivity problem, but there are encouraging signs that the issue is beginning to receive the proper attention it deserves. More than half (56%) of respondents say productivity has moved up the boardroom agenda in the past decade, with only 7% saying it has moved down.

In a sign of the importance retailers are placing on productivity, in September 2015, John Lewis Partnership (JLP) appointed Andrew Murphy as its first group productivity director tasked with implementing plans that will support JLP's productivity improvements, financial strategy and future organisational structure. One aspect to these plans is to embrace new technologies that will enhance productivity.

PRODUCTIVITY PERFORMANCE

Going forwards, productivity will be used as one of the KPIs to track the performance of the retail sector, with the BRC including the measure on its newly launched Retail 2020 Dashboard, which also measures trends in pay, employment and staff engagement. The first set of data painted a positive picture for the sector with retail productivity in the year to Q3 2016 climbing sharply and ahead of the wider economy.

For retailers looking to keep tabs on their levels of productivity, the shift to omnichannel operating models has created a number of challenges. Conventional measures, which calculate turnover or gross value added per employee or hour, may no longer have relevance in a model where sales cannot always be attributed to interaction at an individual or even a store level.

"Many of the old KPIs for measuring the success of a retail business have become obsolete in an omnichannel world," explains Géhin. "In the old world, operating costs were fairly predictable – there was only one channel, stores, so that was where costs would be allocated. In the new world, it is much harder for retailers to attribute costs

56%

of respondents say they are hesitant to invest in new technologies but do so anyway

when an order might be placed on a mobile, picked up in store and possibly returned to another store."

Survey respondents say that it is this shift to multichannel shopping that is putting the greatest strain on productivity. Next comes demand for speedy online fulfilment followed by increases in the national living wage and finally the need for greater personalisation.

A recent Joseph Rowntree Foundation (JRF) report – *Improving Pay, Progression and Productivity in the Retail Sector* – found a number of structural reasons that are preventing high productivity from being achieved.

The report states: "In customer-facing roles, for example, the concept of output per hour is hard to quantify when the 'output' is the human quality of the interaction and the way that this affects company reputation and brand, either by word of mouth or the number of stars awarded via an online review." It continues: "It is a world away from the traditional concept of shop-floor or conveyor-belt productivity, where the return on investment of adding an extra human can be weighed up against other potential inputs."

The shift to ecommerce is forcing retailers to think differently about their productivity KPIs. For one survey respondent it is calculated as "the time to supply goods to the customer from the moment a request is put to the supplier". For another it is "comparing hours required to complete a task with actual hours taken to do so". The JRF report, meanwhile, notes that where businesses are most interested in the efficiency of their technological capital then measures that demonstrate the return on investment may be most appropriate.

Measuring return on investment in multichannel operations can be easier said than done, as Simon Blosse, director in Accenture's Retail Practice, explains. "For many retailers, the biggest concern is that they do not have a single version of the truth when it comes to measuring how well their promotions and special offers are performing," he says. "Their individual departments are working in silos, tracking their own data and KPIs – and these KPIs only tell part of the story."

One common problem, Blosse suggests, is that executives often rely on their 'gut feel' for what should be working and don't want to give up on their tried-and-tested metrics. "In turn, they cannot keep up with online shopping platforms that have grown up with sophisticated, data-informed decision-making," he adds.

Blosse believes that retailers need a completely new set of KPIs to be competitive in today's digital retail paradigm. "Giving their departments the tools to track, measure and recalibrate their strategies more effectively is the first step towards becoming more agile and responding to competition."

Technology, when used appropriately, is giving retailers the tools to do just that.

CHAPTER THREE

TECHNOLOGY AS A SOLUTION

£3.9bn
In 2015, retailers invested £3.9bn in innovation

In seeking to explain the improvement in retail productivity in 2016, the BRC highlighted investment in innovation, noting that in 2015, retailers invested £3bn in intellectual property products, including software and research and development, and a further £900m in information and communications technology.

"The technological revolution is fundamentally altering the way retail businesses operate and the skills needed for future success," says BRC chief executive Helen Dickinson. "We have a choice between improved productivity driven by better jobs, innovation and new skills for the digital age, and improved productivity driven primarily by a shrinking UK retail workforce."

Many retailers are rising to the challenge of innovating to boost productivity. For the majority of respondents (64%), it is in ecommerce and data analytics where technology can most help to drive efficiency gains and boost productivity.

Advanced analytics solutions are giving retailers a more nuanced understanding of the shopper, in real time and at the moment of decision, allowing for greater personalisation.

Shop Direct is taking advantage of real-time analytics that track shoppers' product interests, their behaviour and browsing habits to improve the online shopping experience. The etailer believes it can deliver a "Bond Street" level of customer service through its investment in technology, with the ultimate aim for every customer to have their own expert personal shopper and always-on assistance.

"We want to understand every one of our millions of customers more, the more we deal with them," says Shop Direct chief executive Alex Baldock. "We want to become better and better, until we're suggesting items they haven't even thought to ask for."

Shop Direct believes advanced analytics gathered from every corner of the customer interaction will help "super-charge" personalisation via developments like its conversational user interface, which lets customers chat to an AI assistant. Its customer management engine automatically intervenes in customer journeys at opportune moments, in an attempt to prompt certain behaviours.

> "THE TECHNOLOGICAL REVOLUTION IS FUNDAMENTALLY ALTERING THE WAY RETAIL BUSINESSES OPERATE AND THE SKILLS NEEDED FOR FUTURE SUCCESS"
>
> Helen Dickinson, chief executive, the British Retail Consortium

The etailer is also using advanced analytics to help it make decisions on customer credit, resulting in more personalised outcomes for customers and better risk and credit decisions for the business.

Shop Direct is a good example of where investment in new technology for ecommerce can help to optimise conversion rates and maximise profitability. But such opportunities are to be found the length and breadth of the supply chain. Take logistics where, although much media attention is given to cutting-edge technologies such as driverless cars and delivery drones, there are significant efficiencies to be made across a raft of functions.

IN-STORE AUTOMATION

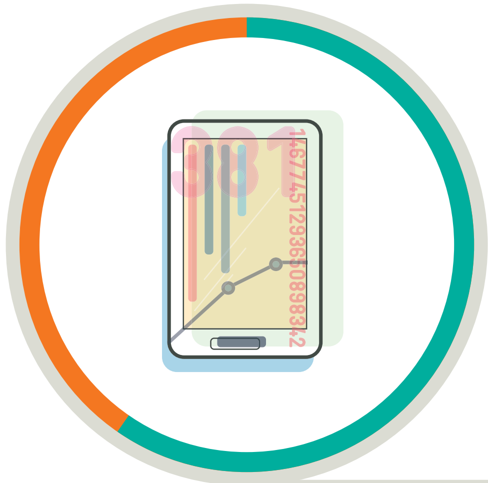
WHSmith is one retailer placing a strategic importance on improving productivity in its supply chain. The retailer has achieved significant improvements in its distribution centres through greater use of automation, including greater use of voice-picking technology and new conveyers.

There are also huge opportunities to use technology to improve the speed and quality of the customer experience in store. Géhin believes that, while the application of technology will have significant impacts on productivity throughout the retail value chain, the most impacted area will be the store itself. "First, stores represent the second biggest chunk of a typical retailer's P&L; product costs being the biggest," she says. "Second, declining in-store sales and the introduction of the living wage will put store margins under pressure."

Amazon Go has received widespread attention for its ability to remove any friction from the in-store experience. The store concept uses CCTV footage and sensors to track which items customers have taken off the shelves, linked to a mobile app that shoppers download and scan on arrival, meaning customers can walk in, pick up items off the shelf and leave without the need for any physical transaction.

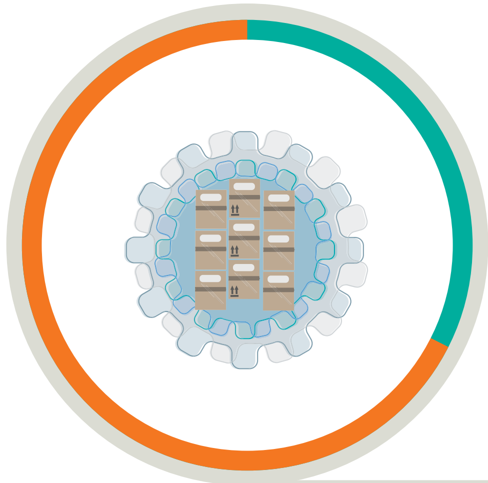
Amazon Go represents the cutting edge of new payment technology, but other technologies are finding more mainstream applications. Kingfisher is one of a number of major retailers rolling out technology-driven productivity solutions aimed at improving the customer experience. Solutions include being able to pay for goods in the aisle via handheld terminals and giving employees

IN WHICH AREAS DO YOU SEE THE GREATEST OPPORTUNITIES FOR TECHNOLOGY TO DRIVE IMPROVEMENTS IN PRODUCTIVITY?



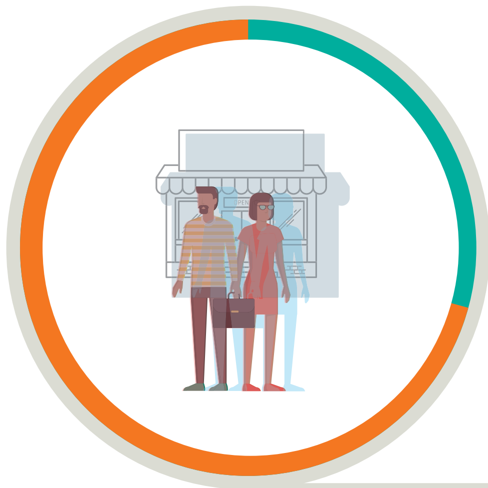
64%

Ecommerce and data analytics



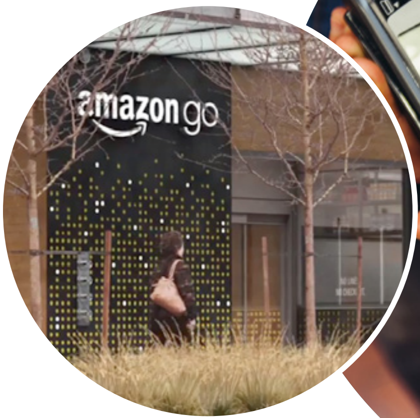
37%

Warehousing and logistics



33%

In store



"STORES REPRESENT THE SECOND BIGGEST CHUNK OF A TYPICAL RETAILER'S P&L; PRODUCT COSTS BEING THE BIGGEST. DECLINING IN-STORE SALES AND THE INTRODUCTION OF THE LIVING WAGE WILL PUT STORE MARGINS INCREASINGLY UNDER PRESSURE"

Siobhán Géhin, managing director, Kurt Salmon

access to real-time stock levels and product information. The removal of time-consuming and unproductive tasks such as queuing mean employees can spend more time with customers, while access to real-time data enables simpler, more agile decision-making and better cost control.

A number of retailers now use apps through which customers can book appointments with product specialists before visiting the store, in order to avoid having to wait. The use of apps to alert the click-and-collect team of a customer's arrival in store is another productivity driver.

Retailers are also experimenting with smart shelving and RFID tagging, whereby readers will detect not only when product lines are running low, thereby avoiding stock-outs from occurring, but may also be able to show precisely which items have been touched, tried on and sold. Algorithms transform all the collected data into specific real-time recommendations that can inform inventory restocking, engage customers and optimise future sales.

RFID can also be used as an effective weapon against fraud by identifying anomalies in product rotation or even instances where products never reached the intended store.

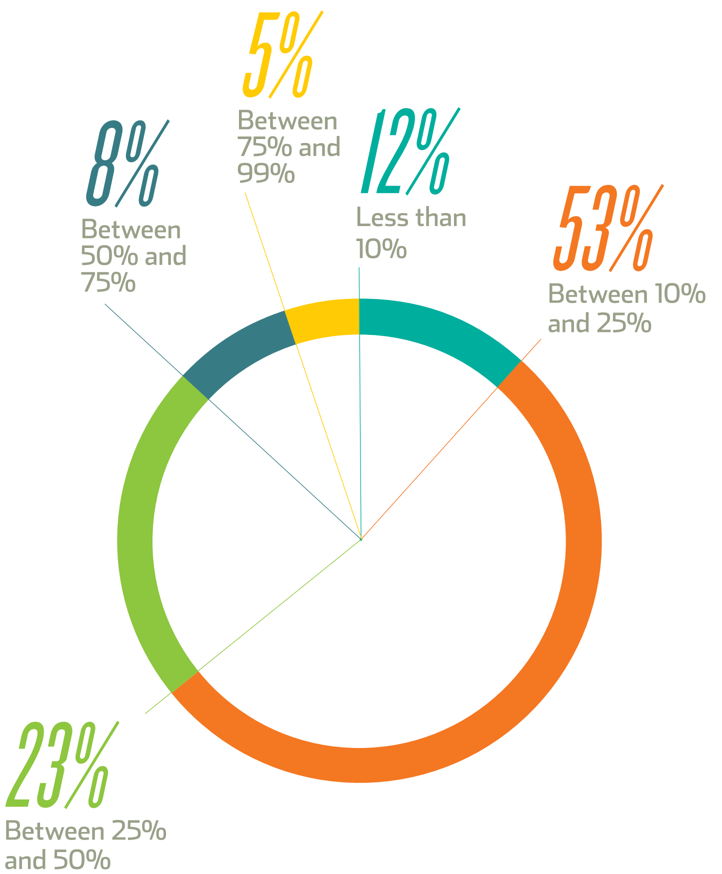
Ship from store, where a system can identify whether it is most cost-effective or fastest to fulfil an online order from a distribution centre or a store, is another development – albeit one still more common in the US than the UK – that Géhin says has the potential "to significantly enhance inventory effectiveness and reduce end-of-season markdowns, thereby improving overall margins".

She also believes technology to migrate paper-based tasks such as clocking in, scheduling rotas and booking holidays on to an employee app can help eliminate pain points for staff, such as forward visibility of rotas, while reducing cost.

Retailers themselves are putting productivity at the heart of their strategic plans. Morrisons says it has identified future opportunities in areas such as product ordering, distribution and in-store administration, having already trialled initiatives such as belted self-scan checkouts, which are convenient for customers and a productivity saving.

The supermarket chain is working on several initiatives to simplify and speed up processes that will bring other productivity opportunities in areas such as product ordering, distribution and in-store administration.

WHAT PROPORTION OF YOUR TOTAL TECHNOLOGY SPEND IS AIMED SPECIFICALLY AT DRIVING IMPROVEMENTS IN PRODUCTIVITY?



CHAPTER 4
CONCLUSION

44%
of respondents say investments are being made with a specific focus on improving productivity

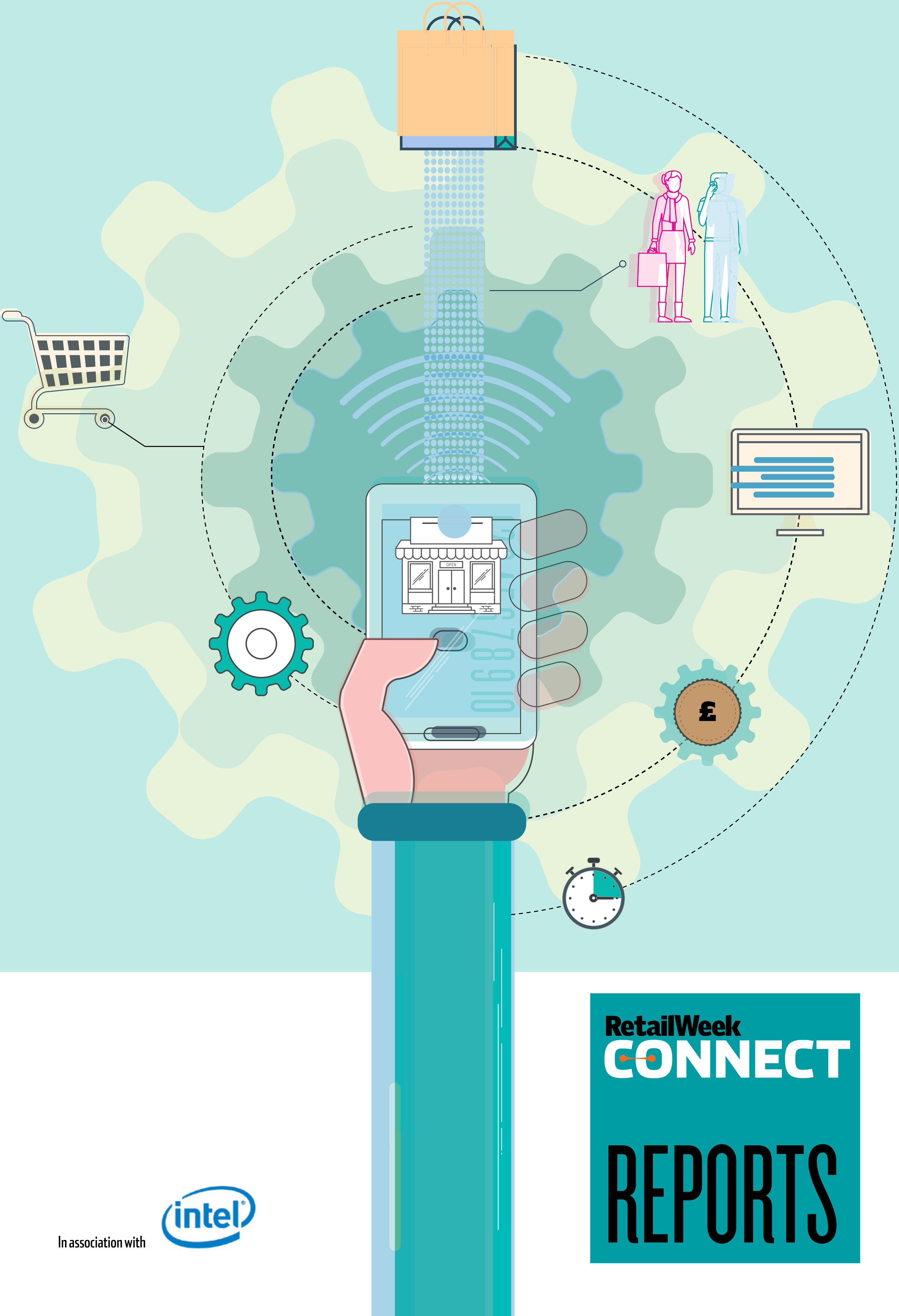
"THE UPFRONT COSTS CAN BE HIGH AND MEASURING THE RETURN ON INVESTMENT CAN BE A CHALLENGE, BUT IN A MULTICHANNEL ENVIRONMENT, WHERE PATHS TO PURCHASE ARE NO LONGER LINEAR, CURRENT METHODS OF MEASURING PRODUCTIVITY MAY NOT BE UP TO THE TASK"

For Morrisons and other retailers, future investment in technology will have a strong productivity rationale. Indeed, for 44% of survey respondents, new investment in technology is being made with the specific aim of driving improvements in productivity, while for a further 50% this is at least a part of the rationale. Only 6% say it is not a consideration at all.

Yes, the upfront costs can be high and measuring the return on investment can be a challenge, but in a multichannel environment, where paths to purchase are no longer linear, current methods of measuring productivity may simply not be up to the task.

Ultimately, retailers must ask themselves not 'can I afford to invest in technology' but 'can I afford not to'?

In a digital age, technology – whether it's bells-and-whistles technology like 'grab and go' or more routine investment in warehouse automation – is inextricably linked with productivity. And while there is no failsafe guarantee that technology spend will lead to a step change in productivity, by applying the right technologies, at the right time and in the right places retailers can give themselves the best opportunity to prosper in a digital world.



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