INCISIV

Playbook

Reimagining Store Operations: Unifying the Associate Experience

IN PARTNERSHIP WITH

Manhattan
Associates®

Store Associate Empowerment: The Key to Retail Excellence

As retail stores evolve from glorified stockrooms into multifaceted service hubs, the essence of achieving a unified customer experience lies in empowering store associates. Equipping them with advanced, intuitive systems that handle the increasing demands of their roles is critical.
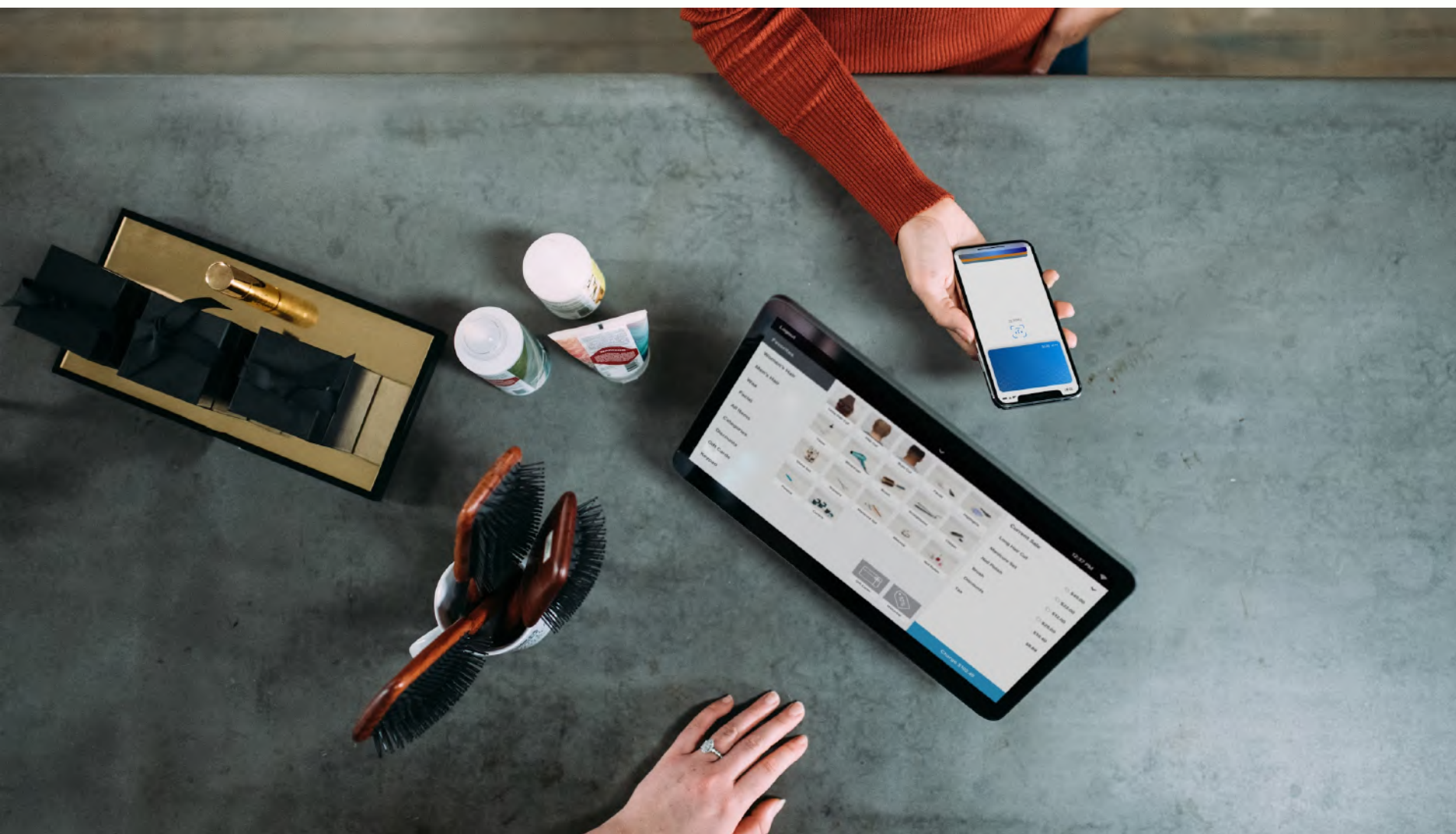
Expanding Associate Roles

The volume, velocity, and variety of tasks store associates handle have increased significantly — from providing fit consultations and customizations to managing store-based fulfillment and returns. Equipping associates with unified systems is crucial for managing these diverse expectations effectively and delivering on the promise of a unified customer experience.

Attracting a Younger, Tech-Savvy Workforce

Retailers need to appeal directly to a younger, tech-savvy workforce by offering technology that mirrors the efficiency and innovation they use daily. With industry-wide high attrition and labor costs, intuitive and powerful systems become non-negotiable. These tools not only facilitate quick onboarding but also empower staff to excel, ensuring the workforce is equipped to meet and exceed the modern consumer's expectations.

Technology Meets Empathy

The best customer experiences blend technology with human insight. Associates need real-time data on customers, inventory, and operations to make decisions that enhance satisfaction and store performance, fulfilling the promise of a unified retail experience.

Disunity's Toll: Undermining Retail's Promise to Customers

A fragmented associate experience hampers retailers' ability to deliver consistently exceptional customer service at scale, affecting profitability and brand loyalty. Identifying how a lack of unification impedes operations provides a clear pathway to addressing these crucial gaps.

Integrating Diverse Systems

Retailers often find themselves entangled in a web of disparate systems—point of sale, inventory management, customer service, and more—patched together over time. This patchwork infrastructure can lead to operational inefficiencies, such as delays in accessing critical data or discrepancies in inventory information, directly impacting customer satisfaction when, for example, an item appears available online but is out of stock in-store.

Training and Development

The constant evolution of retail technologies demands continuous learning. However, without a unified approach, associates face a steep learning curve on multiple fronts, from mastering new sales tools to navigating different systems for customer engagement. This inconsistency can result in slower service, errors, and a workforce that struggles to meet customer expectations with confidence and efficiency.

Consistency Across Touchpoints

A disjointed associate experience makes it challenging to maintain consistency across customer touchpoints. Varied experiences from online to in-store can confuse customers and erode trust. For instance, promotions offered online may not be recognized in-store due to system disconnects, leading to customer frustration and lost sales.

The Unified Associate Experience Framework

Moving from the complexities of retail challenges to actionable solutions, the Unified Associate Experience Framework positions itself as a pivotal tool for store transformation.

It advocates for a holistic approach, merging customer, inventory, product, and operational data and tools into a unified platform. This strategy aims to enhance personalization, streamline sales processes, and foster stronger customer relationships.

The rest of this Playbook presents a structured framework spanning 5 key capability areas.

Unless stated otherwise, all data in this report is from Incisiv's "Unified Associate Experience Survey", in partnership with Manhattan Associates. Detailed survey methodology, industries covered, and respondent demographics are available at the end of the report.

Customer Profile

Relationships

Unified Associate Experience Framework

Experience

Selling

Operations
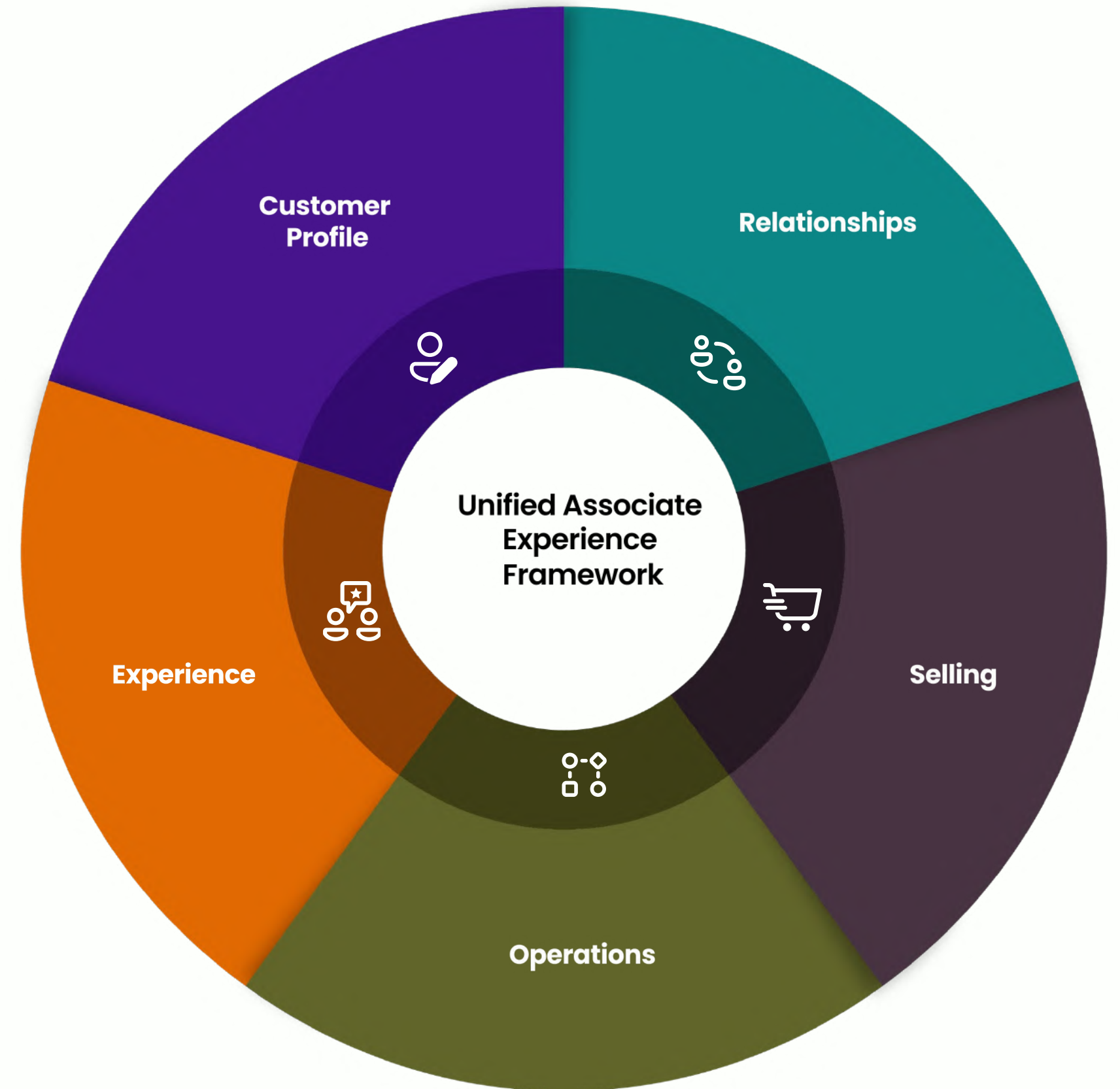
Elevate Customer Interactions via Data-Driven Insights

Streamline customer experiences with integrated profiles and insights, crucial for enhancing customer convenience and interaction, and encouraging repeat business through personalized engagements.

71%

of retailers equip their associates to review comprehensive order history for enhanced customer insights, but

only 12%

enable associates to interact with or make updates to customers' carts or wishlists in real-time.

Customer Data

Associates need access to a consolidated customer profile that eliminates duplicates and inaccurately merged records, ensuring every interaction is based on complete and current information. For instance, when a customer contacts a store for support, associates can immediately recognize them, recall previous interactions, and continue the conversation seamlessly, regardless of the channel used previously.

Cart, Wishlist, and Orders

Empower associates to view and manage a customer's online shopping cart, wishlist, and past orders in real-time, regardless of the purchasing channel. This capability allows an associate to suggest additional items based on past interest or inform customers about the availability of items they've considered or purchased before, directly in-store or during a support call.

Loyalty & Offers

Give associates instant access to a customer's loyalty program status, including available points and personalized offers. This enables associates to inform customers about their rewards at the point of sale or during service interactions, suggesting the best ways to utilize their points or redeem offers, enhancing the shopping experience.

Forge Lasting Customer Connections through Tailored Engagement

Strengthen relationships with personalized engagement and strategic recommendations, ensuring deeper connections and lasting loyalty through memorable customer interactions.

59%

of retailers enable their associates to use customizable communication tools for targeted outreach and clienteling, yet

only 14%

equip associates to access real-time customer data and make instant recommendations using mobile technology.

Clienteling

Provide associates with tools that use predictive customer segmentation to foster strong, individualized relationships. For example, when a customer enters the store, associates can access their purchase history and preferences, allowing for tailored product recommendations and a more personal shopping experience.

Communications

Equip associates with integrated communication tools that ensure consistent and efficient interactions with customers across all channels. Whether through email, SMS, or social media, associates can maintain a continuous dialogue with customers, offering support and information in a unified manner, reflecting the brand's voice and service standards.

Personalized Promotions

Enable associates to craft and extend customized promotions directly to customers, leveraging insights into their preferences and past shopping behaviors. This could mean offering a special discount on a favorite product category, informing them of product availability based on their wishlist, or notifying them about a new arrival that matches their taste, directly enhancing the relevance and appeal of marketing efforts.

Achieve Selling Synergy through Streamlined Commerce

Boost retail sales with limitless product access, unified omnichannel promotions, and flexible payment or purchase options, crafting complete and rewarding shopping experiences.

Only 8%

of retailers equip their associates with technologies to adapt payment and selling options for customers with varying levels of digital access or literacy.

💡 Jewelry & Luxury Goods retailers lead with an adoption rate of 16%.

Endless Aisle

Equip associates to find, view, and sell products beyond store inventory, expanding choices. If a customer seeks a specific product model that's out of stock, the associate can immediately showcase alternative colors or styles available online and facilitate the order, capturing sales without physical inventory constraints.

Omnichannel Promotions

Allow associates to utilize a promotions engine to manage and apply discounts consistently across all channels. For instance, during a holiday sale, the same discounts apply whether the customer shops in-store, online, or via a mobile app, ensuring seamless promotional consistency.

Payments & Remote Selling

Flexibility for associates to process payments and engage customers in-store and remotely is crucial. Through tools like mobile payments and video consultations, an associate could showcase products live during a video call, discuss features, and complete the sale by sending a secure payment link, offering a personalized shopping experience beyond the store.

Create Effortless Operational Efficiency for Retail Excellence

Achieve operational mastery in retail with advanced inventory control, dynamic task management, and efficient in-store order processing for enhanced customer satisfaction, loyalty, and trust.

89%
of retailers equip their associates with mobile devices or apps for inventory management, however

only 34%
provide their store teams with capabilities for real-time tracking and updates of tasks through mobile devices.

Inventory Management

Provide associates with real-time inventory management tools to accurately track and process stock levels across all channels. Empower associates to confidently manage and reconcile in-store and online inventory, facilitating the immediate location and ordering of items that appear low in-store directly through an integrated platform.

Dynamic Task Management

Implement task management tools for associates that automatically prioritize work based on current store conditions and customer needs, enabling associates to efficiently reallocate their focus, whether it's to customer service during a rush, picking priority orders for fulfillment, or restocking when foot traffic is low.

Optimized Store Fulfillment

Equip associates with technology that accelerates the in-store order fulfillment process. Utilizing devices that provide instant notifications and pinpoint item locations, associates can gather products for orders efficiently, delivering a swift and accurate service to customers collecting in-store or those receiving home deliveries.

Foster the Agile Retail Environment with Integrated Experiences

Revolutionize the associate experience by enhancing tool access, leveraging real-time analytics, and boosting workplace connectivity for peak efficiency, adaptability, and streamlined performance.

72%

of retailers provide associates customizable views and tailored dashboards through a single interface, however

only 43%

enable associates to have quick access to product information, inventory levels, and order management, via a unified platform.
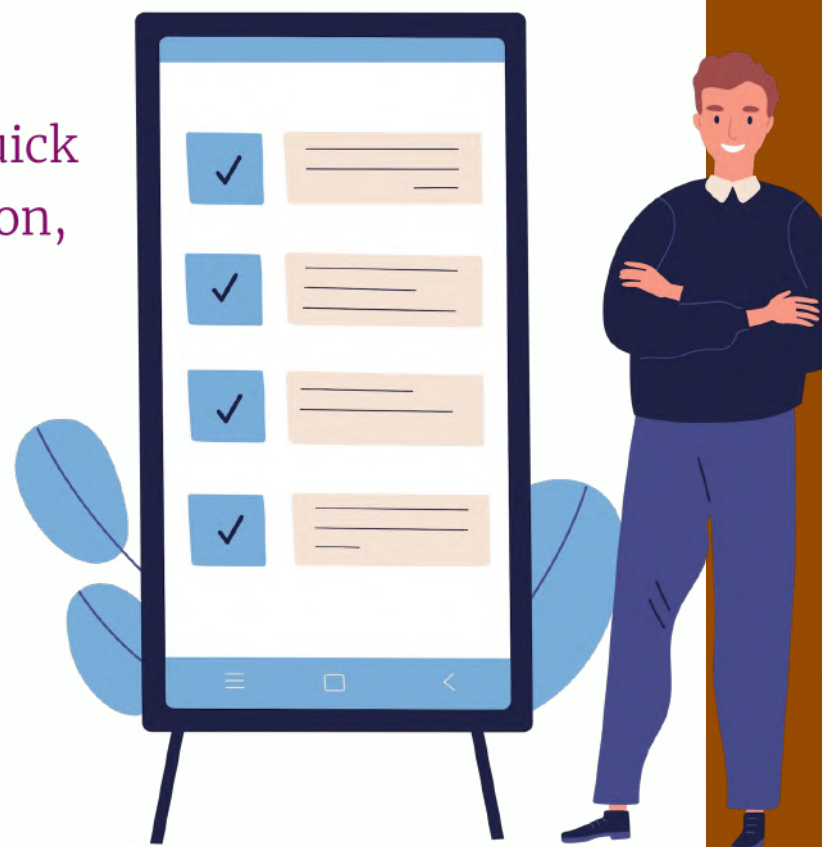
Single Interface

Provide a unified interface that streamlines access to multiple tools and information. For example, during a customer inquiry, an associate could use this interface to view purchase histories, manage orders, and access inventory data, enabling them to provide immediate assistance.

360-Degree Store Insights

Empower associates with real-time analytics and insights into store operations and customer behavior. Access to comprehensive data such as sales trends and inventory turnover would enable associates to anticipate needs and make proactive decisions, whether it's observing real-time data on customer traffic patterns to anticipate busier periods, or using sales trend analytics to suggest restocking popular items.

Modern Mobility & Collaboration

Equip associates with mobile solutions that enable efficient collaboration and sales management, both in-store and remotely. This mobility would allow for real-time access to inventory and customer information, and seamless communication for shift planning and team coordination, ensuring they are always connected and informed.

Elevating Retail through Unified Associate Experience

Retailers cannot unify the customer experience without first ensuring the associate experience is cohesive and comprehensive. The key to retail excellence lies in empowering associates with an integrated suite of tools and insights that span Customer Profiles, Relationships, Selling, Operations, and Experience.

As the industry moves forward, the focus must remain on cultivating an environment where associates are supported by comprehensive, intuitive systems that not only streamline their workflow but also enhance their ability to connect with customers. This is the foundation upon which the future of retail is built—a future where every transaction is an opportunity for engagement, and every engagement strengthens the bond between brand and consumer.

● INCISIV

ABOUT INCISIV

Incisiv is a peer-to-peer executive network and industry insights firm for consumer industry executives navigating digital disruption. Incisiv offers curated executive learning, digital maturity benchmarks, and prescriptive transformation insights to clients across the consumer and technology industry spectrum.

incisiv.com

Manhattan Associates®

ABOUT MANHATTAN

Manhattan is a technology leader focused on improving experiences and outcomes in supply chain commerce. We provide leading software solutions for omnichannel commerce, supply chain planning and supply chain execution. Our cloud-native Manhattan Active® platform technology and unmatched industry experience help increase top-line growth and bottom-line efficiency for the world's leading brands. Manhattan designs, builds and delivers innovative solutions for stores, transportation networks and fulfillment centers, eliminating silos created by legacy commerce, warehouse, and transportation systems to create seamless operations and optimal efficiency.

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Survey Methodology

Incisiv conducted a hybrid online + Computer Aided Telephonic Interview (CATI) survey of 150 retail executives in the US and Canada. The study was conducted from **March 6, 2024 to March 18, 2024.**

Respondent Distribution by Retail Categories

Sporting Goods & Leisure	33%
Jewelry & Luxury Goods	33%
Apparel & Footwear	33%

Respondent Distribution by Number of Stores

51 – 500 stores	51%
501 – 1,000 stores	34%
1,001 or more stores	15%

Respondent Distribution by Annual Revenue

$100 million to $499 million	19%
$500 million to $1 billion	25%
$1 billion to $5 billion	43%
More than $5 billion	13%

Respondent Distribution by Business Function

Executive Leadership	18%
Strategy & Innovation	10%
IT/Information Technology	25%
Digital/eCommerce	14%
Store Operations	33%

Respondent Distribution by Designation

CXO	12%
SVP/EVP	20%
VP	27%
Director	41%