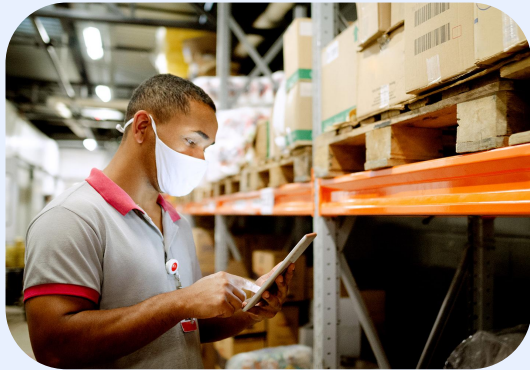


STUDY RESULTS:

Retailers Reset Their 2021 Supply Chain Priorities



A RetailWire Study and Webinar underwritten by:



Al McClain

CEO, Co-founder, RetailWire

Al McClain has spent 30+ years in the retail, tech, and CPG spaces. Al's career highlights include sales and management stints with Luzianne-Blue Plate Foods, Bestfoods, Red Rose Tea, and Progressive Grocer (Trade Dimensions and Retail Insights divisions).

Al has also spoken extensively at industry events such as Shoptalk and for the National Grocers Association, the Institute for International Research, the Magazine Publishers Association, and the Category Management Association. He has written for publications such as Nielsen Wire, Loyalty Management and Forbes.com.

The retail industry's premier online discussion site.

The screenshot displays the RetailWire website interface. At the top, there are social media icons for Twitter, LinkedIn, Facebook, and YouTube, along with a user profile for Rick Moss and a search bar. The main navigation bar includes links for Front Page, Discussions, Retail News, Resources, BrainTrust, Marketing, and About. The date is Wednesday, 6/13/2019.

The content area is divided into several sections:

- DISCUSSION:** "Has Barnes & Noble found its savior(s)?" by Dick Seaver, President, Retailing in France LLC. 17 expert comments.
- DISCUSSION:** "What does FedEx's break with Amazon mean?" by Paula Boardman, Managing Partner, R&B Research. 16 expert comments.
- DISCUSSION:** "Kroger is high on the CBD sales opportunity" by Bethany Alice, Vice President Marketing, Coburn. 11 expert comments.
- BRAINTRUST:** "The retail graveyard is filled with well-known brands that have fallen victim to excessive debt loads and their own dated business practices." by Dick Seaver.
- IRI EARLY VIEW 2019:** "Consumer Food and Beverage Spending Trends" by IRI. Includes a "GET A COPY!" button.

Below the discussions is a "TRENDING" section with a list of topics: Consumer Marketing, Online Retail, Management Strategy, Products Brands, Human Resources, Operations, Customer Service, Category Management, Amazon, and Retail Tech.

At the bottom, there is a "RESOURCES" section with three featured articles:

- "Your POS should be a point of engagement" by Al Manhattan.
- "IRI's Early View 2019: Consumer Food and Beverage Spending Trends" by IRI.
- "See How Retailers Can Lead with Unified Commerce" by IRI.

Uniquely engaging

Three active, in-depth online discussions each business day

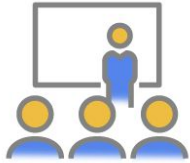
Influential community

Mid to top management from a variety of retail disciplines

Collective thinking

Sharp editorial, plus the combined expertise of over 125 RetailWire BrainTrust panelists.

Today's agenda



Feature presentation:

2021 RETAILER AGENDA – A Major Supply Chain Reset

Results of RetailWire's December 2020 retail industry study.

- Joe Skorupa, RetailWire BrainTrust and study author



Panel discussion

- Paula Natoli, Dir., Supply Chain & Logistics Industry Solutions, Google Cloud
- Brian Kinsella, Senior VP, Product Management, Manhattan Associates



Audience Q&A

Joe Skorupa

Retail Industry Influencer, Consultant, Strategic Advisor

After spending 20 years at *RIS News*, Joe currently does consulting work for a number of leading retail technology and advisory companies. Prior to joining *RIS*, Joe spent 10 years at *Popular Mechanics* during the birth of the worldwide web and moved to San Francisco during the height of the dot-com boom to earn his stripes on the frontlines of early-stage e-commerce and online technologies.

Joe is the Editor-at-Large and featured blogger for *RIS News*. His blog, Retail Insight, was named the best B2B retail blog by *Folio Magazine* in 2019.

Study results

2021 RETAILER AGENDA: A Major Supply Chain Reset



Study Results: A Major Supply Chain Reset

Mission and Methodology

- Study goal was to benchmark supply chain strategies in 2021 and beyond to reveal major areas of strategic focus, tech investment plans, and critical challenges.
- Polling was conducted during December 2020 and included 217 respondents, of which 40% were retailers.
- Retailer segments include:
 - Fast-moving consumer goods – 35%
 - Specialty – 24%
 - Apparel – 15%
 - Total retailers with revenue greater than \$1 billion – 28%

Study Results: Overview of Key Findings

Focusing on end-to-end visibility and rapid response

- **Maximizing e-commerce** is the top priority in 2021 (69%)
- **Inability to adjust inventory** is the top challenge (62%)
- Top supply chain tech investments in 2021 will be in **fulfillment and a real-time dashboard** (both 45%)
- Partnering with **home delivery services** is a top net-new priority (68% say it is important)
- Top areas where AI will be used in the supply chain are **store fulfillment and order management** (both 41%)

Study Results: Top Supply Chain Strategies

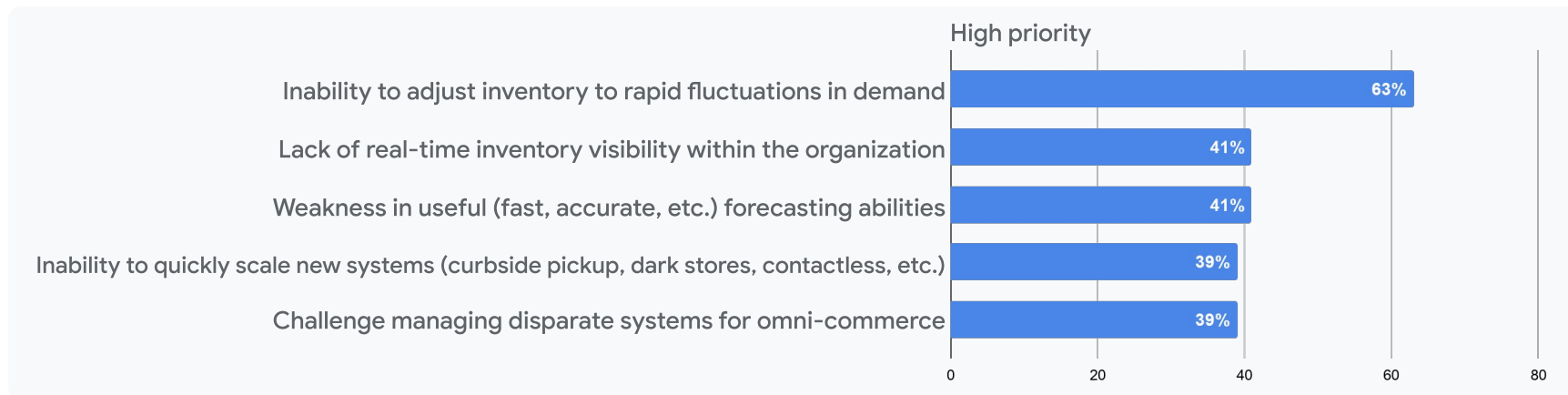
Top supply chain strategies retailers will adopt in 2021 to grow revenue or profits



- In 2020 consumers made a historic shift to e-commerce and online purchases from a specific store, which became a stress test for fulfillment.

Study Results: Challenges Require Action

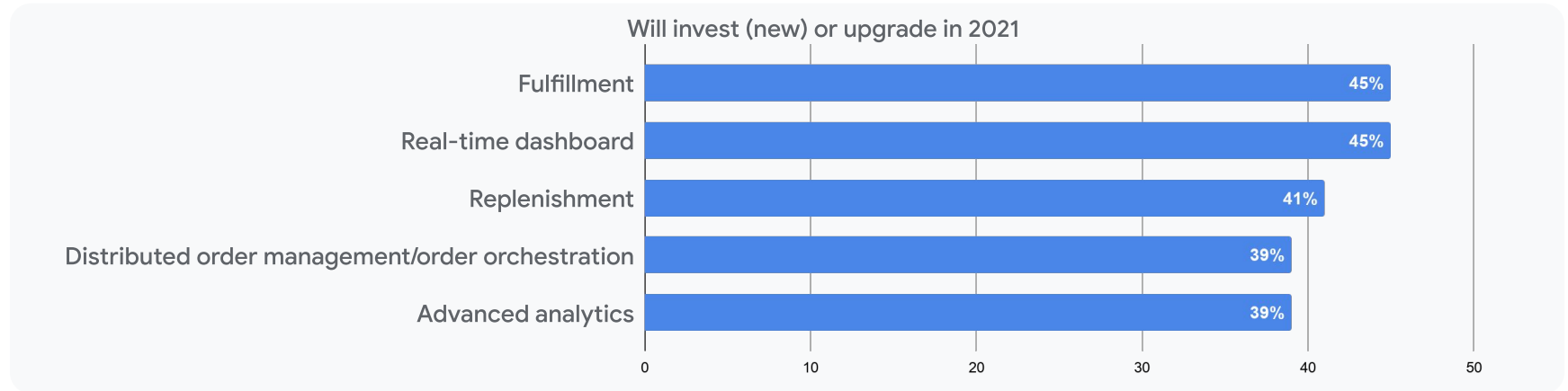
Priority list of supply chain challenges that can help increase efficiency in 2021



- Struggling to cope with extreme spikes in demand during the pandemic threw a harsh spotlight on challenges that require action to solve.

Study Results: Top Tech Investment Plans

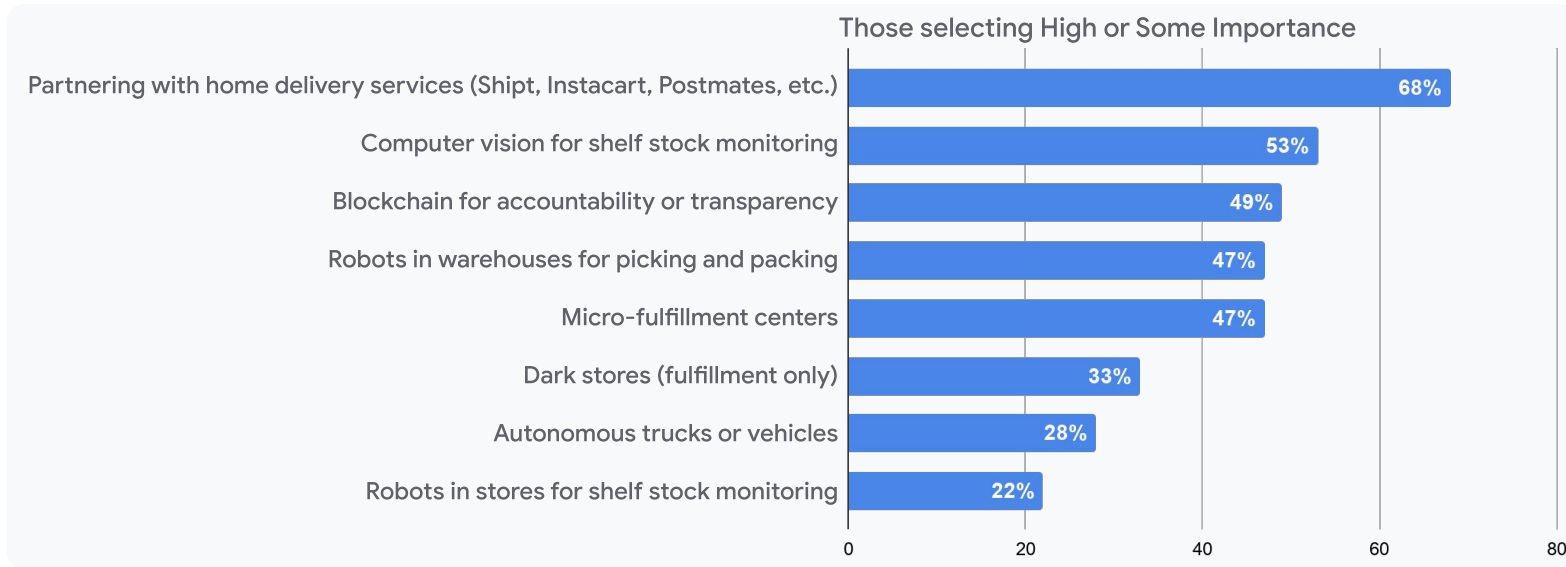
Investment plans for specific supply chain technologies



- New investments in tech are aimed at eliminating data blind spots and time lags that inhibit the speed and efficiency demanded by consumers.

Study Results: Net-New Technology Plans

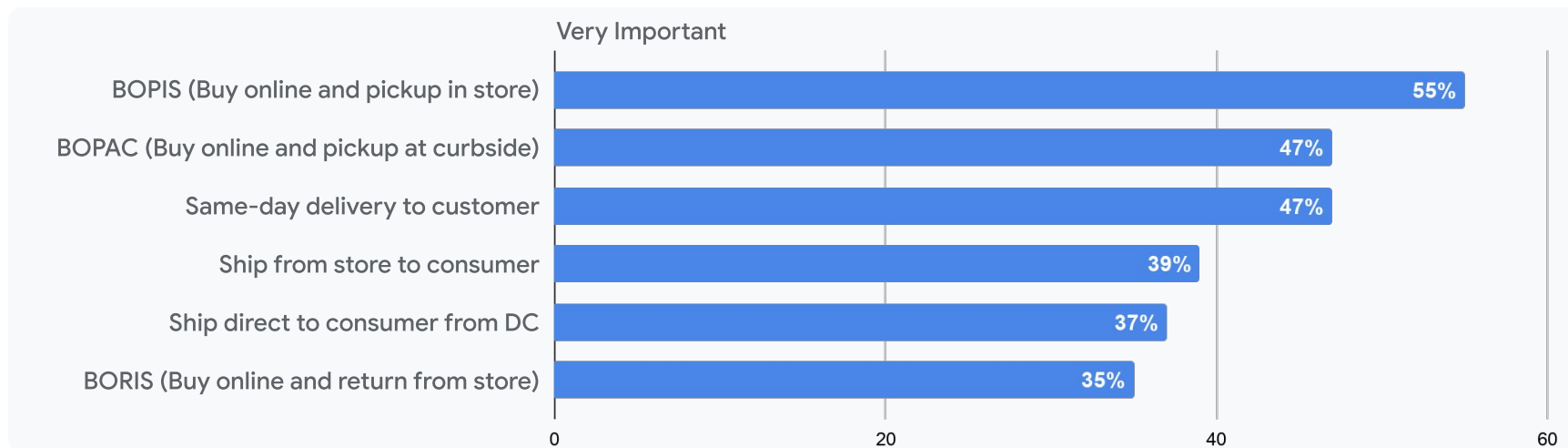
Importance of the following emerging supply chain technologies



- Net-new plans range from the no-brainer of adding home delivery services to computer vision, blockchain, robots and micro-fulfillment centers.

Study Results: Deep Dive into Fulfillment

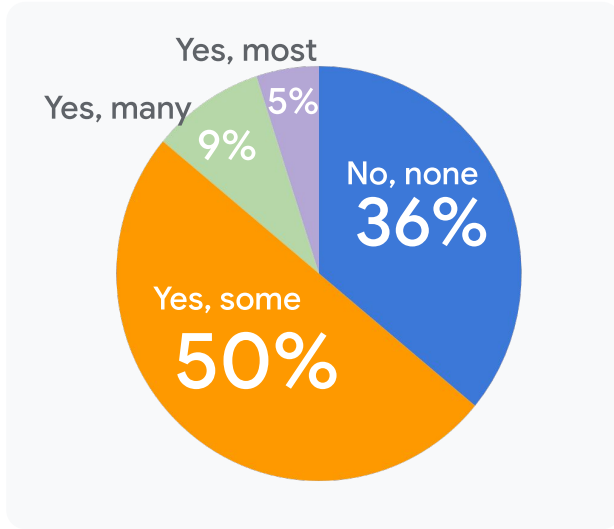
Importance of specific fulfillment opportunities to increase sales and margins



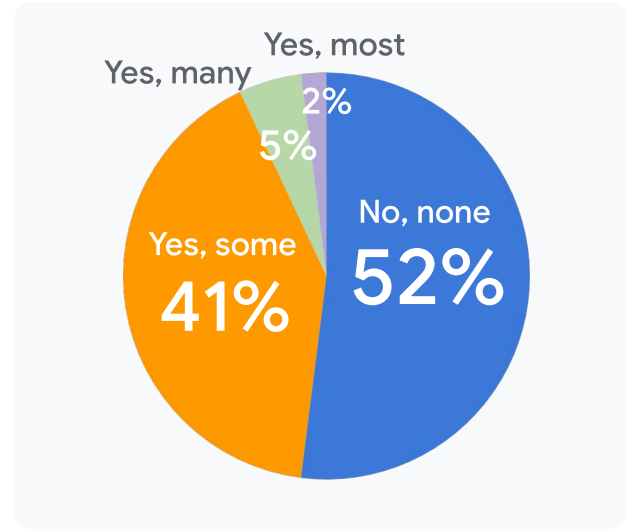
- The boom in e-commerce has given rise to an across-the-board interest into optimizing fulfillment opportunities to increase revenue and profits.

Study Results: Cloud and AI Adoption

Do you run key supply chain systems/ or processes in the cloud today?



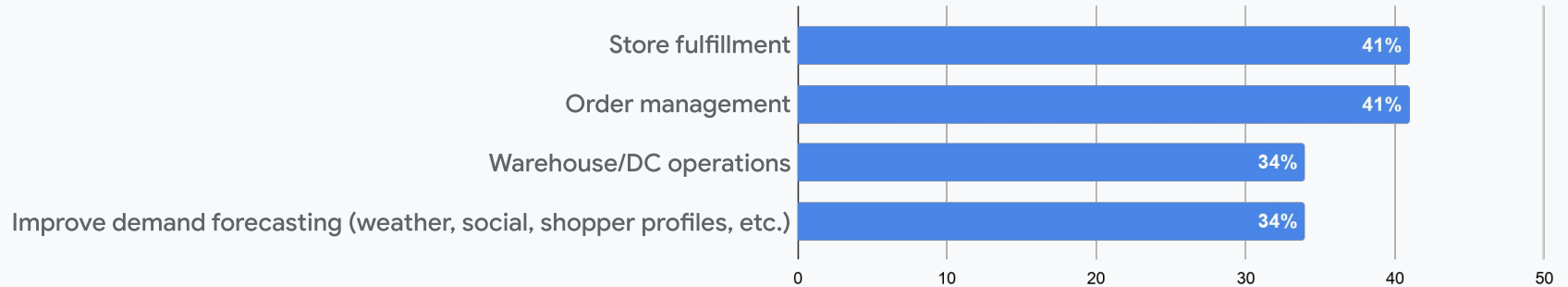
Do you leverage AI to optimize key supply chain systems/processes today?



- Retailers have begun multi-year digital transformation plans that include key supply chain systems to break down walls and reduce blind spots.

Study Results: Specific Functions for AI

If using or planning to use AI in the next 18 months in the supply chain, which use cases functions are high priorities?



- The top two function areas of AI deployment in the supply chain are store fulfillment and order management, areas of focus throughout the study.

Study Results: Summary and Conclusions

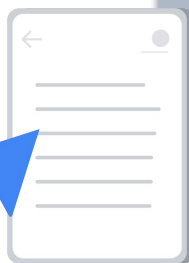
Top Three Study Takeaways

- **Fulfillment:** The boom in e-commerce is a motivating factor in findings throughout the study, especially in the strong interest shown in optimizing fulfillment
 - **Agility:** As retailers search for ways to respond to abrupt fluctuations in demand they are investing in ways to improve real-time data and collaborating with partners.
 - **Closing Gaps:** Weaknesses that require action include the need for end-to-end visibility, improved forecasting, and reducing complexity in omni-commerce systems.
-

Study Results: A Major Supply Chain Reset

Download the Executive Summary to learn more.

Click the link in your “Handouts” tab.



Featured panelist

Paula Natoli

Director, Supply Chain & Logistics Industry Solutions at Google Cloud

Paula has over 15 years of enterprise software product management experience and over 20 years of supply chain experience developing and implementing supply chain solutions serving manufacturing, retail and wholesale distribution companies.

Prior to joining Google Cloud, Paula served as Group Vice President of Product Management at Blue Yonder (formerly JDA Software).

Featured panelist

Brian Kinsella

Senior VP, Product Management, Manhattan Associates

In this role, Brian is responsible for Manhattan's product plans across all applications. Additionally, Mr. Kinsella leads Manhattan's user experience product design organization. He has more than 20 years of experience in designing, building, selling and implementing supply chain applications.

Following a 5-year stint at PricewaterhouseCoopers focusing on implementing warehouse management and transportation management solutions for large enterprises, Mr. Kinsella joined a startup focused on Slotting Optimization software which Manhattan acquired in 2002.

Panel Discussion: A Major Supply Chain Reset for 2021



Paula Natoli, Google Cloud

Brian Kinsella, Manhattan Associates

Joe Skorupa, RetailWire BrainTrust

Al McClain, RetailWire

Panel Discussion: A Major Supply Chain Reset for 2021



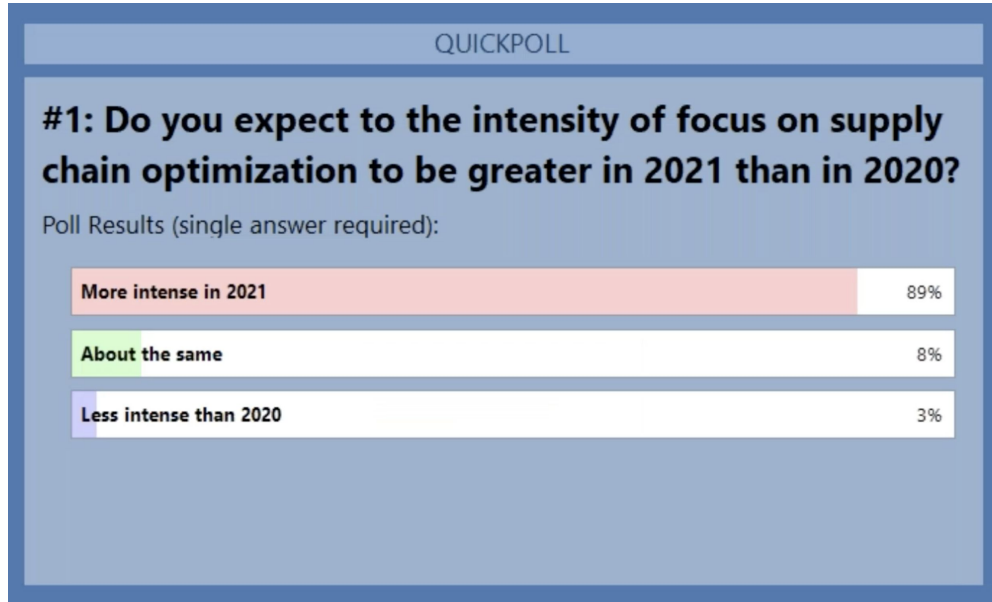
Paula Natoli, Google Cloud

Brian Kinsella, Manhattan Associates

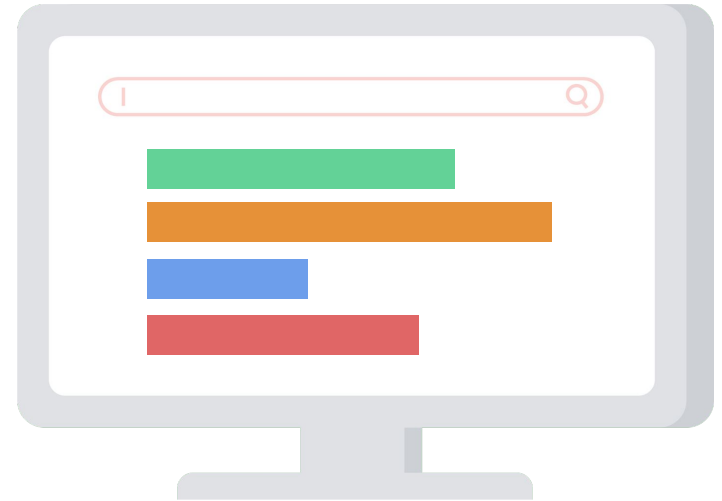
Joe Skorupa, RetailWire BrainTrust

Al McClain, RetailWire

Panel Discussion: A Major Supply Chain Reset for 2021



Audience Poll #1



Panel Discussion: A Major Supply Chain Reset for 2021

QUESTION #1: Priorities

Most retailers had been gradually ramping up their investments in digital transformation and e-commerce until the pandemic hit, then found themselves thrown into acceleration mode.

What do you see as the top priorities for retailers when it comes to supply chain strategies as 2021 picks up steam?



Panel Discussion: A Major Supply Chain Reset for 2021

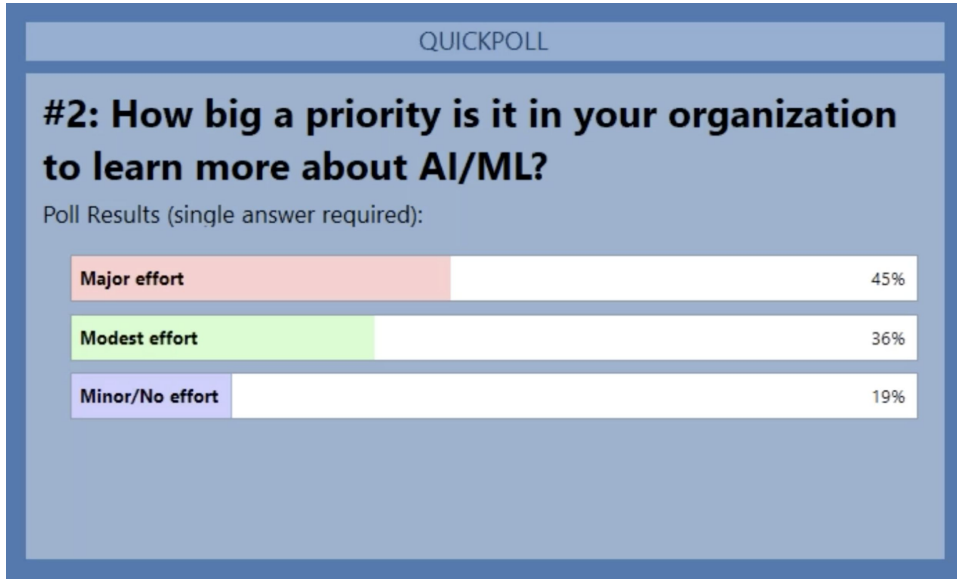
QUESTION #2: Responsiveness

What can retailers do to increase agility and better respond to abrupt fluctuation in demand?

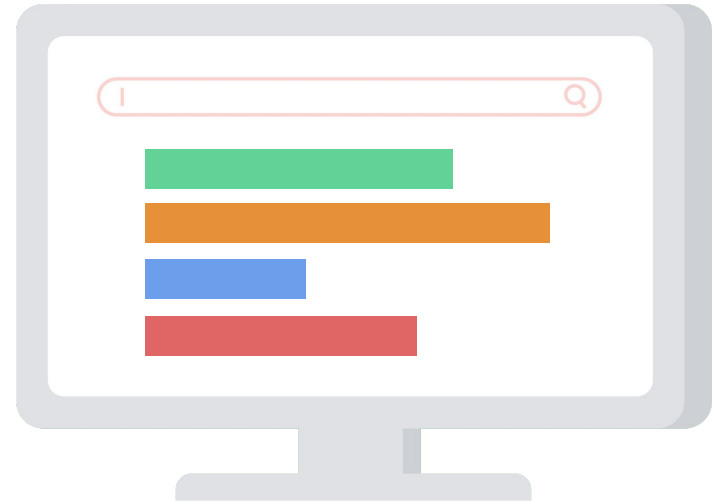
What new tech solutions look most promising?



Panel Discussion: A Major Supply Chain Reset for 2021



Audience Poll #2



Panel Discussion: A Major Supply Chain Reset for 2021

QUESTION #3: AI/ML in practice

What are the key supply chain use cases you are working with customers on when it comes to leveraging AI/ML?



Your questions for the panel.



Paula Natoli, Google Cloud

Brian Kinsella, Manhattan Associates

Joe Skorupa, RetailWire BrainTrust

Al McClain, RetailWire

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