BUILDING THE BUSINESS CASE

FOR A

UNIFIED
COMMERCE PLATFORM

Optimize the Consumer Experience

Ecommerce
FOUNDATION

**ECOMMERCE
EUROPE**

NRF | THE VOICE OF
RETAIL

EXECUTIVE SUMMARY

The 2014 report *Digitizing the Store – The Next Wave of Online and Offline Convergence* by the National Retail Federation and University of Arizona concluded that 70% of retailers plan to refresh aging POS software over next three years to satisfy the demands of increasingly connected consumers. This anticipated investment has prompted retailers to take a fresh look at how they approach all consumer-facing systems. To simplify the technology environment, 86% of retail executives surveyed in late 2014 expect to implement a unified commerce platform over the next ten years to consolidate key data elements, business rules, and functionality that historically have lived in multiple systems. While core merchandising, marketing, supply chain, and business administration applications will continue to be the system of record in many cases, the platform extracts value from back office applications and manages all consumer interactions and transactions throughout the consumer shopping journey. While organizational and technical obstacles exist, two-thirds of respondents anticipate improvements in margin, brand value, and revenue of 10% or more by implementing a unified commerce platform.

The National Retail Federation, Ecommerce Europe, and The Ecommerce Foundation teamed with industry partner Demandware to survey nearly 300 retail business and technology executives in the US, Europe, and Australia to better understand unified commerce platform strategies. This report provides retailers visibility into benefits and organizational impact to justify this business and technical transformation and help guide strategic decisions.

KEY QUESTIONS

Strategy and Investment: How are consumers forcing retailers to rethink their business strategies and technology investments to enable long-term growth?

Consumer Experience: What is a unified commerce platform and how does it enhance consumer experience?

Anticipated Benefits: Which business and technical benefits do retailers anticipate by moving to a unified commerce platform?

Organizational Change: What are the anticipated organizational challenges and structural changes involved?

Metrics: How will retailers measure business metrics across channels?

The Journey: Where are retailers along the journey toward a unified commerce platform and what steps should they take next?

LANDSCAPE

RETAILERS MUST KEEP PACE WITH CONNECTED AND INFLUENTIAL CONSUMERS

With seemingly unlimited knowledge, power, and expectations, connected consumers dictate and control the terms of engagement with retailers. Whether it's digitally native Millennials or consistently influential Digital Divas, the prolific use of consumer devices has fundamentally changed their shopping behavior (See Figure 1). According to University of Arizona's 2013 report, *Who are Digital Divas and Why Should Retailers Care?*, the Digital Diva segment uses an average of 3.7 touch points per purchase and expects fluid and highly relevant interactions across physical and digital destinations.

Existing retail infrastructure, architecture, and applications strain to keep pace with rapid advancements in consumer technology and behavior. Loosely coupled legacy systems originally implemented to solve specific problems for specific channels are not equipped to adequately serve connected consumers. The limitations of complex and disparate technology environments increase the risk of unsatisfied customers, rising costs, and lost revenue. Retailers must redefine their architectural approach to effectively and seamlessly engage consumers across channels.

FIGURE 1: CONNECTED AND INFLUENTIAL CONSUMERS

Source: Building the Business Case for a Unified Commerce Platform (October 2014)

OUTLOOK

UNIFIED COMMERCE PLATFORMS WILL BECOME THE STANDARD OVER TIME

Consistent with the investment cycle that historically occurs about every 12 years, 70% of organizations are currently deploying or planning a refresh of existing traditional POS software in the next three years*. In an effort to better serve the connected consumer, this impending refresh has prompted retailers to rethink traditional store-centric software, along with all consumer-facing technology, and is spurring them to explore emerging unified commerce platforms as a comprehensive solution.

53%

plan to implement a unified commerce platform.

Traditional POS, call center, e-commerce, and mobile technologies that directly interact with consumers are converging, and e-commerce solutions have emerged as the platform of choice to reduce complexity and enable seamless consumer engagements and transactions throughout the shopping journey. In the near-term, 53% of retailers surveyed across markets plan to implement a unified commerce platform to consolidate key data elements, business rules, and functionality historically housed in multiple systems: Australia 60%, US 53%, and Europe 51% (See Figure 2). This outlook represents a nearly 50% increase year-over-year[*]. Over the next ten years, 86% of surveyed retailers plan to leverage a unified commerce platform, making it the emerging standard as technology matures.

FIGURE 2: PLANS FOR UNIFIED COMMERCE PLATFORM
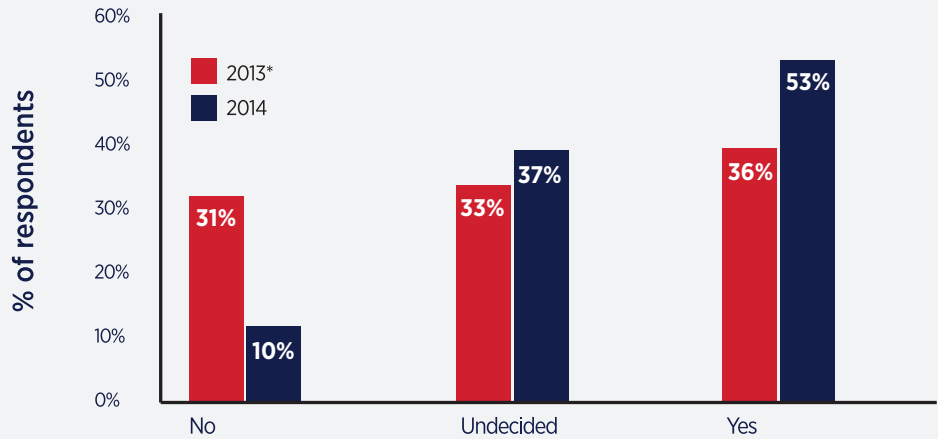
Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=277)
*Source: Digitizing the Store - The Next Wave of Online and Offline Convergence (2013 - N=231)

RETAILERS ARE IN VARIOUS PHASES OF JOURNEY TOWARD UNIFIED COMMERCE PLATFORM

While a vast majority of survey respondents envision a unified commerce platform on the horizon, retailers are at various stages along the journey toward this platform (See Figure 3). A number of factors determine this path: rapidly evolving consumer behavior, the current state of internal retailer systems, the significant organizational impact, and a lack of a fully realized commercially available unified commerce platform solutions.

FIGURE 3: PHASES OF JOURNEY TOWARDS UNIFIED COMMERCE PLATFORM

Exploration 13%
Monitoring Single Platform Trend and Gathering Information for Education

Consideration 23%
Actively Discussing Viability of a Single Platform Approach, but no Formal Plan or Budget in Place

Strategy 36%
Creating a Formal Plan, Developing Business Case, and Seeking Budget

Execution 13%
Implementing a Strategy – Business and Technical – to Manage Change

Realization 9%
Operating a Single Platform and Measuring Benefits to Gauge Future Investments

Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=296)

36%

are creating a formal plan, developing a business case, and mapping out budgets.

Nearly three-quarters (72%) of organizations are informally planning this business and technical transformation by conducting initial research, engaging strategic vendors, and beginning business case development. Retailers that don't evaluate this evolution risk missing significant means to better serve the rapidly evolving consumer – one whose expectations for omnichannel sales and service only continue to rise. The following provides other key observations and analysis from the survey regarding retailers' journey toward a unified commerce platform:

- **Budgeting is critical:** 36% of retailers are in the Strategy Phase, creating a formal plan, developing a business case, and mapping out budgets.
- **Execution is a gradual process:** The 13% of companies in the Execution Phase are initially implementing digestible projects to bring digital capabilities into stores (e.g. endless aisle for product availability, clienteling to better serve clients with stored customer purchase history and other information, and line-busting for expedited checkout) and expanding incrementally as they learn.
- **One size does not fit all:** The 9% of retailers who identify themselves in the Realization Phase may not utilize a single technology partner – no single vendor has a mature or robust enough offering to date – but may have designed a standard architecture to integrate multiple existing and future solutions.

BUSINESS CASE

INVESTMENTS TARGETED AT CONSUMER EXPERIENCE AND ASSOCIATE PRODUCTIVITY

Retailers in our survey believe a unified commerce platform can better address the following business imperatives – in prioritized order (See Figure 4):

1. **Quickly respond to consumer demands:** Enabling organizational agility to effectively execute merchandising, marketing, promotional, and loyalty initiatives.
2. **Increase store associate productivity:** In addition to increased efficiency and lower costs, arming associates to enhance customer interaction and increase conversion.
3. **Support omnichannel strategy and execution:** Providing the backbone to manage data and functionality related to customers, product, price, inventory, orders, and content across channels.

Improving consumer response and associate productivity are consistent across geographies, however:

- *European retailers* cited digitizing the store as one of the top initiatives, indicating an intent to innovate and reinvent the physical store.
- *Australian retailers* prioritized the need to reduce complexity, reflecting the desire to bring relatively less mature digital commerce operations into the traditional brick-and-mortar fold.

While the vision is clear – and many retailers have taken initial steps on the journey – business and technical obstacles remain.

FIGURE 4: KEY INITIATIVES ADDRESSED BY A UNIFIED COMMERCE PLATFORM
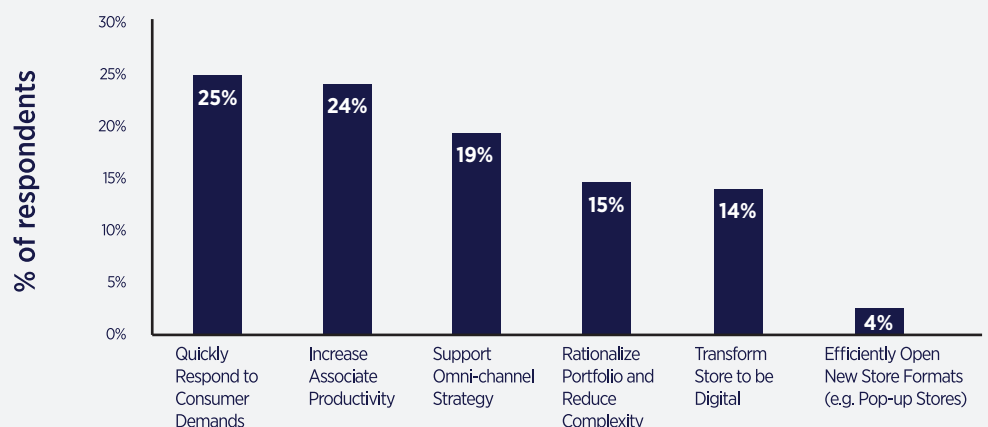
Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=253)

BENEFITS OF ADOPTING A UNIFIED COMMERCE PLATFORM

MARGIN

- Inventory turn: Increase turn, optimize allocation, and reduce markdowns by providing inventory visibility and efficiently selling product not physically available in store.

- Out-of-stock: Reduce walked sales and decrease manual processes by automating buy anywhere and fulfill anywhere capabilities.

- Returns: Streamline reverse logistics by providing visibility into transaction history and simplifying returns processes across channels.

- Operational efficiency: Simplify workflow and usability to increase headquarters staff and store associate productivity by merging historically disparate systems.

BRAND VALUE

- Total customer value: Increase frequency and retention by better recognizing loyal customers and providing appropriate service across physical and virtual touch points.

- Net Promoter Score: Raise score of this objective benchmark by enhancing the customer experience with consistent and personalized interactions.

REVENUE

- Average order value: Increase basket size by providing store associates and consumers with product information, recommendations, and personalized promotions to inform and incentivize purchases.

- Conversion rate: Drive more shoppers through the purchase funnel by breaking down technical and operational barriers to discover, research, browse, and buy merchandise as they weave between store, online, mobile, etc.

- Promotional redemption: Enhance promotional effectiveness by aggregating consumer data and operationalizing intelligence to tailor and optimize offers.

Retail executives report that an unclear business case and impact to the organization are the top business challenges to implement a unified commerce platform. This is a nascent situation, so few examples or proof points exist. The industry is likely to accelerate investments once early adopters show demonstrable benefits. Retailers are also concerned about how individual roles, responsibilities, and accountabilities will alter within and across functions. Given the way processes and technologies have been hardwired to serve consumers by channel, organizational change requires a methodical approach that includes clarity, communication, and training.

Top technical challenges, according to retailers surveyed, include complex legacy migration (54%) and integration of back office systems to the new environment (43%). Moving to a single platform – what some industry leaders are beginning to refer to as the ERP for the Front Office – is not as easy as flipping a switch. As with original ERP investments focused on the consolidation of merchandising, supply chain, and business administration technology, this new unified commerce platform requires a detailed migration and integration plan to meticulously map data, business rules, functionality, and workflow throughout the enterprise. Retailers should expect their plan to be executed over the course of several years as they decommission legacy systems, establish new integrations, and consolidate disparate technologies into a unified commerce platform – all while the business continues to serve and delight consumers.

The transformation to a unified commerce platform undoubtedly entails significant organizational and technology change. It is imperative that retailers build a business case, with quantifiable and compelling metrics, to measure benefits throughout the life of this new and innovative strategy. The following sections examine specific benefits anticipated by retail executives from our survey.

THE LARGEST ANTICIPATED BENEFIT IS MARGIN IMPROVEMENT

While proof points related to benefits have been historically elusive, survey responses show that many retailers anticipate significant improvements in margin, brand value, and revenue (See Figure 5):

Margin: 52% of retailers anticipate significant improvement to controllable items that directly impact margin: inventory turn, out-of-stock, returns, and overall operational efficiency. Supply chains are now more complex – with buy anywhere and fulfill anywhere initiatives – so it is imperative to streamline processes. As merchandise is increasingly shared across channels and locations, consolidated workflow and data from one platform will automate visibility, order, fulfillment, and returns capabilities that were traditionally manual and cumbersome. Operational efficiency, particularly in the store, will have a positive impact on two of the most substantial variable costs – labor and inventory – and ultimately improve margin

Brand Value: 46% of retailers expect significant improvements from the positive impact on total customer value and Net Promoter Scores. A single platform should positively impact brand value by providing a single view of consumer behavior, profiles, and preferences throughout each stage of their shopping journey. With a comprehensive and accurate picture of customers, retailers are able to personalize promotions, products, and service to provide relevant experiences, enhance brand stickiness, and increase customer loyalty.

Revenue: Top line growth is consistently a leading CEO priority. 38% of retailers surveyed believe significant improvement will occur in average order value, promotional redemption, and conversion rate. As retailers more effectively cater to consumer needs, wants, and desires, consumers may increase their purchase frequency at potentially higher price points.

See side bar for a deeper explanation of how margin, brand value, and revenue improvements are achieved with a unified commerce platform.

More than two-thirds expect a unified commerce platform to improve margin, brand value, and revenue benefits by more than 10%.

FIGURE 5: PERCENT OF RETAILERS THAT ANTICIPATE SIGNIFICANT BUSINESS BENEFITS DERIVED FROM A UNIFIED COMMERCE PLATFORM
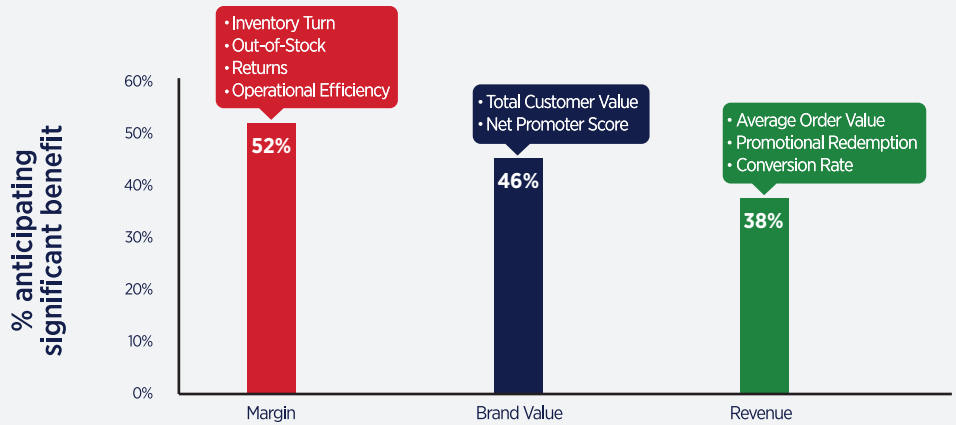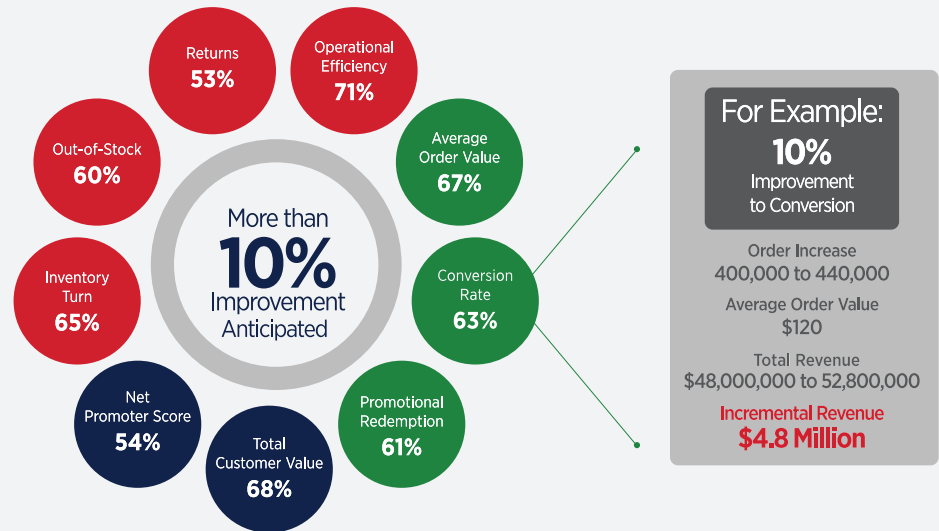

Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=274)

TWO-THIRDS ANTICIPATE MORE THAN 10% BENEFIT IMPROVEMENTS

More than two-thirds of survey participants expect the move to a unified commerce platform to improve margin, brand value, and revenue benefits by more than 10% (See Figure 6). These growth expectations should have direct and positive impact on the bottom line – and help justify the initiative and related budget.

FIGURE 6: PERCENT OF RETAILERS THAT ANTICIPATE MORE THAN 10% IMPROVEMENT TO BENEFITS

Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=293)

NEARLY HALF EXPECT UNIFIED PLATFORM TO DRIVE SIGNIFICANT IT INNOVATION

In addition to improvements in margin, brand value, and revenue, retailers surveyed also expect a unified commerce platform to drive innovation and efficiency within the IT organization. Today's retail CIO balances driving the business strategy forward with managing a backlog of projects that make it challenging to take on new initiatives within existing resources and budget. Because the demands of existing infrastructure and maintenance often constrains growth, technology leaders plan to leverage a new platform in the future to achieve greater agility, faster growth, and more control.

45%

anticipate significant improvement in their ability to meet business demands faster and use development capacity more effectively.

Business and technology executives expect the consolidation of historically disparate technologies – including POS, e-commerce, Call Center, CRM, and Mobile – into a single consumer-facing platform would drive improvements in two primary benefit areas (See Figure 7):

1. **IT Innovation:** 45% of surveyed retailers anticipate significant improvement in their ability to meet business demands faster and use development capacity more effectively. Enabling technology resources to deploy innovations such as mobile payment, digital displays, and social commerce faster will have a positive influence on the consumer experience.

2. **IT Efficiency:** 35% of respondents expect significant improvements in IT efficiency. While technology leaders are keen to shift priorities to innovation, this focus underscores the fact that proficiency in areas such as data security, maintenance costs, and infrastructure (including data, integration, and licenses) are still under intense pressure.

The primary expectation of the CIO is to continually provide new business value, however the day-to-day reality is that a significant amount of IT time and budget is spent managing the current infrastructure. While it is imperative to drive IT efficiency and availability, the survey results emphasize retailers' desire and belief that a fresh environment will help tip the scale to more effectively serve the business, drive critical strategic initiatives, and continually innovate.

FIGURE 7: PERCENT OF RETAILERS THAT ANTICIPATE SIGNIFICANT TECHNICAL BENEFITS DERIVED FROM A UNIFIED COMMERCE PLATFORM
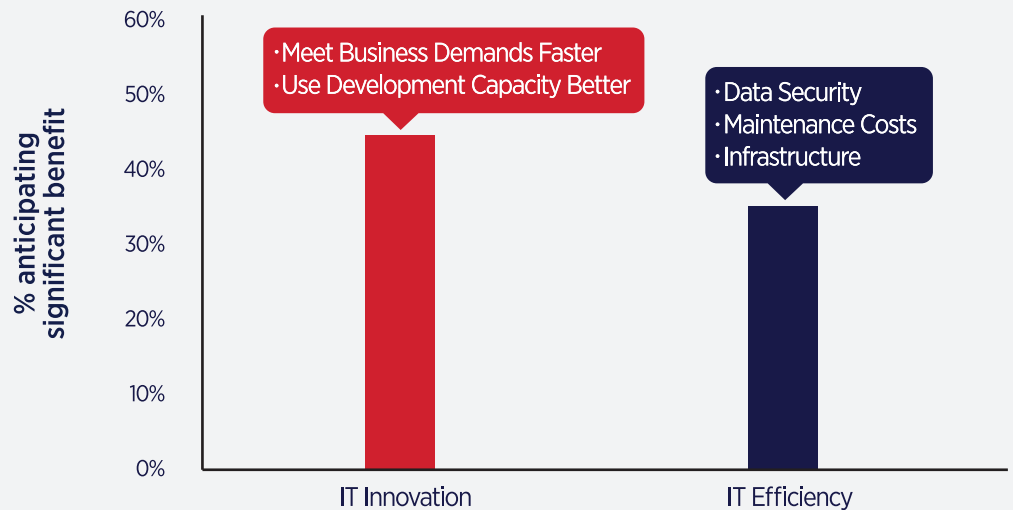
Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=278)

ORGANIZATIONAL CHANGE

While a compelling business case is essential, retailers are also concerned with effectively managing change throughout the organization. The following sections detail changes along three dimensions: business process, structure, and metrics.

BUSINESS PROCESS: STORE OPERATIONS WILL EXPERIENCE MOST SIGNIFICANT CHANGE

Digital and omnichannel capabilities enabled by a unified commerce platform will require notable organizational change to support new business processes within the physical store. Survey results show that twice as many retailers believe store operations will experience significant change compared to e-commerce operations (See Figure 8).

90%
have or expect to consolidate pertinent IT functions into one organization to manage all consumer-facing technology.

FIGURE 8: ANTICIPATED ORGANIZATIONAL CHANGE BY FUNCTION & REGION
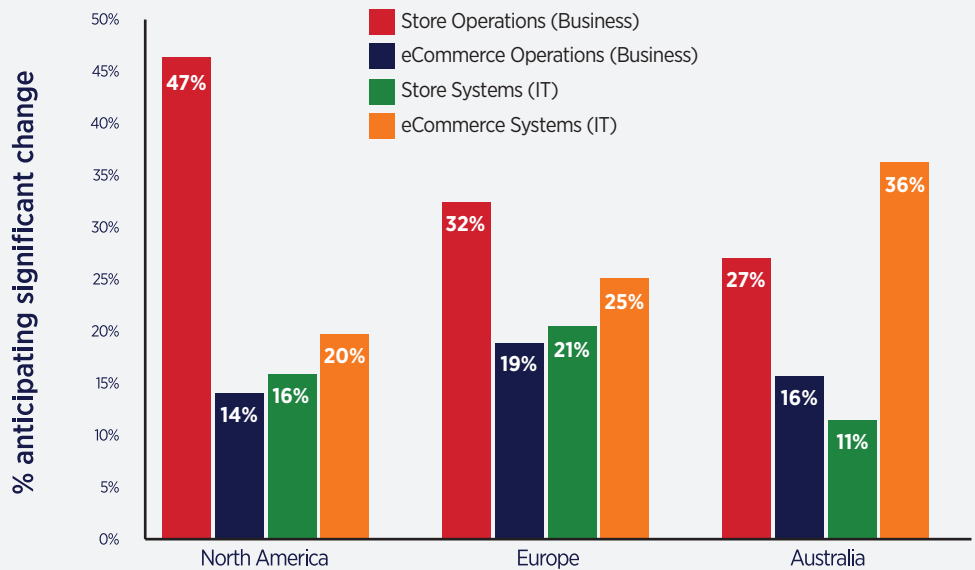
Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=284)

While new technology requires extensive training, consolidated and intuitive applications will automate processes, increase productivity, and unite big data from across the enterprise to deliver personalize shopping in brick-and-mortar locations. The greatest potential disruption, however, will occur from business process change as store associates take on new responsibilities. Following are a few representative scenarios that expand the focus from simply selling available merchandise to more holistically serving connected consumers:

- **Buy online and pickup in store / ship from store:** For some business models, store associates will be required to pick, pack, and ship orders as stores become mini distribution centers.
- **Endless aisle:** Store associates will be expected to facilitate complex orders for merchandise available in the store and other locations.
- **Guided selling:** Store associates will provide personalized service on the floor and have the option to continue the transaction at the cash wrap or anywhere in the store.
- **Post-Purchase service:** Store associates will be able to reach out to customers after purchase to answer questions and proactively follow-up with new or complementary products.

While store operation leaders are planning for impending global change, the research highlighted some geographical differences. For example, Australian retailers surveyed expect significant impact to personnel responsible for e-commerce systems as well. This reflects the independent organizations that currently manage channels and the expanded roles and responsibilities from a tighter integration required across channels.

As retailers continue to digitize the store – and leverage e-commerce as the unified platform – retailers must map out new business processes and thoroughly train employees focused on both operations and technology.

STRUCTURE: IT RESTRUCTURES TO OPTIMALLY MANAGE UNIFIED COMMERCE PLATFORM

CIOs are rethinking the way they organize and manage their teams. Many are establishing a new role that combines the strategic oversight of e-commerce, store, call center, and customer management systems. According to our survey, 90% of organizations have or expect to consolidate pertinent IT functions into one organization to manage all consumer-facing technology (See Figure 9).

This emerging retail technology leader defines and oversees the integrated technology strategy for the online and offline customer experience. The simplified structure enables IT to operate with all the speed and responsiveness of the digital world, while incorporating the capabilities and benefits of a physical presence. Specific benefits include the ability to:

- **Break down barriers** by overcoming territorial and functional conflicts and accelerate transformation to single platform.
- **Optimize development resources** by merging teams that are focused on similar functions within existing channels.
- **Refocus priorities** by shifting attention to business insights and consumer demands

FIGURE 9: PLANS TO CONSOLIDATE CONSUMER-FACING TECHNOLOGY FUNCTIONS
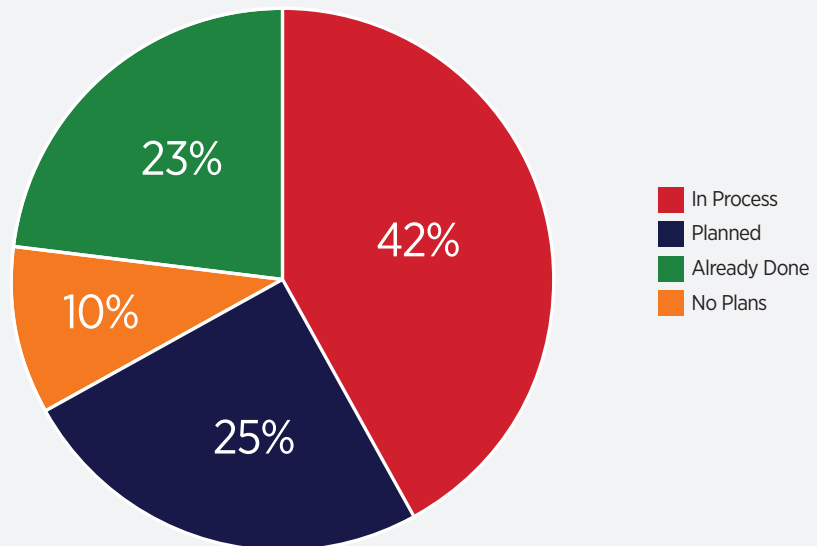
Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=296)

METRICS: RETAILERS ADJUST BUSINESS METRIC CALCULATION

As technologies consolidate and organizational structures change, the calculation of certain metrics and incentives will be re-examined to reflect an enterprise perspective (See Figure 10). Retailers cited that the way operational efficiency, total customer value, and inventory are measured across channels will evolve most dramatically:

- **Operational efficiency** will be measured based on serving consumers and fulfilling orders as they shop across and within multiple channels and touchpoints.
- **Total customer value** will be assessed based on a holistic view, not by individual channel.
- **Inventory turn** (reconciling store versus online inventory) will be evaluated and benchmarked at a total enterprise level.

FIGURE 10: ANTICIPATED DEGREE THAT CALCULATION OF METRICS WILL CHANGE
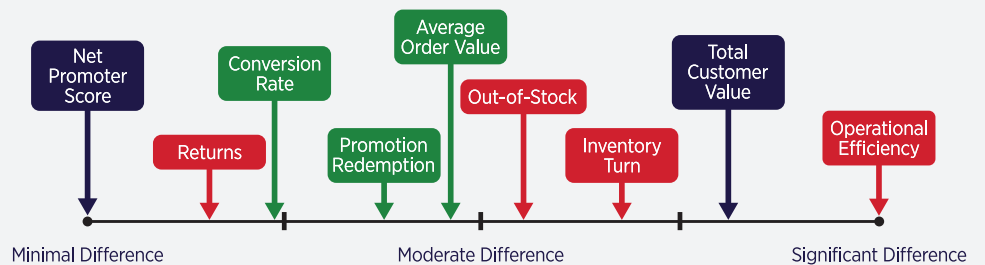
Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=296)

As overall inventory availability is more accessible to stores, distribution centers, and customers, the metrics used to track success, administer sales credit, and provide incentives need to be rethought and repositioned from an individual channel perspective to a company-wide perspective. Since the goal is to create a great consumer experience, store and online channels must all work toward a satisfied buyer – regardless of how, where, and when they want to shop, buy, return, and otherwise interact with the retailer.

GETTING STARTED

RETAILERS MUST PLAN FOR THE JOURNEY TOWARD A UNIFIED COMMERCE PLATFORM

Retailers that believe a unified commerce platform will enable them to move at the speed of consumers, but don't know how to start the process, should leverage the Unified Commerce Platform Journey Framework to assess the organization's status and determine next steps (See Figure 11). With this framework, organizations can accelerate from Exploration to Realization across the following three critical dimensions to create consistent consumer experiences:

- **Organization:** Organizational impact must be tackled from the outset in order to weave change management into the fabric of the initiative. Clearly and continually communicate vision, value, and incentives. Additionally, rethink organizational structures – particularly within IT where a single function is increasingly formed to manage all consumer-facing technologies (including governance and decision rights).

- **Technology:** It is critical to establish a technology architecture and roadmap. Develop a strategy to consolidate redundant data and functionality across consumer-facing technologies. Engage strategic vendor partners to understand how their vision aligns. According to the survey, more than one-third of retailers who identify themselves as already in the Execution and Realization Phase plan to leverage e-commerce for their unified commerce platform – 35% more than those who plan to centralize on POS, CRM, or ERP. And don't forget to future-proof hardware – 81% of retailers surveyed have deployed or plan to deploy mobile devices for store associates in the next three years. To reduce complexity for migration to one software platform, ensure that infrastructure (including hardware, network, and security) investments are not hardwired to existing applications.

- **Metrics:** A comprehensive business case is required to justify investments. Leverage business and technical benefit improvements from the survey as a baseline to justify strategy and measure value over the lifecycle of this initiative. Close to three-quarters of retailers in the Execution and Realization Phases report margin, brand value, and revenue benefit improvements of at least 10%. Establish a dedicated cross-functional team to create the strategic vision, institute a formal plan, and develop budget.

FIGURE 11: UNIFIED COMMERCE PLATFORM JOURNEY ASSESSMENT FRAMEWORK

PHASE	EXPLORATION	CONSIDERATION	STRATEGY	EXECUTION	REALIZATION
ORGANIZATION	• Consumer-facing technologies managed by separate functions within IT organization • No function or individual is responsible for strategy • No owner of change – uncertainty and concern regarding potential change	• Consumer-facing technologies managed by separate functions – hand-offs and organizational overlaps are identified across IT organization • Cross-functional team established to actively aggregate independent research and discuss potential strategic options • No owner of change – cross-functional team identifies high-level impact on organization	• Single IT function to manage consumer-facing technologies is established (including governance and decision rights) • Cross-functional team's research completed – strategy and roadmap incorporated into formal plan • Executive sponsor, business leader, and change advocate assigned to lead Strategy, Execution and Realization phases	• Single IT function defines and oversees the integrated technology strategy for all consumer-facing technologies • Broader cross-functional team created to manage execution and ensure adherence to formal plan • Executive sponsor, business leader, and change advocate oversee communication and change plan – manages adjustments when merited	• Single IT function optimizes productivity and responsiveness – and measures success • Broader cross-functional team measures performance and determines incremental business and technology investments related to unified platform • Executive sponsor, business leader, and change advocate oversee communication and change plan
TECHNOLOGY	• Integrated applications with no definition of future architecture or technology portfolio • Redundant data and functionality across consumer-facing applications – no visibility into impact on cost or consumer experience • Informally engage strategic vendors to understand their unified commerce platform vision	• Integrated applications – begin to define future architecture, technology portfolio, and migration path • Redundant data and functionality across consumer-facing applications – begin effort to quantify impact of current architecture on cost and consumer experience • Formally engage strategic vendors to share organization's intention, and enlist help to articulate strategy and business plan	• Integrated applications – future architecture, technology portfolio, and migration path defined – incorporated into formal plan • Strategy to consolidate redundant data and functionality across consumer-facing applications incorporated into formal plan • Strategic vendor partnerships established – scope of involvement and success metrics defined	• Execution on future architecture, technology portfolio, and migration path initiated • Redundant data and functionality across consumer-facing applications consolidated to a standard data set • Strategic vendors ensure timely completion of milestones and alignment on roadmap	• Technology consolidated – focus on innovation and evaluate new capabilities • Data consolidated – business realizes margin, brand value, and revenue improvement through better customer experiences • Strategic vendors ensure continual innovation and alignment on roadmap
METRICS	• No business case mandated or sought • No budget • Metrics measured for each channel without cross-functional dependencies or accountability	• Recognition that business case is required – begin to define business and technical costs/benefits across margin, brand value, and revenue (no quantification) • No formal budget – cross-functional team creates order-of-magnitude costs • Metrics are measured for each channel – cross-functional dependencies and accountability identified	• Business and technical owners commit to costs/benefits across margin, brand value, and revenue • Actively seek budget based on business case • Metrics and incentives adjusted and vetted based on enterprise perspective (including functional dependencies and accountability)	• Business case rolled out to stakeholders – training and enablement provided – and cross-functional team tracks projection to actuals • Budget approved and interrelated initiatives implemented • Enterprise metrics and incentives accepted and tested	• Business case continually monitored and evaluated for effectiveness and accuracy • Incremental budgets created to fund incremental innovation • Enterprise metrics and incentives are operational and organization is rewarded accordingly

METHODOLOGY AND RESPONDENT PROFILE

The National Retail Federation, Ecommerce Europe and The Ecommerce Foundation teamed with industry partner Demandware to survey nearly 300 retail business and technology executives in the US, Europe and Australia to better understand unified commerce platform strategies. This study was conducted via an online survey in October 2014. Organizations represented various retail segments, and individual respondents spanned business and technology leadership positions (See Figures 12, 13, 14, and 15).
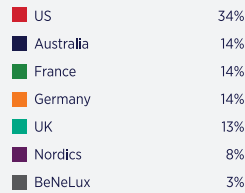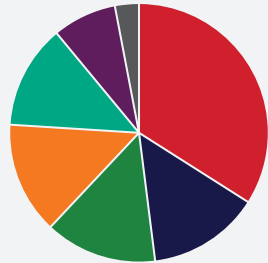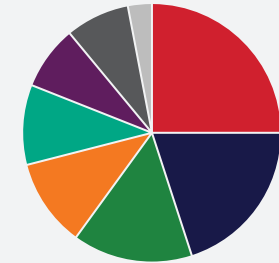
FIGURE 12: GEOGRAPHY

US	34%
Australia	14%
France	14%
Germany	14%
UK	13%
Nordics	8%
BeNeLux	3%

FIGURE 13: ROLE

Other	25%
VP/Director Store Operations	20%
VP/Director IT	15%
Manager IT	11%
CIO	10%
Manager E-commerce	8%
CMO	8%
VP/Director E-commerce	3%

Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=297)

FIGURE 14: VERTICALS
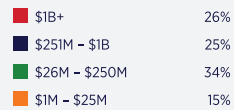
Specialty	23%
Apparel, Accessories and Footwear	14%
Department Stores and Mass Merchants	14%
Health and Beauty	7%
Outdoor and Sporting Goods	5%
Media and Entertainment	4%
Other	33%

FIGURE 15: REVENUE BRAND

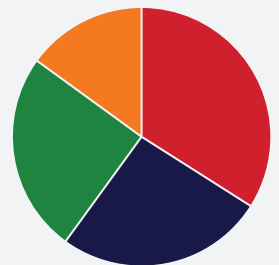|	
$1B+	26%
$251M – $1B	25%
$26M – $250M	34%
$1M – $25M	15%

Source: Building the Business Case for a Unified Commerce Platform (October 2014 - N=297)

National Retail Federation

NRF is the world's largest retail trade association, representing discount and department stores, home goods and specialty stores, Main Street merchants, grocers, wholesalers, chain restaurants and Internet retailers from the United States and more than 45 countries. Retail is the nation's largest private sector employer, supporting one in four U.S. jobs — 42 million working Americans. Contributing $2.5 trillion to annual GDP, retail is a daily barometer for the nation's economy. NRF's This is Retail campaign highlights the industry's opportunities for life-long careers, how retailers strengthen communities, and the critical role that retail plays in driving innovation.

The Ecommerce Foundation

The Ecommerce Foundation is a non-profit, independent foundation. It has been initiated by national e-commerce associations and online and omnichannel selling companies from industries such as retail, travel & finance. Our mission is to facilitate the development of practical knowledge, insights and learnings for which individual institutions, associations and B2C selling companies do not have the (financial) resources and/or capabilities. We do so by combining our forces with those of our stakeholders and (media) partners.

Ecommerce Europe

Ecommerce Europe is the association representing 25,000+ companies that sell products and/or services online to consumers in Europe. Founded by leading national e-commerce associations across the continent, its mission is to advance the interests and influence of European e-commerce through advocacy, communication and networking.

Demandware

Demandware, the category defining leader of enterprise cloud commerce solutions, empowers the world's leading retailers to continuously innovate in our complex, consumer-driven world. Demandware's open cloud platform provides unique benefits including seamless innovation, the LINK ecosystem of integrated best-of-breed partners, and community insight to optimize customer experiences. These advantages enable Demandware customers to lead their markets and grow faster.