



DIGITAL COMMERCE SURVEY

ANNUAL
SURVEY

2016

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“Today’s unified commerce imperative moves the heart of the transaction to a centralized platform. This allows the retailer to become more innovative and agile with their digital commerce offerings to further enable a personalized customer experience.”

- Jeffrey Neville, vice president, BRP

The Catalyst for Unified Commerce

The information that digital commerce offers today’s shopper, combined with ubiquitous, easy-to-use technology, has put the power squarely in the customer’s hands.

Today’s customer is always connected and always on. Digital and mobile commerce has elevated consumer’s expectations of the shopping experience. She expects service anytime, anywhere and any way she wants it. Retailers realize they need a different approach to enable a unified experience, one that supports today’s convergence of the digital and physical worlds. The answer is unified commerce.

BRP’s research over the last few years demonstrates that retailers have generally embraced unified commerce as the best way to overcome and break down the traditional silos around individual channels and bridge the physical and digital worlds.

As retailers aspire to meet customer expectations for a seamless holistic shopping experience across channels, many are considering their order management system (OMS) as a single centralized platform to fulfill the persistent order, or “single, shared cart,” requirements. A retailer’s OMS is well positioned to be the heart or center of a unified commerce platform for all channels.

A unified commerce platform becomes a single consolidation point for all transactions, inventory, pricing, order management, CRM, call center, etc. This platform provides a single version of the truth across all channels to enable transparency, or the “glass pipeline” of real-time visibility to inventory, product and customer information. This is the nirvana, or end-state, that many retailers are trying to achieve with their customer experience and unified commerce goals.


By moving the heart of the transaction, merchandising and fulfillment activities to a centralized platform, retailers can allow their digital commerce applications to be more innovative and agile. This enables retailers to utilize their digital commerce offerings to contribute to the **personal, ubiquitous** and **unified** experience that customers expect.


In BRP’s 2016 Digital Commerce Benchmark Survey, we surveyed top North American retailers to understand the industry’s digital commerce priorities and initiatives as the digital and physical worlds converge to provide customers a seamless experience across channels.


Key Trends



PERSONAL

40% 
are focused on improving personalization as a top digital priority


58% 
plan to utilize geolocation within 2 years

50% 
will have customer identifying technology within the store in 2 years

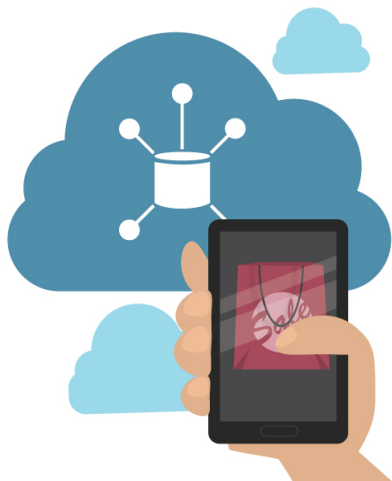


UBIQUITOUS


50% 
will offer "start anywhere, finish anywhere" within 5 years

46% 
are improving the mobile shopping experience as a top digital priority

75% 
will host a single shared cart across channels within 3 years



UNIFIED

73% 
plan to utilize an OMS as their unified commerce platform within 3 years

56% 
are focused on a consistent brand experience across channels as a top digital priority

38% 
are adding new roles and employee incentives to accommodate omni-channel tasks




Personal

Customers want to shop wherever and whenever they want with the benefits of both the digital and physical retail environments. Effective customer engagement requires retailers to offer personalized, relevant, compelling and consistent services across channels.

Consumers want personalized services. According to a recent study by Salesfloor¹ Online shopping has redefined the standards for the retail customer experience and capabilities. The online or mobile shopper is now accustomed to a plethora of convenient options available for product research and to receive personalized recommendations as the digital and physical retail worlds converge. The retailers surveyed are focused on personalization with 40% indicating it is a top digital priority.

Digital personalization

Online shoppers are accustomed to features such as product reviews, expansive merchandise choices, one-click transaction processing and personalized recommendations. These expectations don't dissipate when a customer walks into a physical store. In fact, customer expectations are likely magnified across all channels because many consumers shop more than one channel as part of their shopping journey and expect the benefits available in each channel.

40% 
are focused on improving
personalization as a top
digital priority

Retailers must infuse digital features into the store environment to exceed customer expectations, compete more effectively and offer a more complete shopping experience. Digital commerce is more than purchasing an item online – it is the convergence of the digital experience with the physical environment and today, customers carry their ability to shop anytime in their pocket or purse.

In the store, sales associates are an integral part of the necessary personalization, offering relevant recommendations and offerings. When a customer shops online she still expects that same type of personal interaction. However, a recent study by Salesfloor² indicates there are service gaps between the personalized attention received in the store and the personalization available online. Retailers will need to continue to look for opportunities to merge the digital and physical retail environments to personalize the shopping experience and satisfy their customers wherever they shop.

Customer identification

Customer engagement is key to enhancing the customer's shopping experience, whether online, via a mobile app or in the store. To engage with the customer, retailers need to be able to identify the customer. Therefore, it is imperative to identify the customer as early in the transaction as possible at any touch point. This initiates the dialog and sets the foundation for relationship building. Identifying the customer as they enter the store – via their smartphone, beacon or other technology – affords the retailer the opportunity to personalize the customer's shopping experience. Half of the retailers surveyed plan to utilize customer-identifying technology in the store within two years (**Exhibit 1**).

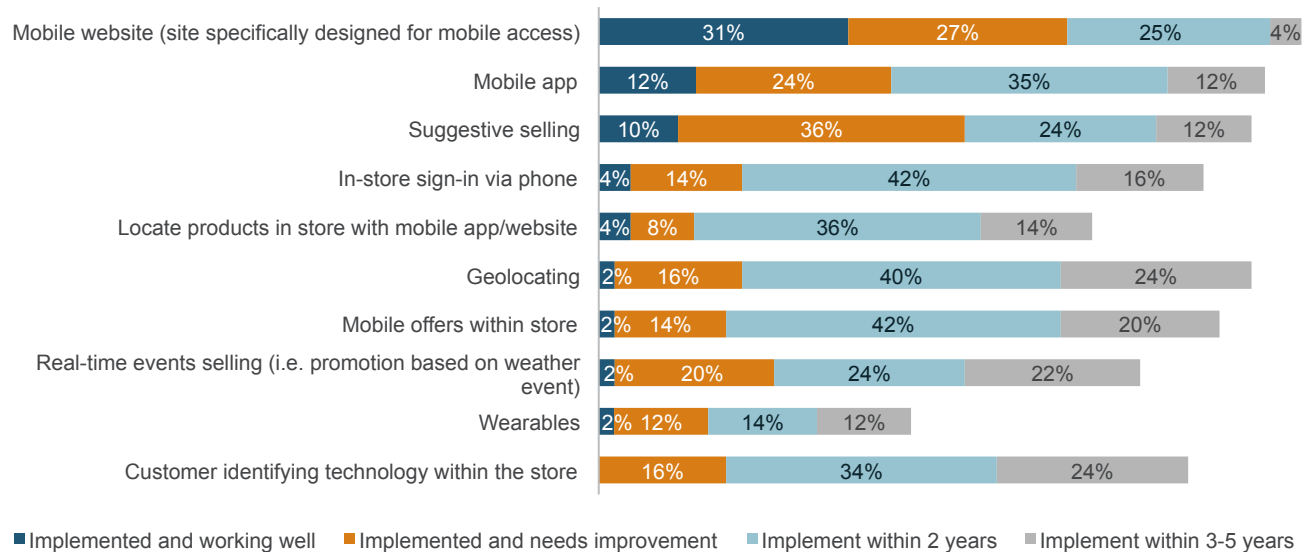
50% 
will have customer identifying
technology within the store in
2 years

Once the customer is identified, understanding her profile, location and the current environmental factors (i.e. time, weather, traffic, etc.) enables the retailer to communicate relevant and contextual messages – what we call customer context communications. Customer context is defined as the interrelated factors of customer insights and environmental conditions that make the shopping experience relevant to the individual customer. This information must be instantly available when a

¹ "2016 Omnichannel Retail Associate," September 2016. <http://salesfloor.net/research-sept-2016/>


² "Ibid."

Exhibit 1
Mobile Capabilities



customer enters the brand's website, mobile app, or store for effective customer engagement. Without this data in real-time, any information provided internally or externally is out-of-date and can be inaccurate and out of context. Retailers must collect, analyze and respond, in real-time, to their customer's interactions across all touch points.

Geolocation is one method retailers utilize in the store to understand where the customer is and automatically provide messaging based on gathered customer insight. Geolocation uses a combination of indoor location-based technologies and a customer's mobile device to transmit her location within the store. This information can be utilized to send promotions or information based on the proximity of merchandise or displays. According to the survey, 58% of retailers plan to utilize geolocation within two years (**Exhibit 1**).

58% 
plan to utilize geolocation
within 2 years

Once the customer has been identified, how the retailer chooses to implement customer engagement is a key differentiator in personalizing the customer experience. In today's digitally focused world, customer engagement has to be holistic and it must transcend channels. Additionally, today's customers are no longer satisfied with a "one size fits all" experience – she expects retailers to put time and effort into establishing and offering a personalized experience.



Ubiquitous

Heightened customer expectations for a personalized, seamless experience require retailers to have the ability to follow the customer's journey as she shops across and among channels.

The pervasiveness and user-friendliness of mobile devices offer tremendous opportunities for the customer to take control of her own retail experience across channels. Mobile purchases are still a small percentage of overall retail sales but are continuing to grow. While purchasing may not be done as often through a mobile device, there is no denying the power of the device as a research and informational tool for customers. Retailers realize that mobile devices are ubiquitous and recognize

that a mobile device in the customer's hands holds tremendous opportunities to enhance the customer experience across channels.

75% 

will host a single shared cart across channels within 3 years

To offer customers the seamless experience they want across channels, retailers need to make it unified and transparent. Customers want access to a single cart to shop across channels and be able to reach their cart via phone, computer, or even in the store. Further, customers want the ability to “start anywhere, finish anywhere” with their shopping cart. The ability to track customer orders across channels and devices is gaining momentum, but having a single OMS to host the shared shopping cart is going to be

essential to deliver the capability across channels that comes from true unified commerce (**Exhibit 2**). Three quarters of the respondents plan to offer a single shared cart across channels within three years.

Mobilization of retail

Expansion of mobile capabilities represents a huge customer engagement opportunity for retailers. Nearly half of the retailers are focused on improving the mobile shopping experience as a top priority. While the main goal of mobile technology from a retailer standpoint may be to drive in-store sales, it is also the conduit that bridges the convergence of the digital and in-store experience. A customer's smartphone is the key to customer identification and personalization of the store shopping experience.

46% 

are improving the mobile shopping experience as a top digital priority

Not surprising, retailers prefer mobile websites to separate native mobile apps with 58% of the retailers offering a mobile website and 36% offering a mobile app. There are a number of retailers who have indicated a desire to offer a mobile app but have not implemented a mobile app yet because they are waiting for the ability to have the app and website share the same code (14%) or waiting until resources and funding are available (26%).

There is a growing trend in the industry to use Progressive Web Apps³, which combine the best of both worlds, offering a mobile web experience that is fast-loading, less data-intensive and engaging in all the right ways. This allows the retailer to offer the desired mobile website with many of the benefits of an app and will likely lead to more retailers optimizing their mobile websites instead of building an app to engage their customers.

Cross-channel services

The customer wants to be able to research, purchase and take delivery wherever and however she wants – she wants to be able to “start anywhere, finish anywhere.” Fortunately, half of the retailers surveyed will offer “start anywhere, finish anywhere” within five years.

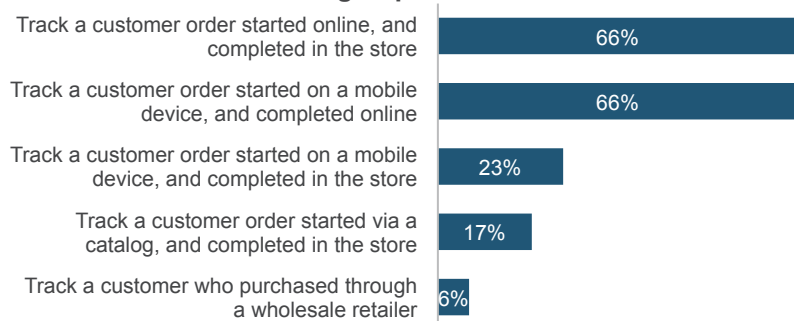
To offer the customer the unified commerce experience she expects, retailers must unify product, pricing and inventory data across the brand and create a “transparent” environment facing the customer. This also places pressure on

50% 

will offer “start anywhere, finish anywhere” within 5 years

Exhibit 2

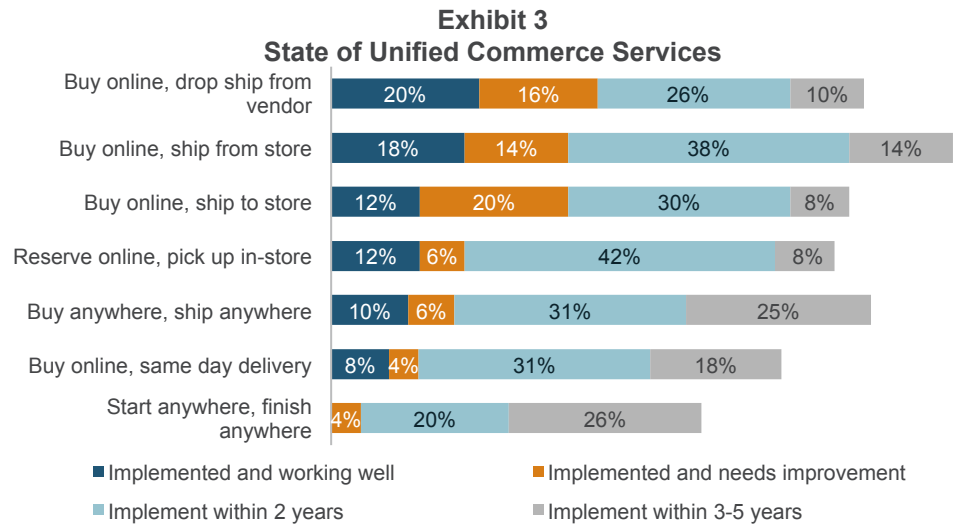
Customer Tracking Capabilities Across Channels



³ “What are Progressive Web Apps?” May 18, 2016, <http://blog.ionic.io/what-is-a-progressive-web-app/>

retailers to offer the flexible ordering and delivery capabilities that are necessary to meet consumers' elevated expectations.

Many retailers have started down the unified commerce path by offering services that provide the expected seamless holistic shopping experience. The ability to “buy anywhere, ship anywhere” is gaining ground, as 72% of respondents plan to offer this capability within five years (**Exhibit 3**). Interestingly, 61% also plan to offer the ability to buy online with same day delivery, which demonstrates the convergence of channels, as customers want the same immediate gratification they get with in-store purchases.



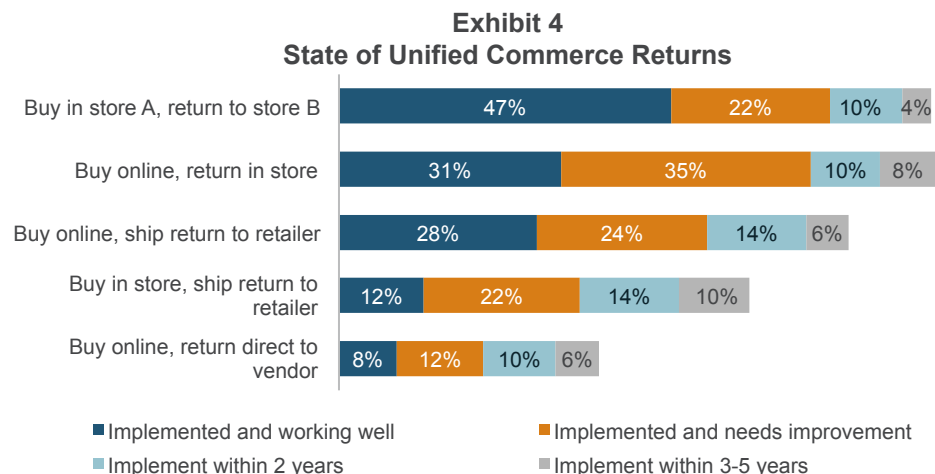
One area that retailers should continue to expand is the option to ship to store so the customer is then more likely to make other purchases when she visits the store to pick up her purchased items. In the UPS survey⁴, 46% of those customers who have utilized the ship-to-store option indicated that they also made an additional purchase at the store. This is a great way to drive incremental sales and enhance the customer's shopping experience.

On the flip side of purchasing, this year we also asked about return capabilities across channels. Two-thirds of the retailers offer the ability to buy in one store and return at another store and the ability to purchase online and return to the store (**Exhibit 4**).

Fulfillment options

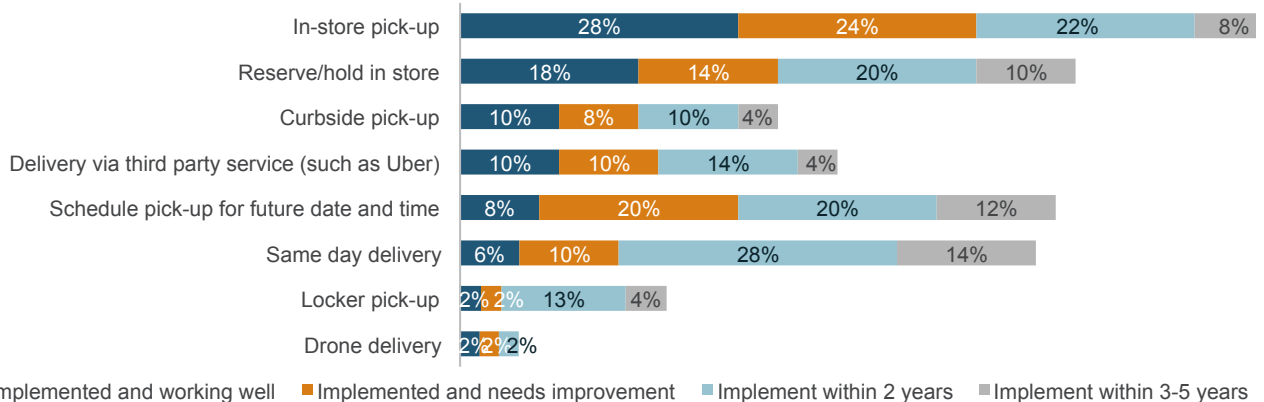
Today's channel agnostic world requires all aspects of the omni-channel fulfillment process to be integrated into a seamless operation. Retailers realize they need to enhance their fulfillment process with 31% of the respondents indicating that enhance fulfillment options is their top digital initiative for the next 12 months.

However, most retailers are still working on creating an optimized seamless fulfillment process. In the meantime, they are offering other ways to enhance the customer experience through various pick-up and delivery options.

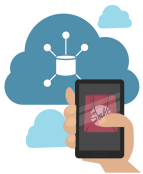


⁴ “UPS Pulse of the Online Shopper,” June 2016. <https://solvers.ups.com/ups-pulse-of-the-online-shopper/>

Exhibit 5
Pick-up/Delivery Options



Retailers are offering additional pick-up/delivery options as they try to bridge across channels and compete with services such as Amazon Prime and Google Express (**Exhibit 5**). Newer areas including same day delivery (16% currently offer) and delivery via a third party service, such as Uber (20% currently offer) are picking up speed as retailers look at different ways to offer customers flexibility to shop, purchase and receive their goods how and when they want.



Unified

Retailers' technology and organization needs to be unified and aligned across channels to offer a seamless and consistent customer experience.

Studies have shown that it costs nearly seven times more to acquire a new customer than it does to keep an existing customer. Another key point to consider is that customers who shop across channels have a 30% greater lifetime value than single channel shoppers⁵. In an age where unhappy customers can publicly blast a brand through social media and reach headline status within minutes, keeping customers satisfied becomes an even higher priority. One of the key ways to increase customer loyalty is to create a consistent brand experience across channels. Our survey confirms this fact, with 56% of the retailers indicating this is their top priority.

56% 

are focused on a consistent brand experience across channels as a top digital priority

As retailers focus on the customer experience, they realize that integrating disparate systems and processes in real-time is extremely difficult and frequently doesn't work very well. Often, retailers are trying to offer customers the services they desire but at a high cost to the retailer, as these processes are inefficient and ineffective. The greatest cost to the retailer is actually the poor customer satisfaction as a result of over-promising and under-delivering on cross-channel services.

Unified commerce platform

A major challenge to retailers today is that when a customer visits a store – which is still generally the desired purchasing location – most of a customer's pre-purchase research and behavior is unavailable to a store associate. This makes personalizing the customer experience nearly impossible. Unified commerce transcends channels and enables store associates to personalize the experience to a customer based on her cross-channel digital footprint.

⁵ "Omni-Channel Shoppers: An Emerging Retail Reality," March 2015, <https://www.thinkwithgoogle.com/articles/omni-channel-shoppers-an-emerging-retail-reality.html>

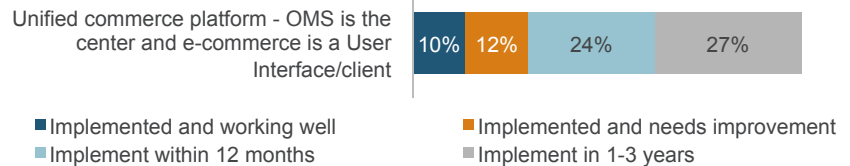
73%

plan to utilize an OMS as their unified commerce platform within 3 years

Integral to unified commerce is a single commerce platform, meaning a centralized platform and single, shared shopping cart for all channels. A unified commerce platform is a single consolidation point for all transactions, inventory, pricing, order management, CRM, call center, etc. This platform provides a single version of the truth across all channels to enable transparency, or the “glass pipeline” of real-time visibility to inventory, product and customer information. This is the nirvana, or end-state, that many retailers are trying to achieve with their customer experience and unified commerce goals.

Unified commerce platforms are becoming a retail imperative as 22% of the respondents currently have a unified commerce platform and by the end of 2019, 73% of retailers plan to have a unified commerce platform implemented (**Exhibit 6**).

Exhibit 6
Organization's Platform Plans



As retailers look to a single commerce platform to meet customer expectations for a seamless holistic shopping experience across channels, many are considering their OMS as the heart of their unified commerce platform to fulfill the persistent order, or “single, shared cart,” requirements.

Order management systems are designed to manage e-commerce orders, complex fulfillment options, and inventory in real-time, and can be adapted to handle transactions across all channels, including the store. Retailers using their OMS as an enterprise-wide order capture hub enable the ability to view and access their customers’ order history, wish lists and purchase behavior across all channels. As retailers look to upgrade or replace their current OMS, this is an opportune time to consider enhancing its capabilities to become the heart of their unified commerce platform strategy.

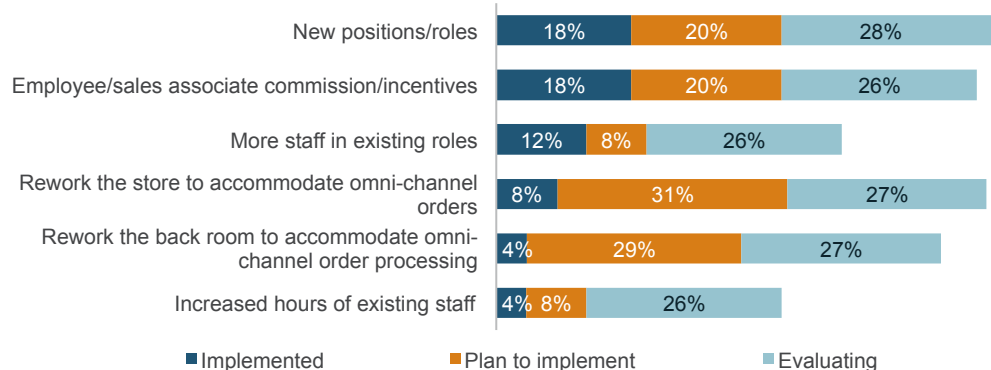
Retail paradigms are changing, forcing retailers to become more innovative to engage and provide service to their customers. The new retail leaders will be the ones who innovate to form a deeper connection with their customer and distinguish their brand. While there are different options available, our survey found that a number of retailers are moving from the traditional model of all solutions residing on-premise, to an updated model where software-as-a-service (SaaS) or cloud solutions are becoming the norm. Last year, only 7% of retailers utilized a SaaS or cloud solution for their order management solution, while this year 20% of retailers indicate SaaS or cloud is the source. We see this movement to the cloud not only increasing, but also accelerating in the next two years.

Solid organization and infrastructure

The right organization and infrastructure are necessary to support the seamless customer experience. For retailers, delivery on the customer experience vision needs to be a transformative enterprise-wide initiative.

We have recently seen a shift in how retailers are arranging their organizations to better

Exhibit 7
Omni-Channel Organization Adoption



serve their customers' needs and differentiate them from pure play online retailers. Some organizations are shifting their e-commerce areas from within the marketing organization to now align with the store organization, or the other way around. The common theme is that the leader of this combined organization is seen as an innovator who understands the unified commerce vision.

The "retail" or "commerce" organization is overseen by a Head of Retail or Chief Customer Officer, who is now in charge of all interactions across all channels and has direct control over any changes or updates to the overall shopping experience. This alignment enables the overall organization to be more nimble and innovative as they work towards a seamless customer experience across all channels.

We asked retailers what types of changes they have made in their organization and infrastructure to adapt to a channel-agnostic environment. 18% of retailers have implemented new roles and employee incentives to accommodate omni-channel tasks such as store-level pick, pack and ship or in-store pick-ups while another 20% plan to implement these features (**Exhibit 7**). Adapting to these new omni-channel services often requires changes to the store infrastructure. According to the survey, 20% of retailers have implemented a shipping station to meet ship-from-store scenarios with another 12% planning to implement this (**Exhibit 8**).

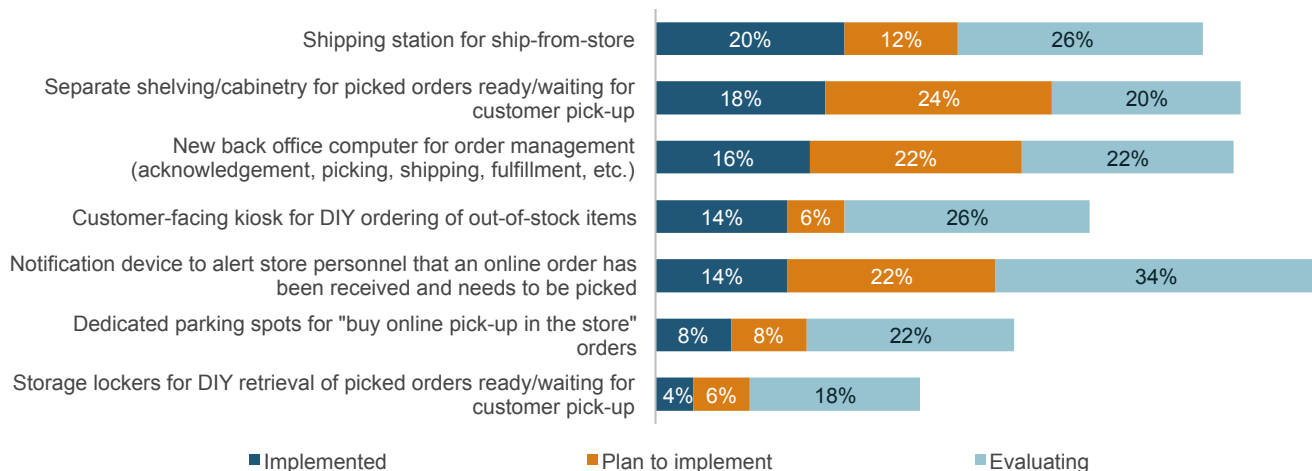
38%  are adding new roles and employee incentives to accommodate omni-channel tasks

One of the challenges retailers face as they try to deliver the seamless customer experience is the organizational change that is necessary to meet today's customer needs. Unfortunately, the cost of doing nothing, or trying to leverage less than effective options, will come with its own costs in missed expectations, disappointed customers and lost sales.

Key metrics

According to a study by Livework, 96% of unhappy customers don't complain, however 91% will instead leave and never return.⁶ This underlines the importance of retailers understanding customer expectations and satisfaction levels. With infinite forums and platforms to air grievances, it becomes even more critical to strive for customer satisfaction with every interaction and transaction. To ensure customer loyalty, retailers need to understand what the customer wants and deliver it. Additionally, retailers need to do everything they can to satisfy every customer.

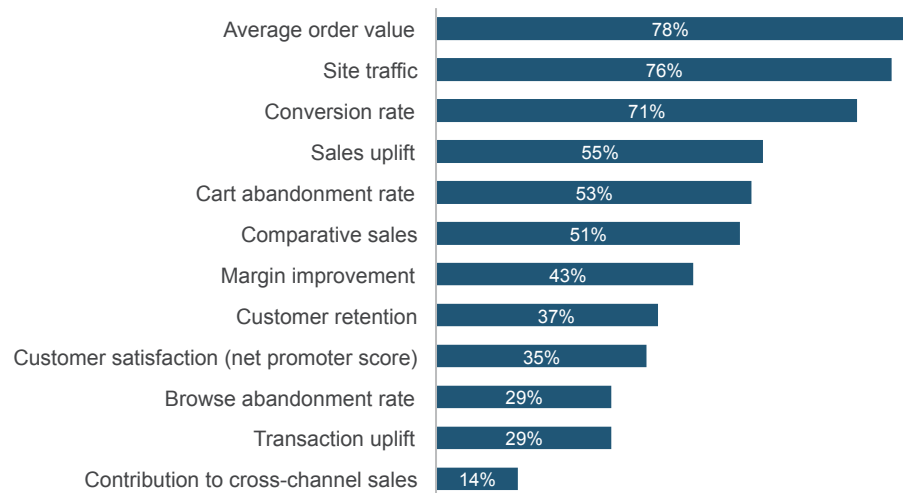
Exhibit 8
Omni-Channel Infrastructure Adoption



⁶ "Customer experience, the key to future business," liveworkstudio, <http://liveworkstudio.com/perspectives/financial-services/>

Retailers' e-commerce program key performance indicators (KPIs) are good gauges to understand what retailers are focusing on to improve the customer experience and sales performance. According to the survey respondents, average order value remains the top KPI from last year to this year **(Exhibit 9)**. Improving the effectiveness of upselling/cross-selling is typically the best way to improve this KPI.

Exhibit 9
E-commerce Site KPIs



We see a trend of retailers shifting from more traditional channel-specific metrics like average order value, site traffic and conversion rates, to metrics focused on customer engagement and unified commerce. Specifically, comparing the findings from this survey to last year's survey, we see an increased focus in the measurement of customer satisfaction and a decreased focus on measuring the utilization of customer retention as a key metric. Overall, retailers are more focused on the omni-channel customer experience and less concerned with single channel opportunities.

Supporting Initiatives

While mobile devices are changing the way that retailers and customers interact in the store and on the go – e-commerce is also a key piece of the digital commerce experience. E-commerce sales are expected to increase for 78% of retailers by the end of this year. It is not surprising that the percentage of e-commerce sales is expected to increase, since e-commerce is still a significantly smaller percentage of total sales than brick-and-mortar. However, e-commerce sales are increasing at a faster rate than brick-and-mortar sales.

Comprehensive e-commerce site

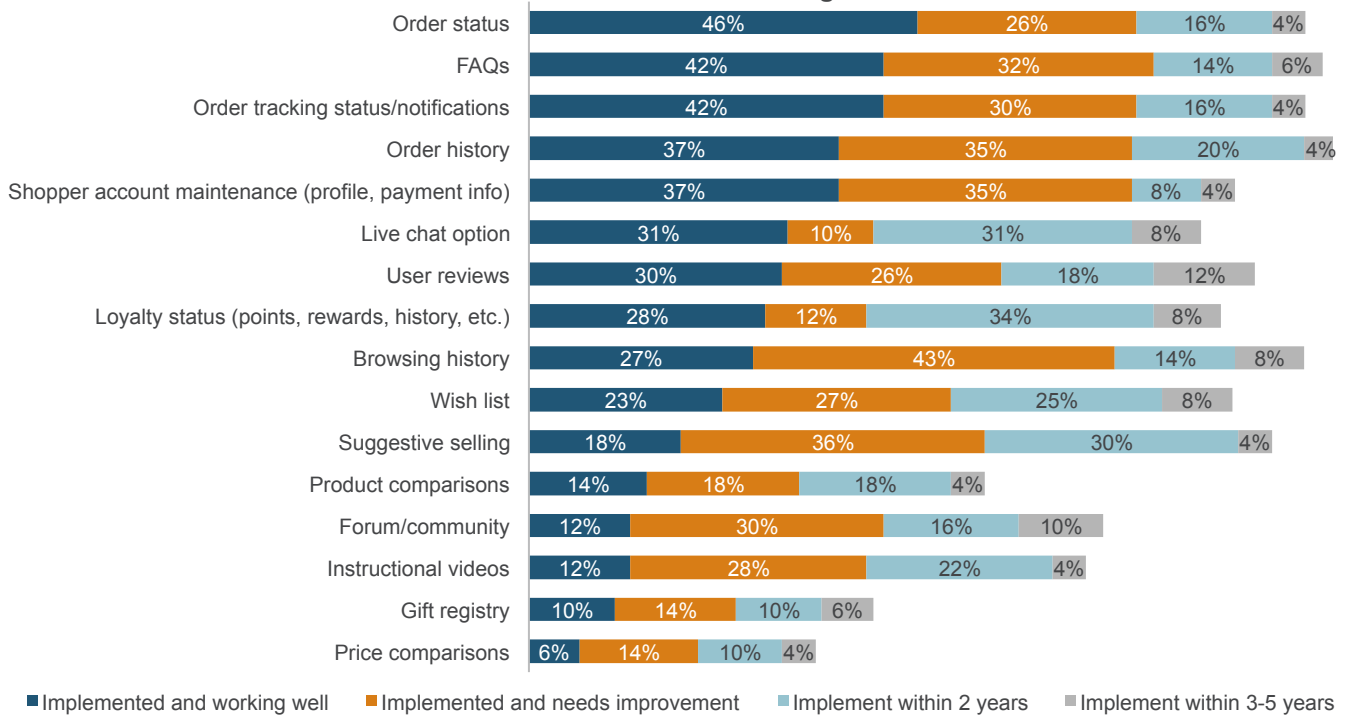
There are opportunities to further enhance personalization of the online shopping experience through the use of user reviews, suggestive selling, and product comparisons on retail websites.

Online shopping is a big part of today's customer journey with 54% having made online purchases in the last three months, according to a recent UPS consumer survey.⁷ Shoppers also tend to find product reviews and consumer photos of products to be influential content when making a purchase decision online.

We asked retailers what type of offerings they had on their e-commerce site to encourage customers to use the site for product research and transactions **(Exhibit 10)**. FAQs were the most popular offering with 74% of retailers offering it. Order status was the second most popular offering with 72% of respondents featuring it on their e-commerce site, although 26% of retailers indicate it needs improvement on their website.

⁷ "UPS Pulse of the Online Shopper," June 2016, <https://solvers.ups.com/ups-pulse-of-the-online-shopper/>

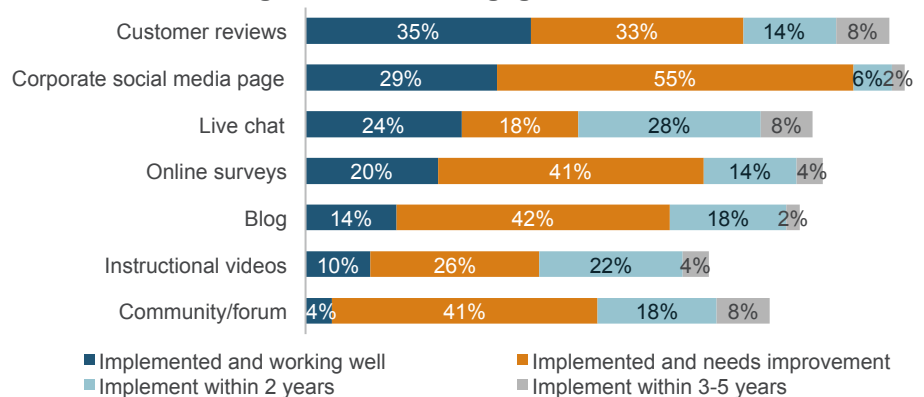
Exhibit 10
E-commerce Site Offerings



Guided or suggestive selling represents another great opportunity and a key component of many retailers' customer engagement strategy. Nearly half of the survey respondents do not currently offer the ability to suggest purchases based on items already acquired or items recently browsed. Suggestive selling is a great tool to drive incremental sales. This is also fundamental in supporting further mobilization of retail and the convergence of online and in-store experiences. Wish lists, suggestive selling, browsing history, etc. need to be available and consistent from one device to the next, across channels and in the hands of in-store associates so the customer can continue the shopping experience seamlessly.

We asked retailers about their online engagement practices and the different methods utilized to drive customers to the digital commerce sites, or to encourage engagement when they have reached the site (**Exhibit 11**). While 68% of the retailers surveyed offer customer reviews online, almost half of these retailers indicate that this feature needs improvement.

Exhibit 11
Digital Customer Engagement Methods



Social media utilization

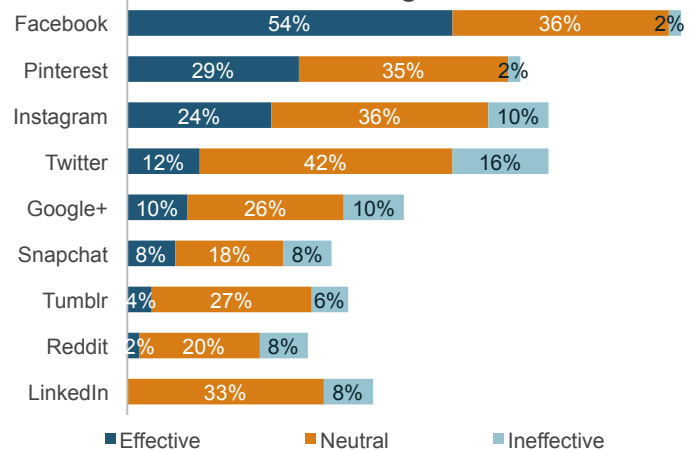
A recent Crowdtap survey⁸ indicated that social media is a popular avenue to engage with Millennials as 71% say that they engage in social media daily. According to survey respondents, 84% of retailers offer a corporate social media page as an

⁸ "Millennials Spend 18 Hours a Day Consuming Media—And It's Mostly Content Created By Peers," March 10, 2014, <https://www.entrepreneur.com/article/232062>

online customer engagement method, however, 65% of those retailers realize this area needs improvement to effectively engage with customers. With many consumers already extremely active with social media, this is a natural way for retailers to engage with customers in the interactive forum they prefer.

As a marketing tool to engage the customer, retailers find Facebook to be the best choice with 54% of the retailers indicating that it is effective (**Exhibit 12**). While retailers don't need to participate in all social media platforms, they need to be active in the forums where their customers and target audience participate.

Exhibit 12
Social Media Marketing Effectiveness



Takeaways

Digital and mobile commerce has elevated shopper's expectations of the customer experience. She expects service anytime, anywhere and any way she wants it. Retailers realize they need a different approach to enable a unified experience, one that supports today's convergence of the digital and physical worlds. The answer is unified commerce.

As retailers aspire to meet customer expectations for a seamless holistic shopping experience across channels, many are considering their order management system (OMS) as a single centralized platform to fulfill the persistent order, or "single, shared cart," requirements. This centralized platform becomes a single consolidation point and provides a single version of the truth across all channels to enable transparency, or the "glass pipeline" of real-time visibility to inventory, product and customer information. This is the nirvana, or end-state, that many retailers are trying to achieve with their customer experience and unified commerce goals.

Unified commerce enables retailers to utilize their digital commerce offerings to contribute to the **personal**, **ubiquitous** and **unified** experience that customers expect.

Next steps

In this rapidly changing environment, retailers recognize the need for unified commerce and to change to meet today's customer expectations but the path of change is not simple. Our advice is to begin the journey one step at a time:

1. Understand how your customers want to engage with your brand and how that differs by customer segments through the use of customer persona's and journey maps
2. Review next year's commerce initiatives to ensure alignment with customer preferences and prioritize those initiatives that build a unified commerce foundation
3. Ensure the organization is aligned (compensation, roles, incentives, KPIs) with offering a seamless customer experience across channels. If you haven't done so already, consider assigning a single executive to own the customer experience for the brand
4. Create a 3-year roadmap to align investment and organizational change initiatives across all selling channels

Survey methodology

BRP conducted the 2016 Digital Commerce Benchmark Survey in June and July of 2016 by contacting more than 500 top North American retailers. Through an online survey system, BRP gained insight into retailers' planned digital commerce initiatives, priorities and future trends.

This paper summarizes the results and key findings of the survey, offers insight based on BRP's client engagements and overall retail experience and identifies current and future trends in the industry to offer retailers opportunities to continue to evolve and prosper.

The primary focus of this survey is the specialty retail segment with 29% of the respondents within the specialty soft goods category and 39% in the specialty hard goods category (**Exhibit 13**). The remainder falls into various other categories such as general merchandise and grocery.

Of the retailers surveyed, the breakdown in size based on gross annual revenue included a broad selection of Tier 1, 2, and 3 retailers with 63% of the respondents generating \$500M or more in annual revenue (**Exhibit 14**).

The respondents were primarily vice presidents or C-level executives.

Exhibit 13
Company Category

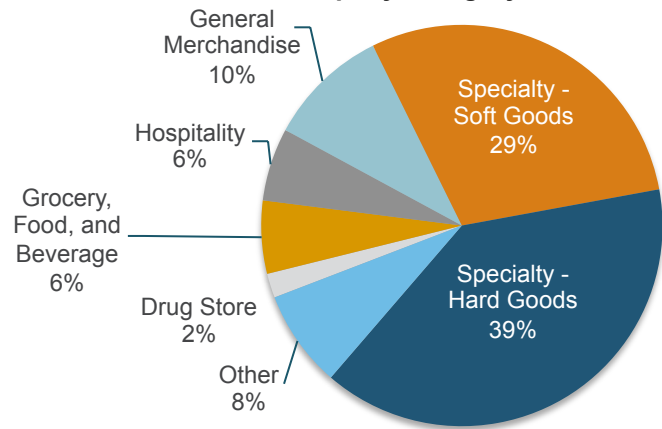
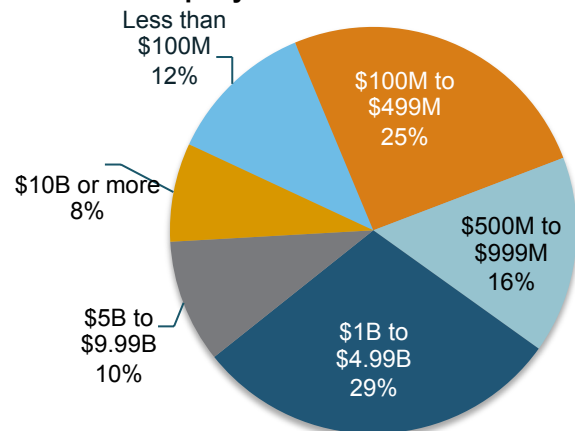


Exhibit 14
Company Gross Annual Revenue





About BRP

Boston Retail Partners (BRP) is an innovative and independent retail management consulting firm dedicated to providing superior service and enduring value to our clients. BRP combines its consultants' deep retail business knowledge and cross-functional capabilities to deliver superior design and implementation of strategy, technology, and process solutions. The firm's unique combination of industry focus, knowledge-based approach, and rapid, end-to-end solution deployment helps clients to achieve their business potential.

BRP's consulting services include:

Strategy
Point of Sale (POS)
CRM
Order Management
Supply Chain

Business Intelligence
Mobile POS
Unified Commerce
E-Commerce
Networks

Business Process Optimization
Payment Security
Customer Experience & Engagement
Merchandise Management
Private Equity

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