Special Report

Four Critical Elements of Retail Supply Chain Success

HighJump SOFTWARE

Introduction

Retailers often struggle with trying to discern why a particular market approach is not driving more traffic and sales into their online and brick-and-mortar stores. Often, the search for answers involves looking at incentives/promotions, pricing, product mix, availability, and the like. They may also look into their branding and messaging. Yet, rarely do they step back from all the details to assess the situation from a different perspective—one that includes the role of the supply chain in determining success.

Kanbay Research Institute (KRI) published a study to provide this perspective. First executed in 2005[1] then updated in 2006[2], this study was undertaken to identify the emerging needs and desires of retail consumers and measure how well today's market is delivering against them. When measuring desires, the research combines the power of how consumers view retailers from three unique views: Functionally, Emotionally and Economically. These views encompass the areas of consumer decision-making at the start of the shopping process, often before the consumer is even consciously aware of what's happening. Consumers make a complex set of trade-offs to finally decide which stores to visit and where to make a purchase. They cover well-known areas such as quality, safety and pricing, and lesser-known areas such as trust, precision and connection. Most of us know that these trade-offs are being made and are critical to success, but we have never been able to quantify them—and thus develop well-supported, data-driven plans to address them—until now.

One important component underlying all of these retail insights is the supply chain infrastructure that supports each retailer's ability to get the right products to customers. The network of suppliers, manufacturers, co-packers, distribution centers and transportation providers involved in moving goods around the world can be as complicated as it is extensive. The right types of software, material handling equipment and supporting technologies simplify the processes involved in creating, storing and transferring these products.

Four Critical Elements of Retail Supply Chain Success

What You Will Learn in This Report

The objective of this report is to provide all players in the retail supply chain—retailers, suppliers, and service providers alike—with new insights into:

- What drives customer demand in today's retail environment?
- Which retailers are leading the pack with regard to delivering against known customer desires?
- What role does supply chain technology play in meeting those desires? How are the top performers leveraging these tools?

Specifically, we will discuss four key insights gleaned from this research where supply chain strategy is critical. We will recommend steps that forward-thinking retailers can and should be taking in today's ultra-competitive operating environment to exploit these findings.

1. Robust growth in multi-channel retailing requires flexibility and consistency.
2. Because price remains king in the battle for customer dollars, cost control is essential to maintaining profitability.
3. Promotions really do work, as long as products are available when required.
4. Customers expect a wide variety of the latest styles and brands, requiring precise management of lead times.

1 Retail Demand Today: Emerging Consumer Desires in the Retail Sector, 2005 Edition, Kanbay Research Institute (KRI).

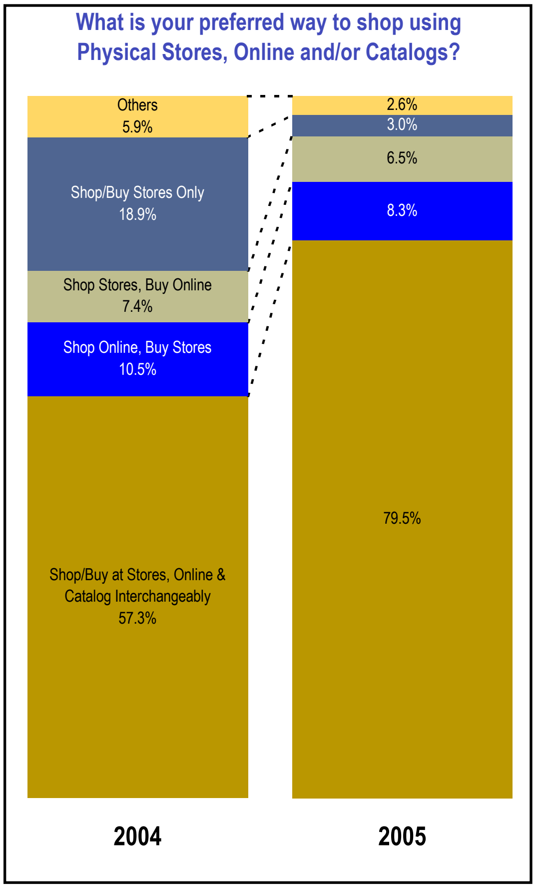
2 Retail Demand Insights: What Drives Consumers?, 2006 Edition, Kanbay Research Institute (KRI) in partnership with the National Retail Federation (NRF) and SAP.

1. Robust growth in multi-channel retailing requires flexibility and consistency.

Consumers increasingly use multiple channels to satisfy their shopping needs. While more than 97% of consumers surveyed stilluse the physical store in some way to shop or buy merchandise, no retailer should be thinking "physical store" only. Empowered by ever-increasing access to information and competing products and services, consumers are redefining the business context of retail. They have become comfortable shopping, ordering, receiving and returning retail products through a wide variety of channels—stores, catalogs, Web sites, call centers and e-mail.

From 2004 to 2005, Kanbay's research showed a 22%+ increase in this integrated shopping experience to nearly 80% of all shoppers (Figure 1). Successful retailers simply must be able to manage their supply chain operations seamlessly within the appropriate channels to ensure the customer experience remains positive. This presents a significant challenge for retailers that do not tightly integrate their sales and inventory channels. Consumers expect products to be available when they look for them, and only retailers that consistently deliver on customer expectations will win more business and create loyal consumers over time. Clearly this is not a trivial task. Luckily, it is no longer as difficult as it once was with the availability of integrated supply chain software and related technologies that link once-disparate manufacturing and distribution operations throughout global supply chains.

Fig. 1: Rise of Multi-Channel Retailing



Multi-channel distribution and demanding consumers have caused unprecedented pressures on retail distribution. Today's advanced retailers must fulfill orders for their stores and end customers at the same time in order to pool inventory and decrease distribution costs. Inventory availability and distribution must be well-synchronized across all channels—Web, catalogs, stores, call centers and e-mail—so each customer has a seamless experience at every point. Ensuring the buying experience is pleasant for the customer and profitable for the retailer is where supply chain execution software plays a key role. The ability to create cross-docking/flow-through operations, leverage advanced order-fulfillment capabilities such as wave planning, and optimize store distros are key considerations when evaluating the supply chain execution technology that supports the retailer's ability to deliver on customer promises. This type of functionality as part of an overall adaptable supply chain execution system is critical for retailers to protect the value of the brand names they've worked hard to build.

For consumers to have a positive, consistent experience in terms of shopping, purchasing and returning products, the software behind the scenes must manage a variety of order profiles and the associated step. This is true whether the items needed belong to an individual parcel order or a full truckload shipment for store #15 two states away. For example, an order initially placed online or through a catalog call center might be packaged with a promotional insert and a return shipping label. A warehouse management system (WMS) directs the creation/insertion of these items when appropriate according to pre-established rules. Likewise, returns processing is also essential for retailers, particularly those using online and catalog channels. Return rates average 6% overall and can reach as high as 30% for some product lines such as fashion apparel[3]. The WMS needs to receive this merchandise, direct employees through the appropriate quality/inspection steps, and then manage the put-away process for salvageable items.

Many retailers manage incredibly high-volume operations when it comes to their supply chains. A sophisticated, demand-driven supply chain built to adapt quickly to new requirements and scale to mange large volumes often leads to competitive advantage. At every step, retailers must maintain flexibility to support multiple distribution channels—as well as the unique requirements of their overall supply chain. The popularity of each channel may change with the season or slowly over time. Although traditional stores might be a staple today, the online channel continues to grow. Many retailers now generate online sales equal to those in their stores, with online sales climbing to new levels during peak holiday buying periods. The ability to adjust tactics quickly enables fast response to changes, whether expected or not. Supply chain execution solutions that support the need for operational changes without the extra cost or long lead times involved with custom code-based modifications become essential for fast-paced environments.

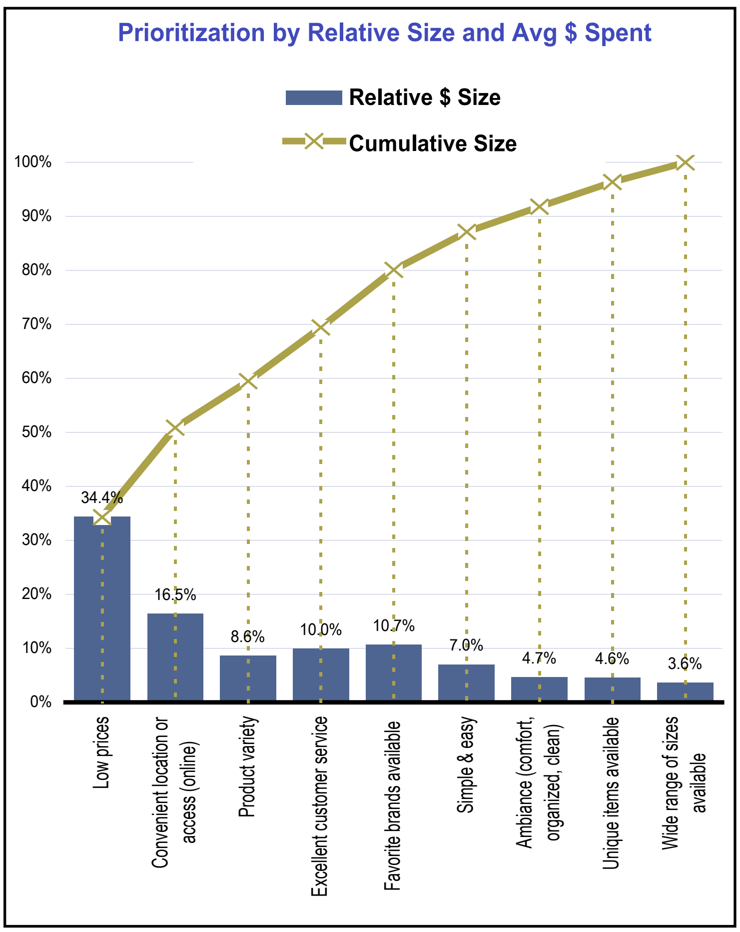
3 Reverse Logistics Executive Council (RLEC), University of Nevada, Reno.

Leading the Pack: Circuit City[4]

Circuit City Stores, Inc. is a leading specialty retailer of consumer electronics. The domestic segment operates 630 Superstores and five other locations in 158 U.S. media markets. The international segment operates through 951 retail stores and dealer outlets in Canada. The company also sells products through its online store. In addition to flexibility, scalability and adaptability, Circuit City requires supply chain execution solutions that not only address current business issues simply and cost effectively, but also respond to future changes in business and customer requirements. For Circuit City, its supply chain execution solutions are a component that will help it meet strategic long-term business goals. In fact, Philip J. Schoonover, president and CEO of Circuit City Stores, noted the importance of a well-run supply chain when the company released its financial results in April 2006. "For the fourth quarter, we continued to see strong sales growth and also delivered a year-over-year increase in gross profit margin as we managed our supply chain more effectively."[5]

The company leverages a WMS in nine facilities. Its distribution centers ship millions of packages each day. Because of this, it must rely on a supply chain execution solution that is adaptable and flexible enough to meet stringent business criteria and ensure end-to-end customer satisfaction. Circuit City views every component of the supply chain as its 'customer base.' The end goal, of course, is to deliver unparalleled customer service.

Fig. 2: Primary Retail Demand Drivers



2. Because price remains king in the battle for customer dollars, cost control is essential to maintaining profitability.

So what motivates a customer to buy? Kanbay found the overwhelming response to be "Low Prices." Figure 2 describes the primary retail customer demand drivers and the potential revenue "opportunity" afforded to retailers for meeting those desires. Opportunity is defined as the average customer's willingness to pay more, and how much more, if the specific desire is met. The cumulative size provides a way to look for the answer(s) with the biggest bang for the buck and invest accordingly. According to this research, almost 35% of the revenue opportunity today rests in keeping prices low relative to the competitors operating in your respective retail sector. It is important to keep in mind, however, that "low prices" and "lowest price" are not the same. Wal-Mart does not guarantee the lowest price everyday, but only low prices everyday. This means retailers must price their goods in an acceptable range to win shoppers. Given today's environment of increasing interest rates, rising gas prices and general economic uncertainty, this is understandable.

It is also important to note here that low prices are only part of the story. Price consistency across channels is also critical. In the 2006 Kanbay study, the only thing more important than convenience, promotions, and variety was fair and consistent pricing across all channels. Two thirds of the consumers surveyed reported this to be the most important component influencing their perception of a given retailer. The ability to offer promotions does not negate a retailer's responsibility of keeping prices consistent from one channel to the next (Web, store and catalog) and among geographic regions. In terms of pricing, retailers and other large enterprises have typically enjoyed the advantage of asymmetric information, where one party has better information than the rest. But as pricing becomes more and more transparent through Web sites and other mass media, the concept of fair pricing is a growing issue across most industries that Kanbay studies. Consumers have gone to great lengths to dismantle the airline industry's pricing structure year by year, and the automotive industry is heading in that direction as well. Retailers must take care to keep their pricing consistent and fair in order not to be compared negatively with those industries. Successful retailers will adopt a fair pricing practice over the long term.

4 HighJump Software press release, July 10, 2001.

5 Circuit City press release, "Circuit City Stores, Inc. Reports Fourth Quarter and Fiscal 2006 Results." April 12, 2006.

To keep prices low, retailers across all segments are looking to their supply chains for help. Global sourcing programs, offshore manufacturing and assembly, and innovative supplier initiatives such as vendor-managed inventory (VMI) programs and inventory consignment arrangements are becoming more and more prevalent. Changes in the regulatory environment are also having an impact on the industry. As textile quotas created by the World Trade Organization (WTO) are gradually eliminated, an increasing amount of apparel sold in the United States will be made abroad. In fact, already more than 50% of apparel sold in the U.S. is made abroad[6]. This creates significant challenges for retailers in that:

(a) Extended lead times that account for transportation are required for manufacturing orders (holiday season products may now be ordered as early as March/April).

(b) Longer lead times mean retailers must develop increased supply chain flexibility and postponement strategies to support service-level requirements.

When it comes to establishing supply chain goals, many executives can boil their requirements down to two key concepts. First, supply chain operations must ensure customers receive complete shipments on time, every time. And second, this must be carried out in a way that maximizes profitability for the business. Ultimately, supply chain execution technology that helps retailers accomplish these goals forms the basis for lower prices at the consumer level.

An efficient, well-managed and demand-driven supply chain gives retailers the ability to eliminate wasted time and excess inventory, two major areas of cost. Considering all aspects of the supply chain from source to consumption—and implementing integrated software that's able to communicate changing needs, status and other information in real time from one point to the next—is a highly effective method of linking once-disparate operations and reducing costs throughout. Systems that shed light on all aspects of the supply chain help reduce guesswork that leads to higher costs, stock-outs, backorders and dissatisfied customers. Suppliers, manufacturers, warehouses/distribution centers and transporters should all be brought together with the right supply chain execution software. Systems that work to optimize activities involved with each of these supply chain nodes will provide a new level of control and cost reduction, ultimately leading to stronger profitability levels.

Companies across every industry are realizing that today's supply chains involve global complexities. Although offshore sourcing and manufacturing is prevalent for many retailers, the impact of long lead times and loss of visibility into the status of goods is costly—not to mention risky when dealing with highly seasonal items that need to be available when expected. Web-based supply chain execution systems—most notably supplier enablement applications—provide retailers and the partners in their supply chain network with real-time visibility. Before the advent of the Internet and smart systems, offshore suppliers had to be equipped with fat client, complex systems (i.e., EDI) in order to provide meaningful inventory visibility to retailers. Now a simple browser can suffice for all parties to view min/max levels, communicate anticipated replenishments or send notification of delayed or early arrivals.

Leading the Pack: 99 Cents Only Stores[7]

99¢ Only Stores is a unique, deep-discount retailer of primarily name-brand consumable general merchandise at an affordable, single-price point. From its first store opening in 1982, the company's chain of 99¢ Only Stores has expanded to hundreds of stores in California, Nevada, Arizona and Texas. Given the company name, raising prices is not an option for 99¢ Only Stores. Because of this, robust supply chain execution functionality—especially in the area of receiving—and a high level of system adaptability are necessary to drive complex, high-volume operations.

99¢ Only Stores' business model is based on a lot of opportunistic purchases. Because of this, buyers have to be flexible to quickly purchase the right items, and the company's supply chain has to be extremely agile to support this dynamic environment. The company leverages integrated functionality for warehouse, yard and event management, as well as supply chain visibility. It also combines material handling automation, voice-directed picking and wave planning to move inventory quickly through the distribution center.

Through an innovative approach to supply chain execution, 99 Cents Only Stores has achieved real-time inventory control and an efficient receiving process. Its flexible software allows employees to create processes unique to the business. For example, even when there is no advance warning of incoming items, employees are still able to move goods through the facility very quickly and efficiently.

Finance will be interested in the link between the system and bottom-line performance as well as metrics such as return on investment (ROI) and total cost of ownership (TCO). Upfront system costs will also be a factor, especially if you are discussing a best-of-breed system versus an add-on module to your existing ERP.

6 Inboundlogistics.com, November 2005.

7 HighJump Software's 99 Cents Only Stores case study, 2004.

Fig. 3: How Do Sales & Service Drive Perception

Key Respondent Data

	Size	Average Basket Size in $	Pay % More	Win Rating
Frequent Promotions	38.9%	$71.69	4.2%	93.00
Gift/Reward Programs	25.3%	$60.55	2.6%	93.02
Exchange products easily	18.4%	$59.43	3.0%	93.14
Gift Certificates	10.1%	$87.48	4.7%	95.15
Assist with Child Needs	3.3%	$77.03	3.0%	94.84
Personal Consultation	3.3%	$103.16	5.4%	94.87
Come to home with Products	0.7%	$132.14	5.3%	91.02

3. Promotions really do work, as long as products are available when required.

When consumers were asked what was the single most effective thing retailers could do from a sales and service perspective to improve their overall perception to that customer, more than 64% responded with "Frequent Promotions" or "Gift/Reward Programs" (Figure 3).

Further confirming the importance of promotions and customer loyalty programs, more than 54% of consumers who participated in the 2006 study indicated they would be influenced to spend MORE at a retailer if they were receiving gifts or rewards for being a long-time, loyal customer. With their loyalty, consumers are looking for retailers to know that "I only buy from your store, and I've been buying from you for years."

Throughout the supply chain, the ability to adapt processes to meet changing needs is critical to effectively manage promotional item handling. Demand spikes often require creative handling of orders. Retailers need systems in place to respond quickly across all distribution channels.

The flexible supply chain execution systems which many progressive retailers have implemented allow them to deal with the multitude of promotional activities in today's environment. Forecasts are often unreliable when it comes to predicting volume requirements, especially for promotional events. Today, building a supply chain lean enough to work based on demand is a more efficient, cost-effective method of delivering goods that consumers want in a timely fashion. Even sudden bursts of demand can be managed flawlessly if suppliers, manufacturers, distribution centers and transporters are able to communicate in real time about their forthcoming requirements.

Integrated supply chain execution suites are built for just this purpose—to connect all of the dots in the supply chain with a smooth flow of inventory and information. This helps retailers support just-in-time practices that keep the amount of inventory in the channel at the lowest possible level, thereby reducing costs for all involved. In particular, supplier enablement solutions break down communication barriers in worldwide supplier and distribution networks, allowing for visibility into in-transit status, communication about lead times, and activities such as labeling that can occur before shipments reach the DC. The result is that whether an item is a component of a promotion or an everyday staple, the supply chain can quickly and easily handle its distribution.

In addition to a well-linked supply chain, there are particular types of functionality that support the finer details of promotional programs. A WMS equipped with kitting, assembly, bundling and other value-added services handling capabilities is key to creating unique combinations of products used for a short time period. Likewise, leveraging cross-docking for inbound shipments that don't require special handling within the warehouse or DC can speed delivery to retail stores.

Leading the Pack: Overstock.com[8]

Overstock.com, Inc. is an online "closeout" retailer offering discount, brand-name merchandise for sale over the Internet. The company gives customers an opportunity to shop for bargains conveniently, while offering suppliers an alternative inventory liquidation distribution channel. Overstock.com implemented a WMS in 2001 to successfully manage the picking, packing, receiving and delivery operations of thousands of fast-changing SKUs. The nature of Overstock.com's business means it has a dynamic inventory, with many thousand SKUs in the warehouse at any given time. Warehouse management personnel rely on the speed and accuracy of fully automated fulfillment processes along with real-time visibility of inventory and order status. The company uses reporting tools to monitor team and individual productivity. The WMS allows employees to track the inbound inventory and manage rapidly changing inventory more easily and efficiently than ever before.

4. Customers expect a wide variety of the latest styles and brands, requiring precise management of lead times.

Today, the importance of merchandising as a differentiator among retailers is increasing. This is evidenced in Figure 4, where more than 47% of consumers surveyed reported that offering a "Wide Variety" or "Popular Styles and Brands" were the most important things retailers could do from a marketing/merchandising perspective to best improve their perception to that customer. That said, a wide variety of inventory left at the end of the season to mark down is not an attractive condition either. So, although difficult to achieve, it is increasingly critical for retailers to have the right product assortment at the right time.

Fig. 4: What Role Does Merchandising Play?

Key Respondent Data

	Size	Average Basket Size in $	Pay % More	Win Rating
Talk to Customers More	33.4%	$67.04	3.3%	91.15
Wide Variety	28.4%	$68.42	3.2%	93.72
Popular Styles and Brands	18.9%	$74.34	4.5%	94.04
Fun advertising theme	8.7%	$76.35	4.0%	96.63
Offer private label	5.7%	$60.17	3.9%	96.43
Co-brand/Co-deliver with other retail providers	3.4%	$86.61	4.1%	92.23
Use a celebrity spokesperson	0.8%	$73.44	4.8%	96.71
Use their CEO as the spokesperson	0.7%	$52.86	1.2%	103.38

In the past, some retailers have used supply chain proficiency to differentiate themselves. In fact, recent statistics suggest that retailers have never been better as an industry at moving product from place to place as they are now. New enabling technologies, such as RFID in particular, are leading to even greater visibility, shorter lead times, and further improvements in overall inventory effectiveness. But are they moving around the right product? Will the merchandising teams be capable of managing the business in a shorter lead time environment? Even the most nimble and advanced supply chains can suffer under the weight of over-assorted conditions, or underachieving categories. The increasing sophistication, speed and effectiveness of retail supply chain operations will place a closer lens on the decisions of merchants and the implications of those decisions.

The impact of SKU variety and seasonal inventory shifts is felt throughout the retail supply chain. Speed of operations is key. Products need to be on store shelves or ready for online ordering quickly. For some retailers, this means getting the latest 'hot' item in their stores or online quicker than their competition. More and more retailers are realizing the benefits of having a distribution center instead of a warehouse to speed operations. Using a WMS to create an optimal flow-through environment that leverages cross-docking is a component of this. A smart supply chain execution system can marry inbound merchandise with outbound orders quickly and in the most cost-effective manner.

Likewise, coordination with a variety of worldwide suppliers and manufacturers is essential to getting the product assortment desired in a timely manner. The flexibility to receive goods quickly is essential. Supplier enablement functionality enables retailers to push activities such as labeling to their suppliers, so shipments come in without needing additional processing. Retailers often coordinate with different types of suppliers as well, ranging from small mom-and-pop shops to large manufacturers. Linked systems that share information will help with the process of scheduling lead times and communicating any delays or the status of expected shipments.

Customer choice also means that product lifecycle management becomes an everyday consideration. A constant influx of new merchandise translates into the need to discontinue older items. An agile, demand-driven supply chain allows retailers to complete the operational steps required as products enter and exit the supply chain. This includes coordinating raw material requirements with suppliers, production with manufacturing facilities, appropriate slotting, picking and packing in the distribution center, and finally changes in transportation required to get products to their destination.

8 HighJump Software's Overstock.com case study, 2001.

Speed is often the key driver in all of this. When new products come into the supply chain, businesses must be able to coordinate all aspects of production, warehousing and distribution to make sure they are available as quickly as consumers want them—especially when marketing campaigns have specified launch dates for new items. Likewise, when older products are no longer needed, they must be processed for clearance and phased out efficiently.

Leading the Pack: Kirkland's[9]

Kirkland's, Inc. is a leading specialty retailer of home décor in the United States, operating 310 stores in 37 states. Kirkland's relies on supply chain execution solutions for warehouse management, yard management and management visibility. The company operates complex, high-volume operations on a flow-through model to route inbound shipments rapidly to stores. Kirkland's leverages its solutions' ability to be configured quickly and cost-effectively to accommodate unexpected changes that result from an ever-transitioning product line. New products arrive daily at Kirkland's, and between 60% and 70% of SKUs in inventory are new at any point in time. Kirkland's streamlines inbound and outbound operations for these SKUs with a yard management system. The company has increased control and security over inventory and trucks in the yard through improved trailer check-in and check-out, verified yard passes, and appointment scheduling.

Leading the Pack: Quiksilver[10]

Quiksilver's primary focus is apparel, footwear and accessories for men, women, boys and girls under the Quiksilver, Silver Edition, Fidra, Roxy, DC Shoes, Raisins and Radio Fiji labels. Quiksilver also manufactures snowboards and snowboard boots. The company operates two distribution facilities in Southern California and sells products through more than 2,000 surf shops, specialty stores, Quiksilver retail stores and major department stores worldwide.

Quiksilver is a very dynamic organization with many changing business practices. As Quiksilver extends its solution to new warehouses, adds product lines or takes on new customers, in-house staff can quickly make necessary system changes without disrupting operations. The flexibility of Quiksilver's supply chain execution system has allowed the distribution management team to explore creative ways to push merchandise through the facilities faster. By designing and implementing a cross-dock function called "hot pick pack," Quiksilver marries inbound items with outbound orders, allowing customers to get popular merchandise quickly.

Additionally, Quicksilver has configured its system to meet a particular need involving a process called "pack and hold." With clear visibility into customer orders and shipping times, the WMS directs staff to pick, pack and hold until a customer's shipping window opens. The company's supply chain execution system allows employees to plan outbound shipments with great precision. This way they are prepared to release the shipment when the customer's shipping window opens, and product gets to the store right away.

What Role Does Technology Play?

Technology has shifted from a traditional, one-dimensional use of information to a more sophisticated toolset that leverages information in a multi-dimensional relationship to help retailers satisfy the more technology-savvy customer. Supply chain execution (SCE) systems link supply chain partners with integrated tools for optimizing the flow of inventory, information and other resources worldwide.

Product identification has also made a move as RFID technology begins to replace the bar code, oftentimes co-existing alongside it. RFID technology is transformational and promises dramatic improvements in item-level visibility across the supply chain. This visibility should ultimately reduce the likelihood of out-of-stock events as well as shrinkage. That said, RFID remains an emerging technology and is currently in pilot stages with early adopters. As software, hardware and tag costs decrease, and communication frequencies converge to a standard, retailers should expect rapid adoption of RFID across all sectors.

Demands for data synchronization are increasing in the industry between retailers and suppliers. Technologies such as advance shipping notices (ASNs), RFID and direct supplier collaboration/enablement systems are providing new opportunities for communication and proactive information sharing. Retailers expect cleaner data as well as standard/uniform product descriptions to achieve results such as efficient delivery truck loading, reduced order discrepancies and increased likelihood of correct product stocked on store shelves. As an example, P&G estimates saving more than $1 million annually in administrative costs by synchronizing data with Wal-Mart[11].

9 HighJump Software press release, March 29, 2005.

10 HighJump Software Quiksilver case study, 2005.

11 InformationWeek.com, May 30, 2005.

The Customer Has Spoken. So Now What?

So what does this all mean? To summarize recent consumer research: brand, responsiveness, culture and price are all key desires that must be met by retailers. Today, consumers struggle to find balance across all four desires, ultimately leading them to shop across a variety of channels. Department stores, mass and Internet merchants have focused on streamlining their supply chain operations, so consumers rate them highly in both responsiveness and price. Specialty apparel retailers focus on fashion and customer service to hit the mark on brand and culture desires. Successful apparel retailers either excel in delivering on two desires or expand their offering to include more (e.g., 3 or 4) of the key consumer desires. Companies that can achieve a greater balance and/or excellence in meeting multiple consumer desires will continue to increase sales and market share until others can adapt their operating models.

The balance of power is clearly shifting in favor of the consumer, and the role of the retail supply chain in delivering on expectations of price, quality, selection and availability has never been more important. Flexibility to meet new requirements is key. Today's increasingly sophisticated retail customers are demanding a wide array of the latest products at lower and lower prices offered through a variety of channels. And they are getting it. This shift represents a tremendous opportunity for progressive, forward-looking retailers to leverage the power of their supply chains to capture market share and create distance between themselves and their competitors. However, those retailers too slow to embrace the new approaches, techniques, capabilities and technologies will certainly hinder their own growth potential. Where will your organization fit in?

About HighJump Software

Forward-thinking companies entrust HighJump Software to power their supply chains. HighJump Software simplifies the art and business of creating, selling and moving products across global networks. HighJump Software helps more than 1,300 clients worldwide drive growth and manage change.

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