

# THE EVOLUTION OF RETAIL



2017 OMNI-CHANNEL FINDINGS REPORT

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# Introduction: The Evolution of Retail

MJD has spent the last two years researching, designing, and developing mobile, web, and in-store experiences for major retail brands (American Girl, Disney Parks, Electrolux, Stride Rite, Oakley). Over the course of that span we've found several thought provoking insights that have guided our omni-channel strategy and executions.

This document is a compilation of those findings along with our perspective on digital evolution in the retail category. Our hope is that the trends and our take on them shines a new or different light on the challenges you may be facing, and offers a new perspective to solving those challenges.

# The Evolution of Retail

The increase of digital interactions in the customer shopping journey means a detailed and functioning omni-channel program is no longer a luxury for retailers and brands - it's a requirement.



## THE CONNECTED CUSTOMER

Digital devices and content have been woven into the shopping experience. Not only does digital provide guests with product information, recommendations and price comparison; it adds a layer of deeper brand connection, entertainment and community while in the store.

**76%**

*76% of consumers surveyed interact with brands or products long before stepping into the brick-and-mortar store, and are therefore making digitally influenced decisions much earlier in the shopping process.<sup>2</sup>*

**50%**

*50% of shoppers are using digital while in the store.<sup>1</sup>*

**62%**

*62% say the information on their phone is more important than the in-store product displays.<sup>1</sup>*



## CUSTOMERS TODAY EXPECT CONSISTENCY ACROSS CHANNELS

Therein lies the challenge. How does a brand create a manageable and memorable retail experience with multiple channels and millions of individual customer preferences? Customers expect consistency whenever they connect with a brand. The entire guest experience, digital and physical, should remove any friction in the purchase process.

**61%**

*61% of customers have not been able to easily switch from one channel to another when interacting with customer service.<sup>3</sup>*

**50%**

*50% of those who opted to buy online and pick up in-store encountered problems in 2015.<sup>4</sup>*



## **PEOPLE POWER**

What if we could switch our concentration from the store and its products to the guest and their experiences? What would that look like? How would it differ from where you are today? What would it take to get there?

Doing this requires that your mobile apps, websites, physical stores and every brand expression are working together in a true omni-channel program from the perspective of the customer.

**That is the goal.**



## **THE STORE IS NO LONGER THE FINAL DESTINATION**

Apple's Genius Bar occupies a significant area of the store but it's not dedicated to purchase. Its role is customer education, service, and loyalty. Starbucks has turned all of its coffee shops into micro-fulfillment centers powered by their 'Order & Pay' app. Google's new pop-up shop is a store with no physical products for sale. The traditional role of the store has been disrupted. The physical space is now an adaptive tactic that can be optimized to meet needs at several points in the customer journey.



# Key Elements of the ‘Store of the Future’

“ *Digital interactions influence 56 cents of every dollar spent in retail stores, totaling \$2.1 trillion by the end of the year – up from 14 cents of every dollar spent in 2013.<sup>2</sup>* ”

→ **A GUEST-CENTERED OMNI-CHANNEL APPROACH**

→ **MOBILE AS THE GREAT CONNECTOR BETWEEN  
PHYSICAL & DIGITAL SPACES**

→ **A PERSONALIZED BRAND EXPERIENCE**



## GUEST-CENTERED OMNI-CHANNEL APPROACH

It powers the modern retail experience which includes brand storytelling, automated checkout and conversion, measurement and business intelligence.

**30%**

Recent figures show the impact of omni-channel shoppers: *They have a 30% higher lifetime value than those who shop using only one channel.*<sup>5</sup>



### MOBILE BRIDGES PHYSICAL & DIGITAL

Mobile devices are becoming an extension of the store. Consider the following:

**71%**

*71% say mobile is an important part of the shopping experience.<sup>6</sup>*

**48%**

*48% use mobile devices to compare prices while in store.<sup>7</sup>*

**59%**

*Personalization of the physical space with Beacons is proving powerful. 59% of retailers feel customers are more engaged in the store with Beacon/mobile app technology.<sup>8</sup>*

**30  
BILLION**

*Mobile adds a new dimension to retail. Virtual and Augmented reality can transform how people shop. With AR and VR investment in retail expected to rise to \$30 billion by 2020, this is clearly a space to reckon with.<sup>9</sup>*



## PERSONALIZED SHOPPING EXPERIENCE

With a robust omni-channel platform and a dynamic mobile experience, the opportunities to personalize guest interactions are endless. Personalization allows retailers to better adapt and serve their customers through direct communication and the easing of decision fatigue.

**300%**

*40% of survey respondents said they buy more from retailers that personalize their shopping experience across channels. Based on sales data from MyBuys' database of over 250 million shoppers, customer-centric marketing delivers a 25% increase in total online sales and a 300% improvement in customer lifetime value.<sup>10</sup>*

# Omni-channel Strategy & Digital Tactics in the 'Store of the Future'

Single-Sign-On. Beacons. Personalization. Virtual Reality. Digital Wayfinding. We've all heard the buzzwords. Many of us have probably read or been told that we need those things to survive in today's modern retail environment. But what it really takes to not just survive, but to win, is a strong, captivating omni-channel strategy. Without strategy, outcomes are short sighted and the buzzwords are simply tactics that support strategy, not the strategy itself.

## WHAT IS STRATEGY?

I think Roger Martin, author of “Playing to Win”, has a great definition (Martin, 2014):

“Strategy is choice. Strategy is not a long planning document; it is a set of interrelated and powerful choices that positions the organization to win. There are five key choices in the Strategy Choice Cascade:

What is our winning aspiration?

Where will we play?

How will we win where we have chosen to play?

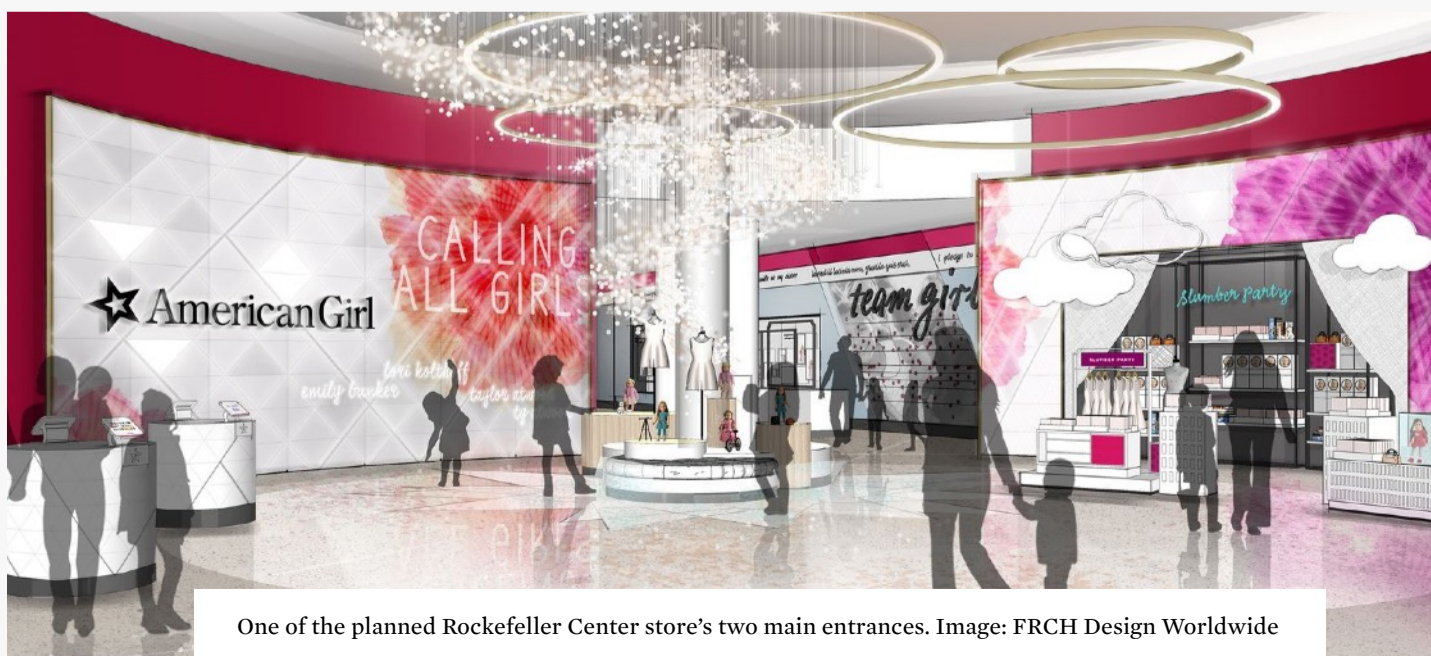
What capabilities must be in place to win?

What management systems are required to ensure the capabilities are in place?

These are all great questions to ask when creating a strategy, but for the purposes of this article, I’ll focus on the one that is a powerful differentiator in retail: Our winning aspiration.

**Strategy’s winning aspiration is to drive sales by building lasting, positive emotional engagements with customers – to tell them a consistent story through every interaction.**

We are using this aspiration as we help our client American Girl create their new ‘Store of the Future’ in New York. Even though the brand has long been prescient about making shopping experiential, they are looking for a deeper bond with their consumers. “As we look at girls today and millennial moms, they’re seeking brands that deliver positive, meaningful experiences, not just products,” says Wade Opland, American Girl’s Senior Vice President of Global Retail. As he puts it, they’re asking themselves, “How does it tie back to me?” (Rubin 2016) Creating positive, meaningful experiences is part of American Girl’s strategy, and the tactics are the methods that make it a success.



One of the planned Rockefeller Center store’s two main entrances. Image: FRCH Design Worldwide

Prioritizing tactics over strategy is not at all unusual. It is completely understandable for a retailer to experiment with tactics to try to find out what works. Most of our clients have built a mobile app. Many have attempted single-sign-on systems. Some have played with cutting edge technology like augmented reality. Those experiments don't always fit into a more focused strategy, but that isn't always a bad thing. There is a lot of value in occasionally building out a tactic to see how the market reacts. It gives valuable insight into what your customers really expect and want. The problem arises when you stop looking at these tactical projects as experiments and start treating them as a strategy of their own. This can cause very valuable digital and physical assets to unravel. When a retailer starts to pile experimental tactics on top of an existing IT, design and architectural platform, things get messy – and expensive. You end up with multiple pieces of software that could all do the same thing. Data gets spread so far between one-off projects that it not only becomes inaccessible to other systems and people in the organization, it becomes invisible because no one knows about it. The store POS can't talk to the e-Commerce software. Digital displays in the store can't make their assets available anywhere else. This can cause questions as to how effective these tactics really are, which leads to calls to return to core competencies. **This can lead to a lack of innovation, muddying of the organization's strategy, and, at worst, a complete detour from it.**

There are two specific tactics that I see regularly that aren't typically an effective part of a winning retail strategy, and I feel they deserve some special attention. **They are: 1. Discounting and 2. The idea that people should be driven to online stores.**

Discounting is typically done with coupons or promotions. While these are effective means to get people to purchase products, they can be devastating to profits. Retailers generally want a better tactic than giving a large percentage of their revenue away via a coupon. This is especially true on the digital side. I've heard the following dozens of times: **"How can I get my customers to use our mobile app more than once? How can I get them to interact with the digital experiences in the store? And please don't tell me that the answer is to offer them coupons or promotions."** The answer to this is to go back to strategy. The mobile app, the digital experiences, and all of your tactics should be telling the same, emotionally connecting story. If the story is resonating, you won't have to rely on promotions to get engagement – it will happen naturally.

The second failed tactic that I commonly see is shifting resources from physical to online stores. Typically, clients argue that online stores have far less overhead and thus are cheaper to run. There is some excellent research being done on this topic, as well as on coupons/promotions. Let's take a look.

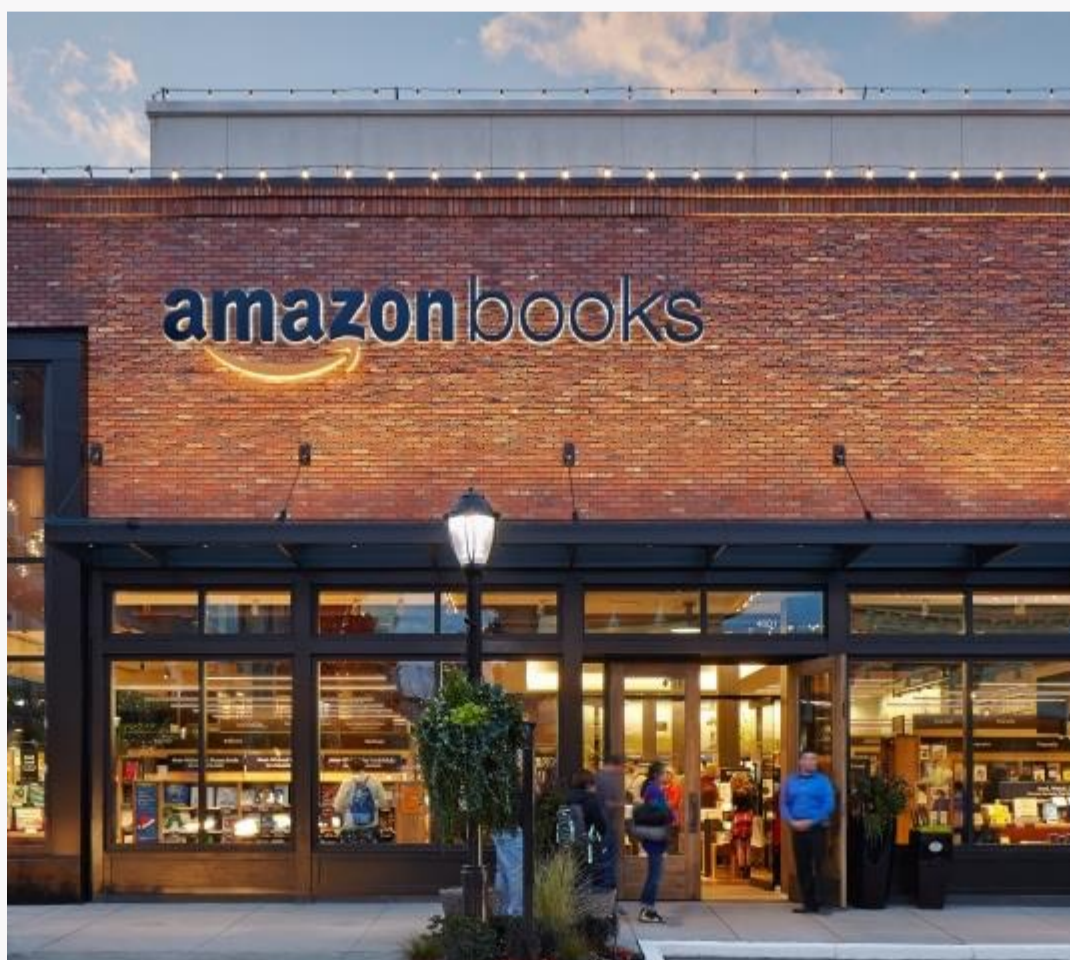
Harvard Business Review recently published an article that included research by a team led by Xueming Luo, a marketing professor at Temple University. It finds that driving customers online instead of to the store can be detrimental to profits.

“Among customers who lived close to a store, no type of coupon made a significant difference to shopping or profits. For those customers, the researchers concluded, the costs of getting to a store were low, so no added motivation was needed to prompt a trip. Among customers who lived farther away and had previously shopped only online, the online coupon generated twice as much profit as among the control group, and the flexible (use online or in-store) coupon increased profits by 800%. But when distant shoppers who’d previously bought only in stores were given online-only coupons, profits from them fell by 51%. In other words, encouraging online customers to visit a store increased profits, but incentivizing in-store customers to shop online decreased them.” (Nyquist, 2016)

Another interesting piece of advice from the researchers:

“If customers come to your physical stores regularly, you should not encourage them to shop online,” Luo advises. The more profitable play is to coax online shoppers to come into your stores, where the environment can induce them to spend more. “That’s the winning omni-channel strategy,” Luo says.

The research shows us that getting shoppers into your physical stores will actually increase profits. Additional research published by Harvard Business Review has shown that by creating emotional ties to your brand, you can lift lifetime value of a customer by nearly double. (Magids, Zorfias & Leemon, 2015)



Physical stores matter: Amazon's new brick-and-mortar concept bookstore in Seattle, WA. Image: University Village



“Lifetime value well exceeds that of the immediate physical purchase,” notes Caitlin Neyer, Associate Director of Strategy and Insights at FRCH Design Worldwide. According to Neyer, FRCH believes that keeping the guest at the center of the omni-channel experience is the crucial foundation for creating emotional ties and in turn, sustainable value. Neyer says

**“An emotional tie is established when a community is built around a passion. The physical store serves as a breeding ground for this passion by enabling guests to share experiences, gain knowledge and meet up with friends – old and new. In order to create a space that facilitates this type of next-level engagement, both the strategy and the store must be designed with the customer as the focus.”**

Customers expect seamless, enjoyable experiences with a brand. They want a brick-and-mortar store to be engaging and to give them a sense of community. They want store staff that can enhance the in-store and digital experience with their vast product knowledge and people skills. They certainly expect to only have one login and password across every digital platform. Past orders, wish lists and loyalty points should be accessible everywhere within the store ecosystem. This renewed focus on the customer will very quickly identify the tactics that should be part of the overall strategy because customers will demand them.

When it comes down to it, simply employing tactics without an omni-channel strategy introduces the risk of creating an untended and unruly garden of digital things, data points, disconnected platforms, and very unsatisfied customers. Taking a step back with your architecture firm, design team, digital team, and operations team is imperative to figuring out which tactics can be utilized successfully in a broader overall strategy. Creating that winning strategy will differentiate you amongst the competition and will positively affect the bottom line.

# Enhancing the Customer Journey

“Macy’s and Sears Holdings to close a combined 226 stores”

“Is There Any Saving Macy’s?”

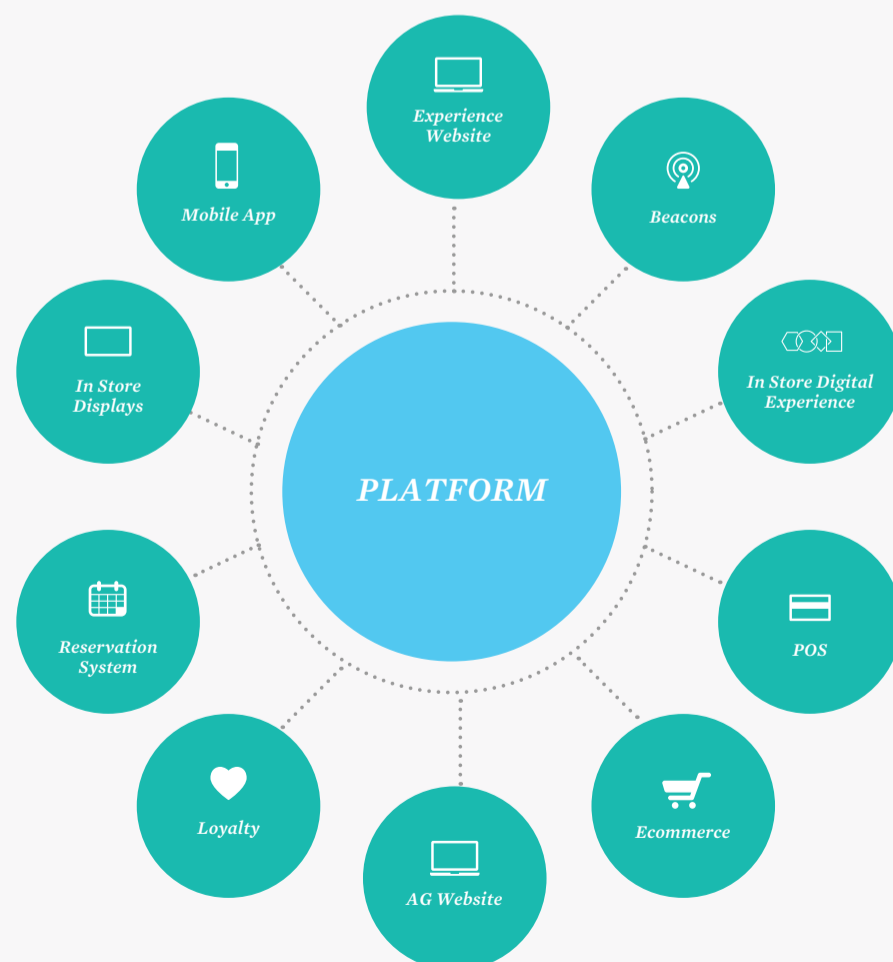
“On the heels of Macy’s and Sears, another major department store announces it will close locations in 2017”

The headlines are dire. Retailers are worried. But the future of retail is bright for forward-thinking brands that are willing to embrace new ways of doing business. In this section **we will explore how customer journeys can be enhanced with new ideas and technology to increase sales and profit** and, in turn, begin to fix the cracks in the retail world as we know it.

When marketers realized that the final transaction wasn't the only key metric in the purchasing funnel, the idea of curating customers' journeys was born.

By measuring every touchpoint along the funnel and giving proper attribution to each and every experience a customer had with a brand, marketers were able to see which ones resulted in sales. This very visibility into attribution, and uncovering the sales and ROI it converts, led to the realization that consumers hold the ultimate power during the customer journey. In an instant, a consumer can be very close to buying, and then disappear. E-Commerce pushed this visibility even further and allowed marketers to price check everything. **The result was what retailers dreaded most: a downward race to the lowest possible price.** To win this race, retailers are required to produce a high volume of sales while reducing the number of high cost of physical locations they are supporting. In essence, this is the Amazon model. This model is contributing to the woes of traditional retailers, and that is leading to a seismic shift in their operations.

Retailers like American Girl, Nordstrom, and others are starting to lead with innovation within the customer journey in order to re-set the race to lowest price. They are creating value through digital software platforms, automation, and IT efficiencies to reduce overall costs. In doing so, they are crafting extraordinary, personalized brand stories that resonate with customers and inadvertently lead to increased purchasing.



## PLATFORM DESIGN

One of the primary tactics we've used to create substantial retail business efficiencies is through something we call Platform Design. Platform Design lowers overall costs while making interactions with customers much more personal and enjoyable.

Most recently, we helped build customer journeys through platform design by combining a mobile application experience with dynamic inventory tracking, product suggestions, and consumer guides. The mobile app allowed users to customize a product, and buy appropriate accessories for their custom product. From there, we connected to a centralized inventory system that checks to see if all the components in the custom order are available and determines whether or not there was an excess of stock warehoused for any particular accessory. By using technology to detect inventory, dynamic pricing was used to discount the accessory for the client where necessary. Fulfillment was then able to electronically receive the order, build it automatically, and ship it to the client. At the tail end of the journey, the customer was able to further their interaction with the brand by being able to log into the brand's website to obtain help in configuring the customized product.

Through single sign-on, the system was capable of knowing exactly what was purchased and was able to serve up help videos to guide them through configuration. **At the end of the journey, customers feel the thrill of a seamless and unique product experience. These emotions are what platform design zeroes in on and uses to tie consumers to brands.**

To build on that, we've found that the journeys we are building aren't limited to the online ecosystem. Using innovation to guide customers through physical stores is just as important. For the in-store customer we've taken this realization and built a mobile app that is capable of reading in-store beacons and triggering a CRM to obtain recent purchases from the customer. In addition to knowing past purchases, the app can entice in-store customers to make purchases outside of their typical buying patterns. If, for instance, the app is able to notify the customer that certain accessories purchased in the past are items that typically run out, we are able to provide an in-store map guiding them to the product where the customer will not only be tempted purchase the product, but purchase multiple products so that they do not run out. The effortlessness of the in-store journey cultivates repeat customers using brand loyalty, just like it does for the online customer.



## AUTOMATION

Automation is the process of replacing formerly manual activities with digital magic. It is another one of the key factors that makes enhancing customer journeys possible.

A great example of this can be seen through our work with GoPro. A typical GoPro customer would go out surfing and capture some amazing video. They would get back to the parking lot, jump into their car and want to immediately share a 15 second clip of their surfing session on Instagram. In order to do that, they would have to manually plug the camera into their computer, download the files, edit them, and finally post them. This was a major pain point for customers. To alleviate this, we automated the process by using wifi to transfer the files to customers' phones with no manual process necessary. Customers are now able to shred waves, get in their car, have the mobile app see

their camera, magically downloads the files, edit and post to friends and family in seconds.

This is just one example of the plethora of ways that digital is automating the customer journey, but automation itself can be tricky. From a customer's standpoint, automation either needs to be invisible or interesting. Technically, making automation invisible is difficult. You have to think through user experiences to make the technology disappear. That's hard. But if you pull it off, the rewards are substantial. Automation that interests and delights is less technically demanding, but requires a strong experience on the part of the user. One of the best ways to create that sort of an experience is through personalization.



## PERSONALIZATION

The days of broadcasting a marketing message to one monolithic group of customers have passed.

Technology has allowed marketers to craft messages on a one-to-one basis between their brand and a single shopper.

Personalization takes these messages a step further. In our work for retail clients, every part of the customer journey is personalized. Once a customer has created an account, the websites, mobile apps and physical stores they interact with all change for that particular person.

When a customer walks into a store, they can be digitally welcomed by name. Or, a notification can be sent to a store associate who can give them a warm, human welcome and assist them.

This allows for storytelling on a very intimate, human level. By bringing elements of joy to customers by making them feel special, we are

providing increased lifetime value to brands through personalization.

**According to a study by MyBuys and the e-tailing group, 40% of survey respondents said they buy more from retailers that personalize their shopping experience across channels. Based on sales data from MyBuys' database of over 250 million shoppers, customer-centric marketing delivers a 25% increase in total online sales and a 300% improvement in customer lifetime value. (Datamentors, 2015)**

Creating a personalized story for a customer's journey requires context. This leads us to the final part of our customer journey: contextual interactivity.

## CONTEXTUAL INTERACTIVITY

Knowing where in the customer journey your customers actually are allows you to interact appropriately with them at a given time, in a given place. The “platform” mentioned above is the tool that allows that to happen.



If, for example, a customer is on your website looking at a product for the third time, analytics and CRM can identify this and dynamically serve the right message to that person to get them past the tipping point of buying. On the other hand, if a customer is walking into a store for the first time, their context is vastly different than that of a loyal customer who visits the store regularly. Each customer is different, and should be offered contextual interactions that are personalized to their particular situation. The first time shopper could be welcomed via a digital display that shows them wayfinding through the store.

The loyal shopper could get a text notification on their phone letting them know how many loyalty points they have, and that they’ve earned a free ‘favorite’ beverage (identified through POS analytics) at the store’s cafe. Context and personalization together form a powerful tool to build strong customer affinity for brands and round out the enhanced customer journey consumers are seeking.

## CONCLUSION

Navigating the complexity of a retail world that is neither bound by brick and mortar or the world wide web is difficult. Consumers are seduced by quick, easy, and cheap solutions that are often detrimental to profit margins and growth. Meeting customers where they are in today’s landscape and watching their exploration within a brand is the key to getting out ahead of broken retail stores and/or clunky digital solutions. Using automation, personalization, and contextual interactivity to enhance a customer’s journey forms a bond with consumers that allows for innovation that will both surprise and delight them.

At the end of the day, it is innovation that we’re after. Innovation that is not only digital, functional, or creative – but, a combination of all three that bonds us together and allows us to grow.

# Customer Expectations

In the first few sections we looked at the importance of using strategy over tactics and shed some light on how to enhance the customer journey. Now that we've established those guidelines, we need to move on to figuring out what our customers expect from retailers. We will be looking at these wants and needs from a digital perspective, but will be highlighting the in-store design implications as they apply.



There is a great research study on customer expectations in retail that was conducted by PWC in 2016. We have used some of their findings as we've gathered our own conclusions around the digital implementations of the data.

## PRICE

Today's consumers have more pricing information at their fingertips than ever before. The ability to check competing prices online, on phones, and in the store establishes firm expectations for retailers to be able to price match, and beat, the costs that are found on these different platforms. A good way to mitigate the constant demands to match and lower prices is to offer a level of service that customers can't get elsewhere. This can include supplying exclusive goods, extraordinary satisfaction guarantees, and friction-free return policies. If price matching is still the only option, it is important to balance these losses with products that generate enough profit to cover them.

## STOCK

Customers expect items to be well stocked in the store. Largely, modern inventory systems and streamlined logistics are able to control and fix stock issues when they arise. If you're a retailer with legacy systems that don't fix supply issues, you need to replace them because you're at a serious competitive disadvantage. However, if you have modern systems, and outliers occur that cause stock to run out, customers' frustrations can be calmed if they are offered the option of ordering out-of-stock items via their phone or other in-store digital methods. When these alternative options are coupled with the guarantee of fast shipping, the customer's goodwill towards the retailer can be maintained and the problem of these outliers is greatly diminished.



## OMNI-CHANNEL

We've covered the immense benefits of omni-channel in previous articles, but it is worth mentioning again in this context. Consistency between channels is the key to the customer journey. Single-Sign-On is paramount to this effort – customers do not want to have to keep track of different logins for different platforms within the same store (website, app, loyalty programs etc.). The single-sign-on model can be elevated in the in-store implementation. Technology allows for cross-pollination between customers online actions and their brick and mortar experiences. If physical stores are aware of the statuses of their customers' online shopping carts, they have the ability to physically guide customers to their unpurchased items in the store using their phones. Tying these experiences together seamlessly defies customers base expectations while vastly increasing sales across multiple platforms.

## MOBILE COMMERCE

The online shopping tool of choice is rapidly transitioning from desktop to mobile devices. According to Business Insider, mobile commerce will reach \$284 billion, or 45% of the total U.S. e-commerce market, by 2020. Savvy retailers are creating mobile optimized shopping experiences that are able to deliver on their brand's promises. Customers expect the same high-quality service that they get on a website, or in the store, on their mobile devices.

For the digital landscape, this means that things must load quickly, have an easy-to-use interface, and evoke an emotional bond to the brand.

## COMMUNITY

Customers are looking for social connections while they are shopping. From peer reviews to chatting with friends on the latest styles and trends, today's shoppers are tapping into their friends and virtual communities for help in navigating product offerings.

**PricewaterhouseCoopers (PWC) polled 22,618 digital buyers ages 18 and older. Respondents had shopped online at least once in the past year. Nearly half (45%) of digital buyers worldwide said that reading reviews, comments and feedback on social media influenced their digital shopping behavior. Some 44% of respondents also said that receiving promotional offerings also influenced their shopping behavior.**

At MJD, we're exploring innovative community technologies that can enhance these experiences. This can include things like building in-store digital experiences that connect to Facebook or a chat client to allow shoppers to get opinions from their friends and family before making purchases. These sorts of technologies are showing great promise.

## EXPERIENCES, NOT “THINGS”

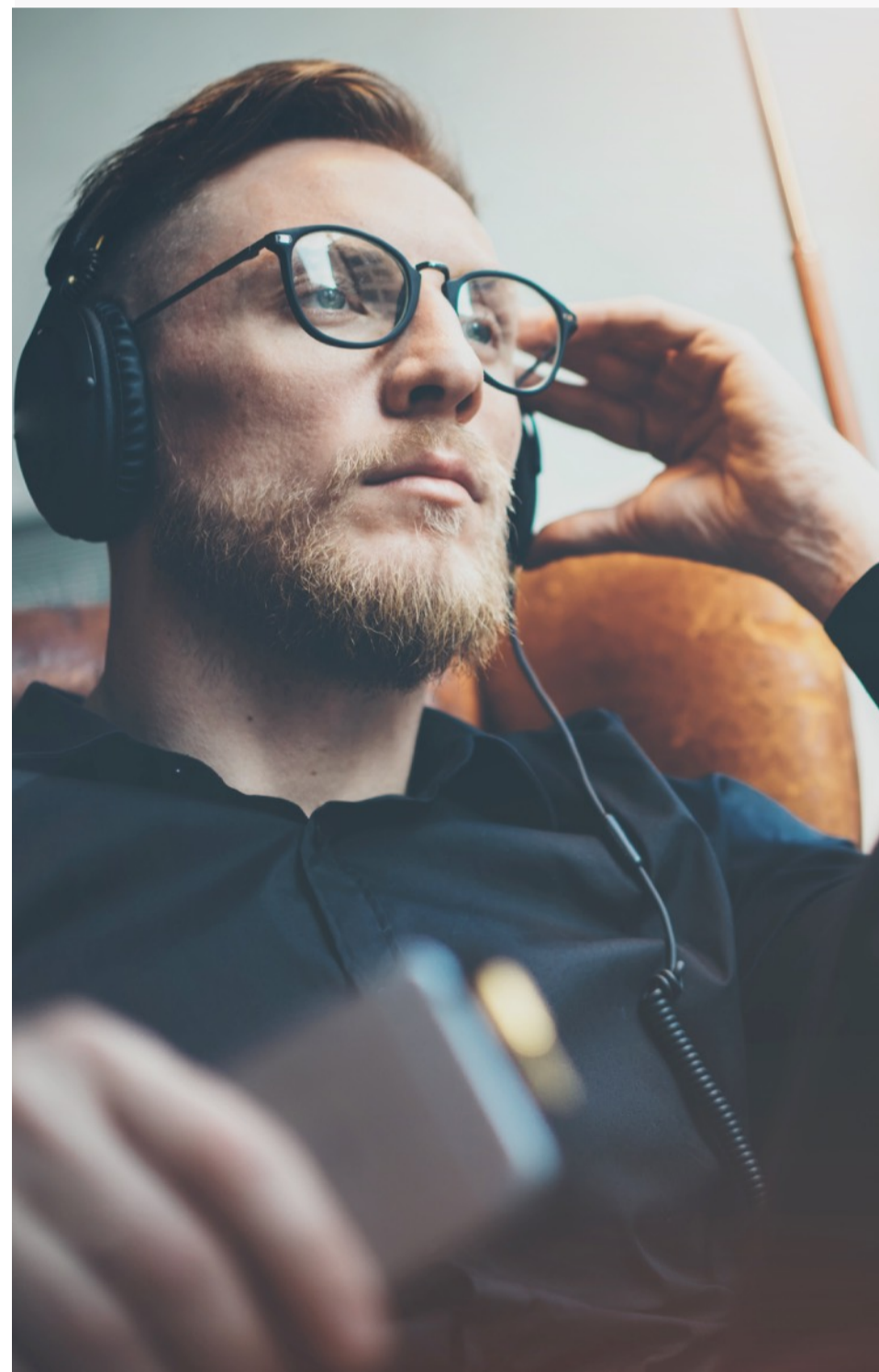
People, especially Millennials, want to buy experiences, not “things.” They want their money to be spent on a life well-lived, and digital has a big place in their lives. Digital experiences add new layers to the ways these millennials experience the retail world. Even the smallest of experiences can connect to customers on an emotional level to tell a powerful story.

## SPEED

Lastly, we want to touch on a very significant undercurrent of customer expectation in retail: speed. By and large, people want things NOW. Deloitte’s 2016 Holiday Survey says that customers in 2015 viewed “fast shipping” as anything within 3-4 days. In a single year, that figure dropped to within 2 days. This is how Amazon Prime is succeeding and, in turn, affecting all retailers. How do retailers compete? One suggestion is to use store design and logistics tools to turn community stores into miniature distribution centers. Combining this with courier services like Uber allows companies to compete, and beat, Amazon’s regional distribution center model.

## CONCLUSION

Through our research, we’ve found that these are a few of the standout customer expectations in today’s retail marketplace. Some are more challenging than others, but using the right mix of digital innovation and store design to create ideal customer journeys is the way to compete in today’s retail marketplace.



# About MJD

We work with forward-thinking retail organizations to create digital products, platforms and experiences through design thinking and technology innovation. Our passion for design and technology is uniquely complemented with our desire to make the world a more optimistic, inspiring, joyful place.

Our unique combination of digital innovation, user experience, user interface design and creative technology solutions has enabled MJD to partner with some of the world's best known brands that include: Disney, GoPro, Mattel, The Container Store, Red Bull, Oakley, Screen Actors Guild, Stride Rite, Titleist, P&G, NBCUniversal, Falken Tire, FTD, and Legendary Pictures. This work has led to a variety of highly acclaimed industry awards including several honors from the Webby Awards, OMMA, W3 Awards, Davey Awards and the ADDYs. For more information visit: [www.mjdiinteractive.com/retail](http://www.mjdiinteractive.com/retail)

## CONTACT MJD

Michael Maginnis, President [michael@MJDinteractive.com](mailto:michael@MJDinteractive.com)  
858.345.8040 x23

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Michael Maginnis, President [michael@mjdinteractive.com](mailto:michael@mjdinteractive.com)

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## CONTACT MJD

Michael Maginnis

President

[michael@MJDinteractive.com](mailto:michael@MJDinteractive.com)

858.345.8040 x23

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