



Better. Faster. Stronger

How COVID-19 has empowered retailers to strengthen their infrastructure and revolutionise their customer experience





COVID-19 Retail Industry Impact: Mega Trends Globally

Essential Retail



Grocery & Pharmacies evolved as “essential businesses”

Evolving Employee Needs



Retail workers shifting to remote – tools needed for real-time communication & collaboration

eCommerce Demand



Shifting consumer behavior from in-store to on-line placing increased demand on-line

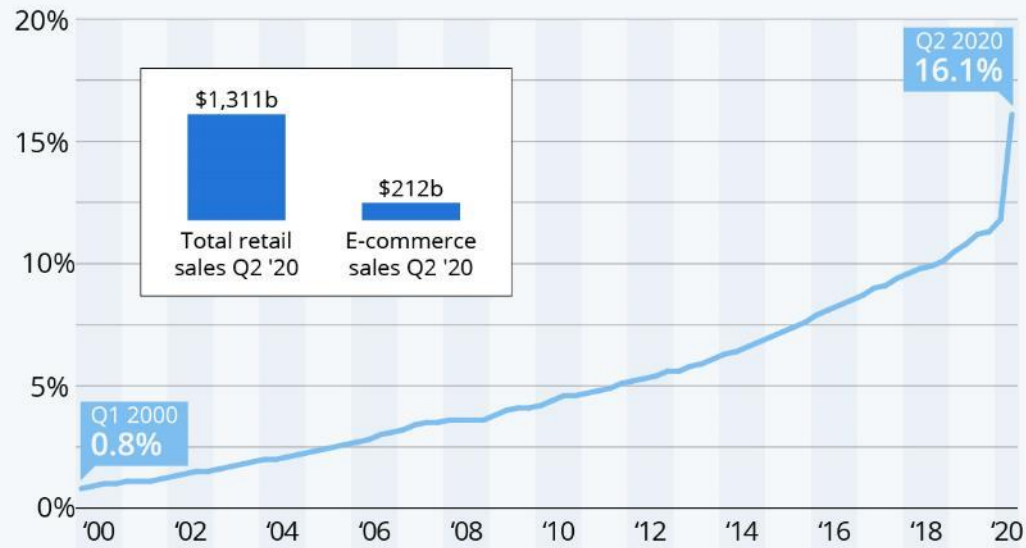
Supply Chain Needs



Need for near real-time visibility into Supply Chain & ability to shift

COVID-19 Crisis Accelerates Shift to Online Retail

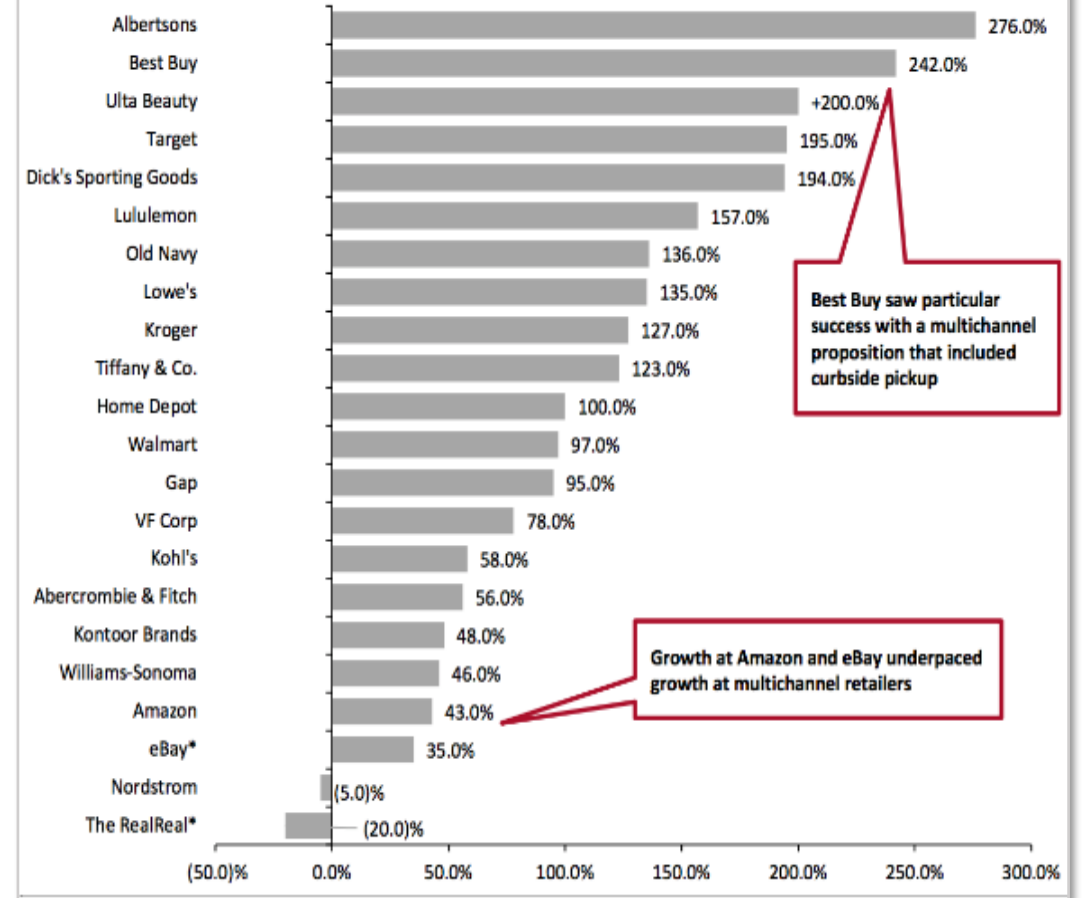
E-Commerce sales as a percentage of total retail sales in the United States (seasonally adjusted)*



* excluding food services sales
Source: U.S. Census Bureau



Figure 7. Selected Retailers' E-Commerce Sales Growth, 2Q20



Best Buy saw particular success with a multichannel proposition that included curbside pickup

Growth at Amazon and eBay underpaced growth at multichannel retailers

The largest beneficiaries were bricks & clicks



WHAT PROPORTION OF MAJOR US RETAILERS NOW OFFERS CURBSIDE PICKUP?

Our August 2020 analysis found that 76% of the top 50 store-based retailers in the US now offer curbside pickup—and we expect this share to creep even higher in the coming months.

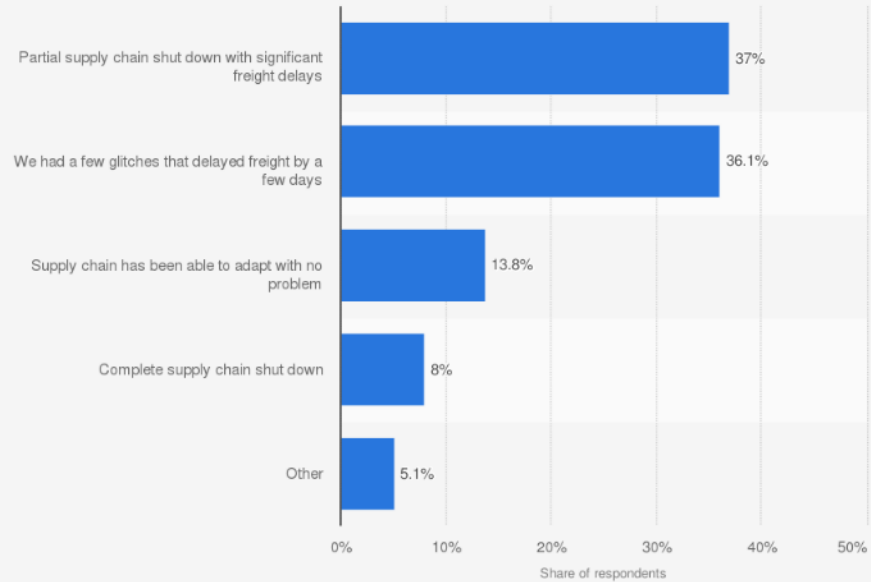


Source: Coresight Research



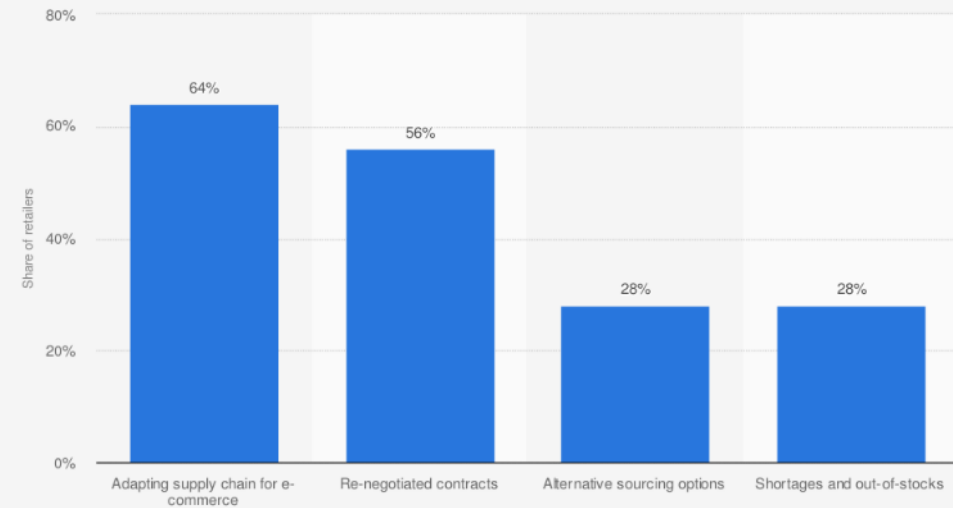
Supply Chain Challenges Brought on by COVID-19

How adaptable have your shipping and supply chain been during the outbreak?



Only 14% of retailers experienced no supply chain disruption

Supply chain changes faced by retailers due to the COVID-19 pandemic worldwide in 2020



Ecommerce growth was the number cause of supply chain challenges



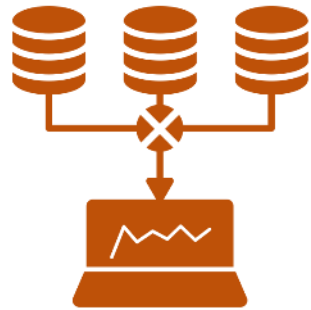
Strengthening Your Supply Chain



Specific Supply Chain Changes Required



Expand Supplier Base



Expand Data Sources -> Demand Forecasting System

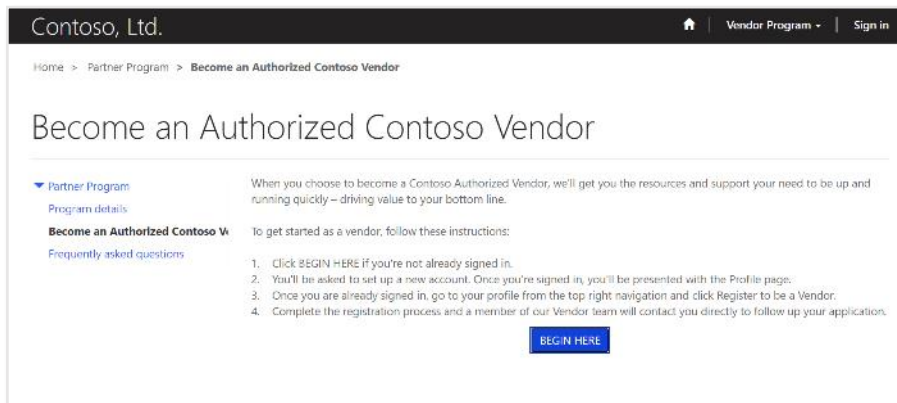


End-2-End Supply Chain Control Tower

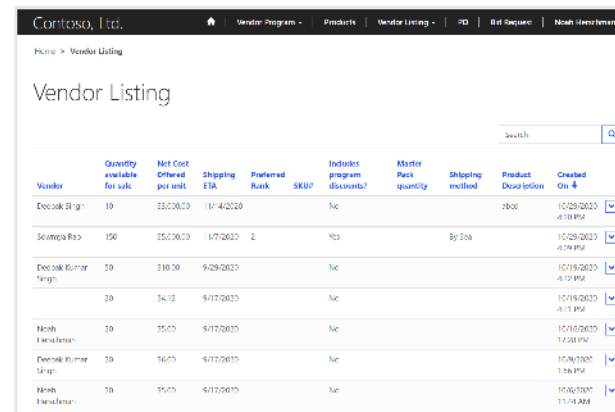


Direct-2-Consumer Last-Mile Fulfillment Capability

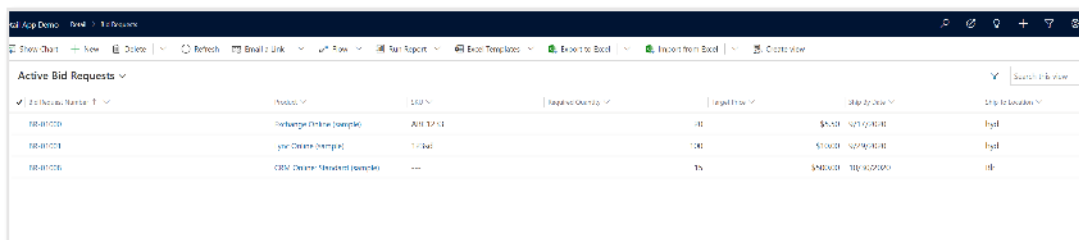
“Reverse-Auction” Vendor Sign-Up & Bid Platform



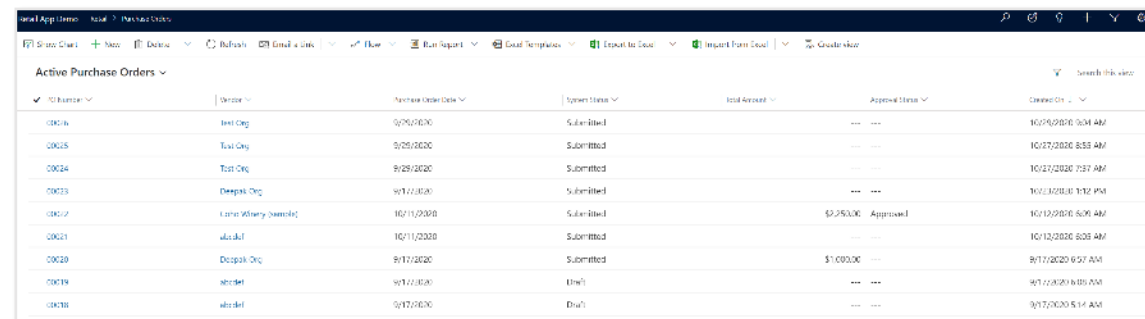
Vendors are invited to sign-up on the platform



Authorized Vendors list products on the platform



Retail Purchasing Managers can also request specific products, prices, quantities and ship-by dates



An algorithm recommends the best products and the Purchasing Manager turns the accepted bids into POs

Microsoft Devices: Dynamic Network Management

An integrated Global Platform to visualize our Global Network.

Millions of supply chain data points, both internally and externally, are being processed in real time through a data science model and displayed.

The foundation for machine learning and predictive analytics delivery performance.



35+ ELD AGGREGATORS/
GLOBAL GPS PROVIDER



ALL VESSEL
VOYAGES GLOBALLY



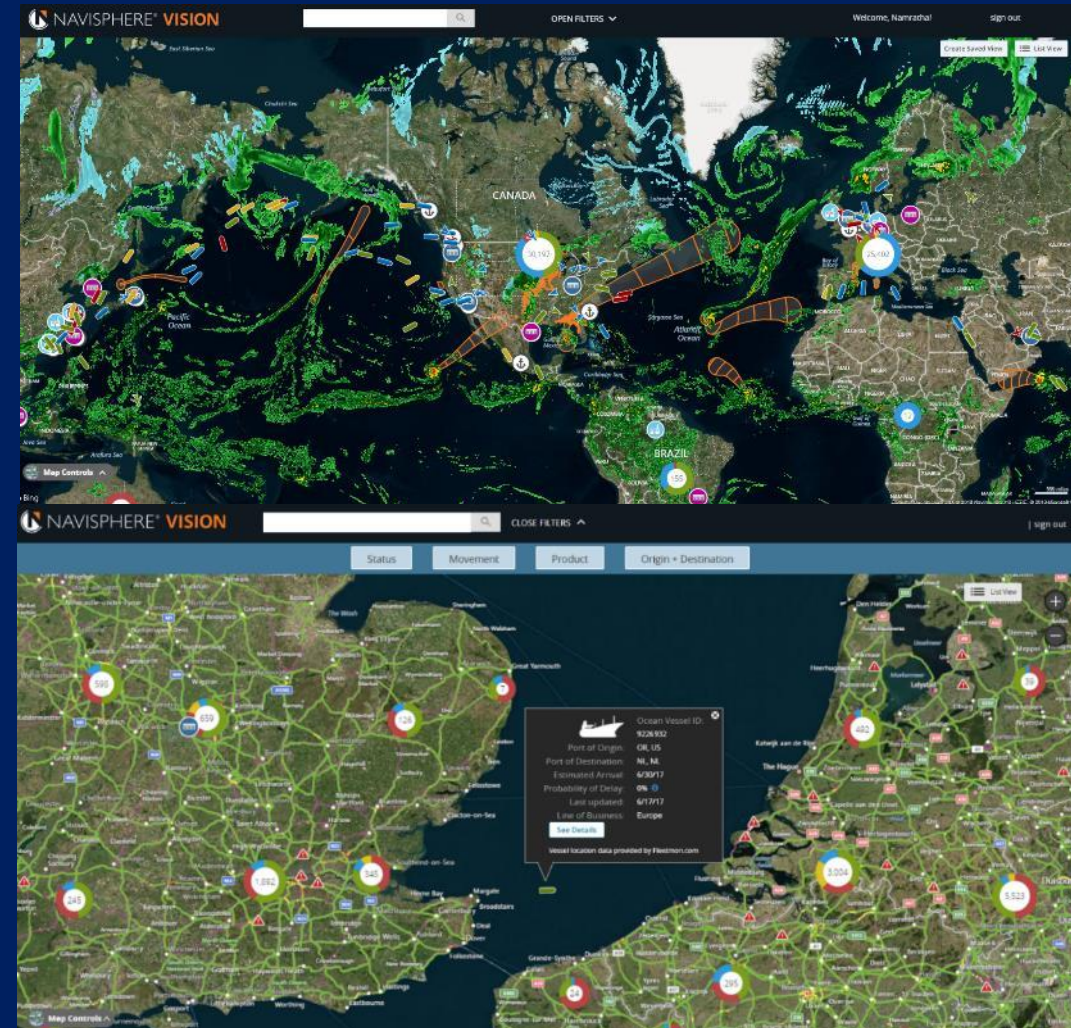
ALL FLIGHTS
GLOBALLY



ELECTRONIC DATA
INTERCHANGE
11K customers
3.5K Carriers

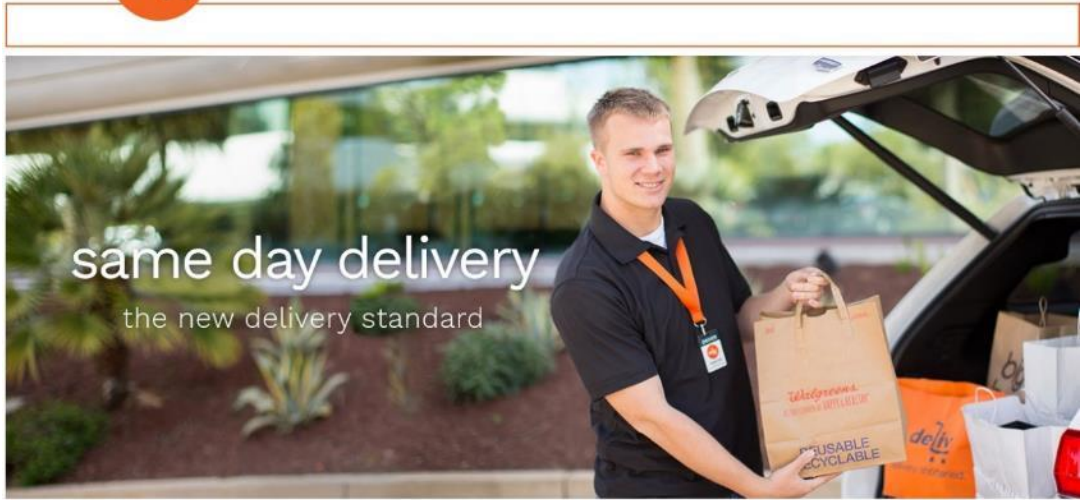


CELL PHONE
TRIANGULATION
4.5 million/month





DELIV SMALL BUSINESS DELIV ENTERPRISE DELIV FRESH SIG



THE BUZZ:

Inc.

Forbes

THE WALL STREET JOURNAL



Happiness. Delivered.

Deliv provides a new last mile delivery solution to power same day delivery for retailers and businesses. Whether you want to integrate Deliv into your ecommerce site or simply book a local delivery today, we've got you covered. Deliv gives customers more - a great deal more - choice and convenience.

Items when you want them. Where you want them. In as fast as an hour.

We currently offer same day delivery services in [35 markets](#).

NEW!

Excited to announce the launch of [Deliv Rx](#) to power same day delivery for pharmacies, hospitals, medical device companies, dentists, & others.



DELIV

business & individuals

Send a package across town today with our offering for individuals and small businesses.

LEARN MORE

GET A QUICK QUOTE



DELIV

enterprise

Power same day, scheduled or future deliveries directly from your website or stores.

LEARN MORE

CONTACT US



DELIV

fresh

Outsource your last mile deliveries for groceries, meal subscriptions and other fresh items.

LEARN MORE

CONTACT US



New Sales Channels



BASIC LIVE COMMERCE USER EXPERIENCE

Top left top corner showing brand name and number of viewers



Bottom left corner showing user comments and notifications showing which users just purchased a product.

Bottom right corner has a shopping cart. Users click on shopping cart icon to see the list of items available.



When a user clicks on a product, they will be taken to the product page where they can immediately purchase the product.



The livestream is still playing as a floating screen. They simply click the floating screen to return to the live stream.

VIYA'S DOUBLE ELEVEN PRE-SALE LIVE STREAMING ON OCT 21ST

Total Sales	Total Viewers
370 Million RMB	140 Million
Total Orders	New Followers
4.55 Million	1.65 Million
Total Value of Products in Pre-Sale	
3.52 Billion RMB	



AUSTIN LI'S DOUBLE ELEVEN PRE-SALE LIVE STREAMING ON OCT 21ST

Total Sales	Total Viewers
690 Million RMB	160 Million
Total Orders	New Followers
8.81 Million	1.73 Million
Total Value of Products in Pre-Sale	
3.33 Billion RMB	



Via Ashley Durdaninok



1

China's 'Copycat' Tech Industry Is Now Being Copied

Social+ for Ecommerce

Taobao



Pinduoduo



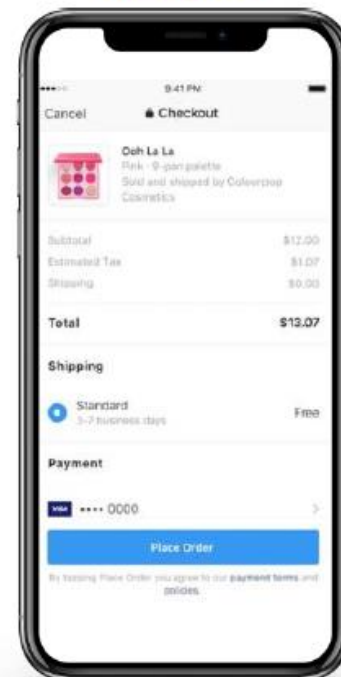
Mogu



Amazon Live



Checkout with Instagram



YouTube Shopping



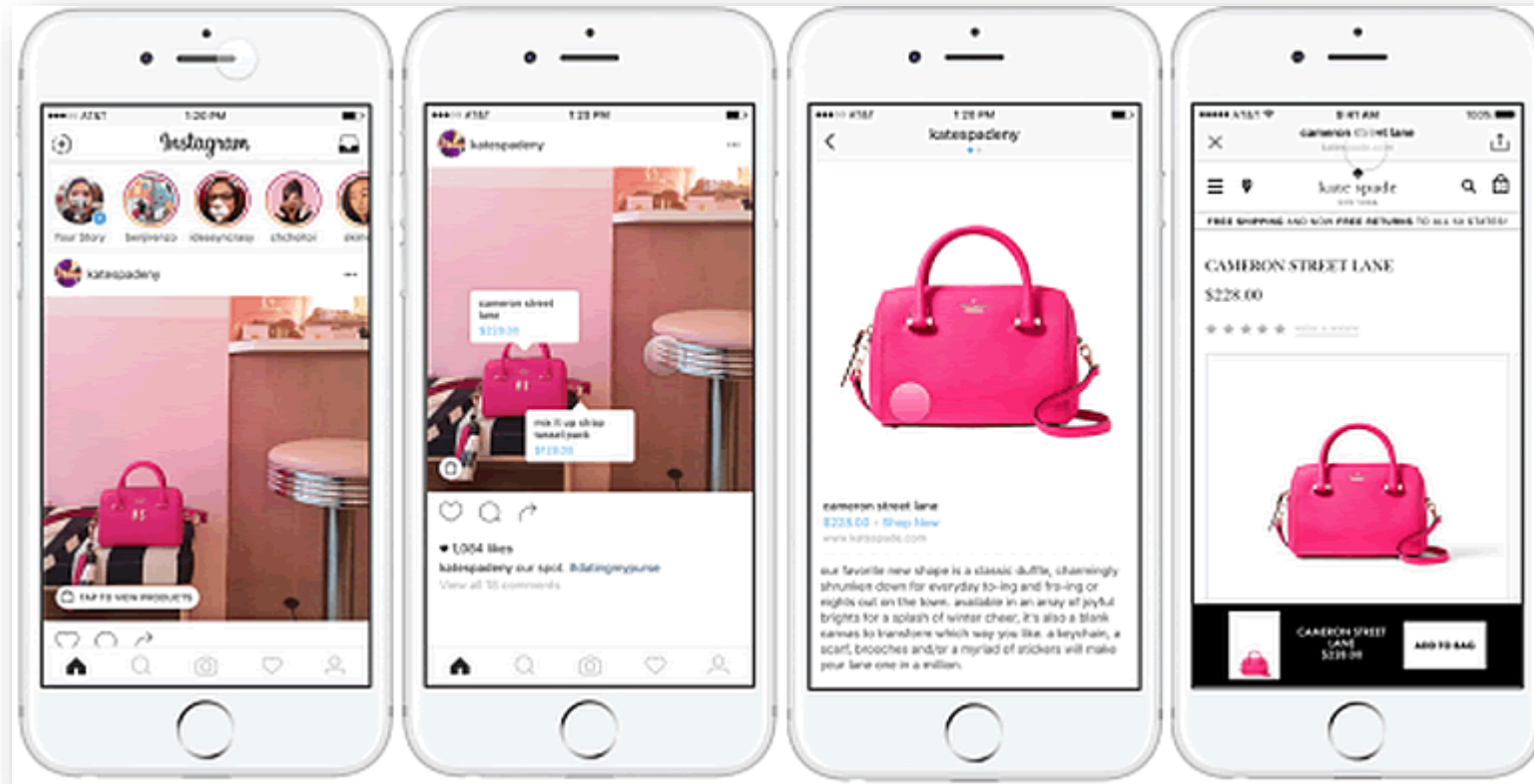
China's online shopping giants and start-ups have pioneered concepts such as group buying and live streaming.

Launched in February 2019, Amazon Live features **live-streamed video of hosts demonstrating products, which viewers can buy directly** from a carousel that displays under the video.

Launched in March 2019, Checkout with Instagram has enabled 130 million users to **buy items by tapping on product tags**, all without leaving the app.

Google plans to add new shopping features to YouTube. Later this year, YouTube will **give shopping recommendations, share affiliate fees, and enable brands to include shoppable ads.**

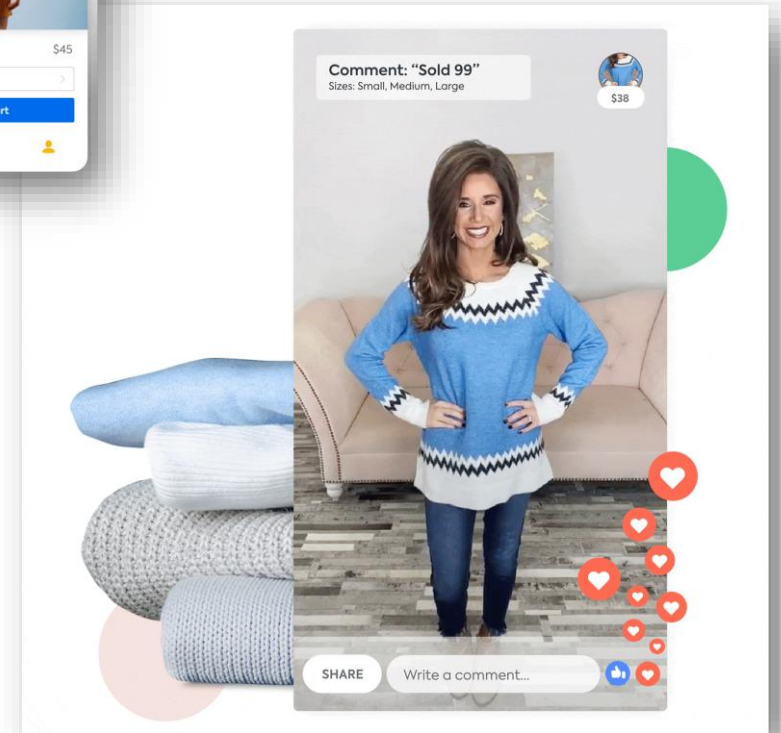
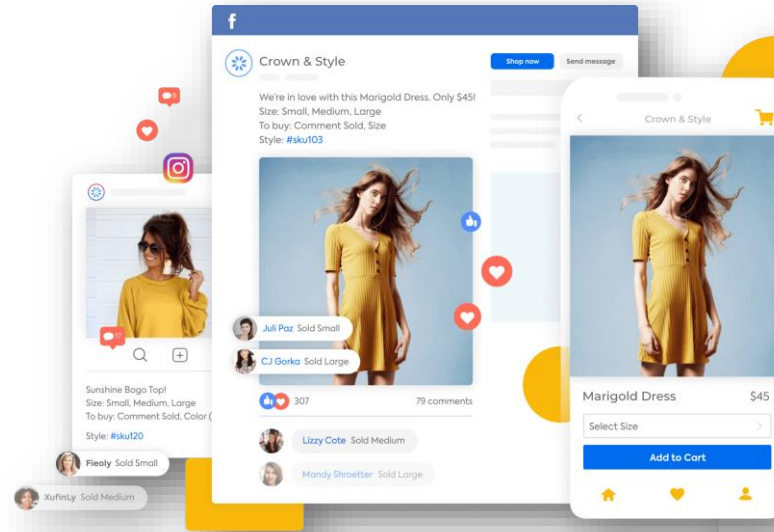
Virtual Instagram Selling



Get started with Instagram Shopping:

1. Create an [online store](#) to sell physical goods
2. Convert to an [Instagram Business Account](#) and connect it to your [Facebook Page](#)
3. Connect your Instagram account to a Facebook catalogue by using the [Catalogue Manager](#)
4. Go to your Instagram profile's settings, tap **Business**, and then **Instagram Shopping**.
5. Follow the steps and submit your account for review (this can take a few days).

Social Media Shoppers can purchase directly through comments



Shopping festivals will continue to gain momentum

Building on Prime Day in the U.S., shopping festivals will become a critical driver of sales both online and in store. We expect more retailers will join existing festivals or create their own.



Alibaba's Single Day Festival
generated \$74 billion in 2020 sales
(\$5B+ in the US)



Amazon's Prime Day
generated \$6 billion in 2019 sales;
we predict 2020 sales will be \$9
billion



JD's 6.18 Festival
generated \$29 billion in 2019 sales



10.10 Day
A new holiday?

Question: Can you do 25% off on 10 items?

Community Group Buying

- Community group buying is an **e-commerce model of group purchases by residents within the same neighborhood**, using WeChat mini programs
 - Community group buying platforms on WeChat **source directly from vendors**
 - Consumers living in close proximity to one another can join and **buy products in bulk at lower cost**
 - One person acts as a “leader,”** serving as agent between the community group buying platform and other consumers
- Many community leaders are **mom-and-pop store owners** or **stay-at-home mothers**
- The **monthly GMV** of a popular community group buying platform was **\$55 million, growing 120% month-to-month** and processing 100 million orders every day

Figure 2. Workflow on Community Group Buying Platforms

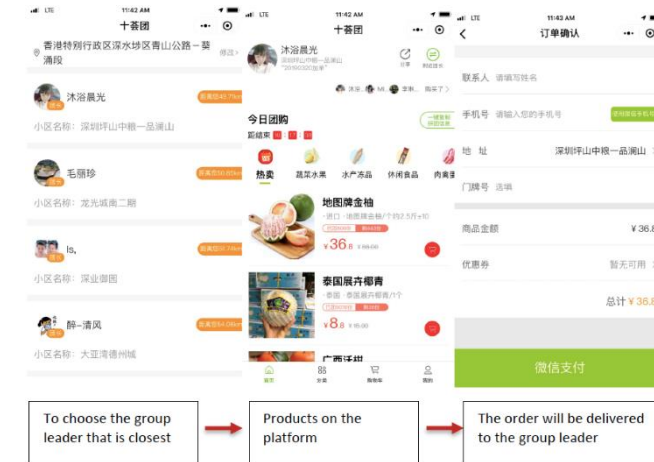


Figure 3. Group-Buying Offerings in China

Company	Tools /Platforms
1 Alibaba's Freshippo	• New “Hema Community” (He Shequn) that combines neighborhood orders to unlock group-buying and self-pickup services
2 JD.com's 7Fresh	• “Little 7 Join-Order” (Xiao Qi Pin) group-buying service, which currently has 1,000 community customers covering 1,200 neighborhoods—serving 500,000 people in total
3 Shi Hui Tuan	• App with community group-buy offers • Achieved GMV of ¥0.6 billion (\$84.6 million) in February 2020 and ¥0.65 billion (\$91.7 million) in April 2020
4 Shi Xiang Hui	• WeChat mini program • Achieved GMV of ¥0.6 billion (\$84.6 million) in February 2020 • Formed a strategic partnership with chained supermarket Wuhan China Commercial Supermarket in Hubei province
5 Pinduoduo	• Launched offline group-buy tool “Kuai Pin Pin,” which covers 10,000 communities, as of March 6, 2020
6 WeChat's mini program “Qun Jie Long”	• Promotes group buying through group chats—where members of the chat can see and buy from the mini program

Source: Coresight Research

Recommerce will become the new hit

- Recommerce—the buying and selling of previously owned goods— will reach **¥1.25 trillion (\$178 billion) in 2020**. This equates to **almost 46% of the total sharing economy market** in China
- **Consumers want to possess the latest in clothing trends**; there is a growing emphasis on reusing and recycling to **keep the planet green**; and budget constraints are an ongoing consideration for most shoppers
- Recommerce is also **particularly prevalent in e-commerce** compared to physical retail, as shoppers can access a greater range of previously owned merchandise online
- There are **99 million users of resale-focused apps** as of August 2019. Leading apps include Alibaba's Xianyu and Tencent-backed Zhuanzhuan





Expanding Ecommerce Capabilities



Ecommerce Basics



Detail Page
Content



Robust Search
Results



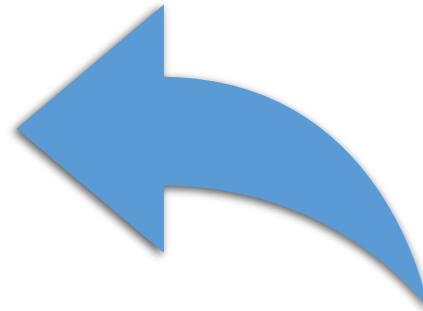
Homepage
Categories



Personalization



Last Mile



Returns

Build out your catalog content


Bose Sport Earbuds

Home > TV & Entertainment > Earphones and Headphones > Bose Sport Earbuds

Extended Warranty Features Specifications [Pre-Order](#)

TechLife

Pre-Order Now



Bose Sport Earbuds

[i-Coin/Home](#)

Bose Sport Earbuds, Acclaimed lifelike sound, True wireless, Simple touch control, Sweat and weather resistant.

HK\$1,499

[Act now! 100+ people are considering](#)

Colour

Quantity

Work on Zero Null-Search Results

FILTERS [RESET](#) LITTLE BLACK DRESS 🔼 SORT (POPULAR)

CATEGORY +


SIZE +


COLORS +


PRICE +


You've searched for
"LITTLE BLACK DRESS"
We found 0 results

TRY THESE INSTEAD

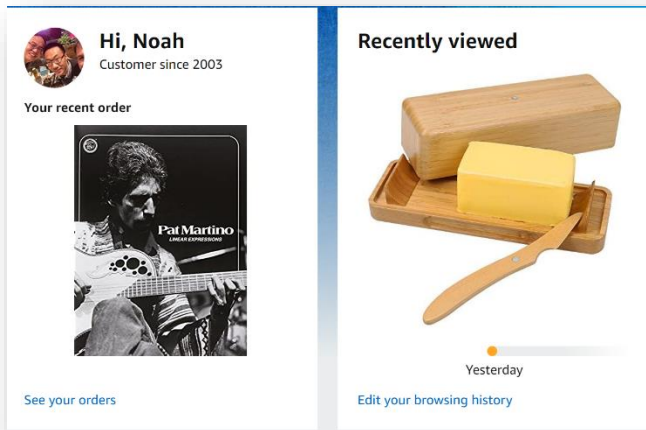

DRESSES


TOPS


BOTTOMS

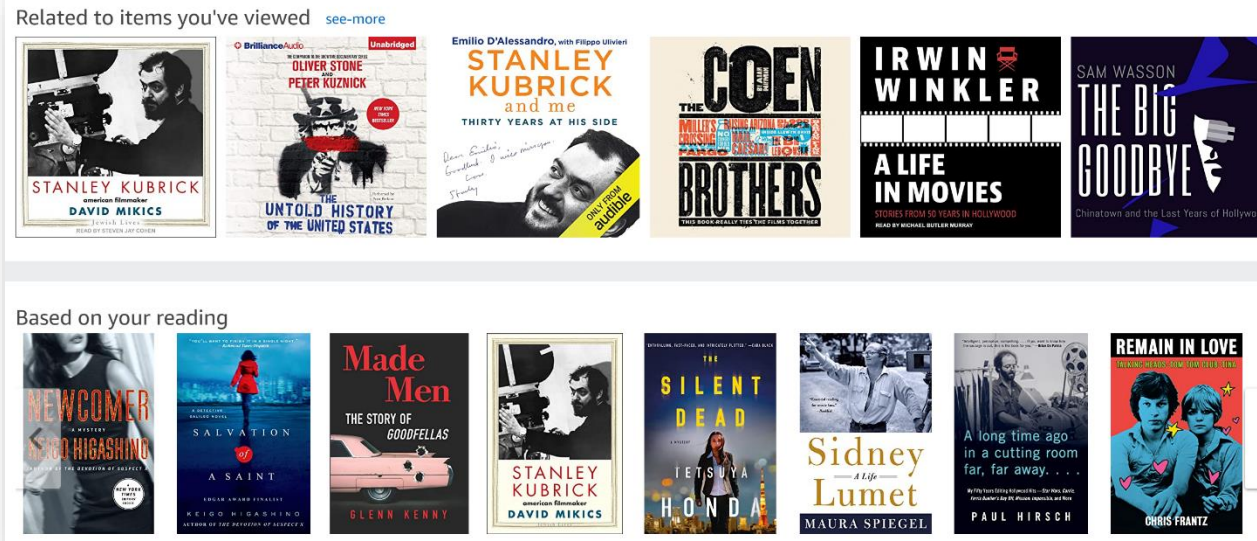

MODEST WEAR

Add Basic Personalization



Simple reminders of what they've viewed and ordered

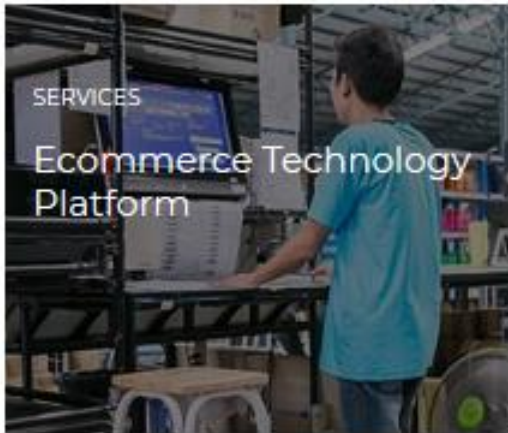
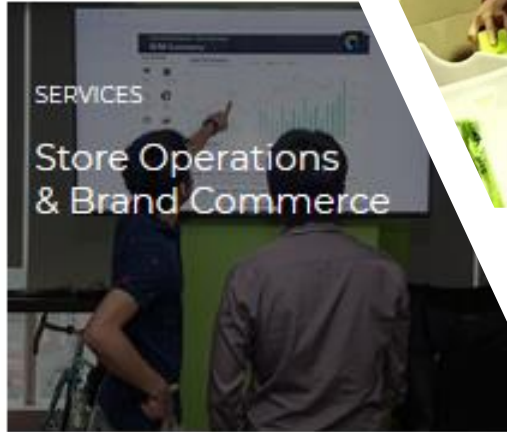
Manually-mapped products



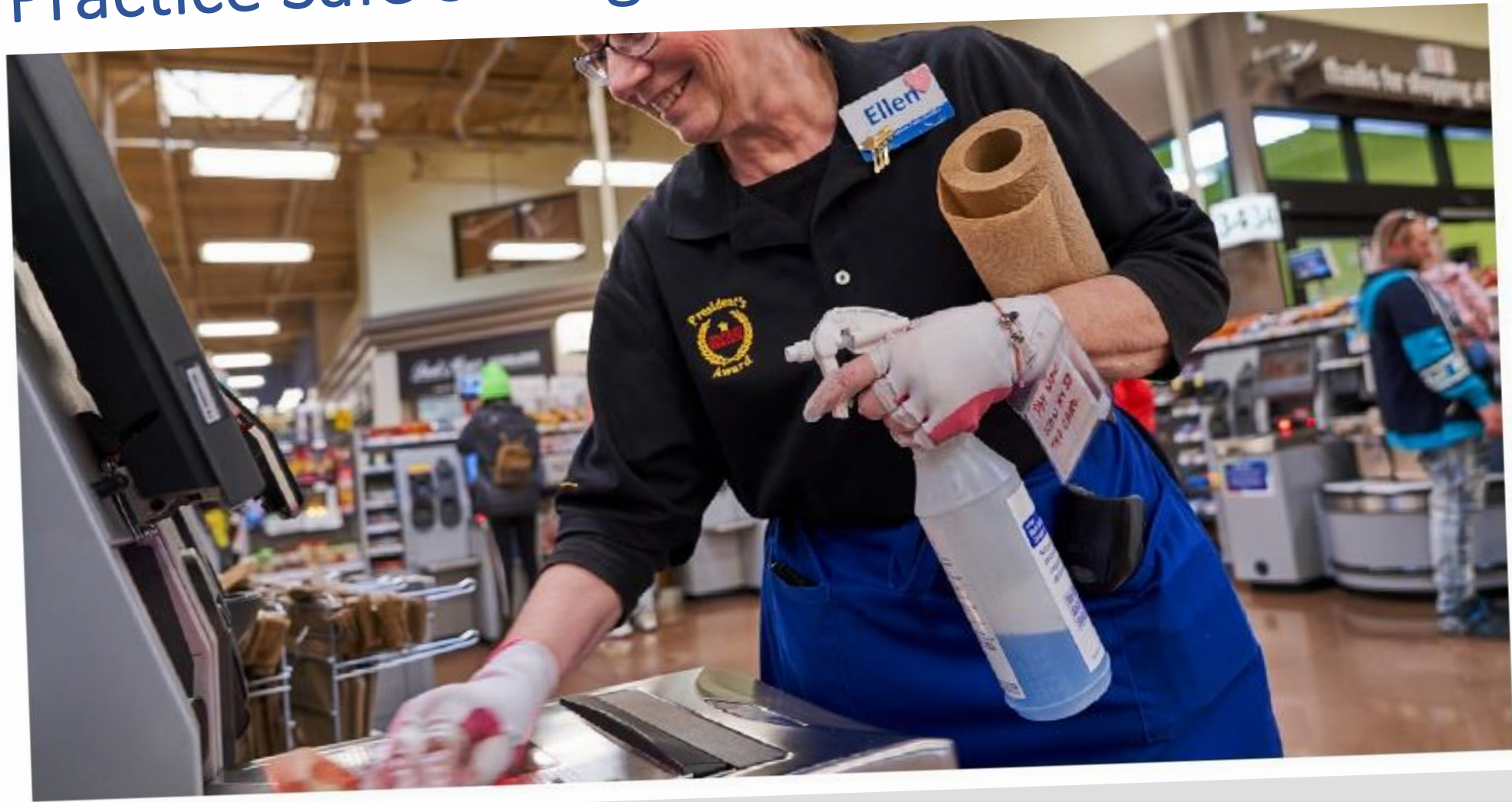
Last-Mile Delivery Partners

aCommerce | Powering Ecommerce > Ecommerce Services

Any business thinking of an online strategy will benefit from working with a specialist. We create an ecommerce solution with?



Practice Safe Selling



02 Sensing Technologies



Microsoft Zap

Zap is a way to allow first line workers of one company to find available shifts for similar work at another company within their community.

The two companies “co-share” the first line worker.



Company
Furloughed
Employee

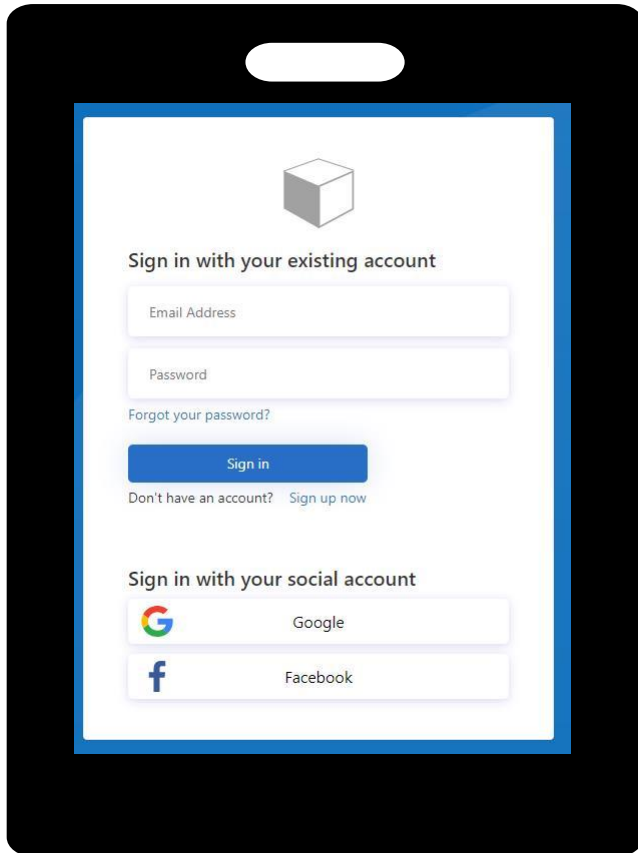


MS Zap Portal

1. Select Location
2. Select Shift
3. Start Working



Demand User Journey



1. Sign In

Contoso Home Privacy Manage Organization Hello! Sign out

Stores

Name	City	Zip or PostCode	Manager Name	Manager Email	View	Edit	Delete
Seattle	Seattle	12345	Jo	jo@contoso.com	View	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
London	London	ab12 3cd	john	john@contoso.com	View	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

New Store

Name

Address

City

Zip or Postcode

Manager

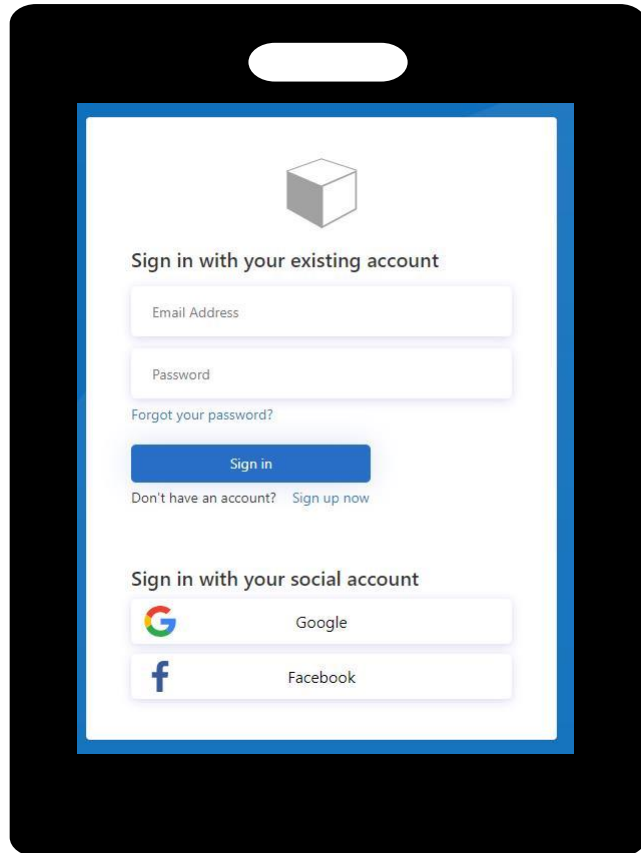
Manager Name

Manager Email

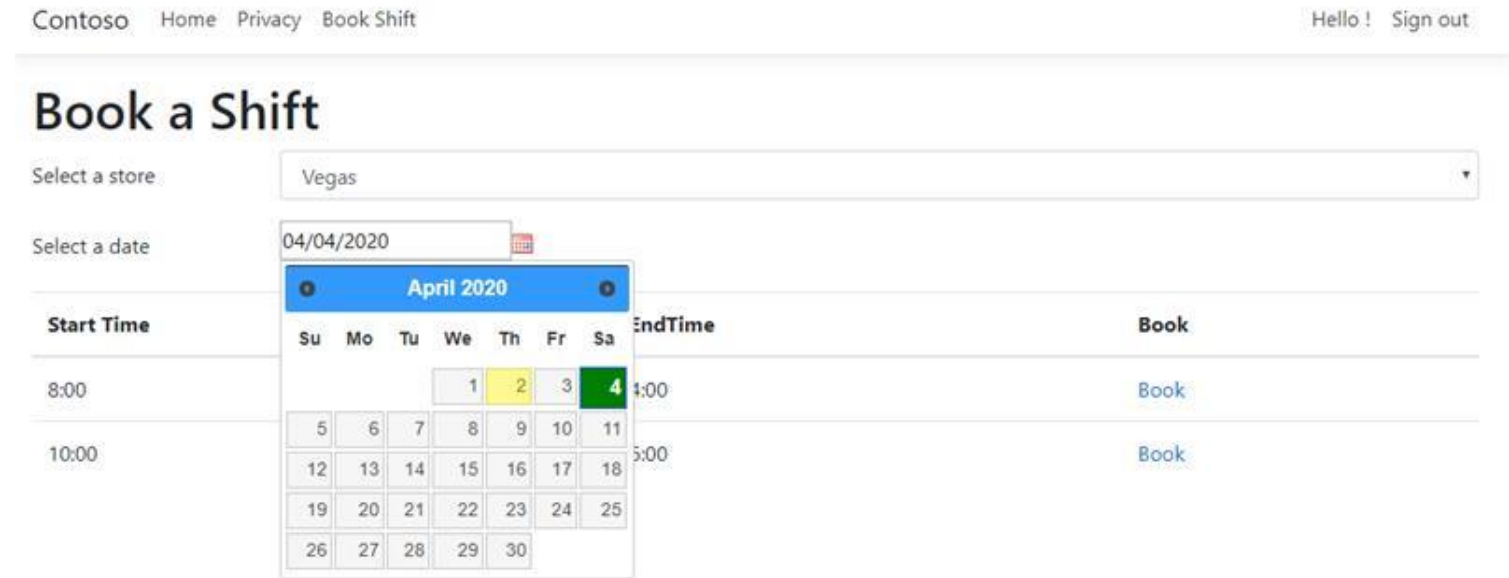
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2. Configure Store Locations, Open Shifts, Store Managers

Employee/Gig Worker User Journey



1. Sign In



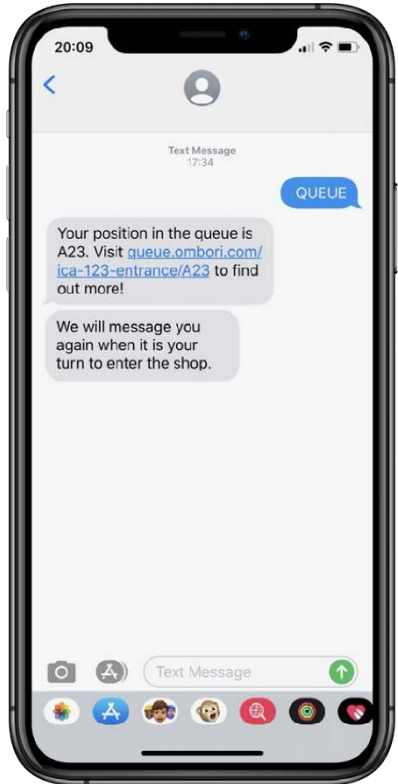
2. Search Location, Select Shift Time and Book Work

Intelligent queueing

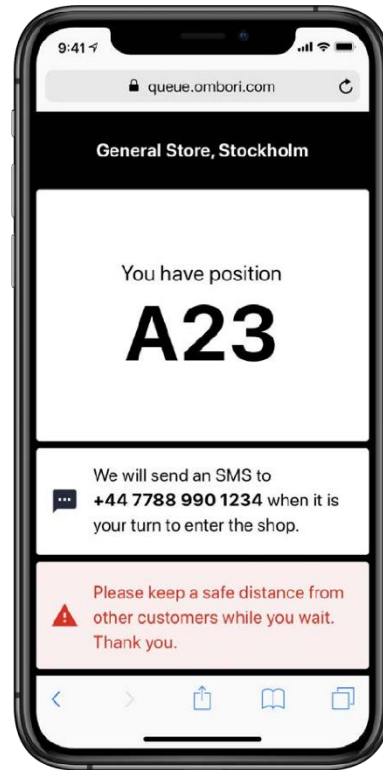
QR Code & SMS to book queue



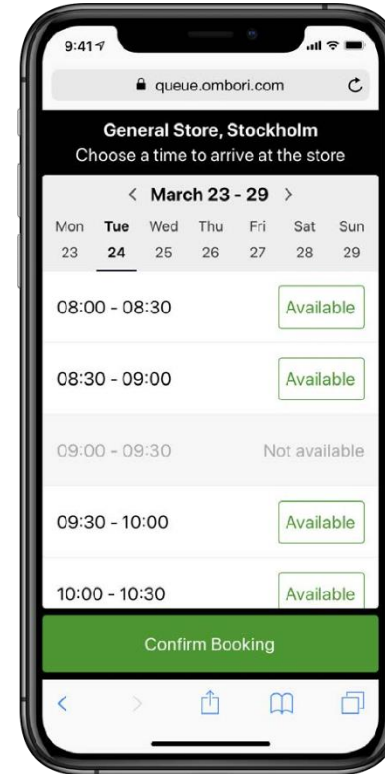
SMS Communication



Mobile based web interface



Book available slot in the specific store



Store Associate Access to Handheld

