Enhancing the Client Experience

WITH MICROSOFT DYNAMICS 365 FOR RETAIL
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Introduction

Rachel Profitt, MCT, MVP
Director, RSM Technology Academy
academy@rsmus.com
@rachelprofitt on Twitter
www.linkedin.com/in.rachelprofitt
www.dynamics365lady.com
Agenda

- Digital Transformation In Retail
- Microsoft and Dynamics 365
- Dynamics 365 Solution Demo
Digital Transformation

- **Engage Your Customers**: To drive loyalty and growth
- **Empower Your Employees**: To be more productive and engaged
- **Optimize Your Operations**: To drive quality and cost effectiveness
- **Transform Your Products**: To drive growth and differentiation
Business and Financial Drivers

• Internet disintermediation
  – Elimination of the middleman
  – Shrinking product profit margins
  – Quest for competitive differentiation

• Rise of the millennial
  – App oriented
  – Amazon and Netflix expectations

• Shifting Wall Street expectations
  – Rewards for recurring revenues and disruption to typical expectations
Digital Technology Enablers (and Threats)

- Destruction of Barriers
- The Democratization of Data
- The Anytime, Anywhere, Economy
- An Expectation of Engagement
Retail Industry Challenges and Priorities
Technological innovations and a hyper-connected world have significantly influenced consumer behaviors and expectations.
Today’s Consumer Journey

Unfolds Everywhere, Anytime, On Any Device
And creates a multitude of opportunities to connect with them...

Awareness
- Advertising
- PR
- Media
- Social
- Banners
- Blogs

Consideration
- Events
- Press
- Word of Mouth
- Reviews
- Search Marketing

Evaluation
- Retailer Website
- In-Store
- Social Network
- Manufacturer Website
- Mobile

Buy
- Retailer Website
- In-Store
- Pop-up Stores
- Mobile
- Manufacturer Website

Post-Purchase
- Retailer Website
- In-Store
- How-To Video
- Manufacturer Website

Relationship Management
- CRM Activities
- Media
- PR
- Loyalty Programs
Technology Priorities in Retail

Devices & Form Factors

Cloud & Security

Predictive & proactive - Machine Learning

Bringing Online Experience In Store

IoT and Network of Devices
The Situation Today for Many Multi-Channel Retailers

Store Systems

- Merchandising System
- Accounting Systems

Ecommerce Systems

- Call Center Order Management
- CRM/Loyalty
- BI/Reporting
- Warehouse Management

Microsoft

RSM
…Resulting in A Disjointed Customer Experience

Store Systems

Discount = $8.50
Item A = No Visibility to DC Stock

Discount = $8.31
Item A = 200 in stock

Discount = What discount?
Item A = 200 in stock (no visibility to ecommerce order just placed for 100 units)

Ecommerce Systems

Call Center Order Management

Buy 2 get 3rd free!

Merchandising System

Received 200 units of item A

Warehouse Management

Accounting Systems

CRM/Loyalty

Item A Inventory Value = $0

BI/Reporting

…Resulting in A Disjointed Customer Experience

Margin = ?
Turn = ?

Microsoft
The Idealized Retail Environment

**Personalization**
Collect data through customer opt-in to personalize the shopping experience

**Click & Collect**
Integrate click-and-collect and customer wish lists into inventory decisions

**Real-Time Inventory Management**
Send real-time offers & notifications based on customer location

**Digital/Physical Integration**
Enable information-rich experiences in store

**Personalization**
Send real-time offers & notifications based on customer location

**Real-Time Offers**
Send real-time offers & notifications based on customer location

**Interactive Kiosk**
Enable information-rich experiences in store

**Empowered Workforce**
Give sales staff the data to deliver a personalized in-store experience

**Social Engagement**
Gauge customer sentiment & trends through social media

**Mobile Checkout**
Utilize secure device-to-device payment

**Wish List**
Enable information-rich experiences in store

**Order Pickup**
Interactive Kiosk

**Retail App**
Enjoy 20% Off Our New Line when you buy 2 items

**Advanced Planning**
Improve operations by acting on data insights and evolving business practices to keep pace with rapid change

**Retail Execution**
Empower your field teams with mobile devices and apps powerful enough to handle daily business

**Supply Chain and Mobile Workers**
Empower your field teams with mobile devices and apps powerful enough to handle daily business

**Customer App**
Welcome valued customer!

**Personnel**
Empower your field teams with mobile devices and apps powerful enough to handle daily business

**Microsoft**

**RSM**
Dynamics 365 for Retail Product Snapshot
Deep Industry Functionality

**OMNICHANNEL BY NATURE**
- One source of truth for all orders, customers, products, etc
- Native POS, call center, and order management. Works with any eComm
- Supports all omnichannel scenarios (BOPUS, etc.)

**BUILT FOR MERCHANTS**
- Deep hierarchy, category, and product management
- Machine Learning based forecasting and planning
- Complex promotional capabilities
- PIM built-in

**COMPLEX SUPPLY CHAIN READY**
- Multi, multi, multi, multi
- Global capabilities
- Built in manufacturing (both owned and subcontracted)
- Native TMS and WMS functionality
**BYOD READY**
- HTML 5 Client — supported on any browser and form factor
- Flattened navigation
- Familiar Microsoft UX
- Office Integration

**RIGHT FOR THE ROLE**
- Web Portal for Self-Service
- MPOS Client for Retailers
- Power BI Report Pack for CXO
- Excel Front End for Budgeters
- Tablet/Touch for Shop Floor

**BUILT FOR PRODUCTIVITY**
- Designed around exception based management
- Built in workflow and alerting
- Universal search capabilities
- Intelligent lookup capabilities
- Hotkey and shortcut support
INTEGRATED EXPERIENCE

- PowerBI content packs come with the solution. Not a separate project.
- Transactional and analytical data side by side
- Real-time KPIs to monitor business metrics
- Marry up with the world of big data
- “Ask the next question”

ACTIONABLE

- Workbenches to take action based on insight
- Filtering based on exceptional and prioritized conditions
- Drill-down capabilities to transaction details

BEST OF MICROSOFT TECHNOLOGY

- Real-time insight for the CXO on an easy-to-use Power BI Portal
- Tight Office integration including import and export of all key data
- Data Management Platform—utilizes Data Entities to migrate, integrate, and mash up data
Demonstration

• Dynamics 365 for Retail
• The Sample eCommerce Store Front
• The new modern POS
Global Capabilities

EASY LOCALIZABLE PRODUCT
- Globally supported in 41 languages for 36 countries
- Additional countries and languages through local ISV solutions

REGULATORY WATCH & COMMUNICATION
- Regulatory updates for supported countries via LCS dashboard
- Business process models for local regulations
- Regulatory collaboration methodology to ensure compliance

CONSISTENT LOCALIZATION EXPERIENCE IN APPSOURCE
- Localization from Microsoft for 36 countries
- Curated LCS ISV solutions for other countries
Retail Stores/POS

- Multi-platform, hardware agnostic POS
  - Offline/traditional till or Cloud
  - Architected for mobility
  - Hardware stations
- POS and Clienteling
- Product browsing/lookup
- Built for omnichannel
- Store operations
  - Reporting, cash, shifts, time clock
- Inventory
  - Lookup, receiving, counts, etc
Order Management and Customer Service

- Complete picture of customer
  - RFM, LTV, etc
- Omni-channel order servicing
  - Changes, cancels, returns, payment management, regardless of channel
- High volume order entry (catalog)
- Order exception workbenches
  - Fraud, holds, payment issues, etc
- Cases, notes, issues
  - Workflow enabled
- Machine Learning based, dynamic, order routing (DOM) coming in future release
Customer Relationship Management & Loyalty

- One view of the customer
  - Transactions, addresses, contact info, etc from all channels
  - Dedup, merge, NCOA, hygiene
- Customer attributes
- Customer segmentation (RFM) and LTV info built in
- Points based loyalty program
  - Links to discounting and coupons
- Behavioral segmentation
- Campaigns
  - Typically leverage outside ESP
- Source codes
Business Intelligence

- **Day One Value**
  - 800+ SRS reports
    - Ranging, filtering, sorting
    - Drill down & drill through
    - Subscriptions/emails, etc
- **Office add-in**
  - Build ad-hoc in Excel from live data, refresh
- **PowerBI**
  - OOB datasets
  - Embedded
  - Data from other sources
    - Web info, traffic counters, social feeds, etc
  - Natural language, ML, and Azure
- Workspaces
- Screen / Form Configuration
  - Add Fields to Any Form
  - Move / Hide / Rename Fields
  - Change Cursor Flow
- Form Filtering / Save Filters
- Drill Down Capability
- Import / Export Functions
- Document Management
- Workflow
- Task Guides
- Mobile apps
Hardware Station Scenarios

Traditional, direct connect

NEW: Network addressable

NEW: Point of service APIs

Shared hardware station over network
HP Mobile Retail Docking Station

Access to expanded set of retail peripherals
  (Serial, USB, RJ-45)
I/O cover for clean look
HDMI and VGA video out
Dual-hinge arm for adjustability
Secured latching, cable lock, and counter options
Dock with or without HP Retail Jacket
Product Information Management

- Unlimited categorizations
  - Merchandising vs buyer vs clearance
  - N-Level Deep
  - Leveraged throughout the system
    - Prices, reporting, ordering, etc.
- Unlimited definable attributes
  - “Anything an ERP doesn’t care about”
  - Numbers, defined lists, units, acceptable ranges, etc.
- Channel/output definition
- Product check/workflow
• Each can be tied to one or more price groups
  - How zone/region pricing is accomplished
Demonstration

- Customer service workbench
- Pricing calculator
- Retail category management
Intelligent Insights

Retail Workforce Management with StaffHub

• For store managers:
  • Create and publish shifts and schedules for workers in stores.
  • Visibility of absence requests submitted by retail workers with the ability to approve or reject requests.
  • Visibility of shift swap and offer shift requests with the ability to approve or reject requests.

• For store associates:
  • Visibility of shifts and assigned schedules, along with instructions for the shift.
  • Visibility of co-workers assigned to shifts.
  • Submit absence requests.
  • Swap shifts, or offer shifts to coworkers.
Demonstration

• StaffHub
Improved inventory visibility

- Allow warehouses and distribution centers to be included in inventory lookup
- Surface ATP and On order quantities in POS
- Support for offline quantity lookups
- Ability to view product variants in a matrix view
Product Recommendations

- Azure Machine Learning Purchase Suggestions at POS
  - Frequently bought together
  - Item to Item Recommendations
  - Personalized customer recommendations
- Embedded in Item screen, customer screen, and transaction screen
Retail Experience App

- Customers will be able to manage their account and view their order history
- Ability to view loyalty point status and rewards
- Add support for orders to be picked up in store
- Integrate machine learning product recommendations
- Enable customer notifications for order status and targeted offers
- Utilize beacons to enable integrated in-store experiences
- Ability to request assistance from an associate in the store
Contact Information and Questions

Rachel Profitt, MCT, MVP
Director, RSM Technology Academy
Rachel.Profitt@rsmus.com
@rachelprofitt on Twitter
www.linkedin.com/in.rachelprofitt
www.dynamics365lady.com
http://roadmap.dynamics.com