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INDIA PHYGITAL INDEX 2022

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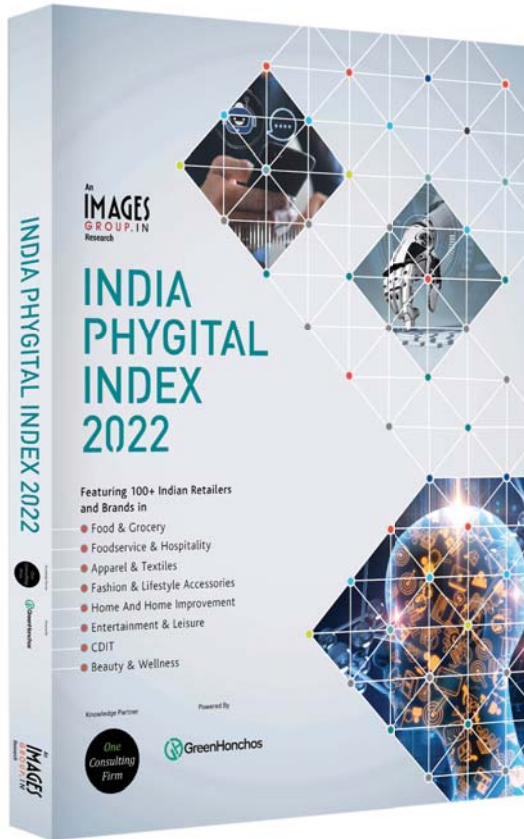
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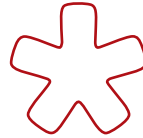
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One Consulting Firm is a premium consulting firm with focus on Retail, e-Commerce and Consumer Product sectors.

Its team members have delivered more than 200 transformation engagements in strategy, performance improvement and digital transformations across the globe.

One Consulting Firm excels in providing exceptional value to its customers because of the care and attention it pays to them and for its speed & quality of deliverables.

One Consulting Firm is perhaps the only consulting firm in Omnichannel field with capability of delivering end to end solution- right from strategy, operating model (supply chain, organization structure etc.), systems selection & implementation and running the operations.

Our unique and comprehensive assessment model allows you to quickly determine your omnichannel maturity. Using this assessment, we then develop a solid roadmap with well-defined priorities and an action plan.

For details and feedback, connect anil.rajpal@oneconsultingfirm.com

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FOREWORD



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Omnichannel has emerged as the 'hero' for retail since the pandemic and in our quest to decode the omnichannel maturity narrative for retail, we set out to examine the retail scape through IMAGES India Phygital Index (IPI) 2022. Following a grand success and huge positive response on IMAGES India Phygital Index (IPI) 2021, this year we set out on the path to analyse the omnichannel strength and maturity of India even further. We have examined almost 102 retailers encompassing online and in-store retail across five segments. Unlike last year, this year our analysis includes five business parameters: e-commerce share of the business, organisational maturity, omnichannel features, practices, and capabilities, and customer journey seamlessness. Each of these parameters has been broken down further for more in-depth investigation.

The IPI 2022 brings to the front important benchmark and best practices that can be applied to prioritise and plan for the new normal. The idea of omnichannel retail at present has begun to receive a new meaning owing to the new tech implementations and renewed strategies that are making shopping personalised, seamless, convenient, and experiences more noteworthy. The idea of omnichannel has been a buzzword for months now, but how many retailers have been able to achieve that is a question that we want to ask and answer through the new study put forth here.

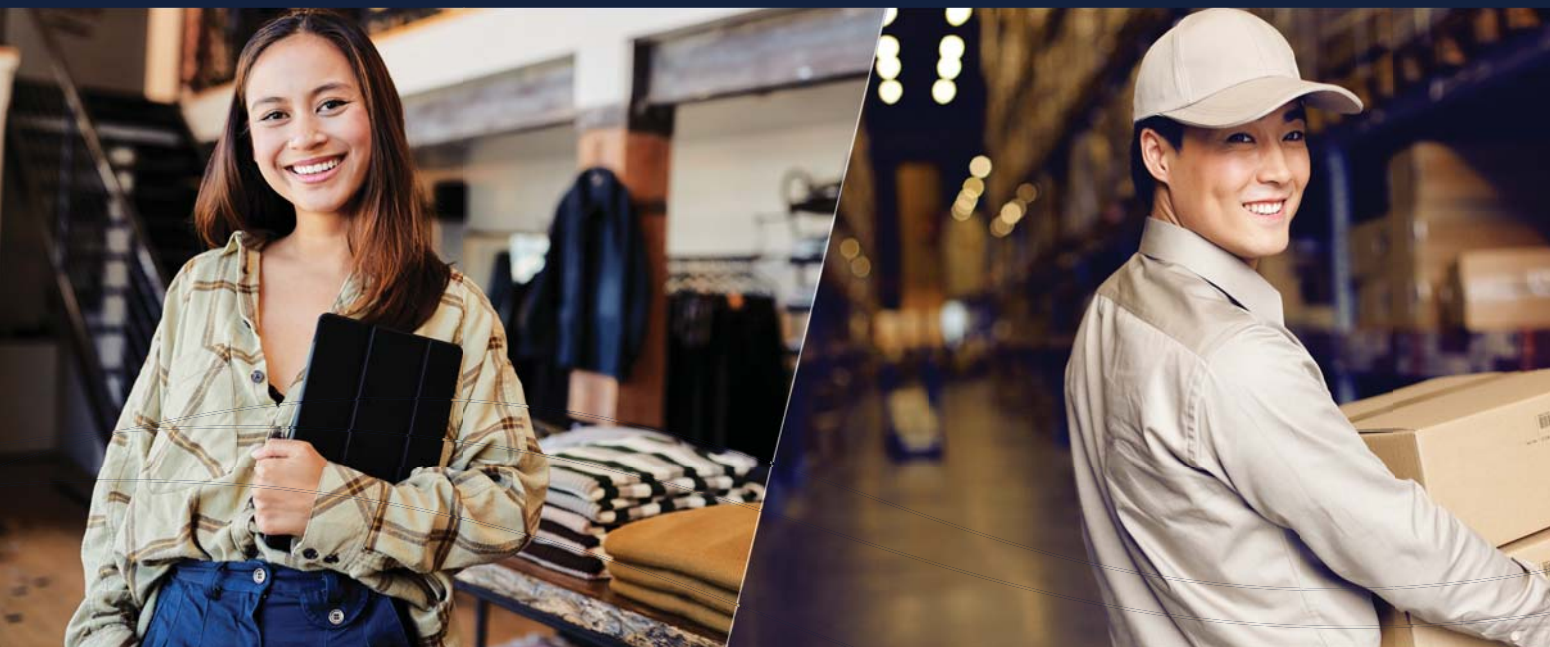
Through this index, we look forward to noticing the changes that have happened within the retail domain and observing the gaps that exist and bringing to the front the technology adaptation and other factors, which have contributed to the omnichannel propagation in retail. From the time we conceptualized the IMAGES India Phygital Index, we have tried to understand the backdrop of omnichannel growth in India and whether it has matured over time or if it is still in a very nascent stage. Through our research and understanding, we intend to measure the omnichannel gap every year through IPI and will continue outlining our findings to note how each sector is reducing the gap to make omnichannel a reality for retail.

Through our findings, we understood that customer today is demanding quicker delivery and is looking for faster resolution of returns too. From same-day delivery to ordering online and picking up in-store, ordering online paying for it at the doorstep, and other such convenient propositions emerged as a winner. We also notably understood that loyalty is winning big with the customers today and it is fast-changing the omnichannel landscape. So, we wish to dive deeper into the concept with our findings every year and build the omnichannel growth story in India!

Amitabh Taneja
Managing Director
IMAGES Group

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PREFACE



A decade ago, text messaging emerged as the primary way to connect with friends and family. Today, messaging apps have become essential tools not only for personal communication but also for running businesses.

Consumers live on their mobile devices and spend more time increasingly on apps such as Facebook Messenger, Instagram, and WhatsApp, which account for more than 90% of the market.

Companies naturally want to become a part of that conversation and use messaging as a new way to enhance customer experiences and increase sales.

The rise of instant messaging

With hundreds of billions of messages delivered daily through messaging apps, the journey messaging has taken throughout these three decades is unmatched.

From the first online chat service back in the 80's to the renaissance instant messaging underwent in 2010 with WhatsApp, WeChat, and Snapchat, the very concept of digital communication has changed entirely.

What once was a simple exchange of information has become a lifestyle with multimedia content, video conferencing, asynchronous voice messages, games, animated GIFs, and sharing one's current location. Plus, some apps help consumers complete purchases, provide customer support, and manage the entire end-to-end customer experience via messaging.

How businesses can benefit from this evolution

In a market where global eCommerce sales are expected to hit \$5.5 trillion this year and 76% of adults shopping online, companies can't afford to offer their customers anything less than impeccable communication experiences.

| PREFACE |

Moving forward, consumers are not going to want to give up the convenience of messaging with brands as long as the communication is authentic, highly curated, and specific to them.

Chat apps offer this unique opportunity to create more intimate relationships and to establish this increased level of convenience customers are looking for, allowing integration at every step of the journey, unparalleled customer service, and increased engagement in larger audiences.

The more advanced messaging technology gets, the savvier consumers will get. And while businesses continue to search for the next best thing to innovate with how they speak to customers, consumers will always expect personalised, safe, and reliable communication.

The moment for brands to take advantage of the endless capabilities of messaging apps to continue building and growing their relationships with their current and future customers is now.

Whether you're trying to improve the quality of existing channels like SMS, Voice, or Email – or adopting new ways of communicating through WhatsApp, Instagram Direct, or Google Maps – MessageBird is here to manage the complexity for you.

With an expanded presence in India, you can now get in touch with the MessageBird India team to learn more about which options may be right for your brand.

Look forward to connecting.

Vinay Bhartia

Country Manager - India
MessageBird

PREFACE



Hi Everyone,

4 months, 8 resources, 15 expert interactions, mapping of 102 retailers and a lot of anxious & fun moments is what has taken to deliver India Phygital Index (IPI) 2022. All this is backed by our solid methodology and analysis.

The retail industry is going through a very dynamic and volatile phase. There is no formal study which captures the state of Omnichannel Maturity. Hopefully IPI fills the gap

The Indian retail landscape is buzzing with terms like same-day/next-day deliveries, click-and-collect, endless aisles, and ship from stores, among others. Retailers have embraced the Omnichannel phenomenon quite well and quickly. However, there are many lessons to be learnt.

IPI's only goal is to show you how you're doing and share the best practices. All this so you can grow faster!

Hope you would enjoy IPI 2022 and find it worthwhile to take inspiration! Your feedback matters. Please feel free to write at anil.rajpai@oneconsultingfirm.com

Anil Rajpal

CEO and Founder

www.oneconsultingfirm.com



Undeniably, the COVID-19 crisis has transformed how consumers interact and transact with retailers. The engagement over the years has decentralised from brick-and-mortar storefronts to online touchpoints, building a growing omnichannel ecosystem. According to the recently published industry reports, 73% of retail consumers are omnichannel buyers, collectively accounting for 70% more purchases than offline-only shoppers.

Adding new platforms to reach your customers is one thing, but scaling those channels, growing revenue from them, and providing a seamless shopping experience is a different feat altogether. In today's day and age of an over-competitive retail market, brands will have to leverage a combination of the right strategy, innovation, and technology to get the growth multiplier effect by integrating the channels of commerce.

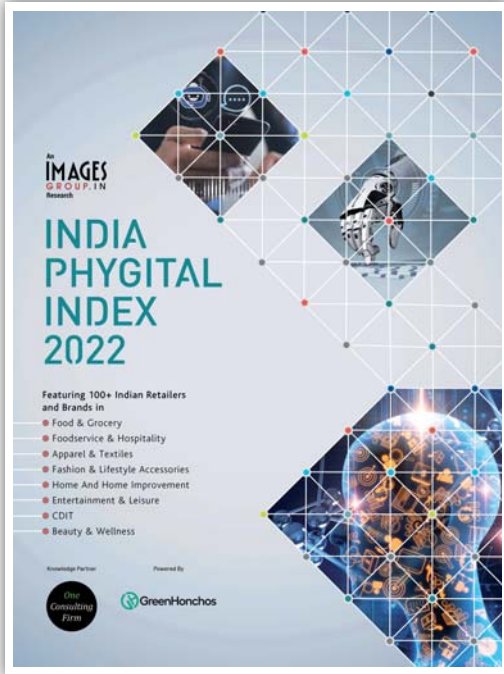
The D2C industry in India is already poised to reach a \$100 billion+ valuation in the next 3 years, with over 350 million consumers projected to shift towards online shopping. This year has been a gauntlet for businesses everywhere. The brands that adopted the change and diversified their outreach to customers are now all set to move forward from a strong position hereafter.

Conclusively, as customer expectations have skyrocketed in their buying experience, businesses must be more proactive. E-commerce will continue to be an essential element of retail strategy, and business growth will ultimately depend on creating a cohesive customer experience. Service, convenience, and ease of navigation will have to be translated into online and physical retail experiences. Hence, it would be best if you positioned your brand thoughtfully while strategically executing an omnichannel growth plan to get the best out of the present, building the right future.

A matter of fact is that the customers' shopping habits have perennially changed. As the brands start to accelerate the compositing of both worlds, consumers will expect these experiences as standard in the battle for the share of the voice, consideration & wallet.

Navin Joshua
Founder & Director
Greenhonchos

CONTENTS



14 EXECUTIVE SUMMARY

16 INTRODUCTION

19 WHAT WE FOUND... PHYGITAL INDEX 2022

20 Parameter 1

22 Parameter 2

26 Parameter 3

30 Parameter 4

34 Parameter 5

38 ROADMAP, OPPORTUNITIES AND CHALLENGES

43 CONCLUSION

46 CASE STUDY: CAPGEMINI ENGINEERING

48 CASE STUDY: FIREWORK

ABOUT THE BOOK

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The retail industry is going through a highly dynamic and volatile period. There is no formal study that accurately depicts the state of Omnichannel Maturity. This is where the India Phygital Index (IPI) comes into play.

The India Phygital Index (IPI) is in its second year. IPI's goal is to capture the current state of Omnichannel maturity of the Indian retail industry and share best practises to help you grow faster and more solidly.

We received excellent feedback from you regarding IPI 2021.

In IPI 2022, we expanded the assessment framework even further.

It now includes five business parameters: e-commerce share of business, organisational maturity, omnichannel features, practises, and capabilities, and customer journey seamlessness. Each of these parameters has been broken down further for more in-depth investigation.

We covered 102 retailers this year. The majority of them are national retailers, and the IPI score reflects this sample type to some extent.

We are thrilled to be collaborating with One Consulting Firm for IPI, and we hope that their extensive experience in retail, e-commerce, and consumer packaged goods will add even more value to you.



THE INDIAN RETAIL LANDSCAPE IS BUZZING WITH TERMS LIKE SAME-DAY/NEXT-DAY DELIVERIES, CLICK-AND-COLLECT, ENDLESS AISLES, AND SHIP FROM STORES, AMONG OTHERS. AFTER A HESITANT START, RETAILERS HAVE EMBRACED THE OMNICHANNEL PHENOMENON QUITE WELL AND QUICKLY.



Currently, Indian retailers generate US \$11.2 billion in revenue from their e-commerce operations. This figure has the potential to rise to US \$ 55 billion in the next five to seven years. There are no two ways about it that Omnichannel retailing has enormous potential in India both from customers and retailers' standpoints. Customers can interact with the company through any channel at any time, and retailers can innovate their business models. Omnichannel can solve some difficult problems such as broken sizes, high inventory levels, and longer delivery times.

We believe that retailers are on their way to achieving this vision if they manage collaboration across e-commerce and stores, work on content, and move into the next Omnichannel orbits of personalization and community building.

Several lessons can be learned along the way. The Phygital Index was created with the intention of first assessing retailers' Omnichannel maturity and then sharing best practises that can help accelerate industry growth.

The Phygital Index analyses the maturity on five parameters listed in the report to comprehensively capture the state of Omnichannel maturity. The industry's overall score is 47.7%, which is a reasonably good score given that the real push toward Omnichannel came in the last couple of years. The industry has scored very well to have the share of e-commerce at 13% of total revenue, in offering rich features such as click & collect, ship from stores etc and in making technology advancement.

We call this stage "Partially Connected Omnichannel" because the customer journey isn't always smooth or consistent or seamless across all channels. The irony is that, in some cases, it could have been avoided. For example, at a popular online fashion store, we had to look hard to find the click and collect option, which was hidden until the very end of the checkout process. Even though we chose the "click and collect" option, we were still charged for delivery, even though the item was to be picked up at the store we chose.

Retailers do get email addresses, but they don't use them to send consistent, personalised content. Getting reviews from users is becoming a weak spot.

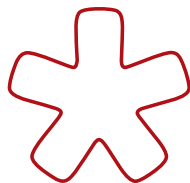
Retailers have done well by offering good omnichannel features like click-and-collect, endless aisle, chatbots (surprisingly low penetration), and shipping from the closest point. Even though this is only available at a small number of retailers for many features. Here, we saw that retailers who did well in brick-and-mortar retailing also did well in Omnichannel retailing, in a general sense. So, there are no surprises, and we wish we had some start-ups or small angels that could have shaken up the market with great new ideas. Omnichannel hasn't yet changed the way businesses work, which is something we can learn from Best Buy or Mercedes India.

When it comes to technology, Indian retailers have done well. Even though the so-called real-time inventory visibility isn't perfect, the system is still working well as it uses inexpensive SaaS options. Technology is overwhelming, and we can see that retailers will continue to play catch-up with future technologies like Metaverse, MACH Alliance (Microservices-based, API-first, Cloud-native SaaS, and Headless), RFID, etc.

On the operations side, the store staff hasn't been taught the new skills they need to handle online deliveries, pack in an attractive way, and meet SLAs. Their DNA is still taking care of walk-ins, which they do well. Here retailers need proper change management interjection.

Collaboration between stores and e-commerce, operational efficiency such as picking and packing, content creation&customer engagement, personalization, leveraging Omnichannel for innovating the business model and Omnichannel profitability, on the other hand, are key areas for improvement. The store staff does not appear to be sufficiently motivated to fulfil online orders from stores, nor do they appear to be particularly interested in promoting features such as endless aisles/self-service kiosks, which can solve problems such as broken size in the fashion industry. There is therefore the danger of all the hard work going waste in case this is not resolved quickly and resolutely. Leaders must take the lead in this situation and bring in the change management process.

Overall, the industry has built a great foundation for it to achieve seamless, personalized and community driven Omnichannel.



With omnichannel retailing, customers can engage with retailers from any location via any available sales channel (physical store, website, mobile app, text message, social media platform, etc.) and have their purchases shipped from the most convenient location (physical store, warehouse, dark store, or fulfilment centre).

We understand that things are more complicated than they look above. This is a really intricate metamorphosis. E-commerce, on the one hand, is a new manner of conducting business that differs greatly from the standard storefront (pricing, merchandising, technology mindset all is so different). However, it can feel like trying to unite the North and South Poles when trying to coordinate efforts between brick-and-mortar and online functions of retailers.

There are fundamental reasons why we believe on the potential of Omnichannel

There is no denying that Omnichannel is the present and future of retailing. From the perspective of the customer, it provides a seamless, convenient, transparent, quick, and most likely the best price proposition.

Currently retailers are deriving about 13% of their sales or US \$11.2 billion from e-commerce/Omnichannel. This has the potential to grow 5 times to US \$ 55 billion by 2027.

One Consulting Firm thinks that retailers are on their way to achieving this vision as long as they continue to invest, manage change, work together across functions, and move into the next orbits of Omnichannel, which are personalization and building the community.

From the standpoint of retailers, it can create tremendous value-capture higher share of wallet, achieve better sell throughs as the store's inventory is exposed to customers at a national level, reduction of broken size problem, reduction in the level of inventories as retailers can fulfil from anywhere so safety stocks can be significantly reduced, store sizes can be optimised as similar SKUs do not need to be stored in the stores (e.g. Pepperfry, Nykaa Stores), If customers in the areas can be catered for by online stores, the number of stores can be reduced (e.g., Best Buy store count reduced from 1400 to 1000 while revenue increased from US \$ 36 billion to US \$ 44 billion from 2016 to 2020)

Retailers in India have begun their Omnichannel journey, as we will see in this report, from a hesitant start to rapid adoption.

While there has been significant progress, much more work remains to be done to realise the potential that Omnichannel offers. A number of issues must be addressed, the most important of which are: the change management required to integrate the stores and e-commerce operations, addressing profitability concerns, introducing personalization at each step of customer journey and building community of customers and ecosystem. Leadership drives change. Leaders must recognise that they are competing with the "Amazon" experience and no less. This shift in attitude must then filter down to the stores, where the staff is so used to serving walk-in customers and perhaps are unaware of the power of Omnichannel. There are numerous lessons to be learned.





Why Phygital Index

The Phygital Index was created with this goal in mind. First, capture the current state of maturity; second, share the lessons learned and help accelerate growth. We hope that this report is useful to you in this endeavour.

The Phygital Index comprehensively captures the state of Omnichannel maturity by analysing the maturity of the five parameters listed below.

Parameter 1 : Share of e-com business as a % of overall revenue

Parameter 2 : Organisation Maturity (culture in promoting Omnichannel)

Parameter 3 : Omnichannel Features the retailer provides (e.g Click & collect, or buy online & return in store, same day/next day delivery)

Parameter 4 : Omnichannel Practices and Capabilities (e.g. Online orders being shipped from stores or warehouse whichever is nearest to customer)

Parameter 5 : Seamlessness of Customer Journey across Awareness, Engagement, Purchase, Service and Loyalty

Each of these parameters was given equal weightage. Based on the points earned for each of these parameters, the retailer was assigned a rating of 0%, 25%, 50%, 75%, or 100%. The following scoring mechanism was used in the case of “share of e-commerce business,” for example. E-commerce includes the revenue from own website(D2C), mobile app, marketplaces, social channels etc.

Figure 1

| % Share of e-commerce | Score Assigned |
|-----------------------|----------------|
| 0-5% | 0% |
| 5-10% | 25% |
| 10-15% | 50% |
| 15-20% | 75% |
| >20% | 100% |

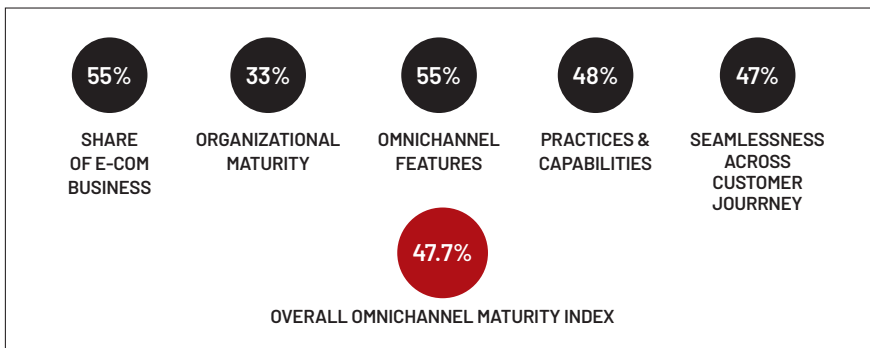
As the most comprehensive survey of its kind, we tracked the Omnichannel maturity of 102 retailers and brands across the above parameters. One Consulting Firms’ team visited over 70 stores and spoke with a variety of industry experts. Because the majority of these retailers were national retailer, the index will reflect greater maturity. The majority of local players have yet to embark on their Omnichannel journeys. The questionnaire is available as an appendix to this report

Following four sources of data were used

- Online survey of CEO/CIO/CMO/e-commerce Head
- Store visits and interaction with store personnel
- Industry experts
- Tracking of e-commerce websites of retailers and brand



INDIAN RETAILERS' OMNICHANNEL MATURITY IS 47.7%, WHICH IS A REASONABLY HIGH ACHIEVEMENT



Although the overall maturity index of 47.7 % appears low, it is a good score given that Omnichannel only recently received a real thrust. In our opinion the Omni child has reached the toddler stage, a stage just before it starts running.

The industry has performed well in terms of the rapid adoption of the Omnichannel concept and the percentage of business generated by e-commerce. While there are some areas that needs improvement, such as organisational maturity and the seamlessness of the customer journey,

Each of these parameters has been detailed out in this report

PARAMETER 1



SHARE of e-COM BUSINESS

INDIAN RETAILERS' MATURITY ON THIS PARAMETER IS 55%, WHICH IS A GREAT ACHIEVEMENT.

e-commerce accounts for approximately 13% of national retailers' retail revenue. Fashion and consumer electronics companies have taken the lead in this space. F&G is lagging in this area.

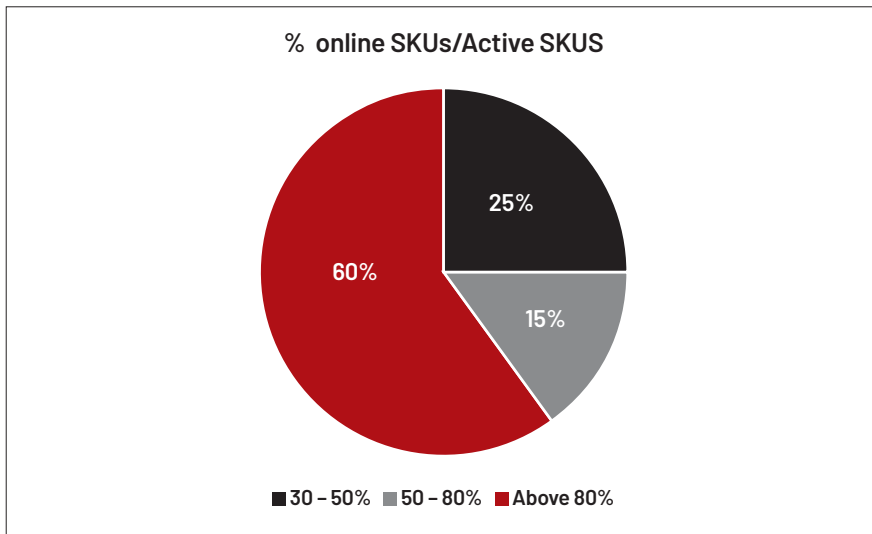
National retailers have made rapid progress in adopting Omnichannel retail in recent years, and full credit should be given to them for this accomplishment. Only a few years ago, this was regarded as a mere buzzword, with much scepticism.

Check out these inspiring facts from the survey

- Today, over 60% of national brands use one or other form of Omnichannel. The rapid evolution of the eco system - SaaS-based technology service providers and logistics players - has significantly aided in this.
- Now it is not uncommon to hear that a retail store receives more orders per day from online than from walk-in customers during certain times of the year. Indeed, in one of the fashion stores we visited, there were 60 bills from online sales and 13 from walk-ins. This is a significant improvement from a few years ago where there was nothing.

- It is not uncommon for retailers to derive 15-20% of their revenue from e-commerce, and about 30% being serviced from the stores. The encouraging news is that a good chunk of this share is now coming from their own websites (D2C), which was previously unattainable.
- It's great to see so many retailers with more than 80% of their active SKUs now available for sale online.

Figure 2



Profitability is a challenge that must be addressed, since it may impede Omnichannel retailing's growth. We discuss this in the opportunity/roadmap section.

We expect Omnichannel retail to grow with the introduction of video/social commerce and immersive technologies. Since many young people already play games, they may go straight to metaverse



| PARAMETER 2 |



ORGANISATION MATURITY (CULTURE IN PROMOTING OMNICHANNEL)

INDIAN RETAILERS' MATURITY ON THIS PARAMETER IS 33%. - AN IMPORTANT AREA IN GREAT NEED OF IMPROVEMENT

In a survey like this, it is difficult to comment on organisational culture. Culture, however, manifests itself in one or more actions. We attempted to assess maturity based on the following observations/points, which are indicative of collaboration efforts between the two channels.

- a. Do the stores encourage the use of QR codes and online information? Are the signs clearly and correctly placed in the designated areas? Signs can be very useful in shaping and assisting the customer's journey.

- b. Are store employees encouraging customers to shop online if necessary? For example, if a size or colour is unavailable, the customer can be directed to the online store/or endless aisle.
- c. Do the appropriate incentives exist for store personnel to promote online?

When calculating the maturity Index, each of the above parameters was given equal weightage.

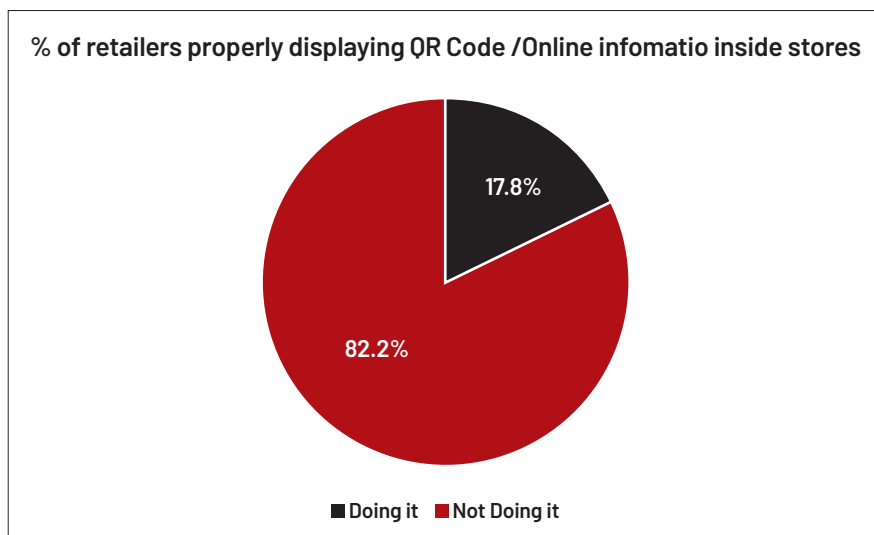
One Consulting Firm’s observations on above sub parameters

- a. Omnichannel retailing is about encouraging cross-channel customer behaviour. The Indian retailers despite all the groundwork are missing this. The customers should be encouraged to switch from online to physical stores and vice versa. For example, if a specific size or colour is unavailable in the store, the customer can visit the website to see if that size and colour are available in the company’s warehouse or other stores.

This Omnichannel feature should be highlighted in stores. Some excellent examples can be found below. This way, the situation of being out of stock and sales loss (5-7% of sales) can be avoided. Additionally, lower markdowns are possible due to higher sales through.

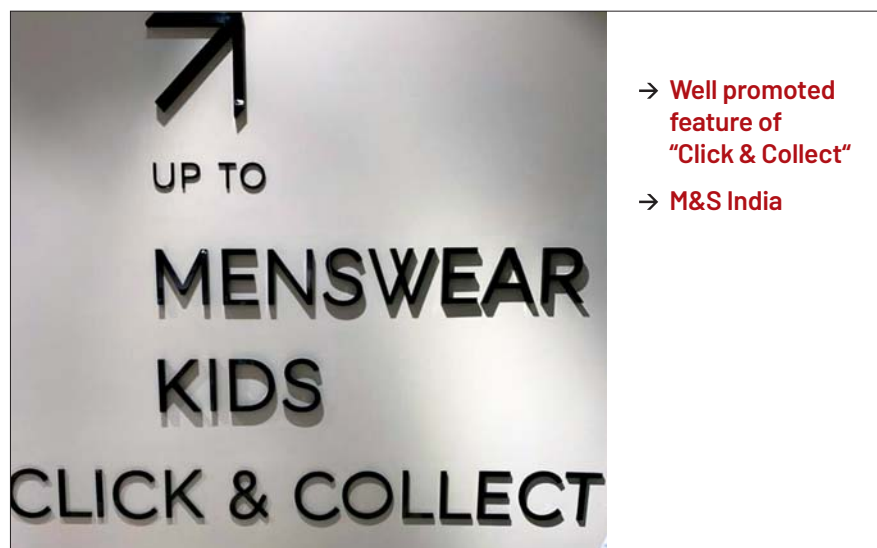
The unfortunate part is that after all of their hard work, most Indian retailers’ efforts are going wasted. Only 18% of national retailers with Omnichannel capabilities display QR codes or display appropriate signage inside their stores to promote their online business.

Figure 3



Some examples of best practices of promoting online channels inside stores:

Figure 4



- Well promoted feature of "Click & Collect"
- M&S India



- Highly visible QR code along with product picture
- Promoting customers to go online



- Encouraging customers to go online in case they can't find size or color a problem which is a big pain area for fashion retailers
- QR code clearly displayed on the board



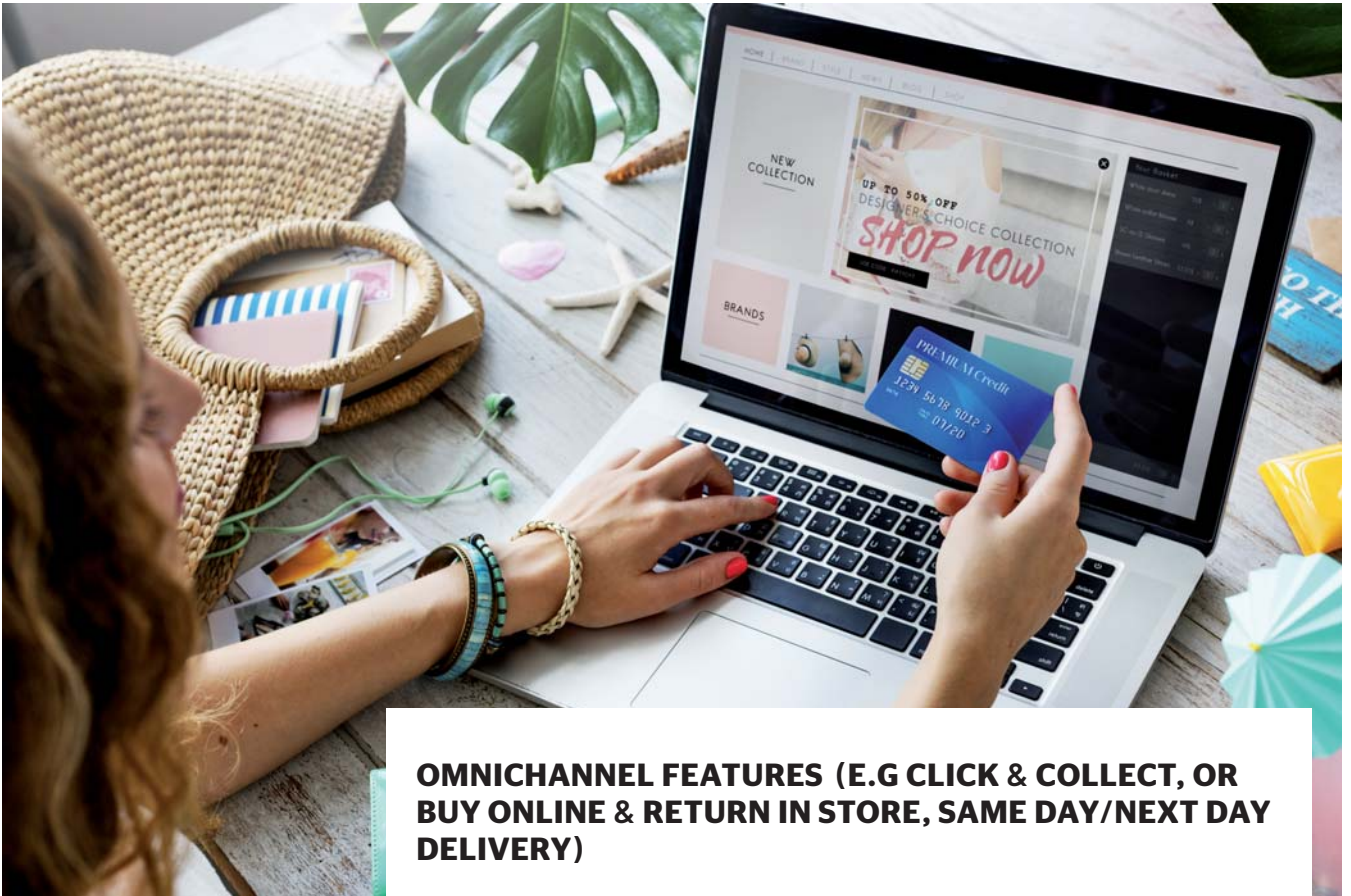
b. Neither does the store staff appear to be particularly interested in promoting cross channel behavior. This could be due to a lack of training, a lack of incentives, a lack of alignment of KPIs, or integration issues with the company’s e-commerce business. This is despite our consultants asking salespeople if they have an endless aisle feature etc.

Broken size is a major issue for fashion retailers (accounting for sales loss), but it can be overcome by the Omnichannel retailing feature described above.

The following are the other parameters that have not been considered in the organization’s maturity but are significant enough to warrant consideration.

- a. Is the structure of the organisation conducive for the incubation of e-commerce and then growth of Omnichannel? There are no right or wrong answers here, different organisations follow different structure and may change it depending on the stage of evolution. In some organisations, especially when e-commerce is incubating, the e-commerce head reports to the CEO and is separated from the store operations team. When e-commerce is required to be integrated with stores, it becomes part of the store operations function. At this stage, it is critical to inquire about the level of collaboration between stores and the e-commerce function.
- b. Are you getting the right people to run your e-commerce business? Retailers have honed their skills in running modern trade businesses over the last 15 years. E-commerce, which is heavily reliant on technology, is a different beast that necessitates top-tier talent. On this front, retailers are having difficulty attracting and retaining qualified employees.





OMNICHANNEL FEATURES (E.G CLICK & COLLECT, OR BUY ONLINE & RETURN IN STORE, SAME DAY/NEXT DAY DELIVERY)

INDIAN RETAILERS' MATURITY ON THIS PARAMETER IS 55% - A GOOD SCORE

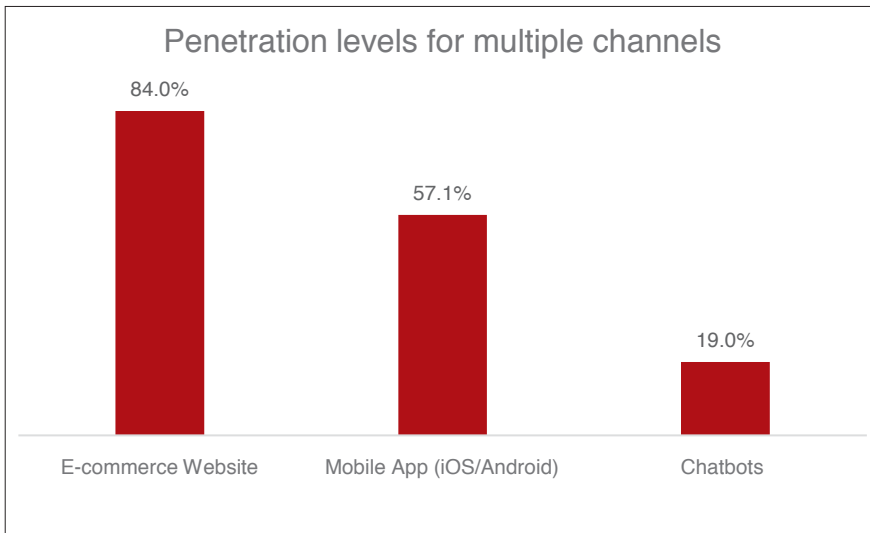
We tracked the following features -whether or not these features are being provided by the retailer. Scores were given as 0%,25%,50%,75% and 100% depending on how many features the retailer is providing

- Earn & Redeem loyalty points across all channels
- Mobile App (iOS/Android)
- E-commerce Website
- Same day/Next day delivery (SDD/NDD)
- Click & Collect / Buy online, Pick up in Store
- Buy Online, Return/Exchange in Store
- Home delivery for store purchases
- Endless Aisle / Save-a-sale/ Associate Ordering
- Loyalty program
- Shop nearby store (only browse/buy items available in particular store)
- "Try & Buy" at home, for online orders
- Online orders are shipped from store or warehouse nearest to customer
- Chatbots for conversational commerce / customer Support

Here are some observations from the survey

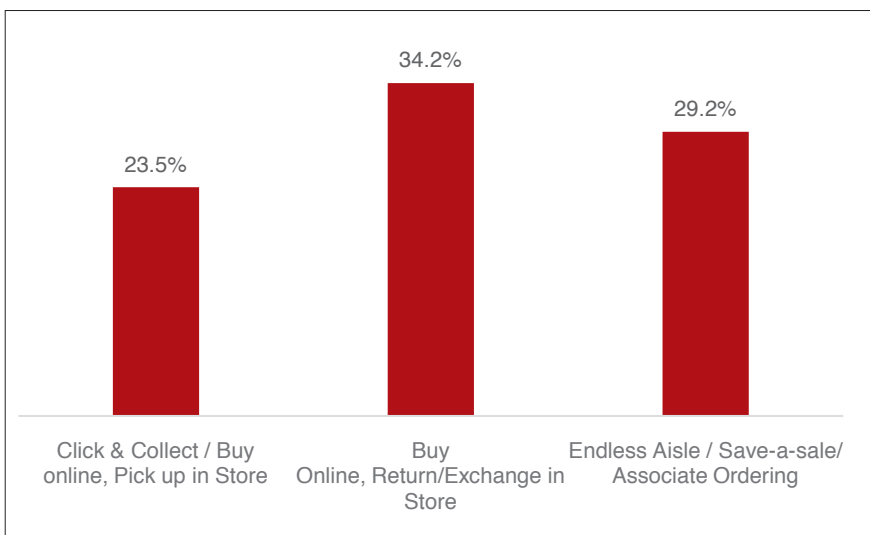
a) Among the participating was the penetration level of multiple channels. Surprisingly chatbot is offered by a very limited set of retailers.

Figure 5



b) While endless aisles has been there for some time, click & collect and etchas been introduced by a few leading .retailers. Although the utilisation of click and collect feature by customers is limited in India, unlike US and Europe. However, in case of categories like appliances this can become useful. So, retailers would do well to put money where there is a likely return.

Figure 6



c) As expected, "Try & Buy" at home for online orders is not being provided by a majority. The cost of managing this is high for most.

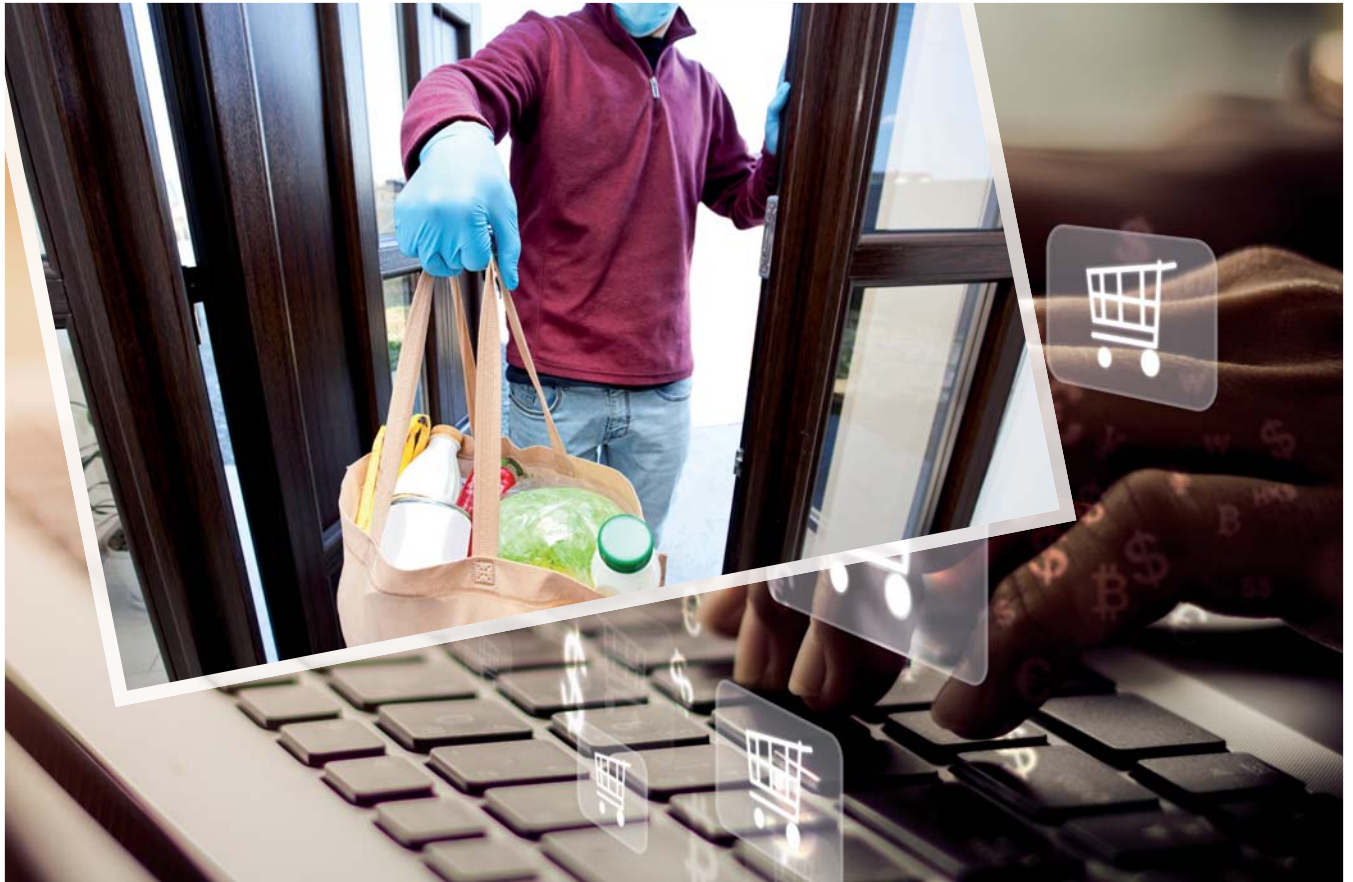
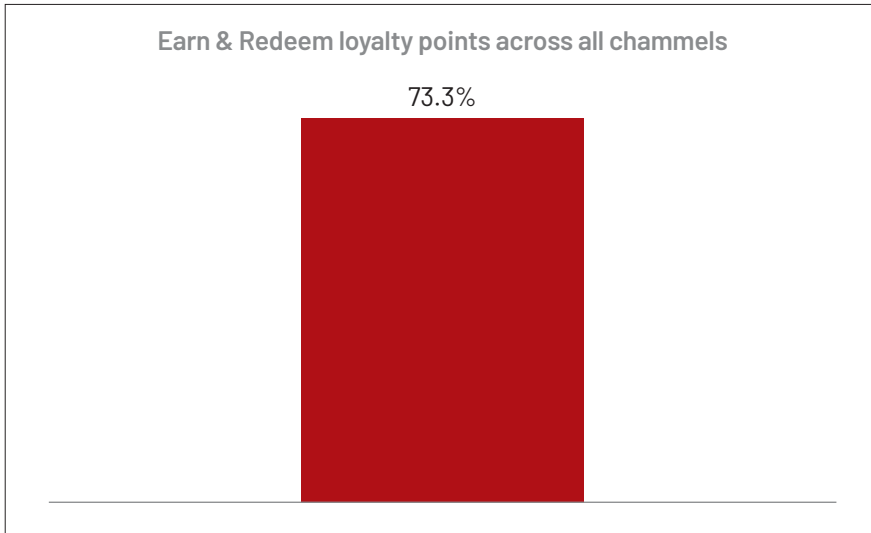


Figure 7



d) Earn and redeem across channels is available for many retailers. However, as we all know, the efficacy of many of these programmes is debatable. Personalized offering for the moment can be aha moment for both customers and retailers, but we are still away from that stage.

Figure 8

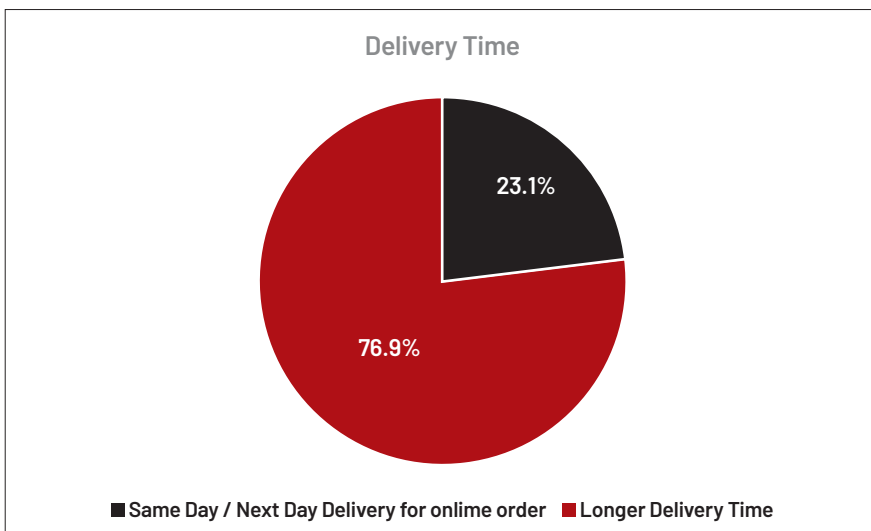


e) These days, the shipping speed is perhaps the most intriguing aspect. 75% of customers say free shipping influences their purchasing decisions, and 18% say they can't wait more than two days for the products they want to buy to arrive- (Source Alixpartners). Because of the scarcity of time, this trend is likely to accelerate as customers demand even faster deliveries.

According to our survey, 23.1% of retailers offer same-day or next-day delivery. This is catching up with retailers in terms of establishing dark stores as well as the systems and processes required to achieve shorter lead times. We anticipate that this trend will continue, and that a higher percentage of deliveries will be completed in less time next year. . This is a bit mad race but hopefully sanity will prevail soon matching the customer needs of speed and the delivery cost.

Picking and packing deliveries takes a considerable amount of time in order fulfilment operations. Tight cycle times, inventory accuracy and precise execution across multiple supply chain parties are required to achieve one- or even two-day shipping. When it comes to store fulfilment of online orders, there is a lot of room for efficiency improvement.

Figure 9



BRANDS AND RETAILERS ARE INVESTING IN DARK STORES, SYSTEMS, AND PROCESS TO ACHIEVE FASTER DELIVERIES.



OMNICHANNEL PRACTICES AND CAPABILITIES

INDIAN RETAILERS' MATURITY ON THIS PARAMETER IS 48 - A MIXED BAG

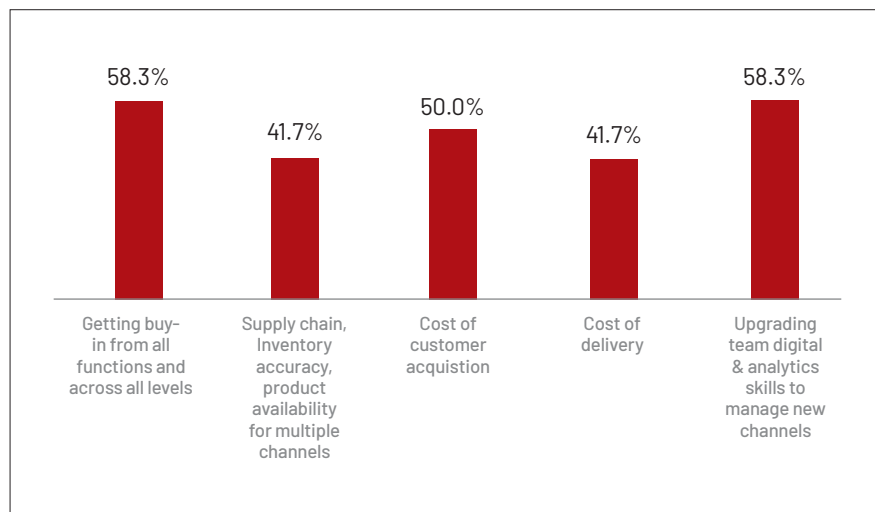
Practices and capabilities are the foundation for retailers to deliver their Omnichannel promise. We have divided them into two components - The first one deals with the non-technology aspects of the business and the second one is about the technology capabilities/systems. While the Indian retailers have made rapid progress on the technology aspects, they must catch up on the non-technology aspects

a) Non-Technology Areas

→ A high proportion of retailers mentioned that they ship from the store or warehouse closest to the customer for the online deliveries. This is an indication of high Omnichannel maturity.

A GOLDEN RULE OF HANDLING CHANNEL CONFLICT IS TO CREATE PROACTIVE AND TRANSPARENT GUIDELINES FOR ALL THE CHANNELS AND HAVE A CONSTANT CONVERSATION WITH THEM.

Figure 11



Supply chain, inventory accuracy, and product availability across numerous channels are additional issue areas. The channel business may be significantly impacted by inventory allocation. In the past, retailers have assigned inventory depending on sales targets. Store managers may feel entitled to that stock as a result of this technique and be hesitant to share it with e-commerce function. However, in order to implement the “sell anywhere, fulfil from anywhere” concept, the leadership must ensure that inventory is shared.

Inventory synchronisation is another challenge: One would assume that after shipments are received, the inventory will be updated accordingly. However, there are several reasons why newly received stock can’t be sold right away. These include quality control checks, put-away procedures, categorization into direct-to-consumer and business-to-business categories, etc. There is a great deal of room for efficiency gains here.





b) Technology

- Many of the retailers have invested in the foundational systems required to achieve Omnichannel capabilities. These systems are Distributed Order Management System (DOMs), Inventory Management System, Catalogue Management System, Logistics Management System and CRM. Product Information Management (PIM) is rather a rarity.
- There are many options available on SaaS basis with developed APIs for interfacing with third parties. This eco system is rapidly growing to retailer's advantage. For example, in the online fashion space there are companies who offer AI enabled cataloguing solution which can dramatically reduce the time (from weeks to days) from item creation to listing on the marketplaces and also increase the accuracy rates to above 95% (from typical levels of 70-80%).
- At the same time while many service providers claim that there is a real time updation of the inventory, it is not the case as reported by some retailers. There is a lag of 8-60 minutes depending on the service provider. This lag can be costly when you are dealing with thousands of orders per day and at the peak time could result in delivery SLAs being breached. To counter this retailer are keeping buffer stocks, which is adding to inefficiency.
- Some advanced retailers have invested in RFID, and they are enjoying its benefits in terms of accurate inventories, faster ready to ship, better customer experience etc. Around 1/4 of the retailers mentioned that they have plans of RFID in the next year or so. As the cost RFID comes down and other challenges are overcome RFID would become an integral part of the technology landscape.
- Some of the stores noted that they do have issues sending the data due to API difficulties. Consequently, when inventory synchronisation occurs between an organisation and a third-party market, they have noticed that there is a little amount of data loss during transmission.
- Technology is overwhelming, and we can see that retailers will continue to play catch-up with future technologies like Metaverse, MACH Alliance (Microservices-based, API-first, Cloud-native SaaS, and Headless), RFID, etc.

PARAMETER 5

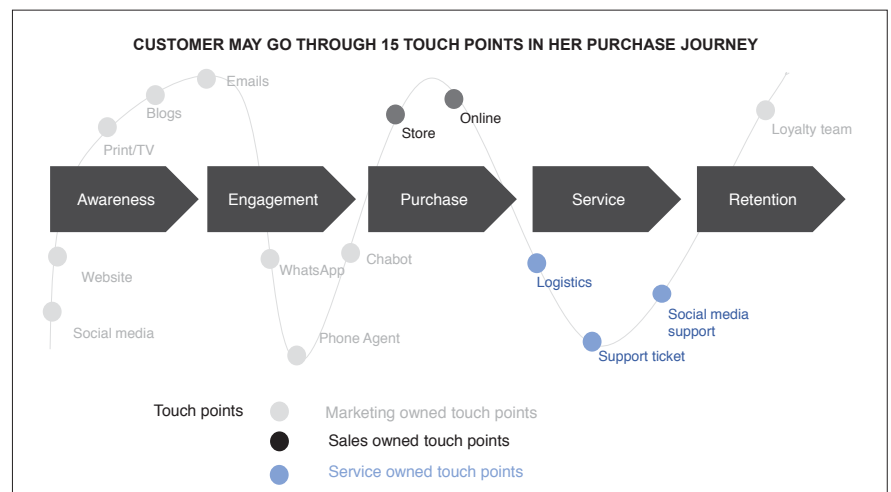


SEAMLESSNESS ACROSS PHASES

INDIAN RETAILERS' MATURITY ON THIS PARAMETER IS 47% - AN AREA OF IMPROVEMENT

Figure 12

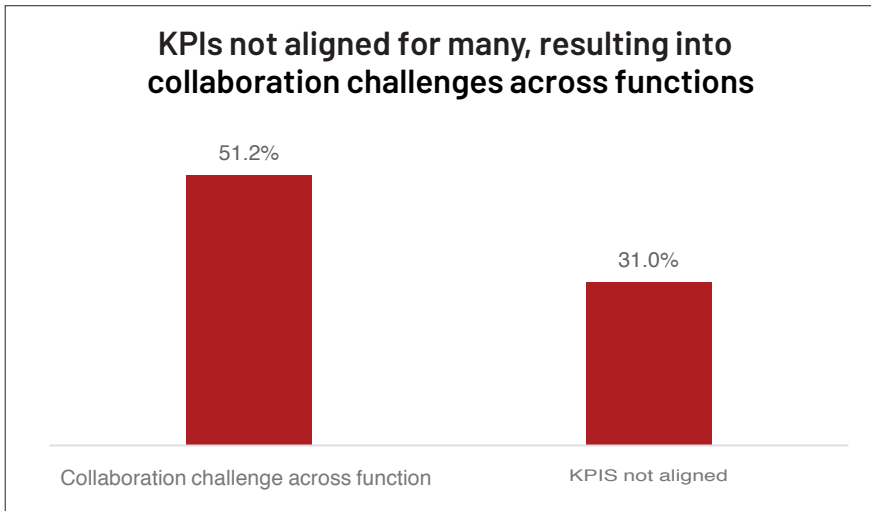
TODAY'S CUSTOMER JOURNEY IS LONG AND COMPLEX AND GOES THROUGH 10-15 TOUCH POINTS.



Today's customer journey is long and complex and goes through 10-15 touch points from awareness phase (getting aware of product/company/promotion etc) to retention phase and then the cycle repeats

There are different custodians from the company who take care of the customer at these touch points. One of the key challenges for retailers is to forge collaboration among different functions of marketing, sales, merchandising, logistics, account, service and maintain a seamless view of the customer. About half the retailers feel that they have collaboration issues and about one third feel that the KPIs are not aligned. 2/3rd feel that there is a need for upgrading the skills.

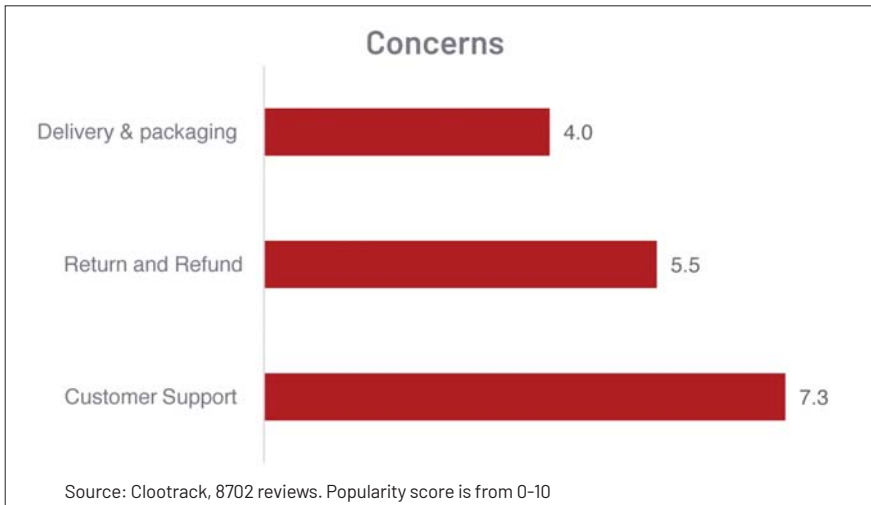
Figure 13



**KPIs
ALIGNMENT AND
COLLABORATION
ACROSS FUNCTIONS
ARE KEY
CHALLENGES.**

Here we observed that the journey is broken at many points and unified view is not easy to maintain, especially with regards to service.

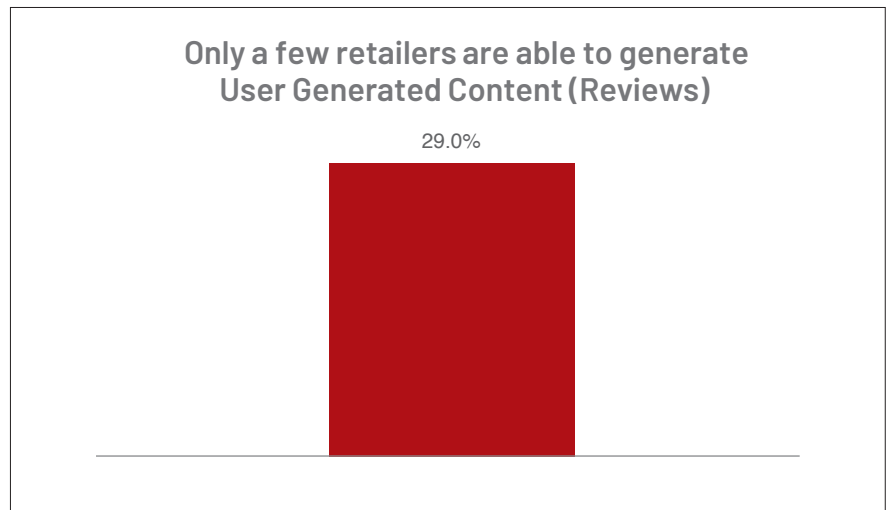
Figure 14



Customer engagement is another important part of the customer journey. Only 29% of retailers can make User Generated Content (UGC reviews) right now, and the quality of that content isn't that great either. Retailers would like to move on to the next level, which is building communities and getting users involved. Don't forget how important reviews and ratings from users are in selling a product or service these days.



Figure 15



While there are 8-10 channels to communicate their offerings to customer, only 9% of the retailers are fully able to use all the channels.

Only 41 % of the retailers are collecting customers' email ids in religious manner. Even the use of current data base for email campaigns is not effectively leveraged. Again, this is one area of keeping the loyal customers engaged through personalisation- a missed opportunity. This can also bring down the cost of customer acquisition which is a key area to be managed well for achieving Omnichannel profitability.

Figure 16

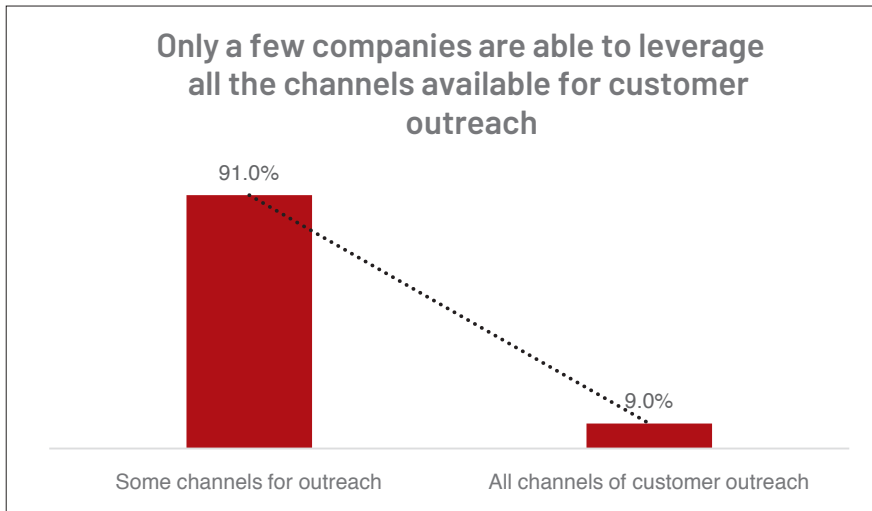
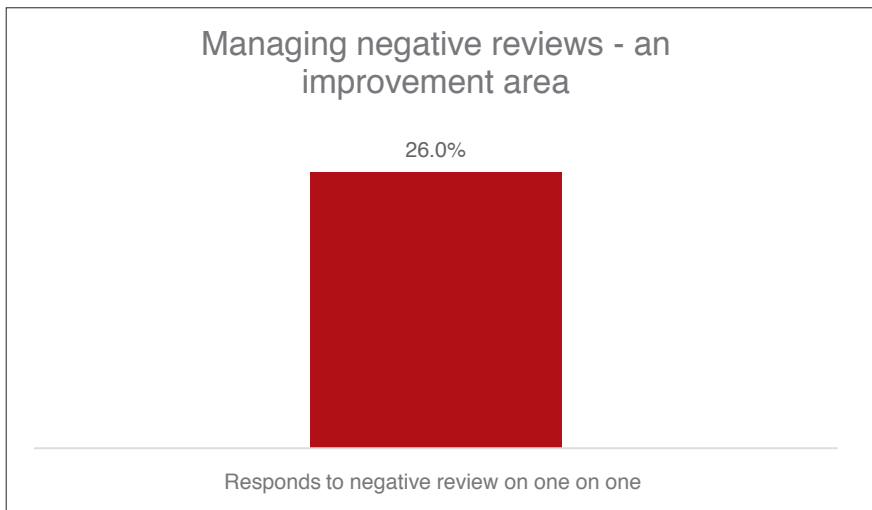


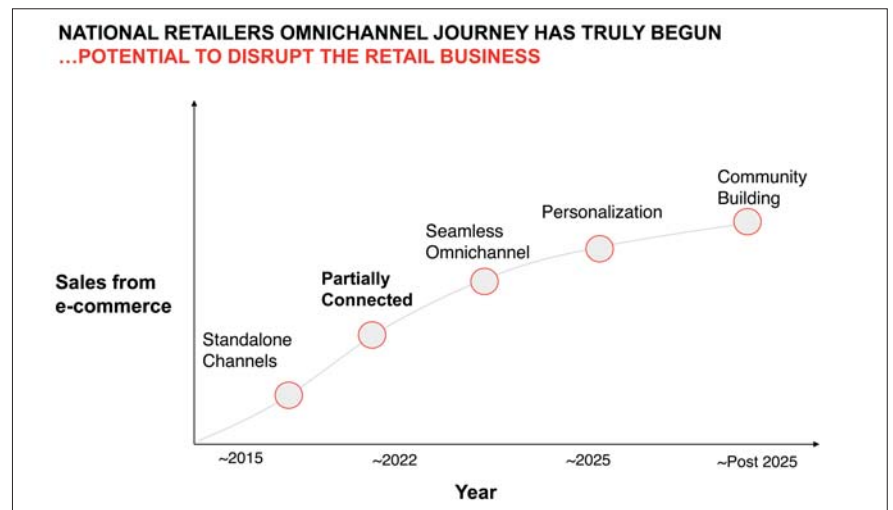
Figure 17





PERSONALIZATION AND COMMUNITY BUILDING ARE THE NEXT BIG OPPORTUNITIES ON THE PATH OF OMNICHANNEL.

Figure 18



- Retailers have done well to get to this stage - the state of Partially Connected Omnichannel. We call this stage "Partially Connected Omnichannel" because the customer journey isn't always smooth or consistent or seamless across all channels. The irony is that, in some cases, it could have been avoided. For example, at a popular online fashion store, we had to look hard to find the click and collect option, which was hidden until the very end of the checkout process. Even though we chose the "click and collect" option, we were still charged for delivery, even though the item was to be picked up at the store we chose.
- Now, they need to use this foundational stage to make their customer proposition even better and journey seamless. Customers already want personalization & great content, but Indian retailers aren't meeting that demand yet. This starts



with knowing the target market and putting investments into technology, people, and processes.

Starbucks is a great case in point. It gets 90 million weekly purchases at 25,000 stores worldwide. Marketing, sales, and supply chain management now use predictive data analytics to personalize the customer offerings.

“Dining at Starbucks is an event. And it’s based on making genuine connections with customers in the shop, one cup, one neighbourhood at a time.

“I think that mission is so fundamental to how technology has to show up for us,” Gerri Martin-Flickinger, Starbucks’ ex CTO, says in a quote. The goal of technology should be to enhance human interaction, not hinder it. Making cutting-edge gadgets is not the point. We need to develop technologies that speak to the sense of community and attention to detail that make Starbucks what it is.

The mobile app and Starbucks Rewards programme are key for Starbucks. The app allows quick transactions. Signing up for the loyalty club gives users rewards like a store finder and personalised music choices.

→ Going beyond this stage would be that of community building. This stage broadens the scope of what consumers can do with a brand, as it gives them access to a growing hub of content, promotions, and user-generated interactions. Consumers no longer treat omnichannel ecosystems as a novelty, but rather as an integral part of their daily routines. It’s a constant connection that can yield great rewards.

Here are some opportunities for Indian retailers

1. Strengthen focus on increasing existing customer spend capture vs new customer acquisition through digital channels

The primary benefit of omnichannel capability is not just incremental online orders, but higher overall spend capture, e.g. on shopping occasions where a competing retailer may otherwise be more convenient to visit, or saving the sale through endless aisle, or enabling discovery of new products etc.

Much of the ambivalence towards omnichannel among retailers is on account of high online customer acquisition & delivery costs. Shifting focus from expensive online acquisition to increasing spend capture, will be far more positive for the bottom-line.

2. Leverage stores to offer services which are hard to match for online-only retailers

Same Day Delivery within store catchments, along with services like “Try & Buy” can enable retailers to not only turn store inventory faster, but also deliver customer delight & build stickiness.

3. Align business metrics and incentives to cross-channel customer journeys

While revenue attribution is extremely complex in an omnichannel business, it is important to set the “North Star” metric which is channel agnostic e.g revenue per customer. Other operational metrics may be channel specific but aligned with the overall outcome.



4. Building omnichannel capability is far more than just growing share of online sales.

The process of omnichannel development has beneficial side-effects on the entire business through a deeper understanding of customer personas, needs & preferences; engagement with the brand; higher inventory accuracy; enhanced store staff knowledge and empowerment, and more.

5. Personalisation of the customer journey across channels

With the capability to track customer interactions across touchpoints, retailers can gather rich data on customers' intent, stage of purchase decision, consideration set etc. The next level of omnichannel maturity will entail personalisation of customer journeys at scale, using AI/ML.

6. Managing Change

We have highlighted how the store staff is uninterested in promoting online stores, the challenges of cross-functional collaboration, and KPI misalignment. This demonstrates that retailers have not done a good job of change management. Actually, these issues are at the heart of Omnichannel operations and must be addressed as soon as possible. Change management is now an evolved process, and retailers may like to consider hiring good change consultants to this end.

7. a) Managing profitability and b) Innovating the Business Model

a) The big question that most retailers haven't figured out is how to make Omnichannel profitable. Is it a zero-sum game?



Consider the following fashion retailer economics. These are ballparks number for indicative purposes

- Average transaction value : Rs 3000.
- Customer acquisition cost: Rs 1000
- E-commerce accounts for 20% of total sales.
- Advertisement Spend Returns : 33%

Spending would increase to 55% for this retailer with a gross margin of 50%.

- 33% marketing (Digital media - Amazon, Instagram and FB etc)
- 10 % discount
- 10% in delivery, storage and return cost
- Incentives and other benefits: 2%

Given the cost structures, is it even possible to generate profits? We believe it is challenging but doable. Some of the options retailers may like to consider are : increasing the ROI of marketing spends, focusing on existing target segments, and optimizing store sizes through endless aisles, etc.

b) So far retailers' efforts have been in providing cross channel engagement and shipment to customers. However, no new innovative business models have emerged so far – like that of Best Buy where through Omnichannel it was able to reduce the number of stores by 40% and increase the sale from US \$ 36 billion to US \$ 44 billion in a matter of four years.

**RETAILERS
HAVE NOT USED
OMNICHANNEL
FOR INNOVATING
THE BUSINES
MODEL LIKE
MERCEDES INDIA
HAS DONE. THERE
IS AN OPPORTUNITY
THERE.**



Another example is that of Mercedes India. It recently introduced its new Future of Retail Model in India using Direct to Consumer & Omnichannel model.

- Mercedes-Benz sells the cars directly to the customers
- Mercedes-Benz India nationally sets the 'best price'
- Higher stock visibility and endless choice for customers with 'centralized' national stock
- 'Central order management' by Mercedes-Benz India
- Complete transparency in the purchase process
- Zero stock and no liability for the Franchise Partners
- It is the first manufacturer to offer national stock visibility transparently along with the production pipeline
- No incidental charges for the customers
- First manufacturer to offer 14 days for order confirmation

This is a fantastic win-win situation for all parties involved. We hope that Indian can take leaf out of the likes of Best Buy's and Mercedes books and reap the benefits.

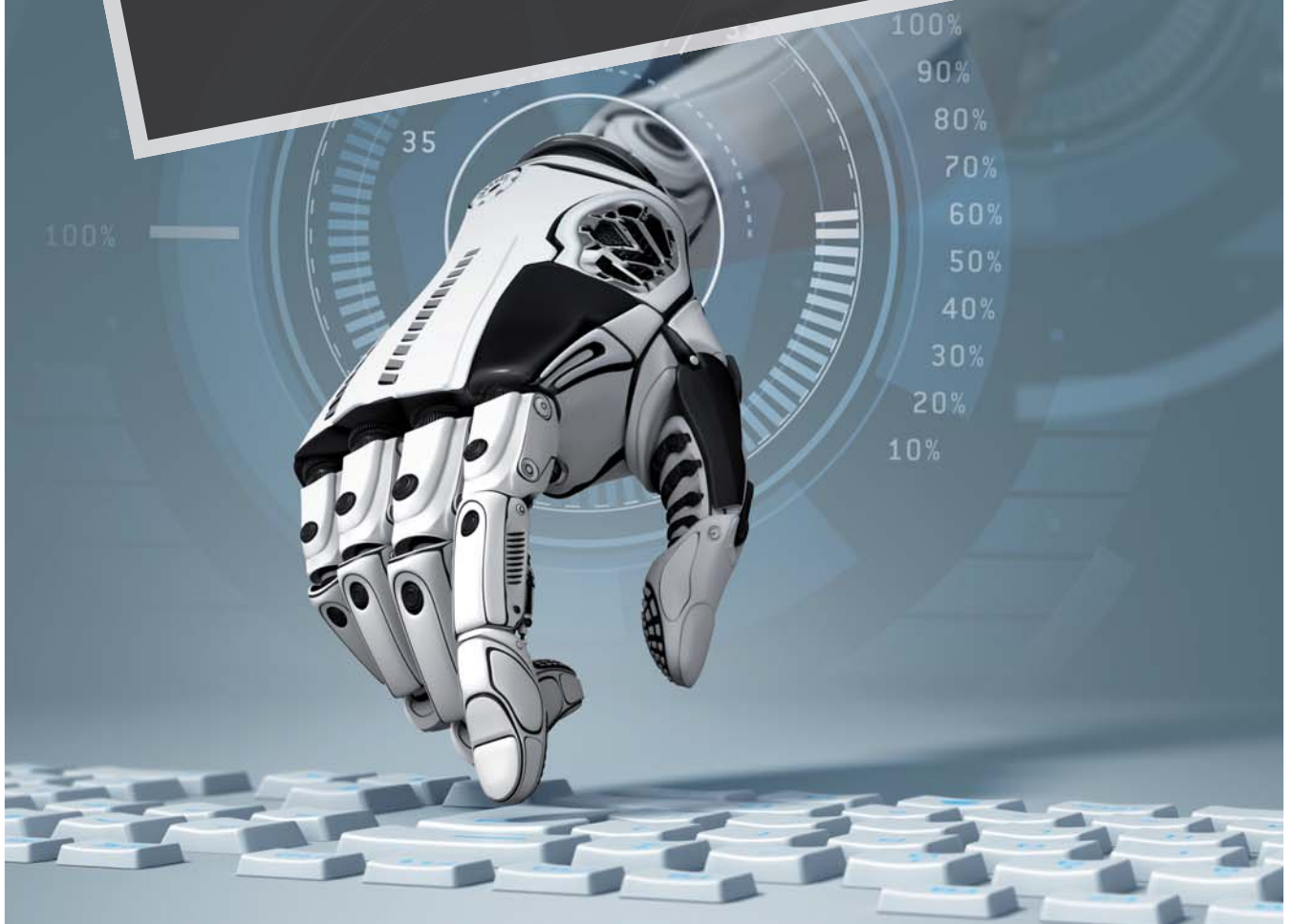
8. Focus

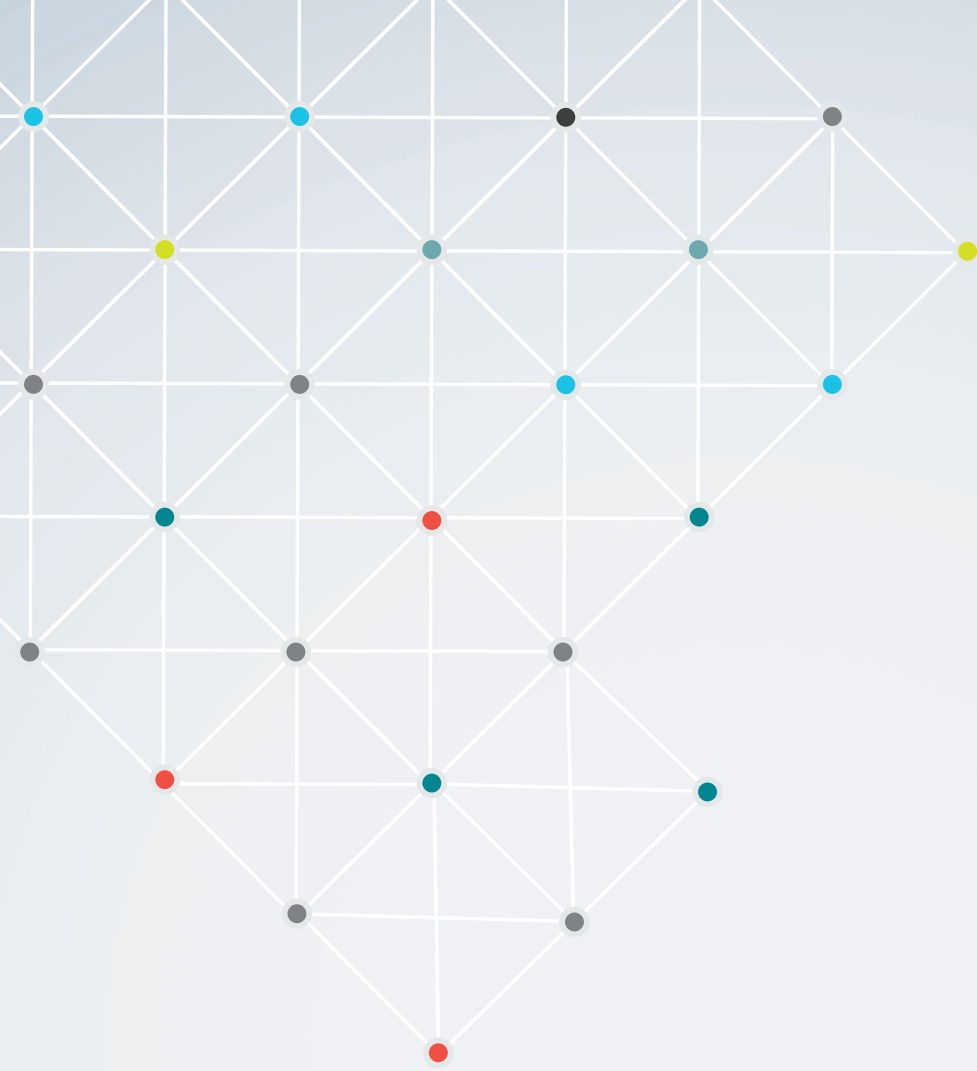
Last but not least, retailers need to pay attention to where they can win. In a world where everyone is competing with each other, it's easy to get side-tracked and lose focus.

We don't think it's important to offer all of the features (C&C, endless aisle, same-day delivery, etc.). Instead, we think it's more important to focus on the features and parts of the customer journey that can add value.

For example, we don't think that click-and-collect (C&C) in India is very useful for customers in many categories. Retailers might want to figure out where they do well and invest wisely there.

- According to our research, the industry has done quite well on the Phygital Index of Omnichannel Maturity, with e-commerce accounting for 13% of total revenue, offering rich features such as click and collect, ship from stores, and so on, and making technological advancements.
- Collaboration between stores and e-commerce, operational efficiency such as picking and packing, content creation and customer engagement, personalization, innovation in the business model using omnichannel and omnichannel profitability, on the other hand, are key areas for improvement. Indian retailers can learn from how companies like Best Buy and Mercedes India have used Omnichannel to come up with innovative business model and gain great benefits including financials gains.
- Overall, the industry has established a solid foundation for achieving seamless, personalised, and community driven and hopefully profitable Omnichannel operations.





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FOR BRANDS & RETAILERS THAT IS RULING THE
RETAIL ECOSYSTEM AND SHOWING THE PATH TO
OTHERS IN ORDER TO ADAPT THE 'OMNI' WAY.**



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Capgemini Engineering is world leader in Engineering and R&D services. We unleash R&D potential and innovation to help clients create smart products, omnichannel, next generation customer experience and to accelerate their journey towards Intelligent Industry.

We understand that software is the digital fabric for the future of the retail industry. We offer software product engineering at scale leveraging expertise in digital native development, agility through variety of operational models, systematic approach by using best of breed methodologies and excellence through building high integrity solution.

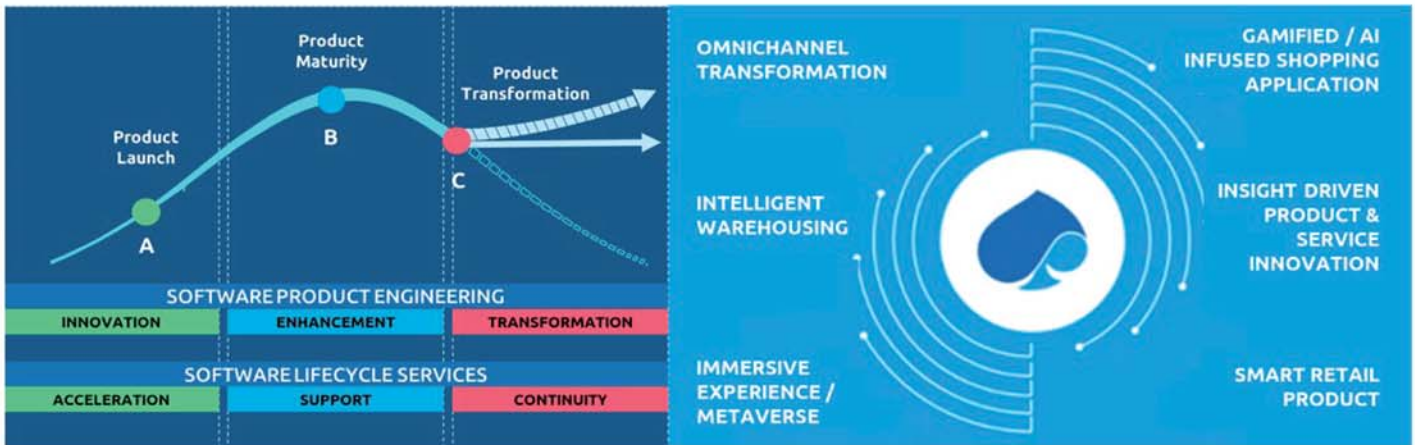
Capgemini Engineering helps enterprises to be a software-driven digital native player by creating connected systems, leveraging data & machine learning, reinventing themselves into cloud native platform, re-architecting specialized and legacy systems and being ready for next generation customer experience.

Featured offerings

- Omnichannel transformation
- Intelligent Warehousing
- Next gen customer experience using Metaverse & Augmented Reality
- Gamified and AI infused Shopping Application
- Insight-Driven Product & Service Innovation
- Smart Retail Products

PROUD MOMENTS

- Transforming omnichannel and developing store apps, e-commerce & m-Commerce platform for a large global home solution retail player
- Developing large scale cloud native application platform for Indian e-commerce leader
- Building an end-to-end analytics-as-a-service platform helping retailers
- Applying AI in creating virtual assistant for an e-commerce optimization solutions provider
- Creating completely secure smart lighting solution for largest global retailer in home furnishing
- Building innovative solution for a leading CRM & Loyalty service provider



We have helped an Indian e-commerce leader to transform their e-commerce platform to a cloud native containerized core.

THE CHALLENGE

- Transformation of ~6500 Microservices across 175 tech stack to a scalable and composable cloud native platform within a short span of time.
- Quick engineering team ramp up to support time-critical onboarding of applications for mega sales campaigns during festival seasons

THE APPROACH

We had taken a systematic approach to categorise the micro services under different groups which need differentiated approach of re-engineering. We had leveraged automation to containerize the micro services, created DevOps pipelines for transformed services and made 100% traffic cutover from old system to the new cloud native platform.

THE OUTCOME

Re-engineered cloud native platform dramatically increased the ease of scaling despite being a complex system of hundreds of de-centralized applications. The release process efficiency increased adding to the benefit of quick launch of new features.



World leader in engineering and R&D services, Capgemini Engineering combines its broad industry knowledge and cutting-edge technologies in digital and software to support the convergence of the physical and digital worlds. Coupled with the capabilities of the rest of the Group, it helps clients to accelerate their journey towards Intelligent Industry. Capgemini Engineering has more than 55,000 engineer and scientist team members in over 30 countries across sectors including Aeronautics, Space, Defense, Naval, Automotive, Rail, Infrastructure & Transportation, Energy, Utilities & Chemicals, Life Sciences, Communications, Semiconductor & Electronics, Industrial & Consumer, Software & Internet.



The Man Company: Powering Next-Gen Customer Experiences with Shoppable Videos

HERE'S HOW THE MAN COMPANY PIONEERED NEXT-GEN CUSTOMER EXPERIENCE IN THE MEN'S PERSONAL CARE SEGMENT.

A leading men's personal care DTC brand, specializing in a range of grooming products. The Company helps men in the continuous evolution of becoming a better version of themselves with all-round grooming through premium grooming essentials and knowledge for the soul.

Their objective has been to formulate skin, hair and body care products of the purest and the finest quality and are meticulous about the ingredients they use. The Man Company's entire product range is free of harmful chemicals and infused with handpicked natural ingredients and premium essential oils.

The Man Company currently has 2000+ offline touchpoints and has collaborated with close to 500 salons across India, including Enrich, LOOKS, Toni & Guy, Headmasters, and Bodycraft. It is present in modern trade outlets across 50+ cities and has 30 exclusive outlets.

THE CHALLENGE

The pandemic accelerated the pace of digital transformation in the retail industry. Consumers started spending more time on digital platforms and online purchases took center stage. Retail brands, big and small, found it imperative to bolster

their presence in the digital world – through marketplaces, social media platforms, and their own digital properties (website and mobile application).

In doing so, they have faced several challenges, such as – bringing their in-store experience to the digital world, differentiating their marketing strategies from competitors, boosting customer engagement, and revving up growth metrics, to name a few. The Man Company, too, was on the journey to find the piece of this puzzle.

The Man Company endeavoured to transform their DTC platform into a new-age, dynamic digital storefront.

THE APPROACH

The Man Company partnered with Firework, a leading live commerce and omnichannel digital transformation platform, to transform their digital customer engagement powered by human connection. The Man Company leveraged Firework's live commerce solutions to create immersive experiences on their digital storefront.

Delivered a modern, mobile-friendly "swipeable experience" on the website



Arpit Upadhyay

Business Lead - eCommerce

As a next-gen DTC brand, we are focused on driving growth and conversions through immersive customer engagement experiences. With Firework, we're able to bring back human connection in the digital space where next-generation consumers shop. We have been able to successfully up our digital customer engagement game with Firework's robust suite of livestream shopping offerings.

Firework brought Tik-tok-style video capability to The Man Company's website and app to encourage customers to browse and discover the product range through short video carousels.

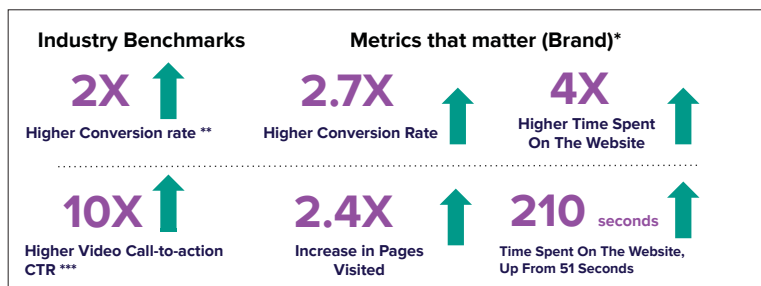
Supercharged conversion with short, shoppable videos

Firework integrated sophisticated shoppable video technology with short videos to enable The Man Company's customers to get in-depth product details and transact live while viewing the videos.

Created walled garden creator experiences on-site

The Man Company was able to tap into creator-led experiences and engagement on the website/ mobile application through short videos with full control over first-party data.

AT A GLANCE



THE OUTCOME

The Man Company rode the transformation wave of digital customer engagement by being an Early Adopter in the DTC space to integrate shoppable videos on its digital storefront. The Man Company recorded a 2.7X increase in their conversion rate with live commerce.

By bringing Firework's live commerce capabilities to its customer engagement strategy, The Man Company was able to:

- Create a Next-gen On-site User Experience
- Enhance and Enrich the Customer Engagement Touchpoints
- Boost Conversions with Digitally-native Experiences
- Tap into Influencer/ Creator Popularity to Drive On-site Product Conversations.

ABOUT FIREWORK

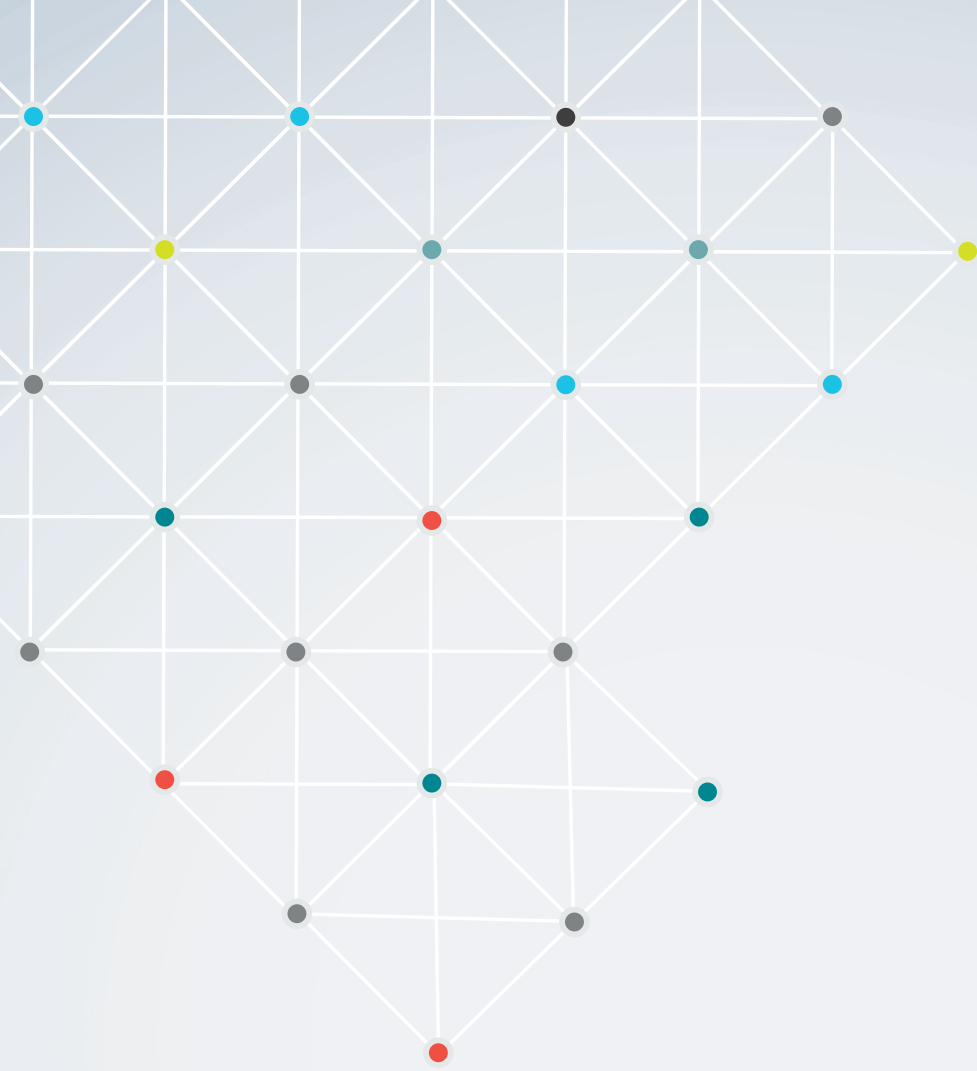


Firework was founded in 2017 by two industry pioneers, Vincent Yang and Jerry Luk, as a live commerce and omnichannel digital transformation platform for the open web. Firework is the global leader in humanizing the open web through the language of video.

Leveraging shoppable video, live streaming commerce and powerful monetization capabilities, Firework empowers the world's most dynamic and exciting retailers, consumer brands, and publishers to build engaging video experiences on their owned and operated digital properties and across channels at a global scale.

Firework provides the deep technology infrastructure to help brands create immersive video-first engagement experiences across the customer journey - from discovery to consideration to purchase. Firework enables organizations to bring new levels of authenticity and connection to online video experiences, speaking to digital natives in the language they understand fully—and taking control of their own customer data.

Some of the leading fashion, beauty, personal care, ecommerce, and food & grocery behemoths trust Firework to boost their customer engagement rate and improve their conversion numbers. Today, Firework works with more than 600 direct-to-consumer brands, retailers, and media publishers and are backed by some of the leading investors in the world including Softbank, IDG Capital, Lightspeed Venture Partners, and GSR Ventures.



Talk to your customers, on any channel



Marketing

Marketing messages, push notifications, order updates, delivery alerts and more.



Sales

Two-way messaging, one-click video meetings and appointment booking.



Customer Support

Inbox, call-to-chat deflections, IVRs, chatbots and more.



Account Security

Multi-Factor Authentication via SMS, Voice, WhatsApp and Email.



Delivering an unfair digital advantage for eRetail Brands.

Consulting | Technology | Marketing | Analytics | Marketplace

