

EXCLUSIVE SURVEY

ARE YOU

Winning

THE LAST MILE
OF RETAIL?

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ARE YOU WINNING THE LAST MILE OF RETAIL?

In retail, the “last mile” is becoming more crowded, more rushed, more expensive, and an ever-more-critical contributor to a positive customer experience.

Over the past 18 months, there has been a **50% increase** in last mile services, with most of the demand coming from B2C e-Commerce, according to *The Last Mile Retail Study, 2018* conducted by [eft Supply Chain and Logistics Business Intelligence](#).

In addition to the growth of online sales, consumer demands are adding fuel to the competitive fire:

- 65% of consumers want **greater flexibility** for deliveries;
- 61% want **faster deliveries**; and
- 51% want **real-time visibility** into the status of their orders.

This inaugural **Retail TouchPoints Last Mile Benchmark Report**, based on a survey of 146 retail executives, provides a snapshot of the challenges retailers face in managing the last mile, including shipping and delivery; post-sale services such as setup and installation; keeping customers informed; and the tricky (and expensive) area of product returns.

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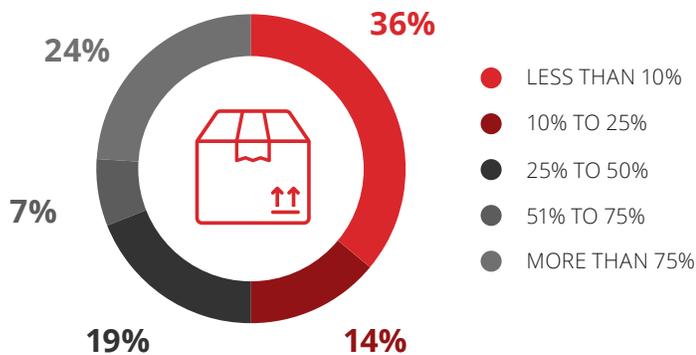
— EFT LAST MILE
RETAIL STUDY 2018



The Last Mile survey indicates that delivery of products to customers' homes or offices already is widespread — and growing. While **36%** of retailers deliver *less than 10%* of orders directly to customers (versus shoppers taking them directly from a store), **19%** deliver *25% to 50%* of orders direct to customers, and **24%** deliver *75% or more* of orders direct to customers. Presumably, though, this last group of respondents are online-only retailers that lack brick-and-mortar stores as distribution points.

What Percentage Of Products Are Delivered To Shoppers' Homes/Offices?

(Versus picked up/purchased in-store)

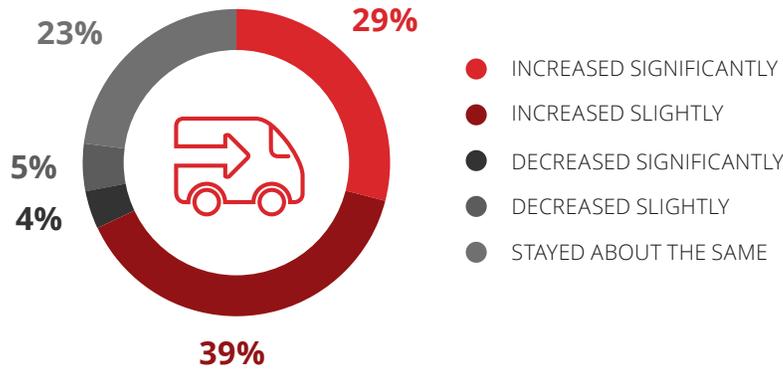


While **36%** of retailers deliver less than 10% of orders directly to customers, **19%** deliver 25% to 50% of orders direct to consumers; **24%** deliver 75% of more.



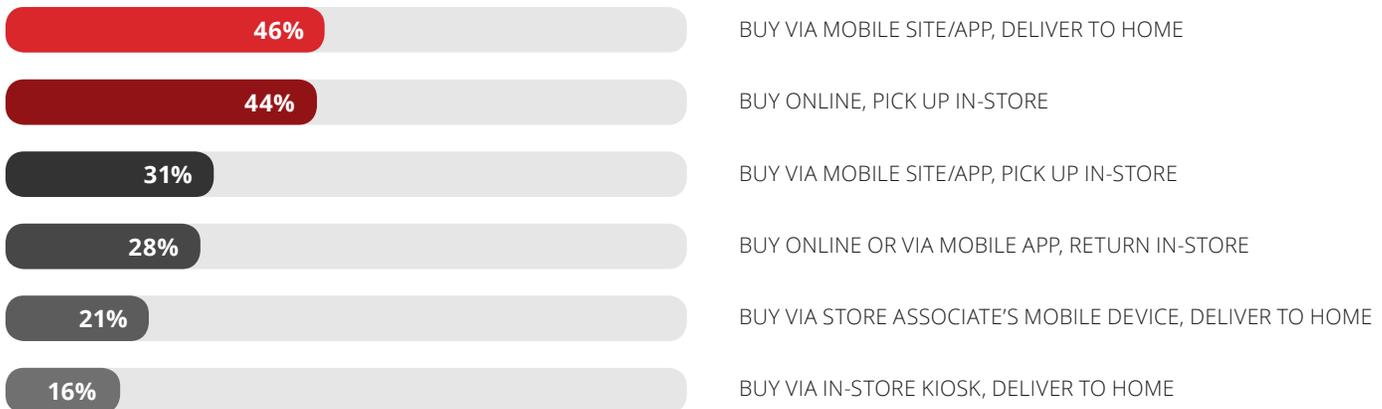
In line with the results of the eft study, Last Mile respondents have seen their volume of direct deliveries increase over the past 18 months: **29%** say the percentage has increased significantly, and **39%** say it has increased slightly. Less than **10%** said the percentage has decreased, and **23%** say the volume has remained the same.

How Has The Percentage Of Products You Deliver To Shoppers Changed In The Last 18 Months?



Retailers have seen their volume of direct deliveries increase over the past 18 months: less than 10% said their percentage has decreased.

Which Fulfillment/Delivery Services Do You Offer? (Among retailers with both stores and e-Commerce sites)





MANAGING CUSTOMER EXPERIENCE AND EXPECTATIONS TOPS RETAIL CHALLENGES

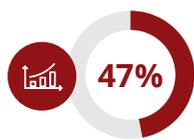
The volume of last-mile activity is not the only thing that's on the rise. Customer expectations around **delivery times**, **service levels** and **visibility into the process** all are increasing rapidly. That's reflected in the fact that two of the top three concerns among retailers responding to the Last Mile survey are related to customers: **Customer expectations around delivery times** is the leading challenge, at **49%**, and **customer expectations of free/low-cost shipping** is third, at **44%**.

Two of the top three concerns among retailers are related to customers: expectations around delivery times at **49%**, and expectations of free/low-cost shipping at **44%**.

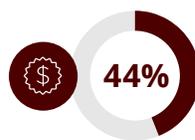
What Are Your Most Significant Last Mile Challenges?



CUSTOMER EXPECTATIONS AROUND DELIVERY TIMES



RISING SHIPPING COSTS



CUSTOMER EXPECTATIONS OF FREE/LOW-COST SHIPPING



HANDLING CUSTOMER QUERIES/COMPLAINTS EFFECTIVELY



DELIVERY/FULFILLMENT LOGISTICS



RETURNS MANAGEMENT



MANAGING POST-PURCHASE SERVICE PROVIDERS



“Ultimately, the most important factor in the last mile is the experience of the end customer (the consumer),” according to the *eft Last Mile Retail Study*. “Consumers have the same expectations of service and engagement from the places they shop online as they do in-store, except they expect it faster, in line with the speed of the digital world.”

Amazon is playing a large part in raising the bar of consumer expectations. The Amazon Prime service effectively “hides” shipping costs in an annual fee, which increases pressures on competitors to offer low- or no-cost shipping. Amazon and others have poured investments into offering **two-day, next-day, same-day**, and even **less than one-hour shipping** to a wider swath of consumers, and it has had an impact on the whole customer mindset.

For example, the maximum number of days people are willing to wait for an item to be delivered in **exchange for free shipping** has decreased, from **5.5** days in 2012 to **4.1** in 2018, according to the 2018 *AlixPartners Home-Delivery Shopping Survey*. Amazon Prime members are less patient than the population at large: only **19%** of Prime members would wait a week in exchange for free shipping, compared to **31%** of non-Prime members.

Free shipping has become very much the rule, not the exception. A December 2017 *survey by L2* revealed that **77%** of brands offer free shipping on their web sites. Among this group, **35%** do not require a minimum spending threshold to qualify for free shipping. For those retailers that do require a minimum order, the median dollar amount of **\$50** has not changed since 2016.

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— ALIXPARTNERS
HOME-DELIVERY
SHOPPING SURVEY

DELIVERY IMPERATIVES TO COMPETE WITH AMAZON WITHOUT BREAKING THE BANK



By Rob Taylor,
CEO, Convey

As retailers fight to stay relevant in the face of Amazon, last mile delivery is being pushed front and center. While Prime delivery has made the words “fast” and “free” synonymous with a seamless shipping experience, companies have had to align their operational costs with quickly changing customer expectations, or risk customer loss — 70% will not return after a poor delivery experience.

Consumers continue to report that they are unimpressed with delivery standards today — nearly 60% of shoppers say that the delivery experience is mediocre at best, and similarly, for those returning parcel shipments, 42% said that they were not satisfied with retailers’ return processes.

This has driven pressures to create the perfect delivery experience, with 83% of supply chain executives saying that CX is now a companywide goal. While the delivery experience is now a standard KPI, many still struggle with legacy technology.

By investing in visibility solutions, retailers can identify exceptions that derail delivery, resolve issues before they result in an angry customer and reset expectations to create a positive outcome. For retailers, this responsibility involves defining appropriate expectations through proactive communication, keeping delivery date promises and providing self-service options.

Communication: Like any great relationship, the retailer-consumer bond needs to be fueled by communication and met expectations. For the 93% of consumers who say they want to stay informed and receive proactive updates about their shipments, communication creates a sense of transparency. This visibility and communication helps them answer, “Where is my order?”

According to our research, returns communication is equally important, as it was a source of anxiety for 70% of customers. Customers returning items indicated that the “Where is my money?” question was most pressing, and they did not want to deal with the retailer to get that information.

Commitment: While customers care about “fast and free shipping,” over 90% indicated that missing a promise date comes with consequences ranging from expected compensation to disloyalty. If a retailer misses a promise date, consumers expect a proactive response, and this expectation is amplified over the holidays. Over 57% of consumers said they would be impressed if their retailer either refunded shipping costs or expedited a new shipment in response to a late shipment.

Control: When it is possible for the consumer to resolve the exception or an anxiety, 97.5% of customers will opt for self-service options. This includes the ability to re-route an in-transit shipment or expedite a new delivery, with younger consumers also asking for self-pickup options such as lockers. In reverse logistics, consumer control gives the consumer the ability to schedule the return themselves. In either scenario, they seek convenience — they do not want to pick up the phone to call a carrier’s 1-800 number.

Customer experience is becoming increasingly important in final mile delivery. Those who can embrace the rise of digital and bend to their customers’ demands can also increase their own flexibility for package delivery. Ultimately, these retailers will be able to create a memorable delivery experience and a loyal following without compromising their operations budget.

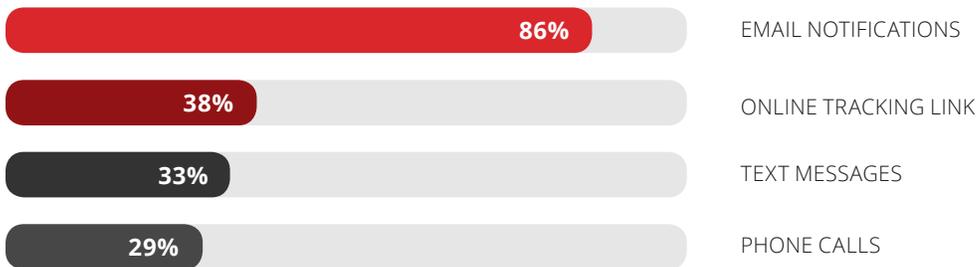
CLEARING UP CONSUMERS' VISIBILITY CHALLENGES

Retailers are paying attention to shoppers' last-mile demands. According to the eft survey, **47%** have implemented delivery feedback surveys, and **40%** have increased last mile visibility for customers.

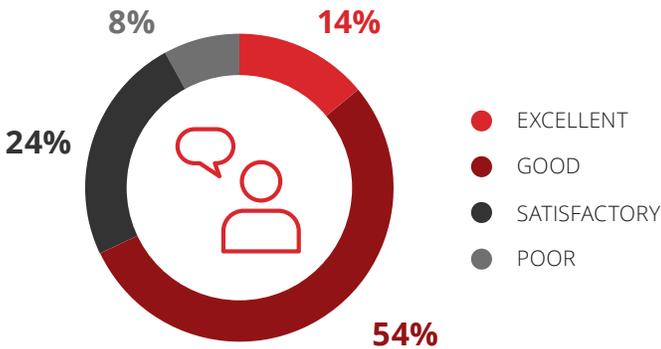
Respondents to the Last Mile survey use a variety of tools to keep customers informed about the status of their deliveries: **86%** rely on email notifications, along with online tracking links (**38%**), text messages (**33%**) and phone calls (**29%**). Retailers' self-evaluation of their communication skills is generally positive. A majority, **54%**, rate them as "good," and only **8%** rate them as "poor."

How Do You Inform Customers About Their Delivery Status?

(Check all that apply)



How Would You Rate Your Last-Mile Communications With Customers?



47% of retailers have implemented delivery feedback surveys and **40%** have increased last mile visibility for customers.

— EFT LAST MILE RETAIL STUDY 2018



SUCCESS STORY



VISIBILITY SOLUTION BOOSTS ENGAGEMENT AND CTR FOR UNCOMMON GOODS

Uncommon Goods, a heavily gift-oriented online business devoted to sustainability and customer service, knew that its customers expected visibility into where their packages were at any given time. The retailer launched the Engage product from **Convey** in November 2016 to provide communication and proactive exception management, and has used the platform since then to deliver exceptional customer experiences.

When an order ships, customers receive an email with a tracking link that takes them to a mobile-optimized branded page on the Convey platform. Behind the scenes, Convey integrates and translates all carrier information, allowing customers to watch and understand what's happening as the shipment progresses. Shoppers can sign up for text messages and exception emails; rate the experience and submit feedback to the Uncommon Goods team; click back to FAQs; and in some cases place additional orders via special promotions.

Key results include:

- **12%** of shoppers subscribe to SMS notifications;
- **54%** of shoppers leave feedback before delivery; and
- **6%** of shoppers are clicking through to the Uncommon Goods site from the tracking page.

Early knowledge of customer feedback and shipment issues such as delays, incorrect addresses or damaged shipments gives the retailer's team more time to proactively correct problems. "Customers really appreciate being in the loop, and alerted when there's an unforeseen delay," said MC Halfpenny, Director of Operations, Uncommon Goods. "Rather than causing them to be angry, often Uncommon Goods looks like the hero because we're being proactive."

RETAILERS SEEK NEW SOLUTIONS TO PERENNIAL PROBLEM OF RETURNS

One of the most challenging aspects of the Last Mile is that it's a two-way street. Customers can (and do) return items, and the rise of digital commerce has raised the stakes — and the costs — in this critical area.

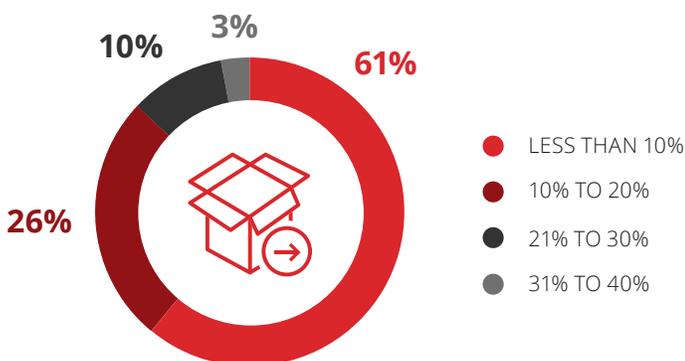
"Return rates for online retail are higher — sometimes four times higher — than for traditional brick-and-mortar retailers," said Patrick Bohannon, Vice President, Retail Strategy for Oracle. "Return policy is very influential to online sales. Consumers want to have easy and cost-free returns, so many retailers are liberalizing their return rates."

A [Deloitte 2017 holiday shopping survey](#) indicated that consumers' top perks for online shopping were free shipping, at **72%**, and store policies for easy returns, at **44%**.

While the majority (**61%**) of retailers responding to the Last Mile survey are able to keep their returns percentage **below 10%**, more than one in four, **26%**, have a returns percentage in the **10% to 20%** range.

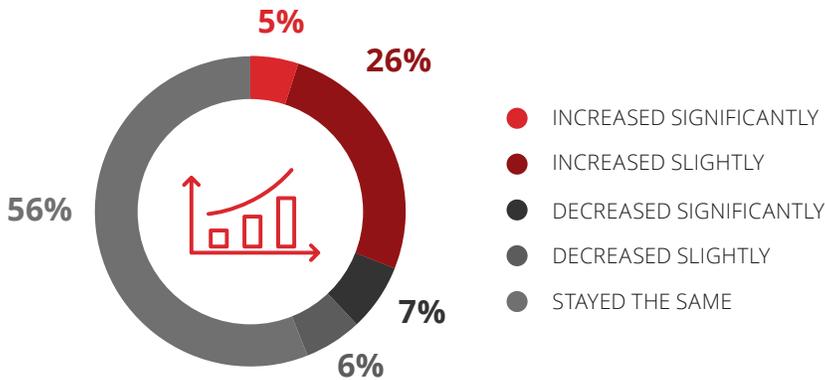
Returns percentages appear to be on the rise; only **13%** of retailers reported decreases over the past 18 months.

What Is Your Returns Percentage?



Returns percentages appear to be on the rise: **26%** of retailers reported a slight increase over the past 18 months and **5%** reported a significant increase. Only **13%** reported decreases.

How Has Your Returns Percentage Changed Over The Past 18 Months?



Cost of returns top the list of retailer challenges at **48%**, followed by customer issues with packing/shipping items for return, at **39%**

RETURNS CREATE MULTIPLE COST CENTERS AND COMPLEXITIES

Retailers responding to the Last Mile survey identified returns costs as their biggest challenge, at **48%**, but in addition to this general concern, returns create a number of other hurdles.

What Are Your Biggest Returns Challenges?





Returns can play havoc with basic retailing functions, including planning, inventory, pricing and in-store assortments. "Many retailers do not plan for returned inventory as an available 'pot' of stock, meaning they overbuy," said Justine Shiou, Solutions Manager, Planning & Optimization at Oracle. Additionally, "returns are generally made weeks after the initial purchase which reduces the time to re-sell the item at full price. This can be a significant issue for fashion/short lifecycle retailers that turn quickly. The selling price is likely to have already been marked down versus the price when it was purchased."

David Sobie, Co-Founder and CEO of **Happy Returns**, which operates "return bars" where shoppers can bring back items they have bought online, identified other returns-related issues retailers grapple with. "Broadly speaking, the challenge for retailers is 'How do I get this inventory back and ready to be restocked in a way that doesn't break the bank?'" said Sobie.

Costs include shipping the item back to the distribution center or store, but that's only the beginning, said Sobie. Someone needs to assess whether the item can be added back into the retailer's inventory. In some cases this is a simple matter of relabeling and repackaging an undamaged item, but if the item is damaged in some way, refurbishment might be needed. The retailer might need to take a loss or sell the item to a downmarket channel.

ONLINE RETURNS UPSET STORE ASSORTMENT PLANS

Omnichannel retailers have their own set of returns challenges. A retailer's online assortment may be much larger than that of an individual brick-and-mortar store, but if shoppers return an item bought online, it needs to be incorporated into the store's assortment — or shipped to another store or DC at additional cost.

"Retailers make meticulous plans down to the square inch about what's carried in their stores, but those plans can be upset by a bin of onesie-twosie returns," said Sobie. "That carefully planned store assortment can make the store look like more of a discount retailer."

"Retailers make meticulous plans down to the square inch about what's carried in their stores, but those plans can be upset by a bin of onesie-twosie returns."

— DAVID SOBIE,
HAPPY RETURNS



POOR RETURNS EXPERIENCES CREATE NEGATIVE CX

Retailers seeking to keep returns costs down may decide to choose slower, less expensive shipping options, but they may end up paying higher costs in other areas. "The longer the returns process takes, the more customer service contacts will be generated," Sobie warned. "The number-one reason people contact customer service is to check on their order, but the number-two reason relates to returns. These are not insignificant costs, either; they can run to a couple of bucks per contact at a well-run retailer."

Returns create headaches for consumers as well, meaning that if retailers don't handle the process well, they risk losing dissatisfied customers. A 2017 study conducted by [Forrester](#) for Happy Returns, which surveyed online fashion shoppers, revealed that returns are the worst part of online shopping for **73%** of consumers. Among those that have to return items, **39%** say they do not shop at the retailer again.

Returns are the worst part of online shopping for **73%** of consumers. Among those that have to return items, **39%** don't shop that retailer again.

— FORRESTER

FINAL MILE STRATEGIES: BALANCING CUSTOMER SATISFACTION AND PROFITABILITY



*By Justine Shiou, Solutions Manager,
Planning and Optimization, Oracle*

ONLINE RETURNS AND INVENTORY SHUFFLING

A sale is not a sale until the customer decides to keep it. Return rates have continued to increase across all channels but online sales have a higher return rate (more than 3X). Despite the operational impacts, retailers are liberalizing return policies: free returns, return in-store, return without limits basically, to reduce friction. This strategy has significantly increased operational cost. An online return to the warehouse includes shipping costs and restocking fees, an online back-to-store return also includes restocking fees but brings another layer of inefficiency, requiring the associate to handle the item, run it back onto the floor, ultimately distracting him/her from more productive customer engagements.

Markdown rates are also climbing exponentially, due to incongruent on-hand store inventory and delayed returns. Returns are generally made weeks after the initial purchase, which means reduced time to resell at full price, particularly for fashion retailers. The effectiveness of localized assortment strategies is degraded due to buy online, return in store (BORIS). The BORIS journey creates incongruent inventory and cluttered sales floors. Retailers are dealing with this in two ways:

- Treatment 1: absorb the cost of taking one-off markdowns to clear the stock
- Treatment 2: absorb the cost of transferring items back to the online warehouse or to another store with the item in its assortment, a.k.a. inventory shuffling

While the practice of inventory shuffling [using transfers] used to be deemed costly, some retailers have decided this treatment is more sales effective than creating markdowns. Neither approach is optimal.

TRADE REGIONS: MEASURING TRADEOFF BETWEEN CX AND GROSS MARGIN

A focus on total trade region (online and stores combined) when developing omnichannel strategies and the role of the store is critical to long-term success. Retailers need to consider all roles, including fulfillment, pickup, return, traditional sales or a showroom concept. Advanced analysis on departments and items that have high conversion rates need to be conducted to save sales and create new revenue opportunities. Integrating business insights, like customer loyalty, with POS or order system data will more effectively drive planning by customer and fulfillment channel. With improved weekly sales, stock and intake accuracy, and in-season projections by channel, retailers will be able to increase gross margin, and reduce markdown liabilities. The ability to track the effects of cross-channel returns can help limit under- or over-stock situations, plan return percentages by channel and customer journey and plan cross-channel sales fulfillment paths.

Retailers intrinsically are bound by the bottom line and shareholder interest. However, the retail environment has changed significantly while the mindset around profitability has not. Including a customer experience measure (such as NPS) in the planning process can also help retailers understand a more holistic view of their business and ensure the plan's relevance to both gross margin and customer service (t-NPS).



KOHL'S GETS TRAFFIC BUMP FROM AMAZON RETURNS

Returns aren't all bad news. Savvy retailers with well-trained staffs have long been able to turn the return occasion into an opportunity to repair a damaged customer relationship, and in some cases even to take advantage of the consumer's presence to sell them additional items.

Since October 2017, **Amazon** shoppers have been able to return items at 82 **Kohl's** stores. It seems benefits are flowing to both parties: Amazon gets a physical location for returns, improving customer service and potentially cutting costs, and Kohl's has seen increased foot traffic in the participating stores.

A study by **UberMedia** found that stores with Amazon Return Centers saw their daily visitors increase **48%** after October 2017, compared to a **36% increase** in non-Amazon Return center locations. The 12-point difference was over and above the normal holiday traffic increase to be expected in Q4.

RETAILERS TURN TO TECHNOLOGY, THIRD-PARTY SERVICES AND DISRUPTORS

Retailers are tackling their last-mile challenges with a mix of traditional technologies and cutting-edge solutions. Additionally, as might be expected in an area that's often far from their core competencies, retailers rely heavily on third-party services to fulfill many last-mile chores.

More than half, **59%**, of retailers deploy courier/delivery services, and **28%** drop ship items directly from suppliers. For services that involve direct customer contact, however, most retailers prefer to keep these functions in-house: only **14%** outsource customer service call centers, and just **12%** rely on others for product delivery and setup; **22%** do not outsource any of their last-mile services.

Retailers' choices for technological aids in this area generally run to the tried and true: transportation management solutions and route optimization systems top the current usage list, at **35%** and **27%** respectively. The percentages using more advanced solutions, such as RFID on shipping containers and products/packaging, are in the teens. IoT sensors, AI/machine learning, and the use of land-based robots or airborne drones are even less common. Perhaps in an area as high-stakes as the last mile, retailers are waiting for the technology to be perfected before taking a chance on it.

For services that involve direct customer contact, most retailers prefer to keep functions in-house: **22%** do not outsource any of their last-mile services.

Which Last Mile Services Do You Outsource To Third Parties?

(Check all that apply)



Which Technologies Do You Use To Manage Last-Mile Activities?

	USE NOW	PLAN TO ADOPT WITHIN 18 MONTHS	NO PLANS TO ADOPT
TRANSPORTATION MANAGEMENT SOLUTION	35%	21%	44%
ROUTE OPTIMIZATION SYSTEM	27%	27%	46%
VEHICLE MONITORING TECHNOLOGY	18%	24%	58%
RFID ON SHIPPING CONTAINERS	16%	24%	60%
MOBILE DEVICE MONITORING OF DELIVERY PEOPLE	14%	31%	55%
RFID ON PRODUCTS/PACKAGING	14%	28%	58%
IOT SENSORS	10%	26%	64%
AI/MACHINE LEARNING	7%	33%	60%
LAND-BASED ROBOTIC DELIVERIES	6%	12%	82%
DRONE DELIVERIES	2%	14%	84%

One area where at least a few retailers are willing to try something new is with disruptive shippers, such as Uber, Deliv, Instacart and Shipt. The December 2017 Target acquisition of Shipt for \$550 million, and high-profile Instacart partnerships with retailers including BJ's Wholesale Club and Albertsons, may signal to other brands that such services are "retail-ready."

Which Non-Traditional Shippers Have You Used During The Past 12 Months?

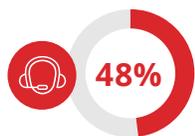
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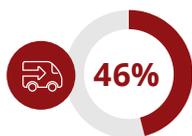
Top retailer data uses are focused on functional areas, but **42%** are using returns data to adjust their product selections.

Given the growing volume of last mile activity, retailers should look to step up their data collection and analysis efforts in order to gain a strategic advantage. At this point, top data uses are focused on functional areas such as resolving customer service issues, at **48%**, and tracking the speed/efficiency of drivers, at **46%**. A significant minority of respondents, **42%**, are using returns data to adjust their product selections, a smart move that could potentially reduce future returns rates.

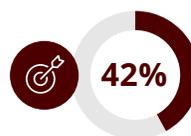
What Are Your Most Valuable Uses For Last Mile Data?



RESOLVE CUSTOMER SERVICE ISSUES



TRACK SPEED/ EFFICIENCY OF DRIVERS OR DELIVERY SERVICES



USE RETURNS DATA TO ALTER PRODUCT SELECTION



DETERMINE MORE EFFICIENT DELIVERY ROUTES



CHANGE SHIPPING OFFERS (I.E. DISCOUNTS FOR DELIVERING MULTIPLE ITEMS IN ONE BOX)



CHANGE INTERNAL FULFILLMENT RULES (E.G. SET MINIMUM TRUCK CAPACITIES AT 75%)



IDENTIFY LOCATIONS FOR NEW STORES/ E-COMMERCE ACTIVITIES



NEIMAN MARCUS BOOSTS SPEED, SERVICE LEVELS WITH PROACTIVE SOLUTION

Last-mile challenges are multiplied when retailers are delivering large, bulky items such as furniture and appliances. At least one in every 10 of these “white glove” deliveries faces a problem of some kind, such as an incorrect address or phone number or a scheduling conflict with the carrier, according to the *Wall Street Journal*.

When the retailer is **Neiman Marcus**, known for its high levels of in-store customer service, there's lots of pressure to get these deliveries right as often as possible. The supply chain team at Neiman Marcus collaborated with the customer care group, using a **Convey** solution to track the most complex deliveries.

The software captures problems with enough time to correct them before the scheduled delivery date. Within 30 days of launching the solution, Neiman Marcus had reduced transit times to customer by **24%**.

CONCLUSION

Retailers and their last-mile partners are racing to keep up with customer expectations that are only moving in one direction: higher. To make things even more challenging, customers want fast, accurate deliveries, hassle-free returns, and enhanced visibility into these processes — all for little or no cost.

“The biggest challenge in the last mile is matching increasing cost against spiraling consumer expectations,” said Paul Hamblin, Editor in Chief, *Logistics Business* magazine, as quoted in the *eft Last Mile Retail Study*. “Next-day is already almost standard, same-day is hot on its heels. Who’s going to pay for all this?”

Technology and innovation are providing some of the answers, as retailers seek the most optimal transportation routes and try out new business models for shipping and returns. But retailers will need to dig deeper in order to meet their last-mile challenges. They need to gather insights about price sensitivity and elasticity in the last mile, so that they can begin recouping at least some of their costs without alienating customers. They should invest in back-end systems that allow them to make firm delivery date promises, and to proactively prevent missteps that can damage the customer relationship. Finally, retailers may want to rethink whether **every order** needs to be delivered within 12, 24 or 48 hours. If consumers are confident that their order will arrive when the retailer has said it will, they might be more willing to wait a few days.

“The biggest challenge in the last mile is matching increasing cost against spiraling consumer expectations.”

— PAUL HAMBLIN,
LOGISTICS BUSINESS

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