

Expert Group

Connected Stores

Steps Toward the Ultimate "Connected Store"

Takeaways

1. This blue paper on "connected stores" gives pointers to retailers for ways to make your customers feel connected to you. For the purposes of this paper, we distinguish between three levels of maturity among retailers: beginner, intermediate, and expert.
2. Based on a description of the process and the organization, we will take an in-depth look at the four cornerstones of connected stores: Marketing & Communications, Staff & Skills, Data, and Privacy.
3. The Connected Stores Expert Group provides retailers with a model to help them assess their level of maturity in terms of connecting with their customers, and determine areas to prioritize in order to strengthen customer relationships and build customer loyalty. Retailers can assess their own performance by completing an online questionnaire.

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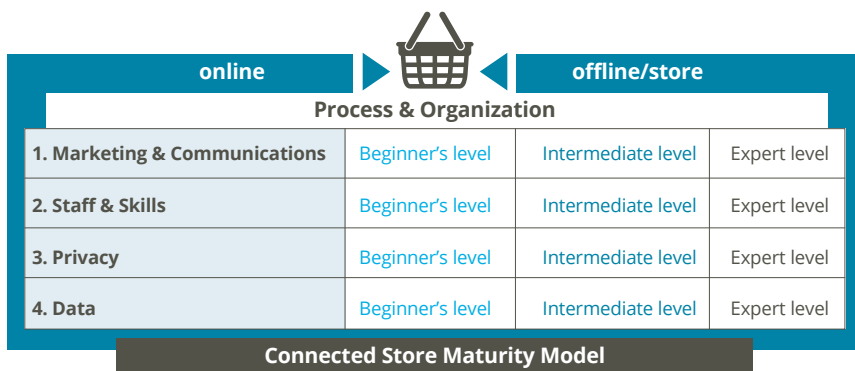
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How "Connected" Am I as a Retailer and What Can I Do to Improve?

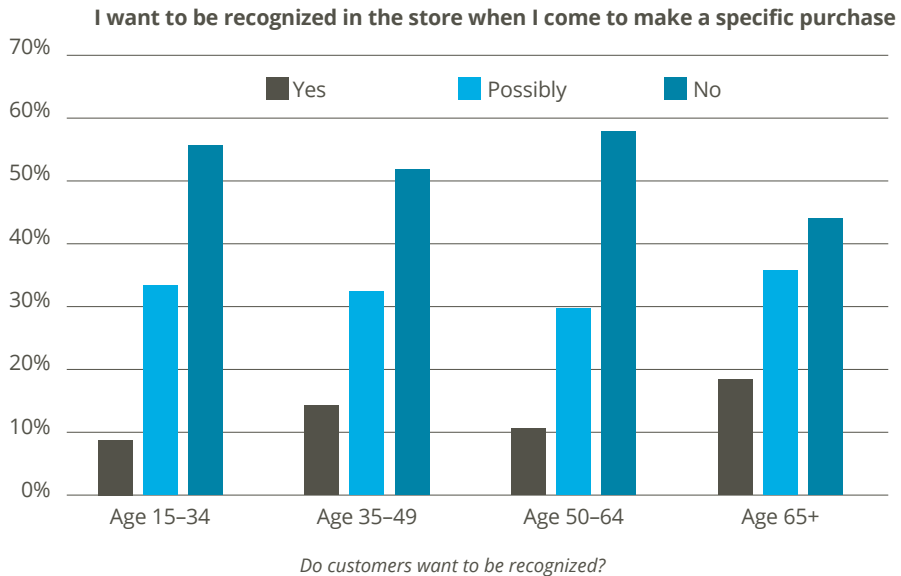
Being "connected" means two different things, both of which are key in the context of this paper. In addition to the word's literal meaning of being "linked" (i.e., "associated or related" with others), for retailers being "connected" is also – importantly – about having an offline and online presence that form a consistent whole. The former is about the relationship between the customer and the retailer, while the latter is about collecting and making effective use of data, and figuring out the right way to structure your processes and organization. The central question we ask in this blue paper is not so much "What is a connected store?" or "When are you fully connected?", but rather: "What should I do to make my customers feel connected to me as a retailer?"

In this blue paper, the expert group describes what steps need to be taken order to create a fully connected store, taking into consideration the level of maturity your organization is currently at. We describe this, taking business processes and organization as the starting point, with the experts distinguishing between four axes and three levels (see the image below). You can use the model to identify what steps you need to complete toward this transformation in key sub-areas in order to achieve the ideal situation: a connected store that recognizes customers in brick-and-mortar stores and is able to provide personalized and relevant sales advice on this basis.



Process and organization serve as the basis, but also have an umbrella function that is supportive of, and provides direction to, the four axes: Marketing & Communications, Staff & Skills, Privacy, and Data. The "Marketing & Communications" axis focuses mainly on the way in which customers are taken on a journey to a fully cohesive and connected environment which offers a consistent experience across both physical and online stores. The "Staff & Skills" axis addresses the various skills and competencies that employees are required to possess.

The third axis, "Data," focuses on ensuring customers have a consistent experience in the online environment and the physical stores, which is mainly about being able to recognize the customer. In doing so, it goes without saying that we need to be mindful of customers' privacy and whether they want to be recognized in the physical world. "Privacy" is the fourth axis.



The GfK Consumer Survey conducted in 2018 revealed that older people, in particular, are less resistant to the idea of being recognized while shopping.

Irrespective of privacy concerns, data is a key element in recognizing and enticing customers. Note: this blue paper does not address the various technologies available for this purpose.¹ As far as data is concerned, the key principle is that brick-and-mortar stores provide retailers with the resources and triggers required to be able to identify existing customers (partly drawing on relevant data), tempt new customers to sign up, and incite both existing and new customers to make purchases. This connects the physical store to the online store, and vice versa.

1. The End Goal

The ultimate end goal for retailers is a satisfied and loyal customer base that is offered an optimal customer experience in the physical store due to the right mix of online and offline services. Customers' privacy is respected throughout, and employees are supported by data and technology, enabling them to achieve conversion goals and provide an optimal customer experience. *Share of wallet* and NPS are both key success indicators in this respect.

¹ FOR FURTHER INFORMATION ABOUT THIS TOPIC, PLEASE REFER TO THE BLUE PAPER AUTHORED BY THE INNOVATIVE RETAIL TECHNOLOGY EXPERT GROUP (FROM PAGE 240 ONWARD.)

In order to achieve this goal, it is important for organizations to be aware of their level of maturity. We distinguish between the following three levels of expertise and experience:

- 1. Beginner's level:** Traditional retailers who focus mainly on sales through separate channels, with no overarching coordination. These kinds of organizations are closest to the traditional concept of retail, whereby there is no integration between the physical store and the online environment.
- 2. Intermediate level:** Multichannel retailers that have put in place a variety of channels that operate alongside each other (and often in competition with one another). Each individual channel has its own *profit and loss statement* (P&L). There is a growing level of coordination between online and physical stores.
- 3. Expert level:** The perfect omnichannel organization has integrated all channels based on the customer's needs. The retailer's strategy is centered on the customer journey, which informs all development and actions.

2. Process and Organization

The basis for delivering an optimal customer experience is a well-functioning organization. When it comes to the organization and its processes, everything needs to be based around the customer. The retailer must be able to outline a RACI-based (see paragraph 2.1) growth process toward maturity based on one or more customer journeys, including the required activities and internal roles. This must align directly with the competencies and responsibilities of the various roles in the organization and the way in which these various roles relate to each other and interact with one another. The optimization of these elements is an ongoing process, in which efficiency, clarity and the development of the relevant expertise/competencies are all paramount.

2.1 RACI

In addition to the distinct processes and competencies/skills that exist within the organization, there are also certain dependencies and areas of overlap. In order to ensure these synergies are harnessed and mutual interests are addressed, you can work with a RACI model. In this model, the organization identifies the process element and, subsequently, the department or employee/official involved in this particular element. This reveals who is *responsible* and *accountable* and who must be *consulted* or *informed*. The RACI process is of vital importance and should form part of the description of processes and roles within the organization.



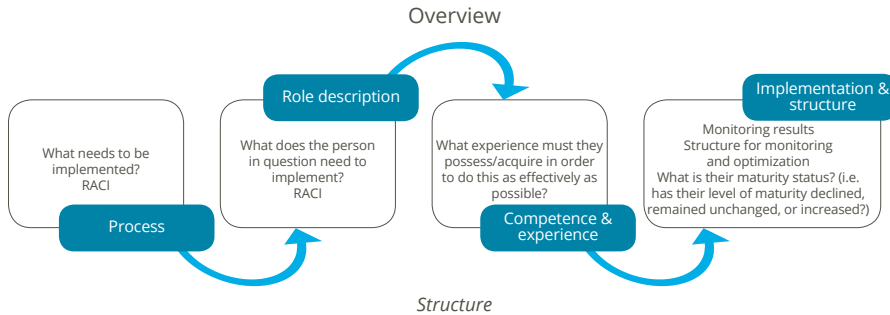
The introduction of the RACI model

2.2 Maturity

Where is the organization at right now and what do you want to achieve in terms of process, people, competency, and strategy? To answer these questions, the organization needs to undergo a maturity analysis, so as to ensure that a baseline measurement is available. This baseline measurement will help the organization to assess at a later stage of the process what the impact (positive or negative) has been of the changes that have been implemented.

Structure

A structure is required in order to put checks in place that help to coordinate the process and people's roles. How are things progressing, what might be improved, and what does the organization regard as the positives? A structure will include regular checks and assessments, which are established based on SMART (Specific, Measurable, Achievable, Realistic, and Timely) principles.²



Let's take a marketing position at a small organization (beginner's level) as an example. Beginners tend to use the existing structure and competencies as their point of departure. However, organizations rarely have the competencies and skills required available in-house, while lack of time also ends up becoming a problem. One option is to engage the services of an external agency that takes care of all aspects of marketing (including search engine marketing or SEM, e-CRM, social media, and the retailer's offline presence.)

As soon as growth takes off and revenues increase, the organization progresses to the intermediate stage. At this point, this position is divided into an online and offline component, but the duties and responsibilities have not been tailored to the situation at hand, and all the specialisms are being lumped together. The organization is not quite ready yet for a specialism for each separate touchpoint, but is it ready to place a greater focus on the customer journey. Optimization relating to the KPIs is crucial here.

If the organization continues to grow in terms of revenue and potential, this marketing role will come to be fulfilled by a team of specialists who work together to oversee and fulfill the duties of the marketing department. (Obviously, this applies not only to marketing, but also to other disciplines such as category management, supply chain management, and customer service.) This is due to the growing demand for improved KPIs and also because the organization will start to pay more attention to details at this stage, seeking to improve these details, which will require the services of a specialist. The processes are divided along RACI lines and are monitored for each individual KPI. The organization now has an expert in charge of each individual touchpoint, where they can continue to grow within their specialism.

2.3 Matrix Model

We describe a number of aspects and indicators below that can be used to establish an organization's maturity in terms of how connected their stores are. These aspects reveal the organization's current level in terms of process and organization.

² BJERKE, M.B., & RENGER, R. (2017). "BEING SMART ABOUT WRITING SMART OBJECTIVES." EVALUATION AND PROGRAM PLANNING, (61), 125-127.

	Beginner's level	Intermediate level	Expert level
1. Integration	No integration between store(s) and online environment	Growing integration.	Seamless environment. Individual customers are recognized everywhere/ in all stores of the retail chain.
2. Customer identification	The retailer currently has no customer identification process in place.	Customers have to identify themselves at the cash register.	There is an automatic identification process and services/products are tailored to customer preference.
3. Logistics	Stock availability based on a gut feeling about expected sales.	Stock availability based on expected sales and historical data.	Stock availability based on predictive models, supported by artificial intelligence (AI) and agreements with the supply-chain partners.
4. Fulfillment	Dispatched in accordance with the established procedure.	Organization may set alternative delivery time/date as needed.	Customer determines delivery time/address.
5. Privacy	Total GDPR implementation at a basic level.	Minimal GDPR implementation in a shift toward privacy by design.	Privacy by design is implemented into the organization; the ePrivacy Regulation has been addressed as well. Full implementation of the Qiy Scheme. ³
6. Technology (data)	The data and data models are not comprehensive or standardized.	Data fundamentals are in place and initial links are being established (MDA and MA) in order to ensure customer recognition across a variety of channels.	There is a 360-degree customer view, which the organization can convert into new values and standards.

Matrix model for Process & Organization

3. Marketing and Communications

"Marketing & Communications" constitutes the first axis described in this blue paper. This chapter describes the activities that are typical for the retailer's level of maturity.

In this chapter, we will apply three criteria to indicate an organization's current level of maturity in terms of marketing and communications.

- **Customer:** A detailed customer profile helps the retailer to better understand their customers and enables them to categorize customers based on their purchasing behavior, brand and/or product-group needs/preferences, and demographic and geographical data.

³ THE NONPROFIT QIY (PRONOUNCED "KEY") FOUNDATION FACILITATES PUBLIC-PRIVATE PARTNERSHIPS BASED ON A SERIES OF AGREEMENTS RELATING TO DATA-SHARING, WITH INDIVIDUAL CUSTOMERS BEING IN CHARGE. CUSTOMERS ARE PART OF A SECURE AND RELIABLE DIGITAL ECOSYSTEM, IN WHICH THEY CAN POSITION THEMSELVES WITHIN THE GENERAL DATA PROTECTION REGULATION (GDPR), INDICATE THEIR PREFERENCES AND INTERESTS, AND BENEFIT FROM THE ABILITY TO STORE VALIDATED IDENTIFYING INFORMATION OR MAKE PAYMENTS EASILY.

- **Data model:** Data provides organizations with a 360-degree view of their customers, allowing the organization to respond more effectively to the customer's needs. Organizations receive a growing amount of data through both internal sources (i.e. their website, customer loyalty cards, and CRM) and external sources (social media). This data must be aggregated.
- **Marketing (including predictive marketing):** Big data and customer profiles enable *predictive marketing*. This makes it possible to take a predictive look at value creation, value communication, and value delivery. *Predictive analytics* and big data can be used to make predictions based on individual behavior (including purchasing behavior).

The next paragraph shows the three different levels of maturity that organizations can be at when it comes to marketing and communications.

3.1 Matrix Model

The matrix model shown below contains the criteria used to measure the level of marketing and communications. All organizations ultimately aim to reach the expert level: insight into customer profiles, optimal data integration, proficiency in predictive marketing, and tools being used to maximum effect.

	Beginner's level	Intermediate level	Expert level
1. Customer	<p>Business and customer data is stored in a central repository. This enables the organization to identify trends in customers' purchasing behavior and other marketing-related areas.</p> <p>Beginners can use data they have collected through initiatives like customer loyalty cards.</p>	<p>Loyal customers can be rewarded based on their value and receive free services in exchange for new data. One example of this is customers providing their date of birth and then receiving a gift on their birthday.</p> <p>The organization is gaining more and more insight into customer profiles and is eagerly taking advantage of this.</p>	<p>The organization knows its customers (360-degree customer view) and knows how to capitalize on this.</p>
2. Data model	<p>The various data sources are not linked to each other, and there is no, or only limited, customer data available. Insight must be obtained into the various touchpoints and applications in the customer journey. The organization does not use any CRM software or customer loyalty cards.</p>	<p>An intermediate-level retailer is slightly further when it comes to integrating different data sources, but at this moment they are barely integrated. Relevant data is not available, and the various touchpoints and applications in a customer's purchase journey are not connected, or only connected to a limited extent. Intermediate-level retailers tend to use multiple tools.</p>	<p>The organization has the appropriate skills and the required technologies at its disposal and makes optimal use of a CRM application, a data tool, and/or customer loyalty-card software.</p>

	Beginner's level	Intermediate level	Expert level
3. • Marketing (including predictive marketing)	Marketing efforts are based on the data collected, but since the flow of information is minimal, it is not possible to take full advantage of the opportunities provided by consumer-relevant data. As such, efforts remain restricted to fairly general marketing, rather than being focused on specific groups of consumers.	Customer profiles enable demographic-specific online and offline marketing within the consecutive stages of the customer purchasing journey. This might include sending out leaflets and/or newsletters by email listing products by brand X in category Y exclusively to customers who have purchased this product in the past three months. In addition, there is the option of personalizing the homepage or specific category pages of an online store.	Predictive marketing is applied, and ensures that the target demographic receives personalized information about the value the retailer is able to deliver, and prefers this added value to the competing services or products.

Matrix model for Marketing & Organization

4. Staff & Skills

When can a company's employees be considered beginners, intermediate, or experts where the "Staff & Skills" category is concerned? We apply five criteria, which we use to further analyze and define the roles of individual employees and the skills they require:

- **Product expertise:** Product knowledge and the availability of product information.
- **Social skills:** The skills required for customer interaction.
- **Technological skills:** The ability to use the available technology and customer data.
- **Mandate:** Retail workers' authorizations.
- **After-sales service:** Resources and options that employees possess for maximizing customer satisfaction.

In the expert stage, store staff can respond effectively to customer needs if specific information about the customer is available in their systems. The ideal scenario is one where a customer profile has been established and the customer has communicated their interests, including their preferred shopping behavior in specific situations, i.e. whether they are "run," "fun," or "detail-oriented" customers. When in the vicinity of the store, the customer will be enticed to visit the store. Store employees have real-time access to data (customer profiles and purchases across all channels) and receive an alert about this customer, allowing them to provide the customer with the best possible service by interpreting this data using predictive analytics. They are supported in this process by state-of-the-art technology.

4.1 Matrix Model

The matrix model shown on the next page describes the various levels based on the five criteria listed above.

	Beginner's level	Intermediate level	Expert level
1. Product expertise:	Basic knowledge is acquired and then forwarded to an expert in-store, online, or in the customer service department. Only limited access to product information.	The organization has direct access to its own product information and staff is trained in how to use this information in dialog with the customer.	Knowledge of/about the full product range, including availability and the products offered by competitors, product comparison, and reviews. In-depth expertise is available in real-time through modern media.
2. Social skills	Customer recognition and customer profiling without support from either technology or data. Advice based on intuition.	The customer is recognized (with the help of technology) or identifies themselves. The customer's purchase history is known. Store staff use their social skills to be able to meet customers' needs, and are trained and coached in this by the organization.	A great deal of information is available about the customer, including their financial situation and preferences. Store staff are able to interpret customers' interests and use this knowledge to incite them to make a purchase.
3. Technological skills	Limited resources are available: product information can be accessed on personal digital assistants (PDAs) or point-of-sale (POS) systems.	Harnessing the available technology, including for the purpose of customer recognition and product information. In-store kiosks and/or PDAs support store employees.	Using the various hardware and software solutions to translate customer and product information into relevant solutions: <ul style="list-style-type: none"> • Product comparisons • Customer reviews
4. Mandate	Very limited, e.g., only decisions on product returns as a result of damage/defects; limited budget for price reductions and promotions.	Limited/predetermined, partly because there is no access to information regarding the customer (or potential customer)'s profitability.	Ample freedom to independently tailor the product range to the needs of individual customers through an understanding of the customer's potential and thanks to trust from within the organization.
5. After-sales service	Only verbal and/or written instructions on purchase.	Verbal and/or visual product instructions. Pre-sales options are relatively limited, as only the customer's order history is available.	Employees can support the customer in installing and using products. Input is gathered for product development and leads are generated for future purchases/lost sales are prevented, partly thanks to access to data regarding the future availability of items.

Matrix model for Staff & Skills

5. Privacy

A key element of any connected store is customer recognition – and, by implication, the processing of personal data. However, there are still retailers that do not process customer data at all.

Customers will be able to choose themselves with whom they wish to share data, and for how long. More than is currently the case, they will have the option of making their data available in exchange for services. Customers have control over all of the data they send to all parties concerned, and they also have the option to specify how long this data should be retained. Virtual assistants will keep them on the ball and will regularly inform them about who has access to their data. This provides customers with real-time access to the data and allows them to track what happens with it.

This means that retailers end up having to 'purchase' data relevant to their purposes from their customers by offering relevant products and services in exchange. In other words, retailers need to make an effort to be able to continue using real customer data. There may be opportunities to use personal data as a form of payment. The retailer will retain access to anonymized data as a matter of course.

The fact that consumers are increasingly aware of the footprint they leave behind when shopping online and offline will pose a challenge to customer recognition. In addition, this awareness is supported by more stringent privacy laws and regulations. Not only are the current GDPR requirements significantly more far-reaching than the regulations that were in place previously, they will also result in a further shift in customers' attitudes.

It is expected to become more and more easy for customers to obtain details of the data they have shared, and they will be able to manage this data with little effort. An eventual solution might be to create a central portal (in the form of an app or website) where all parties and authorizations are visible in a single location.

5.1 Matrix Model

The matrix model shown on the next page describes five criteria for each of the levels. An example of a beginner-level retailer, for example, would be the cheese shop around the corner that recently launched a customer loyalty program, while intermediate-level retailers include organizations that meet the minimum requirements stipulated in the GDPR or those that have advanced somewhat past the minimum level. Organizations currently at a more advanced level have implemented privacy by design at all levels of the organization and have completed the implementation of the ePrivacy Regulation. The *Data Protection Officer* (DPO) forms part of the *production-readiness process*. Experts have fully implemented the Qiy Scheme (or similar), have met all the requirements of a connected store, and have implemented the highest level of privacy standards.

	Beginner's level	Intermediate level	Expert level
1. Customer	Customers purchase their products and services from their regular supplier and are as yet unaware of any data being exchanged. As a result, the retailer does not yet feel compelled to comply with the requirements stipulated in the GDPR. However, even beginners need to comply with the minimum GDPR requirements.	At minimum, the retailer fulfills the requirements stipulated in the GDPR. Customers are becoming aware of their rights, but are currently exercising these rights only on a very limited scale. With more advanced organizations (i.e. with a higher level of data sophistication), customers tend to be more reluctant to share data and are becoming aware of the privacy risks this entails.	Customers are aware of their rights and of the dangers inherent in privacy violations, and carefully assess which types of data they choose to share with which retailer. They are more inclined to trust retailers with solid reputations. Customers who realize they have control over their personal data are more comfortable sharing this data, particularly if this comes with certain benefits.
2. Process & Organization	Employees interact with customers on a daily basis, know their profiles and recognize them when they shop at the store. They do not store any customer data.	Employees are becoming aware of customers' rights. The operating processes have been adapted accordingly, although some of the details still need to be ironed out. More advanced organizations involve a DPO (Data Protection Officer) in developing new products and services. This is a proactive approach, as privacy laws are taken into consideration from the outset, which is in line with the privacy-by-design concept.	The retailer makes it appealing for customers to provide full consent for the collection and retention of their data, as the customer clearly sees the advantages of doing so. Processes are designed in accordance with the GDPR guidelines, and within these boundaries an extensive package is offered to a select group of consumers, including specific offers and benefits.
3. Marketing & Communications	Customer communications are product-oriented. Retailers advertise their products. Customers have the option to modify the products and services.	Customers are asked for permission to have their data processed. The language used in all communications is clear; customers receive clear instructions and are able to request information. Organizations that are already at a more advanced stage in this process inform customers unambiguously about privacy, but do try to tempt customers into volunteering personal information.	This effort is aimed at customers who are aware of privacy issues and who carefully consider the pros and cons of sharing their data. The retailer clearly explains the benefits for the customer and the balance is tilted in the customer's favor. The retailer is so mature/well-equipped that customers can be secure in the knowledge that their account will be deleted immediately and in accordance with the relevant requirements.

	Beginner's level	Intermediate level	Expert level
4. Legal	Contracts signed with the suppliers are product-oriented. Contracts focus on delivery terms and product quality standards. Contracts contain no references to the processing and editing of customer data. The general terms and conditions are focused on the product (i.e. quality and on-time delivery).	Contracts signed with suppliers have been amended to reflect the new situation. General terms and conditions for customers have been amended and are in accordance with the requirements stipulated in the General Data Protection Regulation (GDPR). If a retailer is at a more advanced stage in this process, privacy by design is being implemented more extensively. By design all systems store the necessary information.	The GDPR requirements are fully satisfied, and there is broad-based awareness in the organization of the importance of the GDPR. In addition, the appropriate technical solutions have been implemented to meet the requirements of the ePrivacy Regulation.
5. IT	Simple tools and resources are used to store basic data. There is a basic administrative system in place that allows retailers to purchase their stock and grow their business.	The IT organization is structured based on the GDPR requirements. Retailers that are somewhat more advanced have developed their own specific solutions for managing authorizations.	Retailers operate a portal where all parties concerned can view their authorizations in a single location.

Matrix model for Privacy

6. Data

Physical stores provide retailers with the resources and tools required to identify existing customers (partly using relevant data) and entice new customers to sign up. This connects the physical store to the online store, and vice versa, creating a connected store.

The critical success factor is how the retailer can convince the customer to make themselves known/ allow themselves to be recognized in the physical store. The solution lies to a significant extent in the ability to provide tangible benefits to customers who sign up and agree to be identified in-store.

There is a growing necessity to continue the online customer experience in offline interaction, and vice versa. This does require, however, that physical stores have access to the customer's digital footprint: their preferences, personal attributes, and purchase history.

6.1 Matrix Model

The matrix below describes the various levels for each domain. Within the data domain, an organization's maturity is measured using the data model, the available IT solutions, and analytics.

Organizations are classified as beginners if they operate an online channel (online store) and/or mobile application (m-commerce or customer app) in addition to their physical store(s). Their offline and online presence are not connected to each other in terms of technology, data, and processes.

Retail organizations at the intermediate level have already initiated the transformation process, which in the first instance will mainly result in greater efficiency in the organization's business processes. This transformation will culminate in the organization being able to recognize the customer in both a digital and an analog context – but they will only be able to do so with existing customers or customers making a purchase. The organization maintains a number of touchpoints in the physical store through which it can identify customers and match them with underlying data.

The ideal situation is the one in which organizations in the expert category find themselves. These organizations have standardized data available in real-time and in a central location, data which is integrated from various internal sources. They have implemented the technological tools, smart processes and triggers that enable them to identify and register the customer in-store, and can match the customer with the underlying data using a unique ID (key).

	Beginner's level	Intermediate level	Expert level
1. Data model (master data & operational data)	No data available on the customer. Fundamentals for product and location in place. Lack of clear and consistent data definition. The data and data models are not comprehensive or standardized.	Basic structure for customer data is in place, e.g., through a data-pool connection. The transformation is initiated at this level. Comprehensive, up-to-date data facilitates a clear and consistent definition and standardization across the various systems. Various data sources and supply-chain partners enrich the existing data sets, which allows retailers to draw on this enriched data to deliver added value in their connected store.	360-degree customer view. Sharing transaction data in order to boost sales. In this stage, after-sales systems are also connected to other data. Retailers share detailed logistics and resale data with suppliers and other supply-chain partners, in order to work together to optimize the logistics process and deliver new added value to the customer.

	Beginner's level	Intermediate level	Expert level
2. IT solutions	The various sources are not integrated. Business Intelligence (BI) at the basic level. The various touchpoints and applications in the customer's purchase journey are not connected, or are only connected to a limited extent.	MDM/PIM (Master Data Management/ Product Information Management) sources are integrated and available in a <i>data warehouse</i> . BI tools and an analysis tool are also in place. Transparency of systems and platforms becomes crucial. The supply-chain partners need to start working together more closely, including when it comes to technology.	In addition to BI and Business Analytics (BA), the organization also possesses a number of apps and customer recognition tools/ software. Customers are recognized without having to take any particular action, and smart or otherwise appealing methods are used to tempt them into signing up. There are tangible benefits involved, which gives customers the sense that they retain their autonomy.
3. Analytics	Only occasional; extensive data cleaning and synchronization. Mainly what happens is "looking back" and reporting. Relevant data is not available during certain processes.	From BI to BA – from reporting through analyses to finally drawing conclusions. The organization still needs to learn how to manage big data and actually convert this into added value.	Artificial intelligence (AI) in relation to customer profiling and offers. The organization is currently at the "looking ahead and predicting" stage. The organization knows how to manage big data.

Matrix model for Data

7. Conclusion

This blue paper aims to provide the reader with information on the numerous factors involved in determining your organization's level of maturity on its journey toward becoming a connected store. We would like to emphasize that organizations need to decide in which of the axes they would like to excel and in which of these areas they aim to be at least on par. In the journey towards the envisaged end goal, it would be too ambitious to aim for the expert level in all the axes.

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