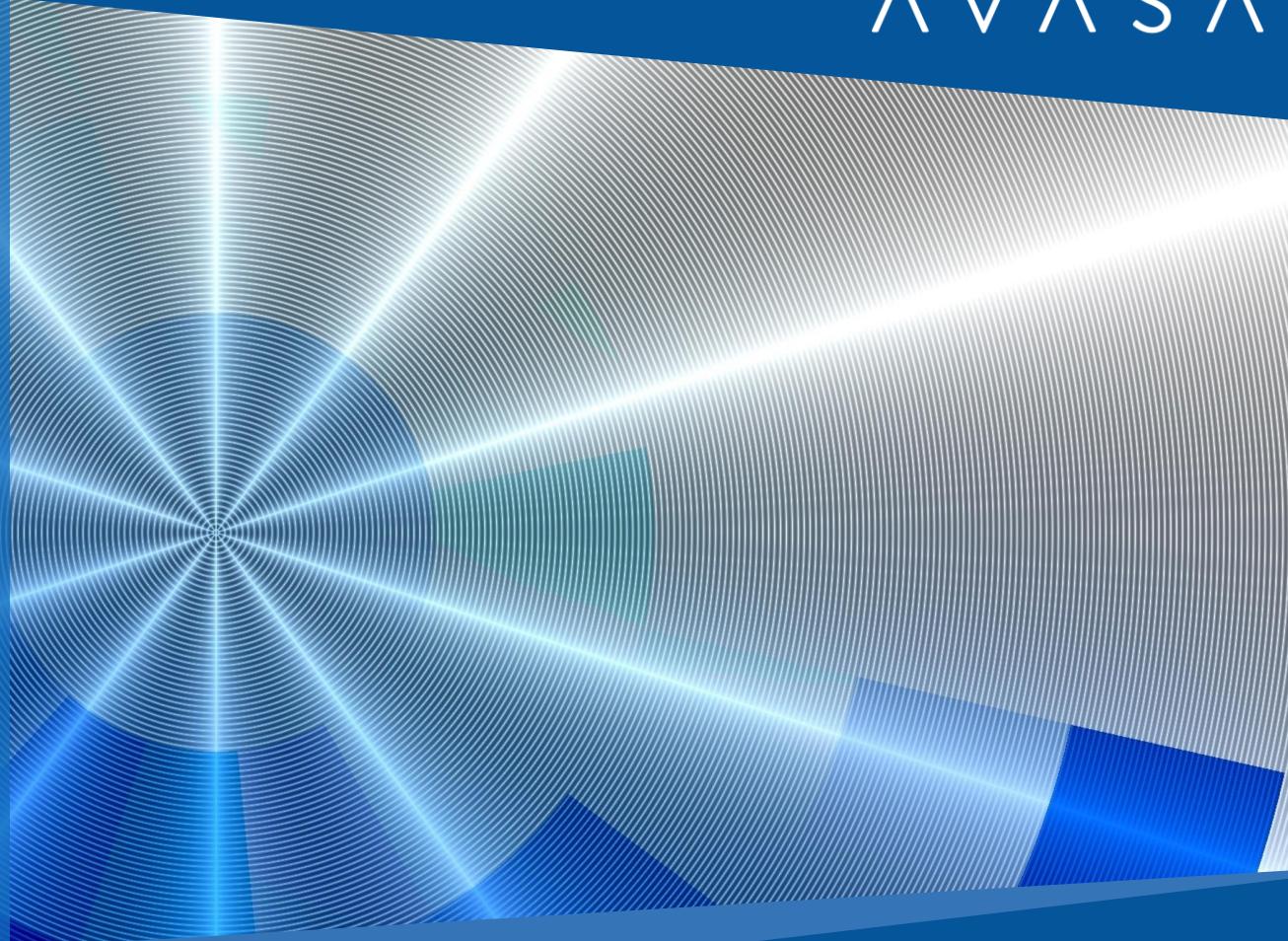


# Retail Digital Services 2022–2023 RadarView

Reimaging customer  
engagement and experience

May 2022

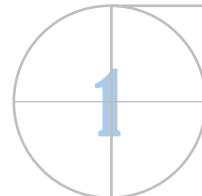


# Table of contents

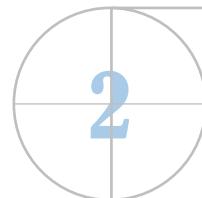
• About the Retail Digital Services 2022–2023 RadarView	3
• Scope of the report	4
• Executive summary	6
• Lay of the land	9
• The road ahead	17
• RadarView overview	26
• Retail Digital Services 2022–2023 RadarView	29
• Service provider profiles	32
• Key contacts	94



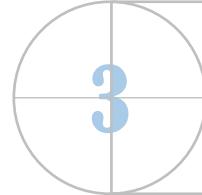
# About the Retail Digital Services 2022–2023 RadarView



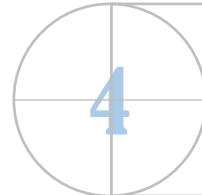
The retail industry is bouncing back. With both online commerce gaining momentum and offline commerce making a comeback, retailers have started to bet big on omnichannel retailing. New touchpoints for online sales, new format of brick-and-mortar stores, and digitally-led experiential retailing have led to the generation of new revenue streams and enhanced customer experience.



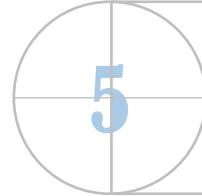
Avasant's ongoing interactions with industry leaders indicate that convergence of digital technologies is crucial for business growth and retention of existing customers. As retailers rapidly digitalize to align with industry dynamics, there is an increasing need for them to partner with the right service provider to assess and realign their digital strategy for the future.



The *Retail Digital Services 2022–2023 RadarView* assists retailers in charting out their action plan to gain competitive advantage. It also identifies essential global service providers and system integrators that can help enterprises transform their business.



Avasant evaluated 36 providers using a rigorous methodology across three key dimensions: practice maturity, investments and innovations, and partner ecosystem. Twenty of the 36 providers were recognized as having brought the most value to the market over the past 12 months.



This report also highlights key trends in the market and Avasant's viewpoint on the direction of the industry over the next 18–24 months.

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AVASANT

## Scope of the report

# Scope of the report

This report focuses on digital services delivered to enterprises in the retail industry.

## Key definitions

### Retail

- The sale of goods from a point of purchase directly to the end customer who intends to use the product.
- The point of purchase can be a physical retail store, a shopping website, or a mobile application.

### Digital services

- Digital services accelerating digital transformation using emerging technologies such as artificial intelligence (AI) and analytics, blockchain, cloud, cybersecurity, intelligent automation (IA), immersive reality, and the Internet of Things (IoT) across the retail value chain.
- Service provider offerings including advisory and consulting, proof of concept (POC) development, build and test, implementation, system integration, and development and maintenance.

## Enterprise examples

**Walmart** 

**COSTCO** 

**TESCO** 

**Kroger** 

**Walgreens** 

**SCHWARZ** 

**THE HOME DEPOT** 

**TARGET** 

**IKEA** 

**amazon** 

**Alibaba.com** 

We assess the offerings of service providers across six service line components of the retail value chain.

### Sourcing and procurement

Sourcing of finished goods from manufacturers, distributors, or wholesalers

### Inventory management and warehouse operations

Managing inventory, replenishment planning, and warehouse operations

### Marketing

Promotion of brand and goods for sale

### Online and in-store commerce

Execution of sale purchase transaction—online, mobile, in-store, and curbside

### Fulfilment

Managing distribution network and delivery and return of goods to and from end consumers

### Customer experience

Customer engagement (online and in-store) and customer support (before and after sale)

**Out of scope:** Does not include manufacturing, distribution, and supply chain management of raw materials

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# Executive summary

# Key recommendations for retailers

Strengthen omnichannel retail by prioritizing customer convenience and experience

- Focus on providing additional convenience to customers through hyperpersonalized services, such as developing curated shopping lists, and enabling a seamless experience across critical touchpoints.
- Elevate the overall customer experience by increasing presence on social media, empathy selling with products and services, providing virtual tours, and streaming live events.

Build an intelligent digital supply chain to streamline processes and expedite delivery

- Optimize operations by deploying computer vision and bots for warehouse management and AI analytics solutions for calculating the best fleet route or predicting local and regional demand.
- Evaluate partnerships with ride hailing companies, prioritize investments in drones and autonomous vehicles, and establish micro fulfilment centres to expedite last mile delivery.

Redesign stores to minimize cost and increase customer foot traffic

- Re-evaluate brick-and-mortar store layouts and assess different revenue generating options such as conversion to dark stores and sub-leasing to other retailers or enterprises like healthcare providers.
- Digitalize stores and enhance overall customer experience by facilitating inventory tracking through smart devices, digital fitting rooms, and contactless payments.

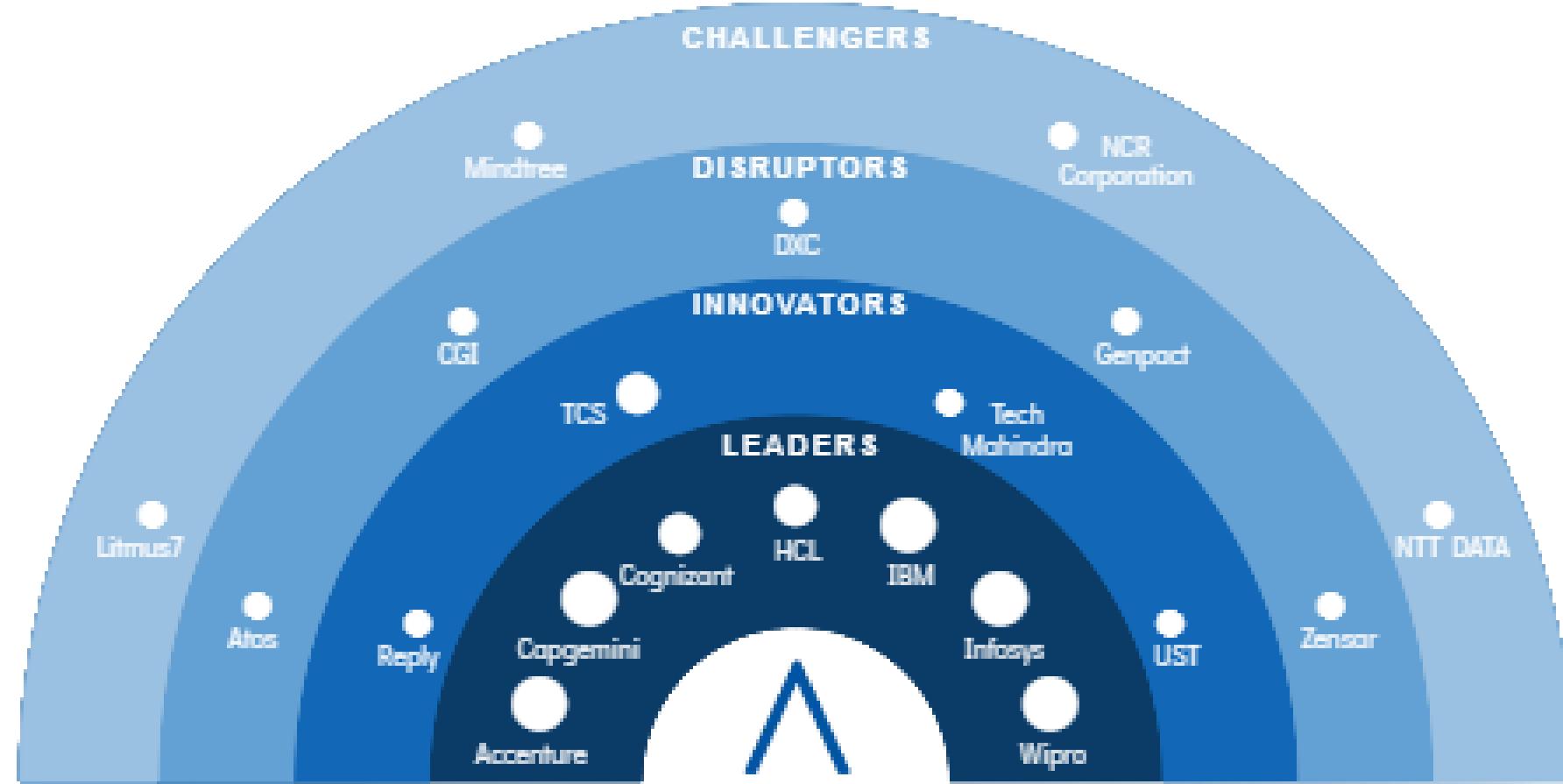
Double down on digital investments to revitalize growth and enhance experience

- Invest in emerging technologies such as video analytics for testing product quality, blockchain for facilitating smart contracts, and immersive reality for enabling experiential retail.
- Explore and monetize opportunities in the Omniverse by assessing digital prerequisites and prioritizing investments for building digital infrastructure and launching virtual stores.

Acquire industry-specific digital expertise to optimize operations and create new revenue streams

- Invest in or partner with startups to expand revenue through new business models, social selling, and personalization, and enhance customer experience by expediting last mile delivery.
- Evaluate partnerships with progressive retailers to leverage their existing products (specifically platforms) to launch new marketplaces or new operating models.

Avasant has recognized 20 top-tier service providers supporting retailers in digital transformation



Practice maturity

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Lay of the land

# The retail industry faces ongoing challenges, but there are also new opportunities



## Store closures and installation of safety protocols

Retailers must close some of their stores and redesign others to improve profitability and accommodate safety protocols such as thermal screening, social distancing, and temperature checking.

## Shift in consumer spending

Lockdowns shifted consumer choices toward essentials and comfort products. As economy strengthens, luxury goods are more connected to consumer's digital lives including NFTs and smart products.

## Operations and supply chain disruptions

Retailers are facing issues of stock unavailability and delay in delivering products due to disruptions in fulfilments centers, unorganized last mile delivery, and inability to predict demand.

## Staffing issues

Staff migration to other industries during the lockdown and difficulty in recruiting skilled staff specializing in showrooming and providing personalized services to customers have led to major staffing issues.

## Growth in omnichannel retail

Omnichannel retail is experiencing exponential growth as digital native retailers launch stores, the role of social media influencers becomes critical, and penetration of smart devices increases.

## Increased traction in different business and operating models

There is increased adoption of varied business and operating models such as BOPIS (buy online pick in store) and curbside pick up to align with the shift in customer expectations.

## High focus on customer experience

Retailers are increasingly investing in digital technologies to provide personalized and differentiated experiences to customers during online and offline sales.

# Key trends shaping the retail industry

- 1 Continued focus on elevating digital shopping experiences
- 2 Emergence of new types of brick-and-mortar stores
- 3 Big investments on building the digital supply chain
- 4 Exploration of new business models
- 5 Accretive mergers and acquisitions within the retail ecosystem

# Retailers are improving the digital shopping experience by catering to customer needs

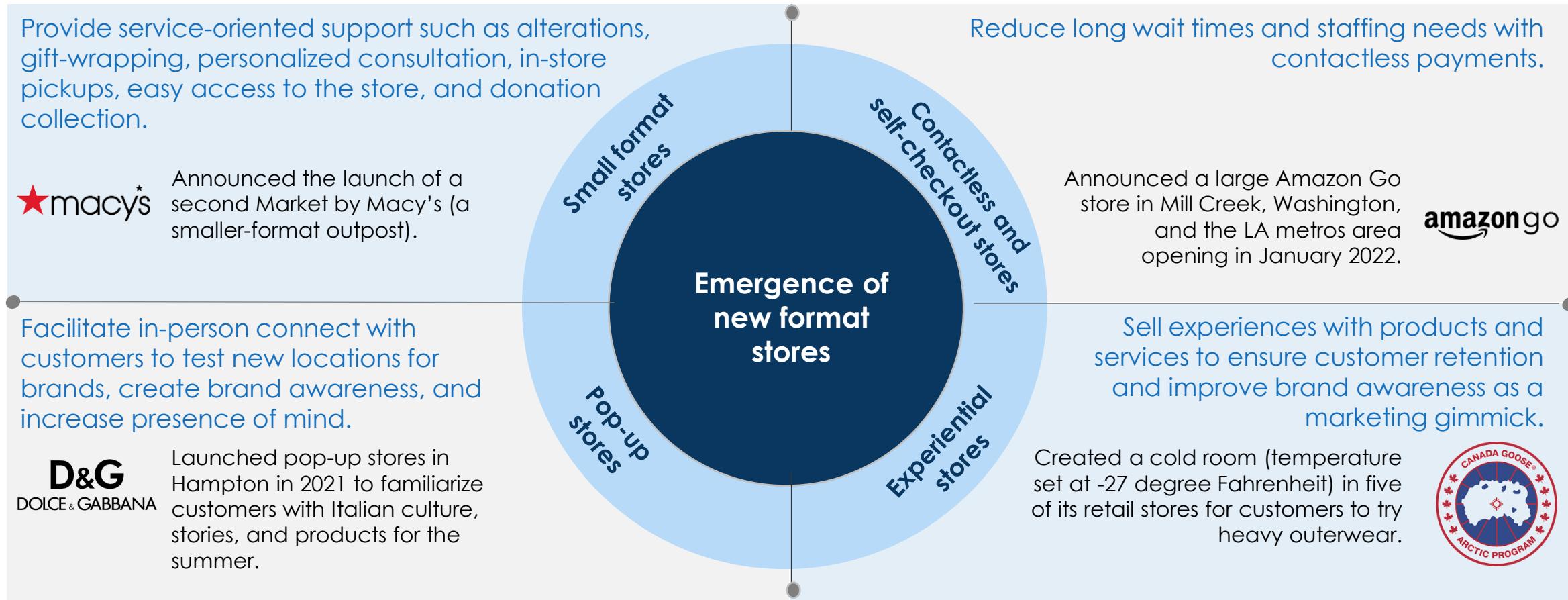


With 11%–13% expected growth in online sales in 2022, the global retail market is forecasted to cross USD 1.17 trillion. Initiatives to elevate the digital shopping experience include:

	<h3>Customer experience</h3> <p>Amplify customer experience in web portals through virtual tours and voice-enabled shopping.</p> <p> Launched a 3D virtual tour of its showroom to give the feeling of a walk-through vintage collection.</p>		<h3>Empathy selling</h3> <p>Sell empathy with the products to provide contextual cues and personalized services by creating empathy maps.</p> <p> Developed 'how it's made' videos that describe the product sourcing to demonstrate care.</p>		<h3>Live shopping experience</h3> <p>Create live shopping experiences to highlight product benefits and usage through events, product demonstrations, and surveys.</p> <p> Reported conversion rates up to 40% by streaming several shows a week and workshops with experts and influencers.</p>		<h3>Customer loyalty</h3> <p>Provide personalized after-sales services and support based on feedback and requirements.</p> <p> Converted a bad experience by replacing one bad protein bar with six new bars and a handwritten note.</p>		<h3>Transparency promotion</h3> <p>Promote transparency by providing real-time updates on the end-to-end delivery schedule, sales return, and stock availability.</p> <p> Increased customer retention by providing notifications on delivery schedule and stock.</p>
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Investment in customer-centric initiatives can generate additional revenue by increasing customer conversion rates and reselling opportunities with existing customers.

# Retailers are introducing new concept brick-and-mortar stores to reduce costs and enhance customer convenience

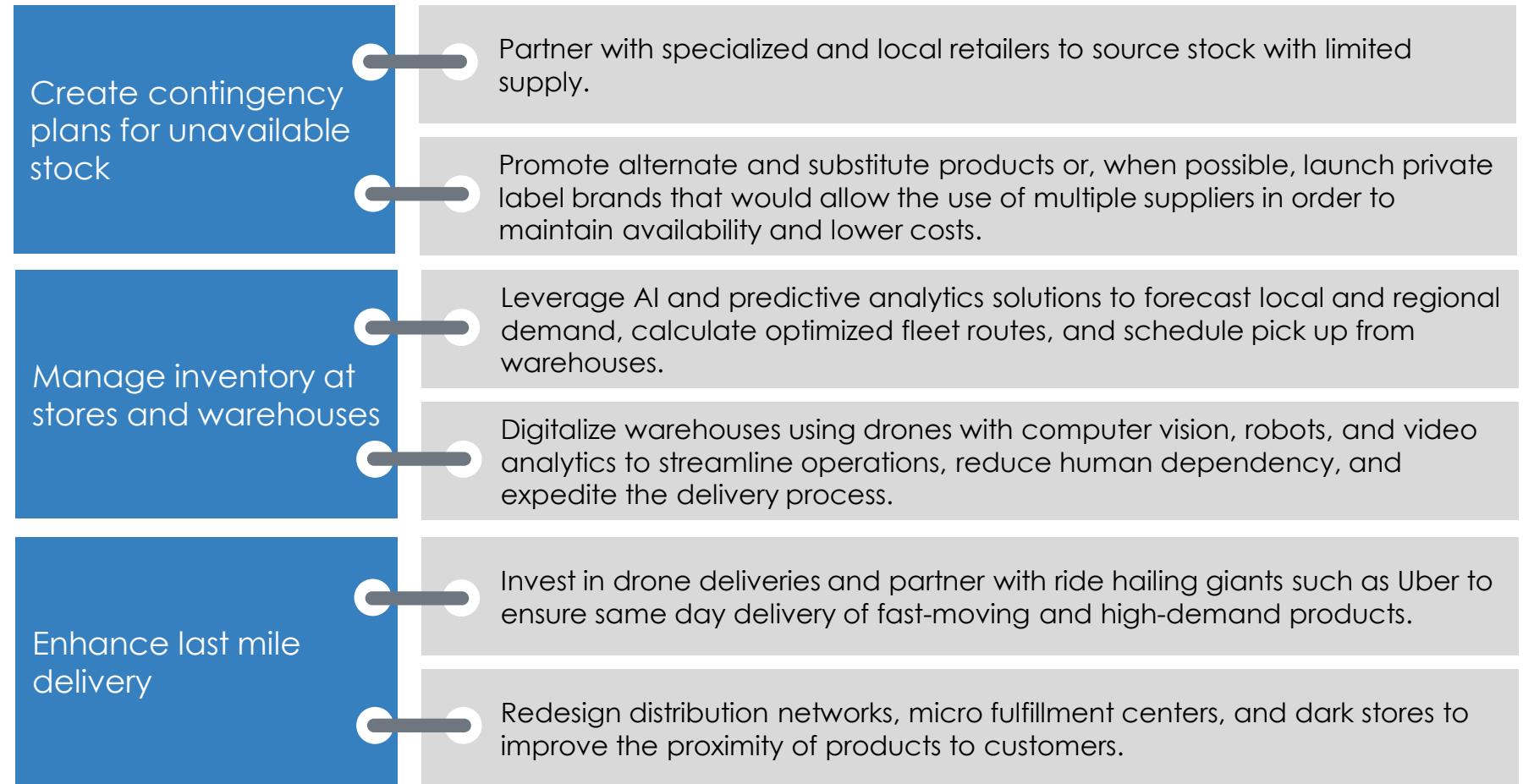


New format stores will play a critical role in driving revenue growth by reducing costs, improving proximity to customers, and providing after-sales support.

# Intelligent digital supply chains are critical

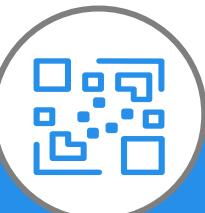


Retailers must prioritize these initiatives to address supply chain disruptions:



Reassessing and digitalizing the supply chain has become critical, as it can improve profitability and manage customer expectations.

# Retailers are evaluating different business models to create new revenue streams



## Providing value-based services

Service-oriented retailers selling packaged products to increase customer outreach



Launched Panera Grocery in 2020 to sell high-demand pantry items such as milk, bread, and fresh produce.



Conducted and organized virtual arts and craft classes for children of different ages during the holidays.



## Monetizing real estate

Brick-and-mortar retailers selling spaces for venturing into other industries



Inaugurated Target Clinic in partnership with Kaiser Permanente to facilitate healthcare delivery.

Specialized retailers subleasing their spaces to attract more customers



Sublet a section to Sephora in multiple stores to cater to a different customer segment.



## Expanding private labels portfolio

Large retailers launching their own brands to target different customer demographics



Launched six private label brands in 2021, including College from Home, to target different customer segments.

To differentiate itself from its competitors, retailers must build on their strengths and explore other revenue opportunities. They can transform challenges such as product expiration and large physical infrastructure into opportunities.

# Progressive retailers are pursuing M&A to increase revenue, optimize operations, and enhance customer experience



## Strategic initiatives triggering M&A activities:

Create new revenue streams by venturing into adjacent spaces

Increase market share by expanding geographical presence

Elevate customer experiences by acquiring digital capabilities

Optimize cost by integrating with supplier networks

Align with customers' expectation of expedited delivery

## Illustrative examples:

Enterprise

Acquired company

Summary

Create new revenue streams by venturing into adjacent spaces	Best Buy	current health	Acquired Current Health for USD 400 million to gain access to its remote monitoring platform for creating a scalable care ecosystem for its customers.
Increase market share by expanding geographical presence	Etsy	elo7	Acquired Elo7 to strengthen its foothold in the Latin American market through its vast e-marketplace ecosystem of 1.9 million active buyers and 56,000 active sellers.
Elevate customer experiences by acquiring digital capabilities	Walmart	ZEEKIT	Acquired Zeekit, a startup specializing in digital fitting rooms, to help customers shop garments on walmart.com by uploading a photo or choosing a model that best represents them.
Optimize cost by integrating with supplier networks	amazon	SpartanNash	Acquired a 15% stake (2.5% in company stock and another 12.5% if Amazon buys groceries of USD 8 billion over seven years) in SpartanNash, its leading grocery supplier.
Align with customers' expectation of expedited delivery	TARGET	deliv	Acquired the technology assets and expertise of Deliv, a startup specializing in last mile delivery transportation services, to facilitate same day delivery for customers.

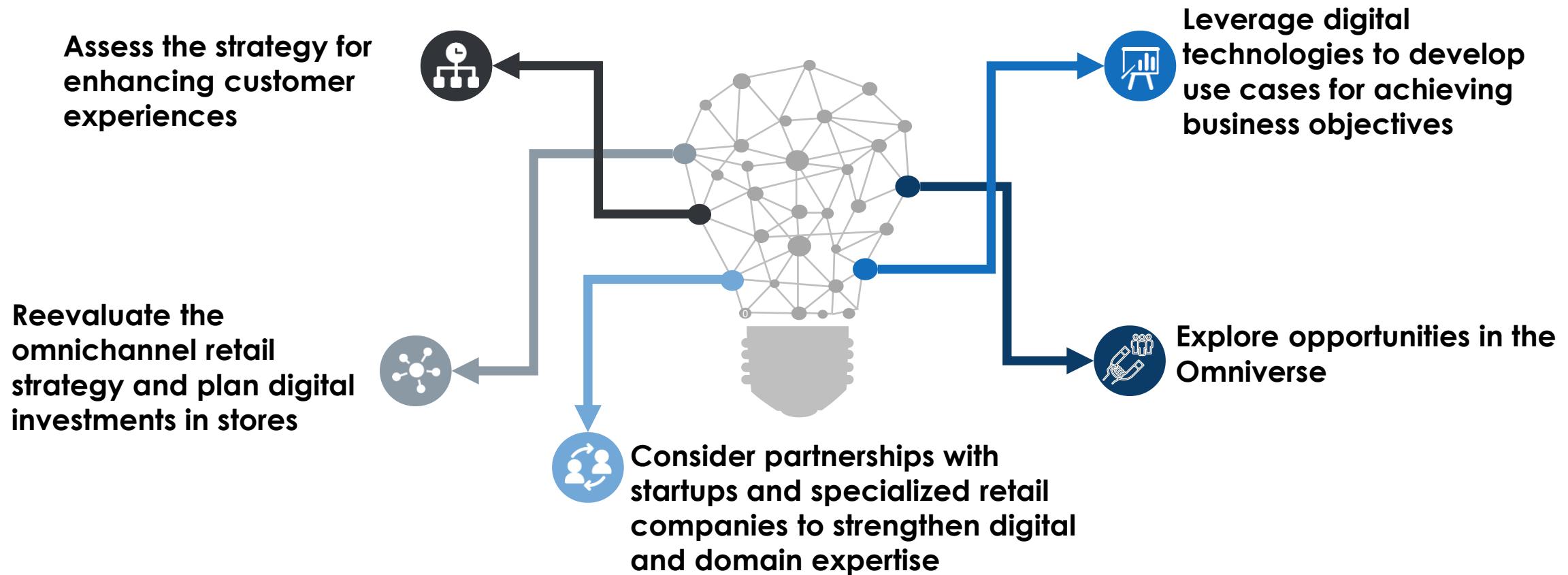
Accretive acquisitions combined with in-house investments is providing a differentiating edge to progressive retailers, as they are evaluating horizontal, vertical, and digital integration.

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The road ahead

# Chart a detailed investment plan to prioritize and plan for business and digital strategies



# Develop customer-centric strategies across critical touchpoints to prioritize convenience and experience

Deployment of emerging digital technologies will act as a catalyst to better understand, analyze, and approach customers.

## Hyperpersonalization

Develop personalized and curated shopping lists based on buying and usage patterns.

## In-store experience

Use IoT and Bluetooth for tracking items, analyzing customer traffic data, and sending targeted deals.

## Social selling

Facilitate live streaming of events, bulk buying discounts, and selling through influencers on social media.



## Immersive experience

Enable virtual product trials, indoor navigation, and product guides using immersive reality.

## Voice commerce

Ensure seamless transfer to relevant pages for online searches and launch the same in physical stores.

## Values-based branding

Promote empathy by stressing ESG initiatives and narrating the culture and stories behind the brand.

Customer expectations are revolving around convenience for fast moving products/ services and experiences for luxury shopping. Retailers must find the right balance for both online and offline commerce.

# Digitalize stores to facilitate omnichannel retail

## Critical digital projects

**Build digitally-led infrastructure**

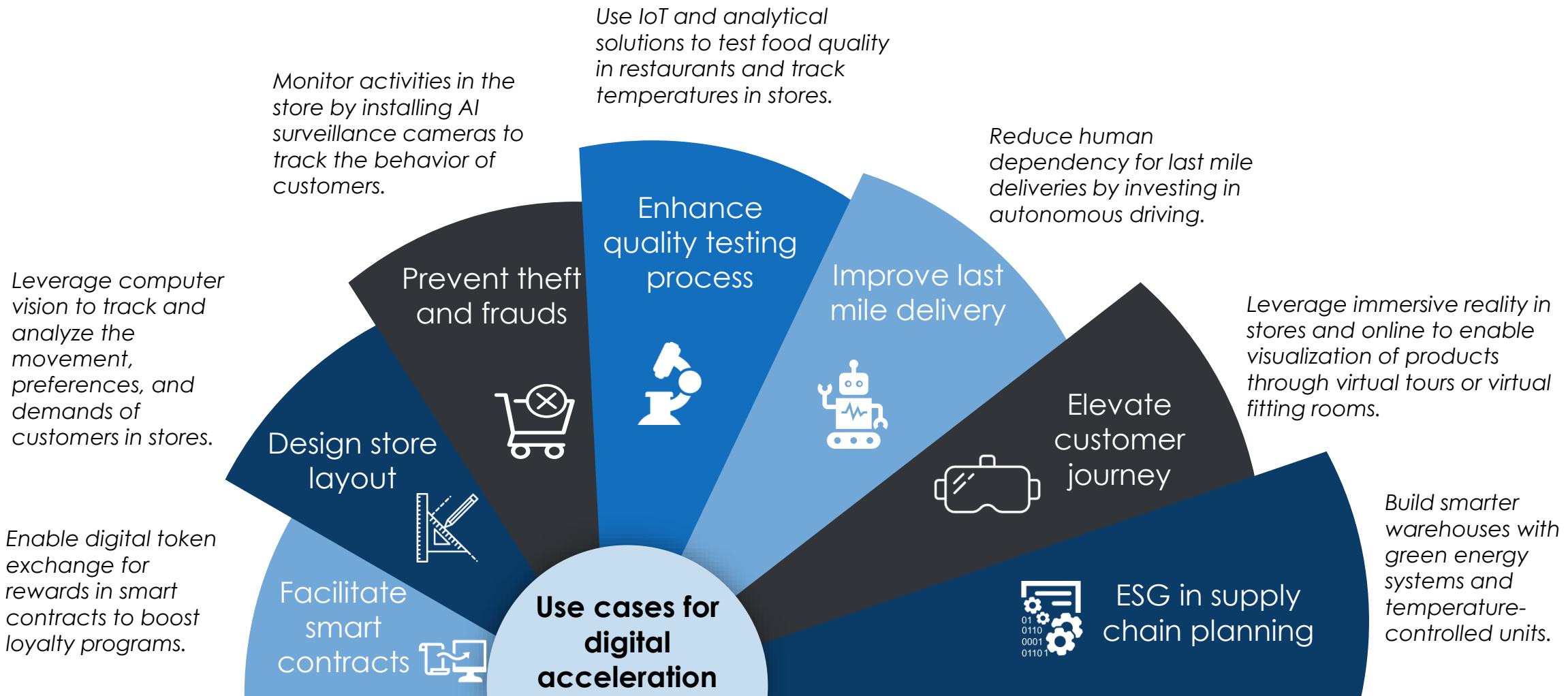
**Connect with social media platforms**

**Offer AI-based advertisements**

Digital themes	Enterprises	Summary	Illustrative examples
Install smart devices to track inventory	<b>GUESS</b>	Rolling stand-mounted iPads used as self-service kiosks for checking online store for wider collection, displaying visuals of clothes/ accessories, and training the staff.	
Provide digital fitting rooms	<b>REBECCA MINKOFF</b>	Installed large touchscreens—Magic Mirrors—that can be used for changing light settings and displaying different sizes and colors of the selected product.	
Launch social retail stores	 BURBERRY ESTABLISHED 1856	Launched its first social retail store in partnership with Tencent to leverage interactions on the WeChat platform in the physical retail environment.	
Set-up GIF booths	 CharlotteTilbury	The make-up company installed a GIF booth for customers to post pictures of themselves. The pictures could go on social media and even feature in storefront windows.	
Use virtual rail format for promotion	<b>MARKS &amp; SPENCER</b>	Mounted a large touchscreen in its Amsterdam store to showcase full images of garments with details in a virtual clothing rack.	
Launch in-store campaigns	<b>UNIQLO</b>	Introduced a neuroscience fashion campaign in its Australia store, which uses AI to suggest clothes based on customer mood and behavior.	

To facilitate the exponential growth of omnichannel retailing, retailers must provide differentiated and value-added services in stores.

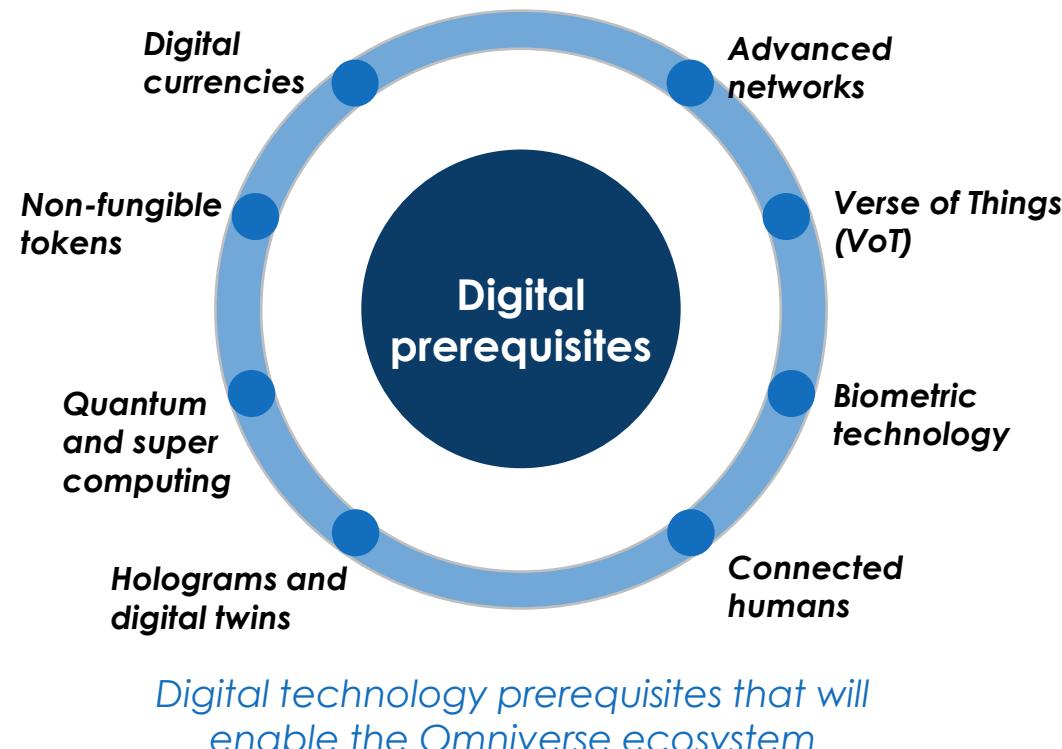
# Deploy digital technologies to achieve business objectives



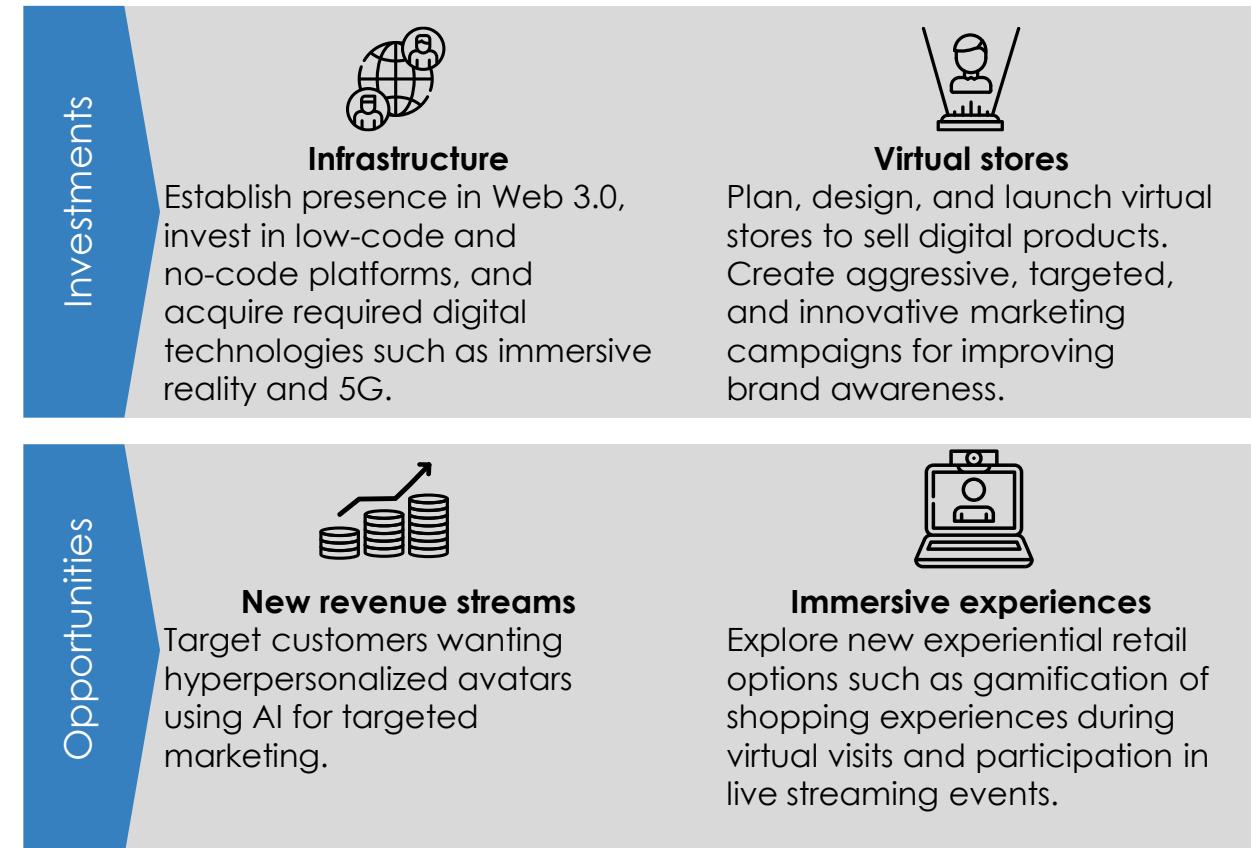
To align with evolving customer expectations, financial challenges, and staffing issues, investing in multiple digital projects is imperative.

# Prioritize investment areas in the Omniverse to monetize opportunities in the near future

The Omniverse is the convergence of human experiences across the physical, virtual, and augmented worlds.



## Disruptive Omniverse investments and opportunities



The retail industry will be impacted by the Omniverse, as it is leading to many opportunities. Though it is still in its nascent stage, progressive retailers must consider exploring, assessing, and planning the transformation plan.

# Expand investments in startups to acquire specialized digital capabilities that align with specific business needs



Many specialized digital companies are focusing on addressing emerging retail trends.

Focus area	Startups	Description
Emergence of new business models	Brik + Clik	A US-based startup offering physical stores as a service model to assist online retailers selling offline. Also operates virtual reality (VR)-based online stores and accepts bitcoin.
	talkshoplive	A US-based startup enabling retailers to integrate videos with shoppable content on its websites and social media platforms and facilitate online sales within the video player.
Facilitation of last mile delivery	Fabric	An Israel-based startup converting small real estate in urban areas into automated micro-fulfillment centers and mini warehouses for one-hour delivery.
	BRINGG	An Israel-based startup offering cloud-based and data-led delivery and fulfilment solutions to manage the last mile delivery ecosystem and provide updates in real-time.
Enhancement of customer experience through social selling and personalization	LTK STITCH FIX <i>Freestyle</i> ™	A US-based startup helping social media influencers sell brands by creating their own content for customers. Has developed two apps called LIKEtoKNOW.it and rewardStyle. A US-based startup offering a differentiating shopping experience through Stitch Fix Freestyle, enabling customers to personalize and curate clothes before purchasing them.
	ReadySet®	A US-based startup providing a 3D VR solution for retailers to design stores based on insights collected by respondents taking a walkthrough of a virtual retail store.
Management and design of stores	retail pulse	An Indian startup improving retail operations in stores by providing real-time shelf analytics, in-store compliance, and visibility score using computer vision and AI.

Retailers can leverage digital expertise (including products and talent), successful business and operating models, and domain know-how and build on it to create new revenue streams, optimize operations, and gain customer loyalty.

# Partner with specialized and progressive retailers to leverage their industry-specific products and platforms



## Industry-specific products:

### Summary:



Delivery as a service

Alignment to growing customer expectation on speed, agility, reliability, and minimal cost of last mile delivery.



Resale as a service

Capitalization of resale market opportunities through its own online marketplace and managing the sourcing, sales, and delivery of resale products.



Cashless technology

Enhancement of customer experience by avoiding long queues for making payments and expediting the entire checkout process.

## Illustrative examples:

Launched Walmart GoLocal for starting a delivery as a service business for scaling last mile delivery. Sample clients are The Home Depot and Chico's.



Launched an RaaS (resale as a service) platform. The business model includes a fixed monthly fee and a portion of sales. Sample clients include Madewell, eBay, and Walmart.



Launched Just Walk Out technology (used in its Amazon Go stores) for other retailers. Sample clients include mid-tier retailers.



As retailers prioritize digital transformation projects, they must consider partnering with specialized retailers to save investment costs and expedite the deployment process.

# Partner with service providers to expedite digital transformation



Recent outsourcing engagements:



NORDSTROM



Key segments and processes that leverage digital transformation within the scope of outsourcing contracts:

Applications and systems integration

- API-based portals
- Cloud-based infrastructure
- Intelligent automation

Infrastructure and security management

- Cloud-based infrastructure
- Networking
- Cybersecurity

Revenue and expense management

- Intelligent automation
- Predictive analytics
- AI
- Cloud

Productivity tool implementation

- Cloud-based infrastructure
- Automation
- AI and analytics

Procurement and supply chain management

- RPA/IA
- IoT and drones
- AI and analytics
- Blockchain
- Robots

In-store and online commerce

- Intelligence automation
- Immersive reality
- AI and analytics
- Cloud
- IoT

Information exchange and communication

- Apps and chatbots
- Blockchain
- AI and analytics
- IoT

Sales and marketing

- Robotic process automation (RPA)
- AI and analytics
- Cloud-based infrastructure

Customer engagement

- IoT
- AI and analytics
- Cloud
- RPA bots
- Immersive reality

With growing digital investments and a pressing need for hyperconvergence of digital technologies, retailers must rely on and partner with service providers to design action plans to maximize impact.

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# RadarView overview

# Avasant's Retail 2022–2023 RadarView assesses providers across three critical dimensions



## Practice maturity

- This dimension includes measures around the type, market acceptance, and quality of offerings in the retail space. It also assesses the strength of the overall practice with respect to its size, certified employees, embedded expertise in emerging technologies, and value chain coverage.
- The width and depth of the client base, practice revenues, use of proprietary/outsourced tools and platforms, and future strategy are important factors that contribute to this dimension.

## Investments and innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model and how it aligns with the future direction of the retail space.
- The overall strategic investments, both organic and inorganic ones, toward capability and offering growth, technology development, and human capital development, along with the innovations that the service provider develops, are critical aspects of this dimension.

## Partner ecosystem

- This dimension assesses the nature of partnerships and ecosystem engagement that the provider has entered. It evaluates the objective of the partnerships (for example, codevelopment or co-innovation), its engagement with technology solutions or product providers, startup communities, and domain associations.
- The kind of joint development programs around offerings, go-to-market approaches, the overall depth in partnerships, and their leverage to deliver superior value to clients are all important aspects.

# Research methodology and coverage

Avasant based its analysis on several sources:

## Public disclosures

Publicly available information such as Securities and Exchange Commission (SEC) filings, annual reports, quarterly earnings calls, and executive interviews and statements

## Market interactions

Discussions with retail service providers leading digital initiatives and influencing retail provider selection and engagement

## Provider inputs

Inputs collected through their capability decks and structured briefings during September–December 2021

Of the over 36 retail service providers assessed, the final 20 featured in RadarView are:

**accenture**

**Atos**

**Capgemini**

**Cognizant**

**CGI**

**DXC  
TECHNOLOGY**

**genpact**

**HCL**

**IBM**

**Infosys**

**LITMUS7**

**Mindtree**  
A Larsen & Toubro Group Company

**NCR**

**NTT DATA**

**REPLY**

**tcs | TATA  
CONSULTANCY  
SERVICES**

**Tech  
Mahindra**

**U ·  
S T**

**wipro**

**zensar**

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# Retail Digital Services 2022–2023 RadarView

# Reading the RadarView

Avasant has recognized retail service providers in four classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, partner ecosystem, and investments and innovation) and have had a superior impact on the market as a whole. These service providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in the space that set the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate in a few select areas or industries and distinguish themselves based on superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers redefining the rules of the game.

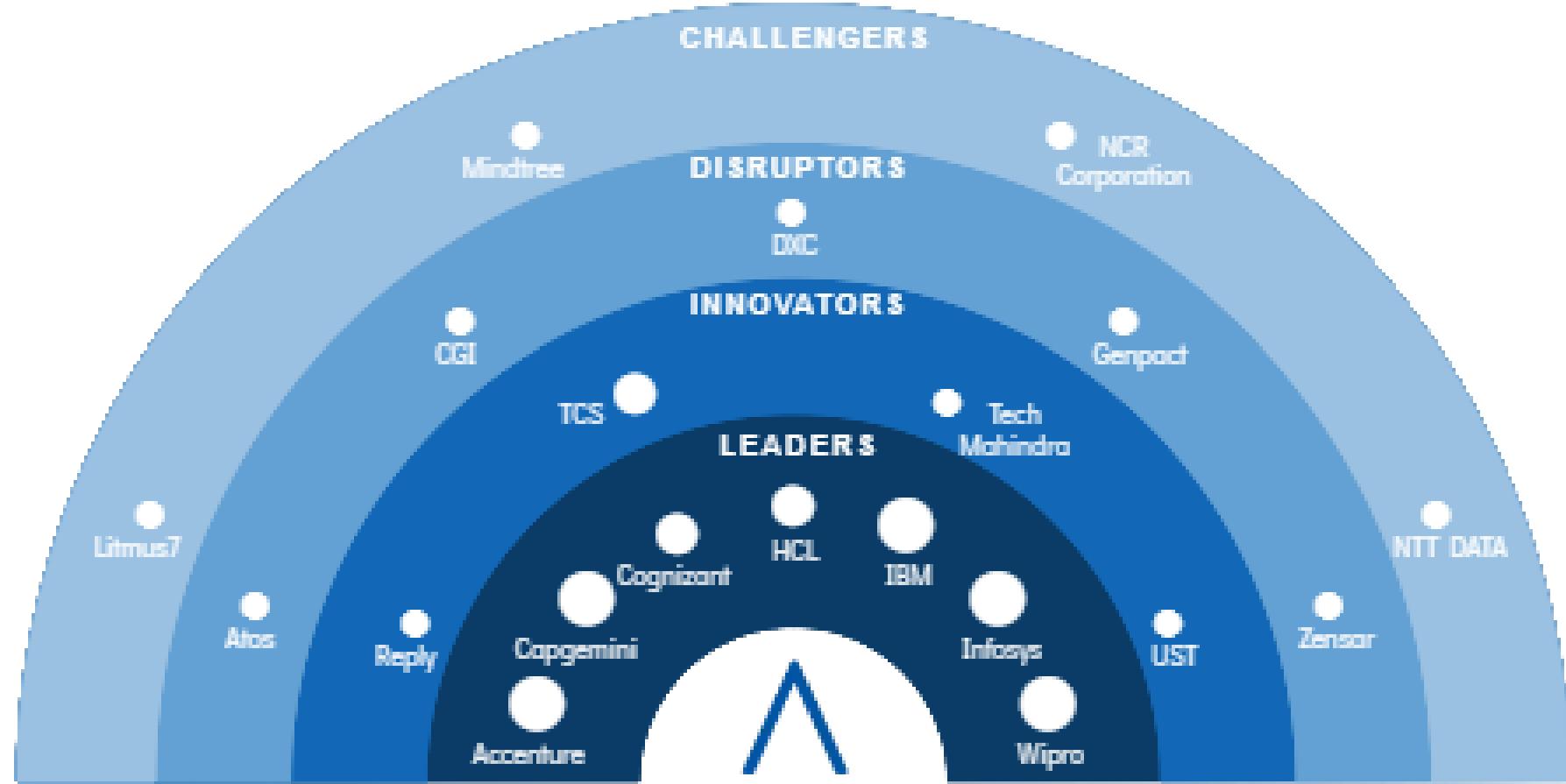


Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These service providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of service providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of providers in other categories.

# Retail Digital Services 2022–2023 RadarView



Practice maturity



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# Service provider profiles

# Accenture: RadarView profile



<b>Practice maturity</b>	★★★★★
<b>Investments and innovation</b>	★★★★★
<b>Partner ecosystem</b>	★★★★★

Elevates customer experience and drives operational efficiencies with its intelligent platforms and scalable solutions.

Practice overview	Industry-specific solutions/offerings			Sample clients
<ul style="list-style-type: none"> <li>• Practice size: NA</li> <li>• Active clients: NA</li> <li>• Delivery highlights: 120 delivery centers worldwide</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>14%</p> <p>Retail, CPG &amp; travel revenue share, Aug. 2021</p> </div> <div style="text-align: center;"> <p>10%</p> <p>Practice growth, Aug. 2021</p> </div> </div>	<p><b>ai.RETAIL</b></p> <p>Accenture Cloud Retail Execution</p> <p>Accenture Retail Clienteling</p> <p>Total Vision for Retail</p>	<p>A scalable data and AI solution for marketing, merchandising, and supply chain</p> <p>A cloud platform to optimize visits and improve sales and collaboration for marketing and sales operations</p> <p>A preconfigured platform with accelerators to personalize in-store CX and follow-up requests</p> <p>A scalable solution to collect data, giving a single view of the customer</p>		<ul style="list-style-type: none"> <li>• Tim Hortons</li> <li>• Intermarché</li> <li>• H&amp;M</li> <li>• Council of Fashion Designers of America</li> <li>• Central Group of Companies</li> <li>• Shopper's Stop</li> <li>• Body Shop</li> <li>• Coop</li> </ul>
				<p>Value chain coverage</p> <div style="background-color: #90EE90; height: 150px; width: 100%;"></div>
				<ul style="list-style-type: none"> <li>Customer engagement</li> <li>Fulfillment</li> <li>In-store commerce</li> <li>Inventory management and warehouse operations</li> <li>Marketing</li> <li>Online commerce</li> <li>Sourcing and procurement</li> </ul>

Darker color indicates higher value chain coverage:

● ● ● ● ●

# Accenture: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A China-based home furnishing chain	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Artificial intelligence (AI)</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to unify its siloed systems to provide a smooth experience to customers online and offline.</li> <li>• Accenture implemented an omnichannel solution using Alibaba's cloud platform with open architecture and strong expansibility for easy sharing of data and services. It integrated order management and customer loyalty system in the platform to improve marketing campaigns.</li> </ul>	<ul style="list-style-type: none"> <li>• Expanded from more than 200 stores to over 350 stores</li> <li>• Experienced 13.3% YOY growth in merchandise volume</li> </ul>
A British cosmetics, skin care, and perfume retailer	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to modernize its legacy IT systems to be more resilient and share data across systems.</li> <li>• Accenture implemented an order management portal and a cloud-based SAP S/4HANA enterprise resource planning system to help transform financial, supply chain, and e-commerce processes. It migrated its legacy data onto Microsoft Azure cloud, using myConcerto platform, to assess data conversion needs, develop testing, and measure cutover quality.</li> </ul>	<ul style="list-style-type: none"> <li>• Enabled accurate stock forecasts and sourcing efficiencies</li> <li>• Imparted seamless customer experience across stores and online</li> <li>• Created a centralized, agile cloud platform to enable business flexibility</li> </ul>
A Canada-based fast-food chain	<ul style="list-style-type: none"> <li>• AI</li> <li>• Analytics</li> </ul>	<ul style="list-style-type: none"> <li>• The client needed a new loyalty program and advanced digital capabilities to increase repeat customers.</li> <li>• Accenture redesigned and relaunched the client's mobile app with loyalty at its core. It created a cross-channel loyalty program, called Tims Rewards, which allowed the mobile app to provide personalized offers, promotions, interactive campaigns, and contests. It increased customer engagement and reduced customer churn.</li> </ul>	<ul style="list-style-type: none"> <li>• Accelerated guest registrations</li> <li>• Experienced a 3x increase in sales impact of loyalty adoption using smart offer allocation</li> </ul>
A Thailand-based retail holding company	<ul style="list-style-type: none"> <li>• AI</li> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to provide a seamless and personalized omnichannel experience to members on its platform.</li> <li>• Accenture implemented a multilayered system with Adobe Experience Cloud, orchestrating data and content. It developed a data-driven loyalty program, expanding the client's partner ecosystem through advanced analytics and improving user experience and workforce transformation using adaptive intelligent solutions.</li> </ul>	<ul style="list-style-type: none"> <li>• Enhanced customer experience</li> <li>• Provided real-time data of customer across various digital touchpoints</li> </ul>

# Accenture: RadarView profile

## Analyst insights

### Practice maturity



- Accenture has strong capabilities in applied intelligence and digital experience across the retail value chain. Its retail, CPG, and travel practice contributes 14% to the company's total revenue of \$50B.
- It differentiates itself by adopting a design thinking-led, innovative approach for developing customer-centric platforms. It provides data-driven, retail-specific platforms to offer retailers with innovative and personalized services for customers, such as ai.retail for getting a 360-degree view of customers with actionable insights and Cloud Retail Execution to execute sales and marketing operations with superior efficiency and intelligence.
- It has a strong focus on enhancing customer experience. It has a dedicated business group for customer experience services, called Accenture Interactive, that specializes in providing marketing transformation services, commerce expansion services, unified brand experience services, and channel enablement services.

### Investments and innovation



- Accenture has been aggressively investing in niche technology players. In fiscal 2021, it invested \$4.2B in 46 acquisitions across industries including retail. It has acquired multiple, retail-oriented organizations to grow its retail capabilities. In 2021, it acquired HRC Retail Advisory, a North America-based retail consulting firm and REPL, a UK-based technology consulting firm for supply chain and retail processes transformation.
- Accenture has been spending heavily on research and development to build cutting-edge technologies. The company has over 100 innovations hubs and invests in growth-stage companies that create innovative enterprise technologies. For instance, it has invested in Touchcast to provide metaverse as a service to its clients.

### Partner ecosystem



- Accenture is involved in developing software applications with end-to-end capabilities to address industry-specific opportunities through its dedicated practices for Google Cloud, Azure, and AWS. Its joint venture with Microsoft, called Avanade, has over 2,400 retail industry professionals and over 100 retail projects to build joint go-to-market (GTM) solutions such as blockchain for supply chain on Azure.
- It integrates its proprietary solutions with industry-leading technology providers to enable digital transformation for clients. For instance, its Retail Execution and Trade Promotion Planning platforms are built in collaboration with Salesforce. Its myConcerto platform includes all the latest solutions from its intelligent platform partners such as SAP, Oracle, Salesforce, Workday, Microsoft, and Adobe.

# Atos: RadarView profile



<b>Practice maturity</b>	★★★
<b>Investments and innovation</b>	★★★★
<b>Partner ecosystem</b>	★★★★

Strong focus on developing retail digital platform solutions that provide ecosystem management across the value chain.

Practice overview	Industry-specific solutions/offerings		Sample clients
<ul style="list-style-type: none"> <li>Practice size: 9,000+</li> <li>Active clients: 350+</li> <li>Delivery highlights: Delivery centers across 71+ countries</li> </ul>	Conversational Commerce	An AI-based voice platform for customers to seek information, assistance, and make purchases	<ul style="list-style-type: none"> <li>Coca-Cola Hellenic Bottling Company</li> <li>A nutrition products company</li> <li>A home improvement chain</li> <li>A US musical retail chain</li> <li>A specialty retailer</li> </ul>
<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>7%</p> <p>Share of retail revenue Dec. 2021</p> </div> <div style="text-align: center;"> <p>34%</p> <p>Share of business &amp; platform solutions Dec. 2021</p> </div> </div>	Autonomous Stores	An IoT platform with integrated apps to fully automate store operations	
	Intelligent Supply Chain for retail	A suite of intelligent solutions for order fulfillment, last-mile delivery, and warehouse automation	
	Connected Cooler	Smart sensors and controllers to connect devices, sharing insights on usage and efficiency	
Partnerships/alliances			Value chain coverage
 <p>Built supply chain solutions in partnership with SAP</p>	 <p>Implemented its ecommerce, sales, service, and marketing cloud for retail clients</p>		Customer engagement
 <p>Utilized its intelligent supply chain solutions</p>	 <p>Leveraged its last-mile delivery platform for the delivery needs of retailers</p>		Fulfillment
 <p>Made use of its smart electronic shelf labels and retail IoT solutions</p>	 <p>Sourced its warehouse capabilities with AI-enabled robotic picking and mobility</p>		In-store commerce
 <p>Deployed its IoT security solutions for connected devices</p>	 <p>Used its conversational AI and digital UX solutions</p>		Inventory management and warehouse operations
			Marketing
			Online commerce
			Sourcing and procurement

Darker color indicates higher value chain coverage:

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# Atos: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A global beverage company	<ul style="list-style-type: none"> <li>• Cloud</li> <li>• Internet of Things (IoT)</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to implement smart coolers for its bottles to reduce unauthorized placement of its products and generate insights on sales.</li> <li>• In partnership with Microsoft and Ebest, Atos implemented a managed end-to-end solution for connecting over one million coolers to a cloud-based IoT platform.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved productivity and enabled predictive maintenance</li> <li>• Reduced costs in field service</li> <li>• Improved incremental transactions by increasing on shelf availability (OSA)</li> </ul>
A specialty retailer	<ul style="list-style-type: none"> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client needed to modernize its technology operations, digitize the supply chain, and mobilize sales to meet customer expectations.</li> <li>• Atos facilitated cloud migration for the client, introduced mobile-based selling capability, and managed their digital supply chain. Furthermore, it developed an iPad-based app for faster sales quote generation and an automated health-check tool to improve the functioning of production systems.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased revenue by five percent</li> <li>• Improved time-to-market by 30%</li> </ul>
A home improvement chain	<ul style="list-style-type: none"> <li>• Analytics</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to bring together siloed customer data sources into a single, integrated master to access comprehensive customer information.</li> <li>• Atos standardized customer records and migrated the data to Hadoop Distributed File System (HDFS) system for real-time processing. With easy, pluggable services, the client could view all customer information in one place and drive insights on buying behavior.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased customer association with the brand by 95%</li> <li>• Reduced time to market for campaigns</li> <li>• Increased visibility in customer behavior</li> <li>• Created effective marketing campaigns with customer segmentation</li> </ul>
A US musical retail chain	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to integrate its legacy merchandising system with its e-commerce portal and add multichannel delivery capabilities.</li> <li>• Atos implemented an omnichannel operation by integrating products from DAX, ATG, POS, HighJump, and Siperian, developing multichannel delivery capabilities on its e-commerce portal. It also integrated its product catalog systems with ATG eCommerce for online product publishing.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased revenue by 20%</li> <li>• Provided multichannel delivery capabilities</li> <li>• Reduced manual effort required for product publishing</li> </ul>

# Atos: RadarView profile

## Analyst insights

### Practice maturity



- Atos has taken a platform-driven approach to address opportunities in retail with a sizeable retail practice supporting over 350 clients globally. It offers end-to-end services that enable enterprises to leverage digital technologies across their value chain.
- It has developed a strong portfolio of digital offerings such as Digital Commerce Platform, Autonomous Stores, Phygital, retail in-store digitalization, Omnichannel CX for Retail, and warehouse automation. It brings together all the offerings under an overarching modular Retail Digital Hub that delivers ecosystem management with a SaaS model. It also has extensive capabilities in edge computing and IoT to optimize supply chain efficiency and transparency, along with blockchain to track and trace the authenticity of products and payments.
- It differentiates itself with the expert domain knowledge in food and grocery retail and connected retail devices solutions to enhance the in-store experience and product availability. For instance, it leveraged its connected cooler solutions to connect more than 500,000 coolers for The Coca-Cola Hellenic Bottling Company using IoT across 28 countries, providing a huge amount of point-of-sale data.

### Investments and innovation



- Atos has been very active in acquisitions in the past three years. It acquired 19 firms across AI, cloud, analytics, and automation, enhancing its capabilities across industries, including retail such as Cloudreach, a public cloud MSP with over 1,000 certifications in AWS, GCP, and Azure.
- Atos has opened nine business technology and innovation centers spread across the globe. It has developed a dedicated Retail Transformation Lab in partnership with Worldline. The lab is a model of a shopping environment with concepts that can create customer-centric and unified in-store and online offerings for retailers. It demonstrates AR to get personalized offers based on customer profile and purchasing habits, dynamic shopping lists that change depending on location, and live promotions using electronic shelf labels.

### Partner ecosystem



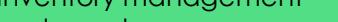
- Atos has partnered with all leading hypers-scalers and technology providers to offer digital transformation solutions in retail. It has partnered with Microsoft, Google, AWS, Cloudera, Pivotal, SAP, Salesforce, and Pega to provide GTM solutions such as in-store digitalization, retail merchandising intelligence, pricing and promotion analytics, and digital supply chain solutions.
- To augment its service offerings, it has partnered with niche players such as Woop for its one-stop-shop last-mile delivery platform, Kore.ai for its intelligent virtual assistant for personalized conversations, Hardis Group for its intelligent supply chain offerings, and Berkshire Grey for its automation solutions.

# Capgemini: RadarView profile



<b>Practice maturity</b>	★★★★★
<b>Investments and innovation</b>	★★★★★
<b>Partner ecosystem</b>	★★★★★

Drives transformation with its industrialized digital services frameworks, advanced retail foundry, and smart-store solutions.

Practice overview	Industry-specific solutions/offerings				Sample clients
<ul style="list-style-type: none"> <li>Practice size: 30,000+</li> <li>Active clients: 300+</li> <li>Delivery highlights: 50 delivery centers worldwide</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>12%</p> <p>Share of retail revenue, Nov. 2021</p> </div> <div style="text-align: center;"> <p>14%</p> <p>YOY revenue growth, Nov. 2021</p> </div> </div>	Retail Analytics	AI and cloud-based accelerators to drive consumer, brand, store, and products insights	Retail Foundry	Industrialized collection of assets like retail-specific microservices and reference architecture	A suite of over 10 digital solutions offering store-in-a-box, smart digital store, and store of future
	Agile Store	An SAP-based platform to deliver solutions across the value chain of OM, fulfillment, and engagement	Digital Core Platforms		
Partnerships/alliances	Value chain coverage				
 Adobe Leveraged cloud and customer experience solutions	 Google Cloud Delivered retail solutions on GCP platforms such as Smart Digital Store				
 SAP Provided services for SAP products and codeveloped retail platforms	 salesforce Digitally transformed client sales and services leveraging its sales cloud				
 Manhattan Associates Provided end-to-end services for its warehouse management system	 BlueYonder Provided services for its digital supply chain platform for warehouse and logistics				
 snowflake Leveraged AI, ML, and operations expertise of its data cloud	 dynatrace Leveraged its expertise in application delivery, AI, cloud, and digital experience				
					
					
					

Darker color indicates higher value chain coverage:



# Capgemini: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A British luxury brand	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Artificial intelligence (AI)</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to deploy a smart supply chain solution to improve demand forecasts and merchandising decisions.</li> <li>• Capgemini created an AI-driven merchandising tool that used augmented AI to assist in buying and merchandising new fashion products. It also applied image analytics to create a forecasting model to predict sales with higher accuracy.</li> </ul>	<ul style="list-style-type: none"> <li>• Achieved sales prediction with 93% accuracy</li> </ul>
A global fast-food restaurant	<ul style="list-style-type: none"> <li>• AI</li> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to transform its IT architecture to improve service levels of its restaurant experience across channels.</li> <li>• Capgemini managed end-to-end IT services for the restaurant such as kiosks, point-of-sale, web, curbside, drive-through, and home delivery. The company leveraged Capgemini's retail foundry model to modernize its IT architecture and technology platforms. It migrated to a service-based model that leverages cloud-driven infrastructure. It also launched a new and personalized loyalty program for targeted marketing.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced costs and increased top line with digital solutions</li> <li>• Improved customer experience</li> </ul>
A home furnishing retailer	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to enhance its order management and fulfillment processes to capture holistic customer information.</li> <li>• Capgemini worked with the client to create a 360-degree customer view and revamped its loyalty program. With new store formats, it helped the client improve its fulfillment process with order orchestration, click and collect, and in-store customer order management solutions.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved fulfillment rate</li> <li>• Increased customer engagement</li> </ul>
A US grocery retailer	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to enhance the customer experience and establish different operating models such as curbside pickup.</li> <li>• Capgemini leveraged its partnership with SAP and Adobe to enable different delivery models, streamline operations in micro-fulfilment centers, and enhance the finance transformation processes. It also launched personalized campaigns.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased online sales by 15%</li> <li>• Improved customer experience</li> </ul>

# Capgemini: RadarView profile

## Analyst insights

### Practice maturity



- With a product-centric design thinking approach and extensive portfolio of retail offerings, Capgemini is expanding its market presence. Retail and CPG is one of its key focus industries, generating more than \$2B revenue annually.
- It has demonstrated advanced capabilities over the years in implementing complex solutions such as the digital twin of supply chain, AI-driven merchandising, omnichannel marketing, and personalization strategy with leading retailers globally.
- It also offers multiple, subindustry-level solutions such as Unified Commerce Grocery solutions that provide end-to-end capabilities for a grocery retailer, including adaptive pricing, promotion planning, responsive procurement, dynamic fulfillment, and personalized customer experience across channels enabled by SAP S/4HANA.
- In the past two years, its focus has shifted on developing digital cloud solutions in e-commerce and in-store operations such as In-Store Analytics, Store Associate x.1, Smart Fitting Room, 3D Space Modeler, Point-of-Sale Experience & Service, and Smart Kiosk/Digital Signage.

### Investments and innovation



- Capgemini is building on its past acquisition of LiquidHub (2018) and Idean (2017) and expanding its customer experience consulting capabilities. In 2021, it consolidated Altran (including Frog) and its engineering capabilities under a single unit, enhancing its skills for advanced technologies such as AI and the Internet of Things (IoT) for retail solutions.
- It invested in several retail labs with clients to demonstrate innovative solutions and reduce time to market. For an American grocery retailer, it developed a point-of-sale (POS) lab, a self-checkout lab, and a store experience lab. It also created a live retail store called CornerShop with TheDrum and SharpEnd to demonstrate next-gen use cases for machine learning, augmented reality, computer vision, and light detection and ranging.

### Partner ecosystem



- Capgemini is transforming its client business with the help of a robust partner ecosystem. Among hyperscalers, it has partnered with AWS, Azure, and Google Cloud Platform to leverage their cloud infrastructure and analytics platforms. Its alliance with technology partners stands strong with SAP, Salesforce, IBM, Oracle, Adobe, and Pega, strengthening its portfolio.
- Capgemini Ventures, an investment arm for innovative startups, has partnered with Threekit, a leading 3D Visual Commerce Platform for manufacturers and retailers. It also partners with niche companies such as Retail Velocity and NCR for POS analytics; Blue Yonder, JDA, and Manhattan Associates for supply chain solutions; and Sitecore, Hybris, Punchh, and Paytronix for their digital experience offerings.

# Cognizant: RadarView profile



<b>Practice maturity</b>	★★★
<b>Investments and innovation</b>	★★★★★
<b>Partner ecosystem</b>	★★★★★

Drives transformation for clients with its design-thinking approach, domain expertise, and advanced tools and accelerators.

Practice overview	Industry-specific solutions/offerings		Sample clients
<ul style="list-style-type: none"> <li>Practice size: 32,000+ FTEs in Retail and CPG</li> <li>Active clients: 250+ retail clients</li> <li>Delivery highlights: Delivery centers in 30+ countries</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>11%</p> <p>Share of retail, CPG revenue, Dec. 2021</p> </div> <div style="text-align: center;"> <p>44%</p> <p>Share of digital revenue, Dec. 2021</p> </div> </div>	OneRetail	An all-in-one, digital-ready information ecosystem platform with BI and analytics capabilities	
	oneInventory	A cloud-native, micro-services inventory management solution for large department store retailers	
	Merch Insight	A cloud-based suite of multichannel analytics solutions for merchandise planning across SCM	
	Customer Journey Artificial Intelligence (CJAI)	An AI-based platform with prebuilt tools for generating insights across the customer journey	
Partnerships/alliances			Value chain coverage
 Implemented its digital supply chain platform	 Provided digital transformation services using the Salesforce Commerce Cloud		
 Codeveloped its cloud warehouse management solution and SaaS-based application for clients	 Provided implementation services for its warehouse management solution		
 Leveraged its Sterling Commerce platform for order management solutions	 Provided end-to-end services for Oracle Retail software suite		
 Codeveloped solutions for shoppable videos and product affinity solutions	 Leveraged its solutions for AR/VR in-store experience		
			
			
			

Darker color indicates higher value chain coverage:



# Cognizant: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A global convenience store chain	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> <li>• Artificial intelligence (AI)</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to unify sales data from company-owned and franchise stores for robust decision-making.</li> <li>• Cognizant helped the client to migrate its historical data to a cloud-based infrastructure, improving data ingestion from thousands of stores. It enabled real-time availability of sales data and implemented an AI model to provide intelligent analytics to solve current business problems and enable new initiatives.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced infrastructure and software licensing costs by 40%</li> <li>• Improved reporting and analytics capabilities</li> <li>• Improved store sales</li> </ul>
A food and beverage company	<ul style="list-style-type: none"> <li>• AI</li> <li>• Analytics</li> <li>• Automation</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to upgrade its B2B e-commerce customer engagement capabilities. It had a traditional call center setup and manual, broad-based marketing campaigns with no insights on consumer behavior.</li> <li>• Cognizant deployed Cognizant Digital Customer Service, an integrated solution that provided multichannel engagement for B2B clients, implemented an e-commerce portal and marketing automation solution, and provided advanced customer analytics to improve sales and service.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased sales by \$150M</li> <li>• Increased contact center productivity by 20%</li> <li>• Automated and made efficient marketing campaign management</li> </ul>
A grocery retail chain	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> <li>• Internet of Things (IoT)</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to integrate monitoring of in-store refrigerator and freezer units to minimize food waste.</li> <li>• Cognizant designed an enterprise IoT platform that allowed the client to aggregate and analyze information from different building systems and equipment. It also implemented cloud-based solutions to perform preventive analytics to determine patterns and anticipate failures.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced on-site critical work orders by 87%</li> <li>• Reduced food waste loss by 5%</li> <li>• Reduced response time from 36 hours to four hours</li> </ul>
A pawn company	<ul style="list-style-type: none"> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to rearchitect its legacy, point-of-sale (POS) system and replace it with a new POS app to increase engagement with in-store associates.</li> <li>• Cognizant modernized its legacy backend and implemented a tablet-based POS application to enhance customer engagement and provide a personalized customer interaction.</li> </ul>	<ul style="list-style-type: none"> <li>• Enhanced customer experience</li> </ul>

# Cognizant: RadarView profile

## Analyst insights

### Practice maturity



- Cognizant's strong presence in the retail sector is backed by more than 32,000 employees in its retail and CPG business unit, providing digital services to over 250 clients globally. With an annualized growth of nearly 10%, Cognizant's retail revenue reached close to \$2 billion in 2021, contributing about 11% to the company's overall revenue.
- Led by an approach to modernize, optimize, and manage clients' digital core, it experienced almost 18% YOY growth in its digital revenue in fiscal 2021. Its portfolio is comprised of solutions around experience-led commerce, intelligent supply chains, hyperpersonalized marketing solutions, connected spaces, and next-gen contact centers.
- It differentiates itself with solutions such as Intellipeak that helps brands successfully manage peak shopping seasons. For example, it helped a consumer goods player to handle peak season sales by providing a scalable e-commerce solution across 125 applications and 12 platforms.
- It has also created advanced retail solutions to detect anomalous activities in blockchain networks to track advertisements on targeted channels.

### Investments and innovation



- In the past three years, Cognizant has spent more than \$3B to acquire over 27 niche organizations that have augmented its digital capabilities with a strategic focus on digital engineering, data, cloud, and IoT. For instance, in 2021, it acquired digital engineering product development company Devbridge, software talent sourcing firm Hunter Technical Resources, and industrial automation firm TQS integration.
- Guided by its innovation framework, the company has built a retail experience lab, theMarkt, which is a virtual experience center where it collaborates and codevelops solutions with clients. Its labs are backed by an innovation fund, crowdsourcing, and collaborations with startups and universities to provide resources for building advanced and innovative solutions for the retail sector.

### Partner ecosystem



- Cognizant has built strong relationships with its ecosystem partners, particularly with hyperscalers and SaaS companies. It has dedicated business groups for Microsoft, AWS, and GCP for developing collaborative digital solutions and a trained workforce in SAP, Salesforce, and Oracle.
- It has partnered with several players for their industry-specific solutions like Blue Yonder, Manhattan Associates, Llamsoft, Highjump, Infor, and o9 Solutions. In addition, it invests in digital retail startups such as Preksh for its in-store augmented reality/virtual reality (AR/VR) experience solution, Stylumia for its fashion AI platform for social listening, and Vue.ai for its shoppable video and product affinity solutions.

# CGI: RadarView profile



<b>Practice maturity</b>	★★
<b>Investments and innovation</b>	★★★
<b>Partner ecosystem</b>	★★★

Improves the in-store experience with a platform-led approach. Provides expertise in cloud, analytics, and automation to transform retail processes.

Practice overview	Industry-specific solutions/offerings	Sample clients
<ul style="list-style-type: none"> <li>Practice size: ~7,000 retail and consumer services employees</li> <li>Active clients: 800+</li> <li>Delivery highlights: Service delivery in 400 locations worldwide</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p><b>24%</b> Share of total revenue (including mfg.)</p> </div> <div style="text-align: center;"> <p><b>4+</b> Years of industry experience</p> </div> </div>	<p><b>CGI Retail Suite</b></p> <p><b>Strata Enterprise</b></p> <p><b>Aromi</b></p> <p><b>Seebrite</b></p>	<p>A cloud-based solution providing a 360-degree inventory view to use a stores' network and control the end-to-end value chain</p> <p>Facilitates decision-making throughout the customer journey</p> <p>An intelligent ERP system to digitize the food service delivery life cycle</p> <p>A customizable audit solution to improve visibility in in-store operations</p>
<b>Partnerships/alliances</b>		<b>Value chain coverage</b>
<p><b>akeneo</b> Leveraged its product information management solution across enterprises</p> <p><b>infor</b> Deployed its supply chain management solution for retail clients</p> <p><b>RIVERLOGIC</b> Improved clients' supply chain visibility through its planning solutions</p> <p><b>Liferay</b> Transformed retail customers' experience through its e-commerce solutions</p>		<div style="background-color: #e0f2e0; padding: 5px;"><b>Customer engagement</b></div> <div style="background-color: #e0f2e0; padding: 5px;"><b>Fulfillment</b></div> <div style="background-color: #2e3436; color: white; padding: 5px;"><b>In-store commerce</b></div> <div style="background-color: #e0f2e0; padding: 5px;"><b>Inventory management and warehouse operations</b></div> <div style="background-color: #e0f2e0; padding: 5px;"><b>Marketing</b></div> <div style="background-color: #2e3436; color: white; padding: 5px;"><b>Online commerce</b></div> <div style="background-color: #e0f2e0; padding: 5px;"><b>Sourcing and procurement</b></div>

Darker color indicates higher value chain coverage:

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# CGI: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A furniture and appliances retailer	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to transition to a new e-commerce platform to deal with business challenges posed by the pandemic.</li> <li>• CGI implemented Intershop, a cloud-based e-commerce platform, and integrated the client's transactional website for improved customer experience. Further, it strengthened the client's pricing and promotion strategies and its omnichannel customer service delivery with insights from its unified operations in a cloud environment.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced time to market for promotional campaigns</li> <li>• Enhanced customer experience</li> <li>• Improved supply chain visibility</li> </ul>
A French multinational retail company	<ul style="list-style-type: none"> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client was facing challenges with disrupted supply chains, interrupted customer interactions, and increased order volumes during the pandemic.</li> <li>• CGI helped the client handle the increased workload with a dedicated workforce of 20 associates. Also, CGI has plans to develop a predictive application for the client that can help anticipate customer demand to address future surges in order volumes.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased warehouse order pickers' efficiency by two times</li> <li>• Expedited order processing</li> </ul>
A multi-brand group	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client partnered with CGI to improve its customers' experience in-store.</li> <li>• CGI leveraged its proprietary, modular Retail Suite to expedite checkouts for in-store shopping. It improved the customer experience by offering a frictionless shopping experience. Additionally, it improved the sales assistants' productivity and efficiency by providing them with product and promotional recommendations for customers.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved checkout experience</li> <li>• Reduced maintenance cost by 40%</li> </ul>
A French home improvement and DIY retail chain	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client was experiencing difficulties with its disparate backend and frontend processes and solutions.</li> <li>• It partnered with CGI to implement its modular CGI Retail Suite for improving supply chain visibility and streamlining omnichannel customer service delivery.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved omnichannel service delivery</li> </ul>

# CGI: RadarView profile

## Analyst insights

### Practice maturity

★★

- CGI's retail industry services are primarily driven by its proprietary technology solutions. It offers end-to-end managed services including consulting and integration and deploys its modular CGI Retail Suite for varied enterprise needs.
- It focuses on transforming customer experience and improving workforce performance across retail enterprises.
- It deploys artificial intelligence (AI), automation, and analytics across customer processes and improves customer experience throughout all physical and digital channels. To help retail enterprises enhance their customer interactions, it provides a digital service agent, SOFIA. To automate processing of customer requests, it affords an NLP-based solution, CGI Smart Case.
- For optimal store performance, it offers Seebrite, an audit solution that helps retail employees track customer visits, leads, and follow-ups.
- Additionally, it leverages Mobilog, its workforce management solution, to improve retail employee productivity and performance quality.
- It leverages its Europe-based CoE to implement best practices and technologies such as cybersecurity and big data in the retail industry.

### Investments and innovation

★★★★

- CGI leverages its innovation centers across France and Canada to streamline digital transformation journeys for retail enterprises. Through these centers, it helps enterprises leverage design thinking to co-innovate technology solutions and define their transformational road maps across the enterprise value chain.
- It continues to strengthen its technology consulting and integration capabilities through inorganic expansion. In December 2021, it acquired Unico for its consulting and system integration capabilities in Australia and added over 150 professionals to its portfolio. In April 2021, it acquired Sense Corp to expand its footprint in the US and strengthen its system integration capabilities.

### Partner ecosystem

★★★★

- CGI has partnered with multiple technology (cloud, automation, AI, and analytics) vendors and retail-specific software providers to help enterprises maximize their returns on these platforms through consulting, integration, and managed services.
- It focuses on strengthening its alliances with cloud vendors. It has developed proprietary retail accelerators on partner platforms such as Aromi, built on Microsoft Cloud. It has over 1,000 dedicated AWS professionals for cloud services.
- Additionally, to bolster its customer experience capabilities, it leverages Liferay's customer portal and commerce solutions.

# DXC: RadarView profile



<b>Practice maturity</b>	★★★
<b>Investments and innovation</b>	★★★★
<b>Partner ecosystem</b>	★★★

Emphasizes on improving the omnichannel experience for retail clients. Provides a cloud-focused digital transformation portfolio.

Practice overview	Industry-specific solutions/offerings		Sample clients
<ul style="list-style-type: none"> <li>Practice size: ~35,000 employees</li> <li>Active clients: ~700</li> <li>Delivery highlights: Seven retail experience centers worldwide</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>~23% Share of applications revenue (2021)</p> </div> <div style="text-align: center;"> <p>60+ Years of industry experience</p> </div> </div>	DXC RemoteRetail Connector	A customizable solution enabling remote contact with consumers	<ul style="list-style-type: none"> <li>A Netherlands-based supermarket chain</li> </ul>
<p>DXC Merchandise Planning &amp; Forecasting</p> <p>DXC Gift Registry</p>			<p>A cloud-based budget planning and demand forecasting solution</p> <p>A D365 e-commerce-based solution for gift registry across different points-of-sale</p>
<p>DXC Retail Digital Transformation Sandbox</p>			<p>A cloud-based solution offering a testing environment for new technologies and business investments</p>
Partnerships/alliances			Value chain coverage
<div style="display: flex; align-items: center;">  <p>Accelerated cloud migration and workplace modernization for clients through Microsoft Cloud</p> </div> <div style="display: flex; align-items: center;">  <p>Collaborated with AWS to offer end-to-end services including strategy for retail clients</p> </div> <div style="display: flex; align-items: center;">  <p>Partnered for developing joint solutions to modernize enterprise IT infrastructure</p> </div>			<p>Customer engagement</p> <p>Fulfillment</p> <p>In-store commerce</p> <p>Inventory management and warehouse operations</p> <p>Marketing</p> <p>Online commerce</p> <p>Sourcing and procurement</p>
<div style="display: flex; align-items: center;">  <p>Sourced its workflow automation capabilities for end-user experience transformation</p> </div> <div style="display: flex; align-items: center;">  <p>Used its chatbots, analytics, and digital service centers for improved customer interaction</p> </div> <div style="display: flex; align-items: center;">  <p>Leveraged its Cloud and SaaS-based enterprise applications to improve clients' business outcomes</p> </div>			

Darker color indicates higher value chain coverage:



# DXC: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A Netherlands-based supermarket chain	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client was struggling with its existing manual processes for ordering new and compliant servers in a short span of time.</li> <li>• DXC implemented an easy-to-use, self-service portal for the client's IT department. The portal, built on VMware Cloud, enables its users to scale and customize services, integrate backend systems, and improve compliance.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced time to deliver servers</li> <li>• Improved standardization and quality</li> <li>• Enhanced security</li> </ul>
A Japanese confectionery company	<ul style="list-style-type: none"> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to strengthen its cloud transformation journey after its merger with three other firms.</li> <li>• DXC leveraged a phased approach to migrate the client's workflows from on-premises to VMware Cloud. It further migrated the client's employee devices to the cloud while offering managed infrastructure and support services in a hybrid environment.</li> </ul>	<ul style="list-style-type: none"> <li>• Optimized hybrid IT operations</li> <li>• Enhanced employee experience</li> </ul>
A US-based nonprofit retailer	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client was facing challenges with its legacy, point-of-sale (POS) system.</li> <li>• DXC helped the client migrate to the cloud using Microsoft Dynamics 365. By combining partner (Microsoft) and proprietary (DXC Retail Toolkit Fundamentals) solutions, DXC transformed the client's end-to-end retail operations, including product tracking, pricing, and discounting processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced IT costs by eliminating unnecessary servers</li> <li>• Improved business operations</li> </ul>
A global retailer	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Machine Learning (ML)</li> </ul>	<ul style="list-style-type: none"> <li>• The client was having trouble with its multichannel customer request processing and communications.</li> <li>• DXC implemented an automation solution that integrates with the Microsoft 365 platform to track and report customer communications. Additionally, it leveraged ML to suggest responses to customer requests, which improved the firm's productivity and reduced customer response cycle time.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved response time to customers</li> <li>• Reduced manual intervention in customer request processing</li> <li>• Decreased ticket escalation rate from 63% to 15%</li> </ul>

# DXC: RadarView profile

## Analyst insights

### Practice maturity



- DXC's digital services portfolio focuses on end-to-end cloud services including consulting, migration, and integration across retail enterprises.
- Through its Cloud Right™ approach, it is combining its data analytics and engineering and cloud capabilities to offer personalized customer services on multiple cloud environments. Furthermore, through this approach, it affords lift-and-shift cloud migration modules, which have enabled several retail enterprises to minimize their total cost of ownership by up to 12%.
- To improve the transformation journey, it provides a cloud-based testing environment through its Retail Digital Transformation Sandbox solution to help enterprises experiment with new technologies.
- Within the retail value chain, it focuses on customer experience transformation. Through its digital service centers, it offers an integrated customer experience across physical and online channels. Additionally, to improve customer interactions within retail enterprises, it relies on both proprietary solutions (such as RemoteRetail Connector) and partner solutions (such as Salesforce-enabled chatbots).

### Investments and innovation



- In January 2022, DXC established a ServiceNow-specialized business group to strengthen its proprietary workflow automation platform, DXC Platform X™. It continues to leverage ServiceNow's automation capabilities for process transformation in the retail industry. For instance, AEON, a retail firm, deployed DXC Platform X to improve its self-serve capabilities for retail clients.
- It continues to strengthen its Microsoft services vertical for the retail industry. In September 2021, it obtained a license from Microsoft for its supply chain transformation module built on Microsoft Dynamics 365. Through this solution, it aims to improve logistical visibility for retail clients.

### Partner ecosystem



- DXC is leveraging its partnerships with cloud providers, hyperscalers, analytics, and automation providers to digitally transform retail processes.
- Microsoft continues to be a key partner in its network. It has a Gold-level partnership for over 30 years with Microsoft and has built multiple connectors for Microsoft Dynamics 365. Using the Microsoft Cloud environment, it aims to improve omnichannel customer experience and optimize the backend processes by integrating analytics and intelligence with data from enterprise resource planning systems.
- It is developing industry-specific solutions through its joint CoE with Google Cloud. This has enabled it to leverage Google Cloud's expertise in analytics and workplace services across retail enterprises.

# Genpact: RadarView profile



<b>Practice maturity</b>	★★★
<b>Investments and innovation</b>	★★★
<b>Partner ecosystem</b>	★★★★★

Augments its rich process expertise with an end-to-end digital service portfolio comprised of intelligent platform solutions.

Practice overview	Industry-specific solutions/offerings			Sample clients
<ul style="list-style-type: none"> <li>Practice size: 8,000+</li> <li>Active clients: NA</li> <li>Delivery highlights: 90+ global delivery centers across 21 countries</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>10%</p> <p>Share of retail revenue, Nov. 2021</p> </div> <div style="text-align: center;"> <p>25%</p> <p>YOY practice growth, Dec. 2020</p> </div> </div>	OrderAssist	An AI- and analytics-based order management software for real-time insights generation	Supply Chain Assistant	An AI-based platform enabling visibility and control over supply chain performance
	Inventory Optimizer	A cloud-based demand planning, supply network planning, and order management platform	Genpact Cora	An AI-, analytics-, automation-, and data-enabled industry agnostic services orchestrating platform
<b>Partnerships/alliances</b>				<b>Value chain coverage</b>
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p><b>kinaxis®</b></p> </div> <div style="width: 30%;"> <p><b>Solutions</b></p> </div> <div style="width: 30%;"> <p><b>FourKites</b></p> </div> <div style="width: 30%;"> <p><b>SAP</b></p> </div> </div> <p>Leveraged its cloud-based AI/ML platform for demand, supply, and inventory planning</p> <p>Utilized its AI, analytics platform for enabling end-to-end decision-making for demand and supply</p> <p>Leveraged its platform for real-time visibility of retail supply chain and data insights for decision-making</p> <p>Implemented SAP solutions for clients to increase productivity and operational efficiency</p>				<div style="background-color: #99ff99; padding: 5px;">Customer engagement</div> <div style="background-color: #99ff99; padding: 5px;">Fulfillment</div> <div style="background-color: #99ff99; padding: 5px;">In-store commerce</div> <div style="background-color: #99ff99; padding: 5px;">Inventory management and warehouse operations</div> <div style="background-color: #99ff99; padding: 5px;">Marketing</div> <div style="background-color: #99ff99; padding: 5px;">Online commerce</div> <div style="background-color: #99ff99; padding: 5px;">Sourcing and procurement</div>
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p><b>E2OPEN®</b> <small>Demand. Supply. Delivered.</small></p> </div> <div style="width: 30%;"> <p><b>skai</b></p> </div> <div style="width: 30%;"> <p><b>ORACLE</b></p> </div> <div style="width: 30%;"> <p><b>EVERSIGHT</b></p> </div> </div> <p>Provided its cloud-based solutions for end-to-end visibility of supply chain for improved decision-making</p> <p>Leveraged its data analytics and market intelligence platform powered by AI, ML, and NLP</p> <p>Leveraged and implemented Oracle retail suite for its clients for intelligent insights and decision-making</p> <p>Utilized its AI-powered software suite for its retail clients to optimize sales and pricing</p>				

Darker color indicates higher value chain coverage: ● ● ● ●

# Genpact: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A global retailer	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Artificial intelligence (AI)</li> <li>• Automation</li> <li>• Machine learning (ML)</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve its finance and accounting processes on fragmented systems to remove manual, repetitive, and inefficient tasks.</li> <li>• Genpact fully redesigned and optimized its finance and accounting processes. It enabled systems of engagement to rationalize and simplify the technology landscape and used robotic process automation (RPA) to automate tasks, analytics to provide root cause analysis (RCA), and machine learning to predict resolutions for cognitive decision-making.</li> </ul>	<ul style="list-style-type: none"> <li>• Enhanced productivity, user experience, cycle time, and quality in all accounts payable (AP) processes</li> <li>• Created financial impacts on disputes, post-audit recovery, and write-offs</li> </ul>
A global party supplies omnichannel retailer	<ul style="list-style-type: none"> <li>• AI</li> <li>• Analytics</li> </ul>	<ul style="list-style-type: none"> <li>• The client needed visibility of inventory and logistics to improve planning operations, especially during peak demand.</li> <li>• Genpact implemented a control tower that provided end-to-end visibility across transportation, logistics, and store operations. It performed system rationalization and integrations to facilitate data capture from disparate sources that helped in generating real-time alerts and enabled proactive decision-making.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved visibility and governance around transportation decisions</li> <li>• Reduced expedited freight spend by 40%</li> </ul>
A global sportswear brand	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Automation</li> </ul>	<ul style="list-style-type: none"> <li>• The client needed to scale backend operations to service consumer demand on its e-commerce platform.</li> <li>• Genpact performed process assessments and RCA and identified automation opportunities. It implemented data analytics to generate insights on prioritization to increase capacity for backlog clearance.</li> </ul>	<ul style="list-style-type: none"> <li>• Achieved 4X backlog clearance via prioritization algorithms</li> <li>• Achieved automation rate from 80% to 90% in three months and 99.6% in nine months</li> </ul>
A global snack company	<ul style="list-style-type: none"> <li>• Automation</li> </ul>	<ul style="list-style-type: none"> <li>• The client was undergoing a change in its business model aligned with growth plans for its direct-to-consumer platform across 20 sites. The client wanted to set up and manage its backend enterprise resource planning (ERP) in-house, which was initially outsourced.</li> <li>• Genpact implemented Oracle NetSuite and managed back-office operations. It worked on redesigning ERP workflows and improved backend data mapping.</li> </ul>	<ul style="list-style-type: none"> <li>• Uplifted revenue recognition by 300%</li> <li>• Achieved higher visibility of order management</li> <li>• Enabled multichannel fulfillment</li> </ul>

# Genpact: RadarView profile

## Analyst insights

### Practice maturity



- Genpact's approach of aligning its technology solutions with its process and domain expertise has led to 2x growth of its retail segment between 2018 and 2021. Supported by a large client base, the retail practice accounts for nearly 10% of Genpact's total revenue.
- Genpact has been investing in advanced capabilities to empower its Cora platform to provide end-to-end business transformation services. With AI at its core, the platform is helping many clients create personalized experiences, provide business resilience, and explore new revenue streams in response to the seismic shifts in the retail industry.
- Leveraging its expertise in backend operations and combined with its Cora platform, it is helping many retailers drive intelligent automation for their enterprise processes. For instance, it helped a global retailer optimize its finance and accounting processes using robotic process automation (RPA) to automate tasks, analytics to provide RCA, and ML to predict resolutions for cognitive decision-making. For another e-commerce retailer, Genpact modernized its backend systems to scale and match the frontend demand with the help of its Cora Platform.

### Investments and innovation



- Genpact has made some industry-specific acquisitions to augment its digital and customer experience capabilities. In 2021, it acquired Enquero, a data-driven digital transformation firm. In 2020, it added e-commerce capabilities by acquiring SomethingDigital.com. In 2019, it acquired Rightpoint to bolster its digital and customer experience capabilities.
- To help accelerate industry innovation, it facilitates collaboration with clients and partners through its Lean Digital Innovation Center in Silicon Valley, where it showcases innovation based on Genpact Cora to tackle specific business needs. The innovation center also enables retailers to design and co-innovate minimal viable products to test and validate new ideas such as smart store technology.

### Partner ecosystem



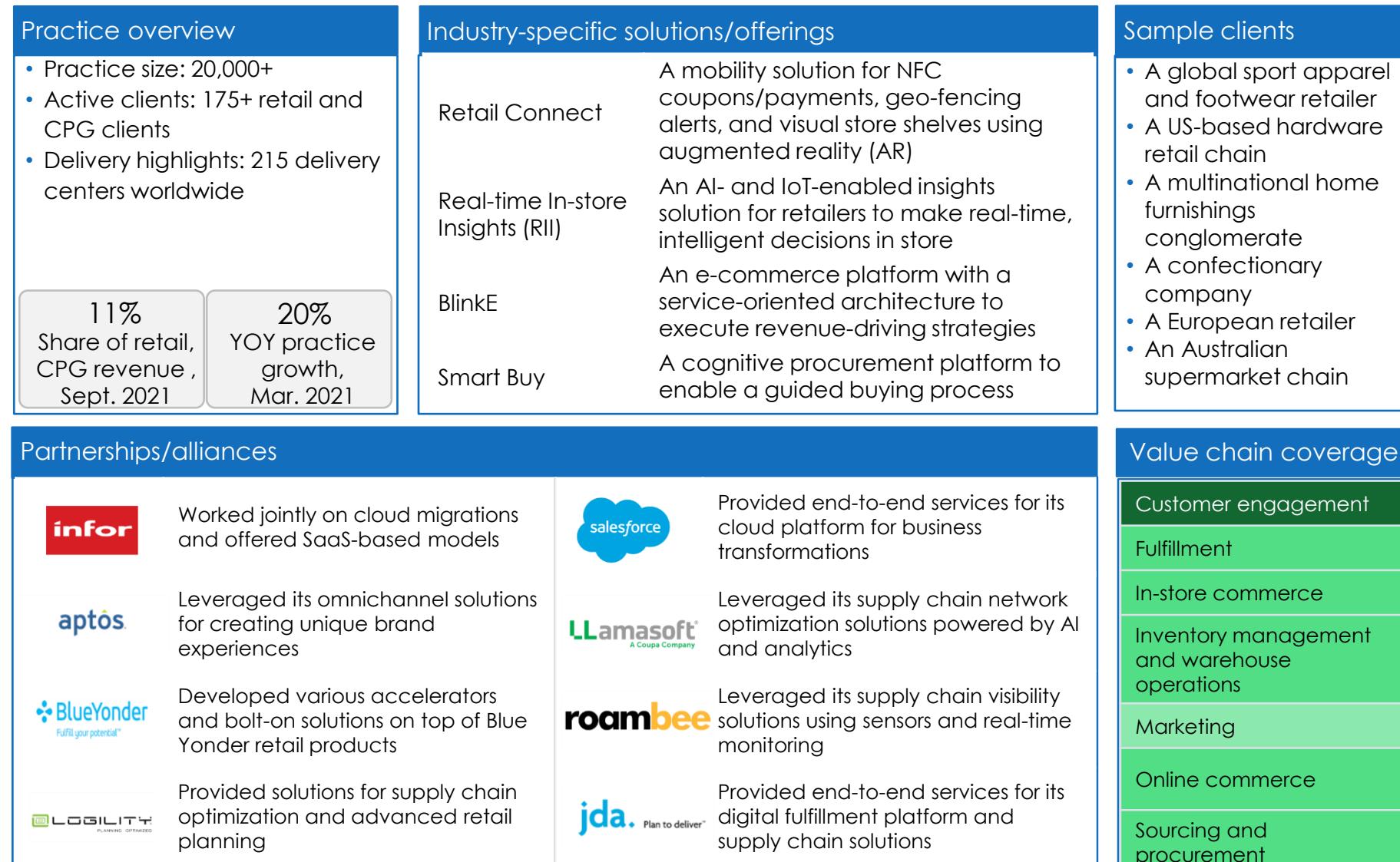
- To deliver end-to-end solutions and expedite a retailer's digital transformation journey, Genpact has partnered with hyperscalers AWS, Google, and Microsoft for their cloud and infrastructure capabilities. It has a large workforce trained in software from enterprise partners like SAP, Oracle, and Workday and equipped with automation capabilities in UI Path, Blue Prism, and Automation Anywhere tools.
- Among niche companies, it has partnered with Eversight for its AI software suite for retailers, E2Open and FourKites for their end-to-end supply chain platforms, and Kinaxis for its AI-powered demand and inventory planning. In addition, it also has external partners that help its clients with point solutions for end-to-end business transformations.

# HCL: RadarView profile



<b>Practice maturity</b>	★★★★★
<b>Investments and innovation</b>	★★★★★
<b>Partner ecosystem</b>	★★★★★

Possesses a strong portfolio of intelligent and cognitive offerings supported by digital platforms and niche business solutions.



Darker color indicates higher value chain coverage:

●
●
●
●
●

# HCL: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A European retailer	<ul style="list-style-type: none"> <li>• Artificial intelligence (AI)</li> <li>• Augmented reality (AR)</li> <li>• Beacon</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve customer experience by deploying advanced technology solutions in-store.</li> <li>• HCL deployed a mobile-based AR solution for product visualization and Beacon technology across the store to provide user-specific offers when customers cross specific aisles. The mobile app also provided a near field communication-based, add-to-cart feature with a tap.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved in-store customer experience</li> <li>• Helped increase customer average basket size by 10%</li> <li>• Increased marketing effectiveness by 40%</li> </ul>
An Australian supermarket chain	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to establish multichannel retailing capability with a scalable platform for future growth.</li> <li>• HCL reengineered the performance of the existing hybrid-based e-commerce platform and optimized data management and the underlying infrastructure, making the portal flexible and scalable to handle the current customer base and potential customers.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved the concurrency and throughput of the application by 40%</li> <li>• Improved the response time by 30%</li> </ul>
A multinational home furnishings conglomerate	<ul style="list-style-type: none"> <li>• AI</li> <li>• Analytics</li> <li>• Automation</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve its forecast accuracy to reduce high inventory carrying costs and improper replenishment.</li> <li>• HCL leveraged its Demand-Driven Value Network (DDVN) framework to analyze the data and developed an algorithmic model to optimize safety stock and improve demand forecast accuracy.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced supplier plan fluctuations</li> <li>• Reduced out of stocks</li> <li>• Improved service levels</li> </ul>
A confectionary company	<ul style="list-style-type: none"> <li>• AI</li> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to grow its direct-to-consumer business by leveraging in-store technology.</li> <li>• HCL enhanced customer in-store experience by deploying robot assistance in-store for customer interaction and digital displays to show product location and stock availability information. It also implemented an integrated bot app, mobile app, website, and social media solution for personalized promotions.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved customer experience</li> <li>• Increased sales</li> </ul>

# HCL: RadarView profile

## Analyst insights

### Practice maturity



- HCL has a strong foothold in the retail industry. Driven by its retail-centric capabilities such as CLTV and loyalty management, smart retail execution, and omnichannel fulfillment, it generates more than \$1B revenue from its retail clients annually, which makes up about 11% of the company's total revenue.
- Its Retail 4.0 framework provides comprehensive services in the field of customer experience, reimaged retail stores, and adaptive supply chain. It has a dedicated practice for customer experience that provides services in digital marketing, commerce, portal, content, and user interface and is supported by more than 100 reusable assets for over 200 customers.
- It differentiates itself by developing customized solutions to address specific challenges. For instance, it partnered with a European retailer to create a technologically advanced retail store by deploying mobile-based augmented reality solutions for product visualization and Beacon technology across the store aisles for hyper-localized and personalized offers.

### Investments and innovation



- HCL has made strategic acquisitions to strengthen its product portfolio and talent in the retail segment. In 2019, it acquired and migrated multiple IBM products, including AppScan, BigFix, Commerce, WebSphere Commerce, Digital Experience, and Unica. These products augmented its capabilities in retail and allied consumer service industries. In 2018, it acquired C3i Solution to improve multichannel customer engagement.
- It has Internet of Things (IoT) innovation labs such as IoT COLLAB, a collaborative initiative to co-create solutions for predictive maintenance, cold-chain logistics, and specialized asset tracking.

### Partner ecosystem



- HCL leverages its strategic ecosystem of partners with leading hyperscalers and technology providers to build market-ready solutions. Its latest offering, HCL Cloud Smart, was developed in collaboration with partners such as AWS, IBM, Microsoft, and Google Cloud to provide industry-specific, cloud-based solutions and services. Retail in a Box is another example of an end-to-end retail operations management offering built in collaboration with leading technology partners like Salesforce, SAP, Manhattan Associates, Aptos, Trax, Retail Pro, and Active Omni.
- Its startup ecosystem platform eSTIP houses over 1,000 startups. With these startup collaborations, technology partners, and co-innovation labs, HCL is helping clients by developing futuristic solutions with next-generation technologies.

# IBM: RadarView profile



<b>Practice maturity</b>	★★★★★
<b>Investments and innovation</b>	★★★★
<b>Partner ecosystem</b>	★★★★★

Has a laser focus on investments and solutions for hybrid cloud and AI and leverages them for building retail solutions in collaboration with ecosystem partners.

Practice overview	Industry-specific solutions/offerings		Sample clients
<ul style="list-style-type: none"> <li>Practice size: NA</li> <li>Active clients: NA</li> <li>Delivery highlights: Operates in 175 countries</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p><b>26%</b> Share of technology services revenue, Dec. 2020</p> </div> <div style="text-align: center;"> <p><b>20%</b> YOY cloud revenue growth, Dec. 2020</p> </div> </div>	<p>IBM Sterling OMS</p> <p>IBM Planning Analytics with Watson</p> <p>Hybrid Cloud for Retail</p> <p>IBM Sterling Inventory Control Tower</p>	<p>An AI-driven platform for real-time inventory management and omnichannel fulfillment</p> <p>An AI platform to unify data into a central repository to enable insights for streamlining planning</p> <p>An AI, IoT, blockchain-based platform to deploy digital experience solutions in physical stores</p> <p>An AI-based solution to access and correlate inventory data across systems to generate insights</p>	<ul style="list-style-type: none"> <li>A US-based fashion house</li> <li>A Swiss chocolatier and confectionery company</li> <li>An American home improvement retailer</li> <li>An American multinational food, snack, and beverage company</li> </ul>
Partnerships/alliances			Value chain coverage
	<p>Used hybrid cloud services and solutions such as SAP Merchandise Planning</p>		Customer engagement
	<p>Leveraged and codeveloped complementary solutions in customer experience</p>		Fulfillment
	<p>Provided seamless transactions across digital and physical channels on IBM cloud</p>		In-store commerce
	<p>Provided solutions for real-time monitoring availability for on-shelf and planogram compliance</p>		Inventory management and warehouse operations
Darker color indicates higher value chain coverage: <span style="color: #99ff99;">●</span> <span style="color: #66cc66;">●</span> <span style="color: #339933;">●</span> <span style="color: #006600;">●</span>			Marketing
			Online commerce
			Sourcing and procurement

# IBM: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A Swiss multinational supermarket chain	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Artificial intelligence (AI)</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to implement click-and-collect services for its customers with accurate stock planning.</li> <li>• IBM consolidated around 300 SAP retail application servers and databases on the IBM Power Systems platform and improved capacity, scalability, and performance. The solution enabled the client to use near-real-time insights into orders and inventory to increase customer satisfaction.</li> </ul>	<ul style="list-style-type: none"> <li>• Enhanced analytics function by 5x with 85% fewer processor cores</li> <li>• Improved planning and distribution processes</li> </ul>
A US-based fashion house	<ul style="list-style-type: none"> <li>• AI</li> <li>• Cloud</li> <li>• Analytics</li> </ul>	<ul style="list-style-type: none"> <li>• The client needed to unify its data sources into a single, coherent system for enhanced decision making to meet product demand and shipment.</li> <li>• IBM implemented its business analytics suite of software such as Cognos, SPSS Modeler, and WebSphere to create highly accurate and predictive demand planning capabilities.</li> </ul>	<ul style="list-style-type: none"> <li>• Optimized store-level merchandising decisions</li> <li>• Improved trend prediction to match consumer demand</li> </ul>
An American multinational food, snack, and beverage company	<ul style="list-style-type: none"> <li>• AI</li> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve productivity of its frontline sales workforce across systems and retailers that they served.</li> <li>• IBM leveraged its partnership with Salesforce to create an AI-based, advanced e-commerce solution and a sales hub. It also developed a mobile app to improve the performance and visibility of drivers. The solution simplified the ordering and delivery process and provided AI-driven, predictive suggestions to retailers for order placement.</li> </ul>	<ul style="list-style-type: none"> <li>• Streamlined order processing</li> <li>• Increased productivity and visibility</li> </ul>
An American home improvement retailer	<ul style="list-style-type: none"> <li>• Blockchain</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to remove discrepancies in supplier shipments to strengthen trust and save time and money invested in vendor disputes.</li> <li>• IBM implemented a blockchain solution for tracking vendor supplies across various touchpoints. It gathered information from different points along the supply chain and sent that information to the cloud, offering real-time visibility to both retailers and vendors.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved visibility and improved supplier communication</li> <li>• Increased trust</li> </ul>

# IBM: RadarView profile

## Analyst insights

### Practice maturity



- IBM has developed an advanced portfolio of offerings for retailers to expedite their digital transformation journey. With a strong focus on hybrid cloud, AI, the Internet of Things (IoT), and automation, it is helping clients to digitize their store and supply chain process. It has targeted point solutions for smart and flexible retail store operations, customer experience transformation, and an intelligent supply chain.
- It has scaled its capabilities for delivering end-to-end transformations with the help of its extensive product portfolio, innovation labs, and consulting teams. For example, it developed a retail orchestration hub using its AI-powered IBM Cloud® Paks solution that delivers end-to-end digital transformation for retailers from modernizing stores and enhancing customer experiences to managing inventory.
- It has collaborated with several retailers, logistics firms, and growers on blockchain systems to track and secure their global supply chain. For example, for French retailer Carrefour, it enabled transparencyy and trust among shoppers by providing QR code tracking information for fresh groceries to include date of harvest, location of cultivation, and packing date, resulting in increased sales for the retailer.

### Investments and innovation



- IBM is continuously expanding its capabilities in cloud and AI. Since 2019, it has acquired 17 software, IT consulting, and software-as-a-service (SaaS) companies extending its business portfolio and enhancing growth. For instance, in 2019, it acquired Red Hat that helped a retailer to increase customer traffic by 20% and reduce inventory with its OpenShift on IBM Cloud solution.
- For innovation, it leverages its 16 innovation labs and hubs located worldwide. In retail, it has leveraged the MIT-IBM Watson lab to develop planning and analytics solutions for retailers. Its IBM Cloud Garage is another growing space, where it codevelops solutions for retail clients. For example, it partnered with a major online retailer to unlock new revenue streams based on a subscription model.

### Partner ecosystem



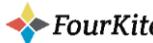
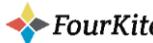
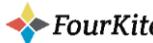
- IBM has developed strategic alliances with platform and technology providers for enabling enterprises to achieve digital transformation in an accelerated timeframe. It leverages partnerships with cloud providers like Microsoft, Amazon, and Google to provide platform, infrastructure, application, and storage services. It has also partnered with technology providers such as Apple, Adobe, Salesforce, Samsung, and SAP to elevate customer experiences.
- It partners with multiple niche retail digital companies that are part of its “Store Cloud” solution such as Flooid, a provider of an online and offline retail platform; RelevanC, a promotions and customer loyalty solution provider; and Trax Retail, a real-time monitoring of shelf solution provider.

# Infosys: RadarView profile



<b>Practice maturity</b>	★★★★★
<b>Investments and innovation</b>	★★★★★
<b>Partner ecosystem</b>	★★★★★

Provides transformational services with platform-driven, next-generation retail solutions built by leveraging its IP assets and partner ecosystem.

Practice overview	Industry-specific solutions/offerings			Sample clients															
<ul style="list-style-type: none"> <li>Practice size: 20,000+</li> <li>Active clients: 190+</li> <li>Delivery highlights: Delivery centers spread across 46 countries</li> </ul>	TradeEdge	An insights-driven platform to provide insights from distributors and retailers across the demand value chain	Equinox platform	An API-first, microservices-based, cloud-native platform for improving digital commerce															
<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>8%</p> <p>Share of retail revenue, Dec. 2021</p> </div> <div style="text-align: center;"> <p>&gt;57%</p> <p>Share of digital retail revenue, Dec. 2021</p> </div> </div>	Infosys Genome	An analytics platform for providing personalized recommendations on an e-commerce site	Data monetization platform	An AI-driven platform to generate insights from customer data for improved CX and revenue growth															
<h3>Partnerships/alliances</h3> <table border="0"> <tr> <td style="vertical-align: top;">   <small>Fill your potential™</small> </td><td>Provided supply chain solutions leveraging its Luminate platform</td> <td style="vertical-align: top;">  </td><td>Provided solutions for real-time freight visibility</td> </tr> <tr> <td style="vertical-align: top;">  </td><td>Provided joint solutions on its connected cloud data ecosystem for enterprises</td><td style="vertical-align: top;">  </td><td>Leveraged its natural language capabilities to improve analytical insights for enterprises</td> </tr> <tr> <td style="vertical-align: top;">  </td><td>Extended its Packable IQ platform on Infosys Equinox</td><td style="vertical-align: top;">  </td><td>Provided AI-led conversational messaging solutions for direct to consumer (D2C) commerce</td> </tr> <tr> <td style="vertical-align: top;">  </td><td>Built data foundation platforms in retail such as Infosys Nia and Genome</td><td style="vertical-align: top;">  </td><td>Provided end-to-end services for businesses to accelerate cloud migration</td> </tr> </table>				 <small>Fill your potential™</small>	Provided supply chain solutions leveraging its Luminate platform		Provided solutions for real-time freight visibility		Provided joint solutions on its connected cloud data ecosystem for enterprises		Leveraged its natural language capabilities to improve analytical insights for enterprises		Extended its Packable IQ platform on Infosys Equinox		Provided AI-led conversational messaging solutions for direct to consumer (D2C) commerce		Built data foundation platforms in retail such as Infosys Nia and Genome		Provided end-to-end services for businesses to accelerate cloud migration
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<h3>Value chain coverage</h3>				<div style="background-color: #2e6b2e; color: white; padding: 5px; display: inline-block;">Customer engagement</div> <div style="background-color: #2e6b2e; color: white; padding: 5px; display: inline-block;">Fulfillment</div> <div style="background-color: #2e6b2e; color: white; padding: 5px; display: inline-block;">In-store commerce</div> <div style="background-color: #2e6b2e; color: white; padding: 5px; display: inline-block;">Inventory management and warehouse operations</div> <div style="background-color: #2e6b2e; color: white; padding: 5px; display: inline-block;">Marketing</div> <div style="background-color: #2e6b2e; color: white; padding: 5px; display: inline-block;">Online commerce</div> <div style="background-color: #2e6b2e; color: white; padding: 5px; display: inline-block;">Sourcing and procurement</div>															

Darker color indicates higher value chain coverage:

# Infosys: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A US-based agriculture and home improvement retail chain	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Artificial intelligence (AI)</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve and expand its limited, online merchandising experience as a result of poor online services.</li> <li>• Infosys created an e-commerce platform for web and mobile experience leveraging IBM WCS and Oracle OMS. It delivered a complete solution of content, commerce, and community experience including a new loyalty program, payment solution, and personalized user experience.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved app availability to 99.8%</li> <li>• Increased site revenue by 1,900%</li> <li>• Reduced cart abandonment rate to less than 7%</li> </ul>
An American multinational retailer	<ul style="list-style-type: none"> <li>• AI</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve stock visibility across stores and enable omnichannel fulfillment for its stores and distribution centers.</li> <li>• Infosys implemented a microservices-based solution on AWS for fulfillment services. It created an order repository hub, an IBM Sterling cloud-based order management system (OMS), and a supply hub. The solution also enabled demand prediction capabilities.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved customer experience</li> <li>• Implemented a scalable and flexible application architecture</li> <li>• Deployed modular OMS applications</li> </ul>
A multinational sports lifestyle company	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• AI</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client needed an endless aisle solution for its small footprint stores stocked with limited store assortment.</li> <li>• Infosys implemented its Equinox endless aisle solution to provide an enterprise-grade solution for the client's in-store kiosks and tablets, assisting associates in selling operations. It allowed shoppers to access digital product catalogs, evaluate reviews and ratings, and obtain price and discount information to facilitate the sale of products not in the store.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased sales in small stores</li> <li>• Improved customer experience</li> </ul>
A US-based, retail-focused private equity firm	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client needed to manage its infrastructure, IT, and enterprise systems for its retail stores across brands.</li> <li>• Infosys was selected to be the outsourcing partner for the retail aggregator for seven years, managing IT and Infrastructure and running and managing retail operations across stores. It was also responsible for transforming its e-commerce business from merchandising e-commerce to back-office to move toward digital-only commerce.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased digital retail revenue</li> <li>• Increased e-commerce penetration</li> </ul>

# Infosys: RadarView profile

## Analyst insights

### Practice maturity



- Infosys's approach of human-centered design thinking integrated with digital solutions is helping clients to achieve their transformation goals, which have been accelerated by the pandemic. It serves some of the top retailers globally, generating almost \$1B in revenue annually. Infosys's retail practice contributes about 8% to the company's overall revenue.
- Ahead of its competitors, Infosys differentiates itself by building large, platform-based solutions with its wide service and product portfolio in supply chain, omnichannel e-commerce, store operations, and hyperpersonalized marketing. Its platforms like TradeEdge, Equinox, Genome, and Data Monetization are transforming retailers' core with their microservices and API-led, flexible, and scalable architecture.
- It has extensive capabilities across the retail value chain that have evolved over the years by delivering to a strong client base across subindustries. For example, it helped a large home improvement retailer with a mobile solution to scale and improve its customer experience (CX), resulting in a 42% net sales increase in a single quarter.

### Investments and innovation



- Infosys's growth has been fueled by both organic and inorganic strategies over the past two years. It has been actively involved in acquisitions in the areas of CX, analytics, and product engineering. In 2021, it acquired Carter Digital, a human-centric design agency and Beringer Commerce, a customer experience firm. In 2020, it acquired GuideVision, a ServiceNow partner, and Kaleidoscope Innovations, a product design and development firm.
- It has invested in building vertical solutions for its clients through its Living Labs for retail, which demonstrate future-ready solutions such as store of the future and connected devices in retail. It is also codeveloping retail solutions with clients such as Traceability Solution, DTC, and One Marketplace.

### Partner ecosystem



- Infosys has a large and growing ecosystem of hyperscaler cloud partnerships with AWS, GCP, and Microsoft as a backbone to build solutions in collaboration with enterprise app providers, technology startups, and digital innovators in the retail industry. For example, its Equinox platform, a full suite of application program interface-led solutions for retailers, is built on services and products from Infosys and its partners.
- Infosys is continuously working with its partners to strengthen its retail offerings. Its partnership with Packable amplifies its D2C offerings for brands, LivePerson adds live commerce capabilities, and AIMIA augments loyalty management solutions and analytics capabilities. It has also onboarded 120 tech startups to co-innovate clients' business challenges with new-age technologies like blockchain and augmented reality/virtual reality (AR/VR).

# Litmus7: RadarView profile



Practice maturity	★★★
Investments and innovation	★★
Partner ecosystem	★★★

Fast-growing retail services provider with solutions targeting consumer emotions and progressive omnichannel experiences.

<h3>Practice overview</h3> <ul style="list-style-type: none"><li>• Practice size: 450+</li><li>• Active clients: 22</li><li>• Delivery highlights: Delivery centers in five countries</li></ul> <div style="display: flex; justify-content: space-around;"><div><p>100% Share of retail revenue, Dec. 2021</p></div><div><p>25% YOY revenue growth, Dec. 2021</p></div></div>	<h3>Industry-specific solutions/offerings</h3> <table><tbody><tr><td>Retail Sentient Cloud</td><td>An AI-based intelligent platform with emotion-sensing capabilities to enable informed decision-making</td></tr><tr><td>Progressive Wish Assimilator</td><td>An AI-based, real-time solution enabling progressive consumer conversations across channels</td></tr><tr><td>BOPISPLUS</td><td>A platform-agnostic, modular, omnichannel order fulfillment solution with a full range of services</td></tr><tr><td>Own Brand Promoter</td><td>A personalized recommendation engine for private label promotion on e-commerce sites</td></tr></tbody></table>	Retail Sentient Cloud	An AI-based intelligent platform with emotion-sensing capabilities to enable informed decision-making	Progressive Wish Assimilator	An AI-based, real-time solution enabling progressive consumer conversations across channels	BOPISPLUS	A platform-agnostic, modular, omnichannel order fulfillment solution with a full range of services	Own Brand Promoter	A personalized recommendation engine for private label promotion on e-commerce sites	<h3>Sample clients</h3> <ul style="list-style-type: none"><li>• An American multinational retail chain of hypermarkets</li><li>• An American pet retailer</li><li>• An American lifestyle, clothing, and accessories retailer</li><li>• A French beauty retailer</li><li>• A skin care brand</li></ul>			
Retail Sentient Cloud	An AI-based intelligent platform with emotion-sensing capabilities to enable informed decision-making												
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Marketing													
Online commerce													
Sourcing and procurement													

Darker color indicates higher value chain coverage: ● ● ● ●

# Litmus7: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
An American multinational retail chain of hypermarkets	<ul style="list-style-type: none"> <li>• Artificial intelligence (AI)</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to optimize the frontend experience of its e-commerce website and provide a personalized search experience.</li> <li>• Litmus7 modernized its existing search engine with a natural language processing-based search to provide auto-suggestions, personalization, and recommendations. It also redesigned the e-commerce site to provide frictionless navigation and checkout experience and augmented the solution with integrated mobile apps.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased conversion rate by 5%</li> <li>• Improved customer experience</li> </ul>
A French beauty retailer	<ul style="list-style-type: none"> <li>• AI</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to revamp its loyalty program and modernize its technology stack to build a flexible and scalable platform.</li> <li>• Litmus7 implemented a microservices-led architecture for multiple modules such as e-commerce, order management system (OMS), and loyalty. It also designed an AI-based hyperpersonalization product search on its e-commerce site for providing recommendations, content, and promotions to its customers.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased customer retention</li> <li>• Increased sales</li> </ul>
An American pet retailer	<ul style="list-style-type: none"> <li>• AI</li> <li>• Cloud</li> <li>• Analytics</li> </ul>	<ul style="list-style-type: none"> <li>• The client needed to consolidate customer data across systems, offer personalized content, and expand fulfillment to curbside pickup to minimize interaction during the pandemic.</li> <li>• Litmus7 implemented master data management (Reltio) on the cloud with real-time synchronization of customer data. Furthermore, it used Reflektion to show personalized products during the customer journey. It also enabled curbside pickup of online orders through integration.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved decision-making</li> <li>• Increased sales</li> <li>• Enhanced understanding of customer buying behavior over time</li> </ul>
A skin care brand	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to modernize its e-commerce platform and build analytical capabilities for reporting and marketing initiatives.</li> <li>• Litmus7 migrated its legacy Magento platform to a modern Salesforce commerce cloud platform. It implemented a unified data platform on AWS for sales and channel data using Snowflake and MuleSoft as well as Tableau for visualizations.</li> </ul>	<ul style="list-style-type: none"> <li>• Implemented cross-functional analytics across various applications</li> <li>• Enabled revenue growth</li> </ul>

# Litmus7: RadarView profile

## Analyst insights

### Practice maturity



- Established in 2009, Litmus7 is a pure-play, retail-centric firm focused on providing advanced technology solutions and business transformation services to retailers. It has served some of the biggest retailers in the industry with long-standing relationships of 10–12 years.
- Its solutions are built with a customer-centric approach to maximize customer understanding, conversion, and retention, such as Retail Sentient Cloud for sensing emotions around data and Progressive Wish Assimilator for understanding consumer needs and choices better in real time.
- It differentiates itself with unique solution offerings like Virtualeye that offers simultaneous video consultation on a buying platform, Own Brand Promoter that helps private labels to promote their products in parallel to others on e-commerce sites, and Subscriptions Cartridge, a plug-and-play solution to help retailers retain and engage customers more effectively.
- To help clients keep pace with changing consumer demands, it also offers consulting-led services via its C-Commerce platform, which enables retailers to create a personalized store for every customer using context sensing capabilities to help customers shop better.

### Investments and innovation



- Litmus7's growth strategy is to organically grow and innovate solutions for and with retailers to build strong sector expertise. It focuses on building new engagement models and expanding its presence deeper in the consumer space.
- It is constantly innovating and developing new solutions in collaboration with its clients. For example, its augmented reality/virtual reality (AR/VR) solutions for mobile commerce for a beauty retailer helped it achieve an incremental revenue of \$150M.

### Partner ecosystem



- Litmus7 has built a partner ecosystem for implementing end-to-end solutions. It has alliances with leading technology providers such as IBM for building order management solution on its cloud and Salesforce for developing digital solutions facilitating sales return.
- It has also partnered with niche digital companies such as Commercetools for leveraging its modular platform to modernize legacy ecommerce platforms.

# Mindtree: RadarView profile



<b>Practice maturity</b>	★★
<b>Investments and innovation</b>	★★
<b>Partner ecosystem</b>	★★★

Drives retail transformations by enhancing consumer experience with the help of an extensive portfolio of advanced solutions.

Practice overview	Industry-specific solutions/offerings	Sample clients
<ul style="list-style-type: none"> <li>Practice size: NA</li> <li>Active clients: 20+</li> <li>Delivery highlights: 10 retail delivery centers</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>15%</p> <p>Share of retail revenue, Mar. 2021</p> </div> <div style="text-align: center;"> <p>3%</p> <p>YOY revenue growth, Mar. 2021</p> </div> </div>	<p>Floorsense</p> <p>TradeSmart</p> <p>POSmart</p> <p>Decision Moments</p>	<p>A cloud-based, intelligent platform to boost store associates' productivity and uplift conversions</p> <p>Analytics as a service to analyze spend data to plan promotions using predictive models</p> <p>A data management and analytics solution for analyzing point-of-sale (POS) data</p> <p>A cloud-based analytics platform to drive personalization</p>
Partnerships/alliances	Value chain coverage	
<p> <b>MuleSoft</b> Built accelerators for establishing API-led connectivity and optimizing operations</p> <p> <b>SITECORE</b> Utilized its platform to deliver experience optimization and personalization solutions</p> <p> <b>Adobe</b> Leveraged Adobe Experience Cloud for advertising technology operations</p> <p> <b>Microsoft</b> Developed Microsoft Azure-based joint go-to-market (GTM) solutions</p>	<p> <b>e-Spirit</b> Leveraged its content management services across diverse channels</p> <p> <b>databricks</b> Leveraged its cloud platform for data-driven decision-making</p> <p> <b>salesforce</b> Implemented its marketing automation solutions to drive engagement</p> <p> <b>ACQUIA</b> Leveraged its cloud platform for execution and automation best practices</p>	

Darker color indicates higher value chain coverage:

# Mindtree: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
An Indian online grocer	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> <li>• Machine learning (ML)</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve e-commerce experience for its clients.</li> <li>• Mindtree implemented a cloud-based analytics platform that helped in delivering on-demand scalability and huge parallel processing capabilities. The solution also afforded a high performance, ML-based, real-time cross-sell recommendation engine to personalize customer experience.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased sales</li> <li>• Deployed a highly scalable recommendation engine</li> </ul>
An American office supply retailer	<ul style="list-style-type: none"> <li>• Artificial intelligence (AI)</li> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to redesign its order management (OM) module to incorporate e-commerce and build a recommendation engine.</li> <li>• Mindtree implemented a microservices-led RESTful architecture to modernize its existing systems to elevate customer search and online ordering experience. It redesigned the OM, orchestrating inventory, shipment routing, and delivery, migrated legacy apps to cloud, and developed an AI/ML platform to provide real-time recommendations.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased e-commerce sales</li> <li>• Improved customer experience</li> </ul>
A UK technology retailer	<ul style="list-style-type: none"> <li>• AI</li> <li>• Analytics</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to design and implement an omnichannel strategy to drive sales amid the pandemic.</li> <li>• Mindtree built the complete platform, integrated business solutions, and redesigned customer journeys seamlessly across offline and online channels. It implemented a 360-degree view of customer journeys with the help of ecosystem partners like Adobe and Salesforce. It simplified backend systems, developed data-driven personalization, AI/ML-driven dynamic pricing, and a real-time view of inventory.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased conversion rates and customer loyalty</li> <li>• Increased market share, revenue, and margins</li> <li>• Reduced sales loss</li> </ul>
A large US based specialty retailer	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to adopt new platforms and modernize its IT systems.</li> <li>• Mindtree managed its over 500 applications end to end. It modernized the client's legacy point-of-sale (POS) apps, migrated its order management system (OMS) to the cloud, and leveraged AWS and Google Cloud Platform automation and analytics services to revamp its IT infrastructure.</li> </ul>	<ul style="list-style-type: none"> <li>• Achieved cost savings of 22%</li> <li>• Targeted ticket reduction by 25%</li> </ul>

# Mindtree: RadarView profile

## Analyst insights

### Practice maturity



- Retail, consumer packaged goods, and manufacturing services are key focus industry groups for Mindtree, contributing 15% to its total annual revenue. Keeping digitization and automation at the center, the company has developed more than 20 IPs and solutions for the retail industry to drive its digital revenue, which constitutes more than 65% of its retail business.
- It has a strong presence in the industry driven by its domain expertise-led consulting, consumer experience capabilities, and in-store experience transformation. It has a dedicated Experience Design Group that provides cross-channel experience, mobility user experience, interaction design, and visual design for retailers.
- It differentiates itself by providing Immersive solutions based on AI, computer vision, mixed reality, and conversational AI. For instance, it developed an AI and AR-based mobile solution for a personal care product manufacturer and enabled it to deliver assisted makeup experience to its customers.

### Investments and innovation



- Mindtree strengthened its Internet of Things (IoT), AI, and Industry 4.0 capabilities with the acquisition of NxT Digital Business from its parent company, L&T, in 2021. This acquisition has added scale and digital capabilities helpful in meeting end-to-end digital transformation demands.
- Mindtree's collaborative innovation lab The Digital Pumpkin has produced some advanced solutions for the retail industry. It demonstrates a multitude of solutions, accelerators, and tools such as consumer engagement and loyalty platform, next-generation unified interfaces, and in-store flash deals solution. In 2019, Mindtree also launched an augmented reality/virtual reality (AR/VR) lab, Immersive Aurora, in collaboration with PTC to enable clients to identify and test AR/VR use cases for their business.

### Partner ecosystem



- Mindtree has established partnerships with cloud providers Amazon, Microsoft, and Google for providing cloud migrations and other platform services. It has also co-developed industry solutions like customer experience transformation and digital marketing, including Adobe and Sitecore on Azure and Decision Moments on AWS.
- It has partnered with Adobe, Salesforce, IBM, and Oracle for experience cloud, marketing cloud, retail, and e-commerce platforms, respectively. It has also formed alliances with niche players, such as Shopify for its e-commerce platform, a data alliance with Databricks, a UI/UX alliance with Sitecore, a web content management alliance with E-Spirit, and an alliance with Spinklr for its customer behavior sensing and Snowflake integration capabilities.

# NCR Corporation: RadarView profile



## Practice maturity



## Investments and innovation



## Partner ecosystem



Drives retail transformation through its cloud-based commerce platform, connecting an entire store and facilitating faster checkouts, personalization, and consistency.

<h3>Practice overview</h3> <ul style="list-style-type: none"><li>• Practice size: 4,181+</li><li>• Active clients: NA</li><li>• Delivery highlights: 151 delivery location worldwide</li></ul> <p>33% Share of retail revenue, Sept. 2021</p> <p>5% Practice growth, Sept. 2021</p>	<h3>Industry-specific solutions/offerings</h3> <p>Advanced Marketing Solution An engine to design, rollout, and manage marketing campaigns</p> <p>NCR Analytics Platform Web-based, customizable dashboards for real-time store sales and productivity insights</p> <p>NCR Freshop An API-based, cloud architecture-driven e-commerce platform</p>	<h3>Sample clients</h3> <ul style="list-style-type: none"><li>• Goodwill Chattanooga</li><li>• A Hispanic grocery store chain</li><li>• A retailer owned co-op</li><li>• A US-based supermarket chain</li><li>• BevMo!</li><li>• A family-owned grocery chain</li><li>• An outdoor plant and home decor retailer</li></ul>
<h3>Partnerships/alliances</h3> <p> Google Cloud Provided platform and cloud capabilities including artificial intelligence (AI) and machine learning (ML) solutions for retailers</p> <p> ORACLE Leveraged Oracle cloud for its solutions to bring agility and speed</p>	<h3>Value chain coverage</h3> <p> Microsoft Leveraged Azure and its AI and Internet of Things (IoT) capabilities for its connected device solutions</p> <p> VendorNet Delivered cross-channel integration and supply chain management solutions</p>	

Darker color indicates higher value chain coverage:

# NCR Corporation: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A Hispanic grocery store chain	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to reduce back-office efforts and improve customer experience by introducing personalization.</li> <li>• NCR deployed its Emerald POS solution, which integrated its client's back-end financial systems. The unified solution connected every profit center and touchpoint from POS such as food products and back-office all in one system. The solution enabled a faster checkout experience and personalized offers based on a customers' purchase history.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced manual interventions and back-office activities</li> <li>• Improved employee and customer experience</li> <li>• Quickened checkouts by 2x</li> </ul>
An outdoor plant and home decor retailer	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to introduce multichannel ordering and analytics capabilities to identify ordering patterns and manage demand.</li> <li>• NCR leveraged its NCR Counterpoint to quickly add enhancements and improve the integration between the client's physical store and its e-commerce platform to enable customer analytics. It provided flexible and adaptable systems to create a multichannel experience and quickly adopt contactless payments such as curbside pickup and phone orders.</li> </ul>	<ul style="list-style-type: none"> <li>• Created a seamless shopping experience</li> <li>• Adapted to consumer demand</li> <li>• Increased online sales</li> </ul>
A nonprofit organization involved in selling donated goods	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client was not able to track sales, offer personalized promotions, standardize pricing, or monitor inventory.</li> <li>• NCR implemented its NCR Counterpoint, which enabled tracking of sales, inventory, and customer loyalty information while making employee training fast and easy. It added personalized features for communicating offers to customers during large purchase transactions.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved inventory management</li> <li>• Increased employee productivity and efficiency</li> <li>• Increased customer sales and loyalty</li> </ul>
A Hispanic grocery store chain	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client needed to quickly add curbside pickup during the pandemic without having an online ordering application.</li> <li>• NCR deployed its NCR Freshop online shopping solution that enabled curbside pickup. The platform gave the client the flexibility to support orders placed in Spanish and English. Its native, API-first architecture accelerated innovation, with reporting dashboards that display ordering activity by store, day, and customer.</li> </ul>	<ul style="list-style-type: none"> <li>• Achieved order fill rate of over 90%</li> <li>• Increased online sales with 50% repeat customers</li> </ul>

# NCR Corporation: RadarView profile

## Analyst insights

### Practice maturity

★★★

- NCR is a product-driven services firm serving the retail industry for more than 135 years. Retail is one of the key industries for the provider contributing to 33% of its total revenue. It drives transformation for retailers through its products and platform services.
- It has evolved from hardware-driven solutions to software-driven services for grocery, supermarket, and specialty retailers. Though its solutions which span a wide portfolio such as loyalty and customer engagement, merchandising and supply chain, retail analytics, store virtualization, point-of-sale (POS) and e-commerce are its flagship services.
- It also provides consulting services in retail technology architecture, business process design and optimization. For a luxury department store, it designed the vision for its “store of tomorrow” with expert curation of tools and technologies. It has supported many client journeys from traditional POS solutions to cloud-based integrated point of sale solutions with real-time customer insights and self-checkout facilities. For example, it helped a Hispanic-based grocery store chain move to a cloud-based POS system to improve experience with faster checkouts and personalized offers.

### Investments and innovation

★★★

- NCR acquired multiple firms in the last three years, which are strongly servicing a large client base. In 2021, it acquired grocery e-commerce provider Freshop. In 2019, it acquired OKI Brasil's IT services, and select software assets for retail and other industries, and Zynstra Edge, a virtualization provider with retail-specific capabilities.
- It has also invested in research labs. It supports solutions prototyping such as vision-based self-checkout in convenience stores, contactless age verification using facial recognition, curbside pickup made more efficient with digital signage and mobile payments.

### Partner ecosystem

★★

- NCR has partnered with Google Cloud to make services of its NCR Commerce Platform accessible through APIs on Google Cloud's Apigee and its AI and machine learning solutions for retailers. It has partnered with Microsoft to run connected device solutions on Azure, leveraging its IoT and AI technology to connect all of its IoT edge devices.
- It has also partnered with VendorNet to utilize its supply chain management software solutions and cross-channel integration. The partnership enables seamless integration of multichannel retailers with all fulfillment locations, including warehouses, stores, and third-party suppliers.

# NTT DATA: RadarView profile



<b>Practice maturity</b>	★★
<b>Investments and innovation</b>	★★★
<b>Partner ecosystem</b>	★★★

Drives digital transformation in retail with its advanced, cloud-native solutions and services in small-format stores and digital marketing.

Practice overview	Industry-specific solutions/offerings			Sample clients
<ul style="list-style-type: none"> <li>Practice size: NA</li> <li>Active clients: 50+</li> <li>Delivery highlights: 50+ global delivery centers across 20+ countries</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>6%</p> <p>Share of retail, payments, and other revenue, Mar. 2021</p> </div> <div style="text-align: center;"> <p>4.5%</p> <p>YOY revenue growth, Mar. 2021</p> </div> </div>	it.retail	An SAP-based solution for integrating digital and physical shopping channels	Listening and Insights Service	Gathers data from social media platforms to gain business insights and engage customers
	Digital marketing services	End-to-end solutions to increase conversion rates throughout the digital marketing journey	Supply chain management solutions	A set of solutions to track supply chain, digital sales, and warehousing
<b>Partnerships/alliances</b>				<b>Value chain coverage</b>
<div style="display: flex; align-items: center;">  Drove digital transformations for clients using AWS platform         </div> <div style="display: flex; align-items: center; margin-top: 20px;">  Leveraged its cloud platform for its solutions and provided services such as cloud migrations         </div> <div style="display: flex; align-items: center; margin-top: 20px;">  Leveraged its platform for building CX and CRM capabilities         </div> <div style="display: flex; align-items: center; margin-top: 20px;">  Leveraged its CX management, e-commerce, and managing integrations         </div>				<div style="background-color: #e0f2e0; padding: 5px;">Customer engagement</div> <div style="background-color: #e0f2e0; padding: 5px;">Fulfillment</div> <div style="background-color: #333333; color: white; padding: 5px;">In-store commerce</div> <div style="background-color: #e0f2e0; padding: 5px;">Inventory management and warehouse operations</div> <div style="background-color: #333333; color: white; padding: 5px;">Marketing</div> <div style="background-color: #333333; color: white; padding: 5px;">Online commerce</div> <div style="background-color: #e0f2e0; padding: 5px;">Sourcing and procurement</div>
<div style="text-align: center; margin-top: 20px;"> <p>Darker color indicates higher value chain coverage:</p> <span style="color: #e0f2e0; font-size: 1em;">●</span> <span style="color: #e0f2e0; font-size: 1em;">●</span> <span style="color: #e0f2e0; font-size: 1em;">●</span> <span style="color: #333333; font-size: 1em;">●</span> </div>				

# NTT DATA: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A membership organization	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to implement a new reward card program with enhanced security and reduced maintenance.</li> <li>• NTT DATA migrated the client's gift card e-commerce application to AWS. This extended its microservices architecture in order to deliver updates to its members faster. It automated technology processes with Infrastructure as Code (IaC) and continuous integration/continuous delivery (CI/CD) pipelines. It also established advanced security with WAFv2 and AWS monitoring.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced maintenance needs, freeing time for strategic initiatives</li> <li>• Grew member loyalty</li> <li>• Enhanced security</li> </ul>
A global freight and logistics company	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to maximize the productivity of its resources and reduce efforts spent on maintenance.</li> <li>• NTT DATA migrated the client's systems to AWS for built-in security standards and automation. It enabled self-service capabilities, allowing its engineering team to focus on building rather than maintenance.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved time to market by eliminating barriers</li> <li>• Freed operations from maintenance overhead</li> <li>• Improved productivity with automation</li> </ul>
An e-commerce software company	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to modernize its e-commerce platform with DevOps to drive efficiency and quality of service.</li> <li>• NTT DATA used IaC and automated data-driven DevOps deployment tools on the Google Cloud Platform. It optimized continuous deployment with system monitoring and quality gates to accelerate its microservices CI/CD pipeline.</li> </ul>	<ul style="list-style-type: none"> <li>• Decreased production error rate with greater customer satisfaction and loyalty</li> <li>• Increased quality and reliability with streamlined CI/CD pipeline</li> </ul>
A consumer goods company	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to optimize its IT environment and enable new digital initiatives in order to increase operational efficiencies.</li> <li>• NTT DATA deployed mainframe modernization to help eliminate reliance on legacy infrastructure in its physical data centers. It migrated all business applications to AWS and deployed DevOps tools to reduce manual deployment activities and improve efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced ongoing infrastructure costs by 65%</li> <li>• Reduced operational support costs by 25%</li> </ul>

# NTT DATA: RadarView profile

## Analyst insights

### Practice maturity



- NTT Data generates more than \$1.2 billion in revenue from retailers annually. It has clients spread across the globe; however, most of its strength is in Asia.
- It offers advanced digital services across the value chain with scalable, cloud-based packaged retail solutions based on SAP S/4HANA to meet customer needs with multichannel promotion management, inventory visibility, sales analysis, and advanced supply chain solutions for inventory visibility, tracking, and warehousing. It differentiates itself by offering next-gen, in-store solutions, which optimize store operations using IoT by enabling dynamic pricing with digital price tags, refrigerator monitoring, and engaging customers with dynamic product information using digital signage.
- It has developed innovative solutions for small format stores such as Catch&Go, contactless stores for retailers with advanced self-checkout capabilities, and computer vision-based tracking of customer in-store activity. It also launched the first checkout-free store with a palm reader entrance and face authentication, along with dynamic pricing linked to store inventory levels for Lawson, a large convenience store chain in Japan.

### Investments and innovation



- NTT DATA has been strengthening its capabilities across supply chain and cloud-native development spanning industries. In 2021, it acquired My Supply Chain Group Co. (MSCG), a provider of essential supply chain planning and execution services, Chainalytics, a supply chain consulting and analytics firm, and Nexient, a US-based, cloud-native software development firm.
- In 2020, it acquired Hashmap, a cloud data and analytics firm. In 2019, it attained Flux7 Labs, an IT delivery optimization and cloud-native application migration and modernization firm. With these acquisitions, it not only strengthened its retail capabilities but also significantly expanded its presence in the US.

### Partner ecosystem



- NTT DATA has partnerships with major hyperscalers, Microsoft and Google, providing cloud migrations and enablement services. It partners with SAP to provide joint solutions that support unified and automated collaboration across customers, suppliers, retailers, manufacturers, and logistics providers. In addition, it also supplies SAP cloud migration and managed services. It has also partnered with Adobe to leverage and codevelop solutions for its customer experience.
- It collaborates with Spaceee, a retail market provider of supply chain and inventory management solutions, using computer vision and artificial intelligence (AI).

# Reply: RadarView profile



<b>Practice maturity</b>	★★★
<b>Investments and innovation</b>	★★★★★
<b>Partner ecosystem</b>	★★★★

Builds e-commerce solutions and effective omnichannel strategies to blend and synchronize digital and physical experiences.

Practice overview	Industry-specific solutions/offerings	Sample clients
<ul style="list-style-type: none"> <li>Practice size: NA</li> <li>Active clients: NA</li> <li>Delivery highlights: 48 delivery locations worldwide</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>33%</p> <p>Share of retail and mfg. revenue, Dec. 2020</p> </div> <div style="text-align: center;"> <p>17%</p> <p>YOY revenue growth, TTM Sept. 2021</p> </div> </div>	<p><b>Click Reply™ SCE Suite</b></p> <p><b>LEAT™ Reply</b></p> <p><b>Gaia Reply™</b></p> <p><b>SideUp Reply™</b></p>	<p>A modular solution for streamlining warehouse operations and labor management</p> <p>A warehouse management suite of solutions for visibility, scheduling, smart tracking, and point-of-sale</p> <p>A solution for developing mobile services like mobile sites, client apps, and HTML5 web apps</p> <p>A platform to optimize warehouse management using a software-as-a-service (SaaS) model</p>
<b>Partnerships/alliances</b>		<b>Value chain coverage</b>
<p><b>Adobe</b> Implemented its open-source e-commerce platform Magento</p> <p><b>Microsoft</b> Developed solutions in collaboration with Microsoft such as IoT Digital Twin</p> <p><b>ORACLE®</b> Leveraged its cloud solutions for retail solutions such as xStore platform</p> <p><b>SAP</b> Built omnichannel commerce and warehouse solutions</p>		<p>Customer engagement</p> <p>Fulfillment</p> <p>In-store commerce</p> <p>Inventory management and warehouse operations</p> <p>Marketing</p> <p>Online commerce</p> <p>Sourcing and procurement</p>

Darker color indicates higher value chain coverage: ● ● ● ●

# Reply: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A global furniture retailer	<ul style="list-style-type: none"> <li>• Artificial intelligence (AI)</li> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to extend its last-mile delivery app to offer scalability, monitoring dashboards, and guide operators in daily work.</li> <li>• Logistics Reply implemented the LEA Reply Hub &amp; Network to manage receiving, sorting, cross-docking, consolidation, and shipping activities in multilevel distribution networks via mobile and web applications. It extended this with autonomous sorting capabilities using robots in the warehouse.</li> </ul>	<ul style="list-style-type: none"> <li>• Provided live dashboards and reports for advanced monitoring</li> <li>• Improved usability for users from check-in and sorting to the truck loading</li> </ul>
An Italian luxury fashion house	<ul style="list-style-type: none"> <li>• AI</li> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to digitally transform and standardize its in-store process to improve customer experience across channels.</li> <li>• Retail Reply implemented Oracle's Retail Suite to enable data centrality, scalability, and uniformity. It optimized and standardized its in-store processes to improve customer engagement throughout the purchasing process (sales as well as pre- and post-sales).</li> </ul>	<ul style="list-style-type: none"> <li>• Improved customer experience</li> <li>• Facilitated cross channel sales enablement</li> </ul>
An Italian fashion retailer	<ul style="list-style-type: none"> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve omnichannel experience and employee effectiveness in building client relationships and work efficiency.</li> <li>• Retail Reply implemented Oracle Retail Xstore Point-of-Service and analyzed frontend processes to and from the physical store. It also implemented loyalty and gift card systems to integrate the client's e-commerce systems.</li> </ul>	<ul style="list-style-type: none"> <li>• Provided greater visibility into inventory deliveries and orders</li> <li>• Improved usability of the checkout application</li> <li>• Created an omnichannel customer experience</li> </ul>
An Italian lifestyle apparel brand	<ul style="list-style-type: none"> <li>• AI</li> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve the shopping experience by implementing an omnichannel system.</li> <li>• Retail Reply developed new e-commerce websites for its brands using Salesforce eCommerce Cloud. It integrated the e-commerce platform and marketing automation system to enable centralized marketing campaign management. It also implemented a distributed order management system enhanced with AI to incorporate omnichannel services such as Hybrid Store, Return in Store, and Pay&amp;Collect.</li> </ul>	<ul style="list-style-type: none"> <li>• Set up efficient marketing automation</li> <li>• Promoted superior customer experience</li> </ul>

# Reply: RadarView profile

## Analyst insights

### Practice maturity



- Reply has a strong retail and manufacturing practice contributing one-third of the firm's overall revenue. It caters more to the European market, but it is increasing its presence in North America.
- It has deep expertise across the value chain in building digital solutions with dedicated companies for e-commerce, digital branding, warehouse management solutions, and supply chain solutions. It has demonstrated strong capabilities in designing and implementing e-commerce solutions for its clients in multiple subindustries including fashion, grocery, and lifestyle.
- It differentiates itself with an extensive supply chain product suite with a deep focus on warehouse management. It is one of the few players that offer specific point solutions for dock scheduling, yard management, dropship, and last-mile delivery.
- It has served multiple clients with innovative solutions. For instance, it built an IoT platform with Lavazza to connect and create an intelligent coffee machine to communicate and interact with the user, learning their tastes, schedules, and providing a hands-free, voice-enabled experience.

### Investments and innovation



- Reply has made multiple acquisitions in the last three years. In 2022, it expanded its presence in North America with acquisitions of Enowa LLC and The Spur Group, adding to its SAP and marketing practices, respectively. It has also strengthened its marketing capabilities by acquiring Sagepath and Threepipe in 2020 and Elbkind in 2019.
- It has two centers for demonstrating immersive retail experiences with augmented reality, virtual reality, and mixed reality where it showcases its latest technologies, 3D solutions, and growing selection of tools.

### Partner ecosystem



- Reply has built strong relationships with leading cloud and technology providers like Google, Amazon, Microsoft, SAP, Oracle, and Salesforce. It has codeveloped its digital twin solution with Microsoft and holds retail competency on AWS. It has multiple retail products in collaboration with technology partners such as MOSAIC, which integrates with SAP sales cloud, analytics cloud, and data warehouse cloud, and its physical-digital convergent store management solution, xStore platform built on Oracle.
- Along with the design and implementation of e-commerce solutions such as Salesforce Commerce Cloud, Hybris, and Magento, it also serves clients with niche Demandware and Shopware e-commerce platforms.

# TCS: RadarView profile



<b>Practice maturity</b>	★★★
<b>Investments and innovation</b>	★★★
<b>Partner ecosystem</b>	★★★★

Offers a rich portfolio of retail solutions that seamlessly integrate and orchestrate data across the retail value chain, harnessing the power of AI/ML.

Practice overview	Industry-specific solutions/offerings	Sample clients
<ul style="list-style-type: none"> <li>Practice size: 40,000+</li> <li>Active clients: 100+</li> <li>Delivery highlights: Delivery centers across 71+ countries</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p><b>16%</b> Share of retail/consumer biz., FY 2021</p> </div> <div style="text-align: center;"> <p><b>4.6%</b> YOY revenue growth, FY 2021</p> </div> </div>	<p><b>TCS OmniStore™</b></p> <p><b>TCS Optumera™</b></p> <p><b>TCS Future Stores</b></p> <p><b>TCS Optunique™</b></p>	<p>A unified commerce platform for creating a seamless shopping experience across channels</p> <p>An AI-based suite to optimize space, assortment, pricing, and SCM decisions in a unified manner</p> <p>A suite of AI-powered store solutions to improve productivity and enhance engagement</p> <p>An AI-led solution for unified and personalized experiences</p>
<b>Partnerships/alliances</b>		<b>Value chain coverage</b>
<div style="display: flex; justify-content: space-around;"> <div> <p>Accelerated and optimized cloud transformations on AWS</p> </div> <div> <p>Offered services on IBM Cloud ecosystem leveraging IBM Cloud Pak portfolio</p> </div> <div> <p>Developed joint solutions for adaptive supply chain</p> </div> <div> <p>Leveraged its conversational AI and digital UX solutions</p> </div> </div>		<div style="background-color: #e0f2e0; padding: 5px;"><b>Customer engagement</b></div> <div style="background-color: #e0f2e0; padding: 5px;">Fulfillment</div> <div style="background-color: #e0f2e0; padding: 5px;">In-store commerce</div> <div style="background-color: #e0f2e0; padding: 5px;">Inventory management and warehouse operations</div> <div style="background-color: #e0f2e0; padding: 5px;">Marketing</div> <div style="background-color: #339966; padding: 5px;"><b>Online commerce</b></div> <div style="background-color: #e0f2e0; padding: 5px;">Sourcing and procurement</div>

Darker color indicates higher value chain coverage:

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●

# TCS: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A major British multinational retailer	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Machine learning (ML)</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to outsource their business operations and manage them remotely.</li> <li>• TCS managed the client's end-to-end digital operations. It undertook process improvement led by robotic process automation. It also applied ML techniques to enable predictive improvement of processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved customer experience</li> <li>• Improved process efficiencies</li> </ul>
A US-based retail company	<ul style="list-style-type: none"> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve its logistics operations to meet growing business requirements.</li> <li>• TCS carried out the IT transformation by implementing a new warehouse management system, an e-commerce order management system, and a distribution processes activation system targeting the omnichannel model. It assisted in developing the complex system integrations with new warehouse systems throughout the program.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced lead time to the store by 50%</li> <li>• Increased e-commerce revenue by 89% between 2019 and 2020</li> </ul>
An India-based retail arm of a conglomerate	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to create an omnichannel business to enhance brand promise and customer experience.</li> <li>• TCS implemented an SAP-integrated delivery framework. It migrated existing data to the SAP HANA cloud in order to optimize business processes across retail and finance. It also added real-time visibility of business data to enhance user experience.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced overall data footprint by 50%</li> <li>• Simplified systems and processes</li> <li>• Enabled faster and improved decision-making</li> </ul>
A fashion retailer	<ul style="list-style-type: none"> <li>• Analytics</li> <li>• User interface/user experience</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted a customer-centric digital transformation for its e-commerce business.</li> <li>• TCS delivered a multiyear, multichannel transformation program. It conceptualized, designed, and built technology platforms that support a modern, efficient, and robust digital enterprise with scalable architecture that provided secure and real-time data capabilities.</li> </ul>	<ul style="list-style-type: none"> <li>• Created a scalable and flexible architecture</li> <li>• Improved customer experience</li> </ul>

# TCS: RadarView profile

## Analyst insights

### Practice maturity



- Retail and consumer business is one of the largest practices at TCS, with over 40,000 associates supporting projects for more than 100 retailers across the globe, contributing more than \$3 billion annually to the firm's overall revenue.
- Its strategy focuses on building a rich pipeline of IP-based assets such as patents, products, and platforms to align its business with the latest technology trends and consumer demand. It has bundled its retail solutions under a proprietary framework, TCS Algo Retail, that covers the digital transformation of the retail value chain.
- Customer-centricity has been a core strength of TCS. It has built strong capabilities with respect to customer engagement and satisfaction across industries, including retail. For instance, its OmniStore platform enables a unified customer journey across channels, using omnichannel interactive technology to enhance customer experience. It also has a significant presence in the fashion retail industry, helping multiple clients modernize their stores with digital solutions and infrastructure. These include N Brown, Marks & Spencer, and maurices.

### Investments and innovation



- TCS has strongly focused on organic growth and long-term customer relationships. It has expanded its portfolio by continuously looking for new value chain segments to add value. One of them is TCS OmniStore, a flagship product that resulted from investments done by the TCS co-innovation network.
- Its long-term, strategic focus on co-innovation with clients, startups, and universities has been the core of its innovation centers. In 2021, it launched its third Pace Port Innovation Hub in Amsterdam, which is expected to accelerate the implementation of innovative solutions for European clients. Focused on sustainable codevelopment, it provides rapid prototyping capabilities to retailers while keeping their carbon footprint in check.

### Partner ecosystem



- TCS has dedicated business units for several cloud providers such as GCP, AWS, and Azure. It also hosts a digital lab called Google Garage for testing new solutions built on the GCP platform for its clients. In addition, it has strong partnerships with SAP, Salesforce, and Oracle for implementing retail-specific enterprise and marketing solutions.
- It has delivered multiple supply chain and fulfillment solutions in partnership with Blue Yonder, Llamasoft, and Infor, leveraging their intelligent supply chain solutions. It collaborated with Adobe for its customer experience and marketing cloud and Marketo for managing marketing operations for clients.

# Tech Mahindra: RadarView profile



<b>Practice maturity</b>	★★★
<b>Investments and innovation</b>	★★★★★
<b>Partner ecosystem</b>	★★★★

Leverages NXT.NOW™ to develop human-centered vertical solutions through an as-a-service model with focus on accelerators, IPs, and frameworks for retail.

Practice overview	Industry-specific solutions/offerings	Sample clients
<ul style="list-style-type: none"> <li>Practice size: 10,000+</li> <li>Active clients: 150+</li> <li>Delivery highlights: Delivery operations spread across 90+ countries</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p><b>6%</b> Share of Retail &amp; CPG revenue, Nov. 2021</p> </div> <div style="text-align: center;"> <p><b>3%</b> YOY revenue growth, Mar. 2021</p> </div> </div>	<p><b>PhyGital Stores</b> Store re-imagination solutions for store operations, omnichannel commerce, and inventory tracking</p> <p><b>REIMSTM</b> A business intelligence and analytics solution for enterprise information management across retail KPIs</p> <p><b>Supply Chain Analytics</b> Cloud-based, pre-built adaptors and dashboards for supply chain reports</p> <p><b>Demand Sensing and Forecasting</b> An AI-based forecasting solution for efficient shelf management and pricing analysis</p>	<ul style="list-style-type: none"> <li>A global food and wellness products company</li> <li>An American lifestyle retailer</li> <li>A luxury Indian e-commerce company</li> <li>A US-based retailer</li> <li>A Finnish retailer</li> </ul>
<b>Partnerships/alliances</b>		<b>Value chain coverage</b>
<p><b>aws</b> Provided full stack AWS cloud services</p> <p><b>intel</b> Created a digital, in-store media network for stores with real-time analytics</p> <p><b>Microsoft</b> Utilized its cloud services, accelerators, frameworks, and analytics solutions</p> <p><b>One Network Enterprises™</b> Leveraged its digital platform for automating supply chain network</p>		<p>Customer engagement</p> <p>Fulfillment</p> <p>In-store commerce</p> <p>Inventory management and warehouse operations</p> <p>Marketing</p> <p>Online commerce</p> <p>Sourcing and procurement</p>
<p><b>SAP</b> Provided SAP outsourcing services across solutions</p> <p><b>ORACLE</b> Provided SaaS services and joint go-to-market (GTM) solutions</p> <p><b>shopify</b> Deployed its e-commerce platform for website building and migration services</p> <p><b>salesforce</b> Offered solutions based on Salesforce platform services across industries</p>		

Darker color indicates higher value chain coverage:

# Tech Mahindra: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A Finnish retailer	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to improve time to market for products split across multiple platforms.</li> <li>• Tech Mahindra built a Product Information Management (PIM) environment on AWS, enabling a fast end-to-end product onboarding and simpler asset management. It included provisioning, upgrading, and managing the infrastructure for PIM AWS accounts.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduced time to market from 10 days to 10 minutes</li> <li>• Achieved 50% cost savings on infrastructure</li> <li>• Realized minimum 85% savings per month</li> </ul>
A US-based retailer	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Blockchain</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to reduce invoice reconciliation efforts for its 1.2M customers per day across more than 400 stores.</li> <li>• Tech Mahindra implemented a blockchain-based freight management system and provided a single source of truth across all transactions. The system resulted in eliminating the need for manual effort in invoice reconciliation.</li> </ul>	<ul style="list-style-type: none"> <li>• Achieved annual saving of over \$18M</li> <li>• Reduced audit costs and interest charges</li> <li>• Eliminated incorrect payments</li> </ul>
A luxury Indian e-commerce company	<ul style="list-style-type: none"> <li>• Artificial intelligence (AI)</li> <li>• Automation</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to create a multicategory marketplace with a differentiated e-commerce business model to support its strong offline presence in the market.</li> <li>• BORN Group, a Tech Mahindra company, designed a multibrand (B2C) marketplace with seamless integration between online and offline assets (stores, warehouse, and supply chain). It enabled support for customers across multiple sales channels with initiatives such as Click &amp; Collect and Ship-from-Store.</li> </ul>	<ul style="list-style-type: none"> <li>• Created a flexible and scalable platform</li> <li>• Saw a 200% growth in website visits and orders</li> </ul>
A US-based multicategory retailer	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Radio-frequency identification (RFID)</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted an inventory management system to reduce the time for inventory tracking and counting.</li> <li>• Tech Mahindra implemented an RFID-enabled inventory management system that gave the retailer a real-time view into physical inventory. The solution helped reduce shrinkage due to thefts and misplaced items.</li> </ul>	<ul style="list-style-type: none"> <li>• Achieved efficiencies in stock counting, from an annual two weeks to a daily one-hour activity</li> </ul>

# Tech Mahindra: RadarView profile

## Analyst insights

### Practice maturity



- Tech Mahindra has a large retail practice serving over 150 clients globally. It has developed more than 60 solutions spanning across retail, CPG, and e-commerce verticals, generating 6% of its overall revenue.
- It has a strong focus on providing customers a seamless, omnichannel experience in retail. It specializes in providing end-to-end solutions with the help of its ecosystem partners and in-house capabilities, including AI-first solution, X-Retail platform, and supply chain analytics, among others.
- It has gained a lot of traction in the online experience space with the help of BORN Group, which has catered to several online brands worldwide to elevate their customer experience and engagement using human-centered design. For example, for oreo.com, it created a unique e-commerce experience that enabled personalized cookie orders and end-to-end order management.
- It is also among few service providers who have strong capabilities in physical design space supported by Pininfarina, an innovative and luxury design firm from Italy. For instance, it worked with Rakuten in Japan to create multistoried concept stores with unique experiences for customers.

### Investments and innovation



- Tech Mahindra is aggressively spending on improving its presence in e-commerce and customer experience. In 2021, the company acquired eight companies to augment capabilities such as data strategy expertise from Lodestone; website building and migration services on the Shopify Plus platform from WMW; and cloud and DevOps services from DigitalOnUs. It acquired BORN Group in 2019, a renowned firm in online customer experience and Mad Pow for online and offline promotion management.
- It has six Makers Labs across the globe that focus on innovative solutions. For example, X-RETAiL is a Maker's Lab IP, a next-generation retail transformation platform. Stori-Cool is another IP that builds an extended reality (XR) environment based on storytelling.

### Partner ecosystem



- Tech Mahindra has built a robust ecosystem of partners to augment its capabilities in customer experience, physical design, technology, and data strategies. It has a dedicated AWS CoE with over 1,500 accredited AWS associates, a dedicated Google Cloud Practice leveraging Google Cloud with a focus on IoT, AI/ML, and digital workspaces, and a dedicated Microsoft Practice for joint solutions and frameworks such as X-Retail on Azure.
- It also partners with IBM, Adobe, SAP, Salesforce, ServiceNow, Oracle, Magento, and Pega to leverage their capabilities for building innovative and customized solutions. For building retail-specific expertise, it has invested in niche companies like I-Tek, which specializes in RFID-based solutions, Perigord for artwork, labeling, and design packages for goods across industries, and PTC for its augmented reality/virtual reality (AR/VR) solutions.

# UST: RadarView profile

**U •  
S T**



<b>Practice maturity</b>	★★★
<b>Investments and innovation</b>	★★★★
<b>Partner ecosystem</b>	★★★★★

Focuses on client satisfaction through customized offerings. Drives continuous investments in retail-specific IPs via an innovation-led approach.

Practice overview	Industry-specific solutions/offerings			Sample clients																
<ul style="list-style-type: none"> <li>Practice size: 4,000+ employees</li> <li>Active clients: NA</li> <li>Delivery highlights: Operations in 21 countries</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>20+</p> <p>Years of industry experience</p> </div> <div style="text-align: center;"> <p>14+</p> <p>Years of average client tenure</p> </div> </div>	Edge for Retail	An AI/ML platform with a digital assistant for optimizing store experience	UST Omni™	A Fortune 100 retailer																
	UST SmartOps™	An IoT, AI, and advanced analytics platform for improving supply chain visibility	UST AiSense	A global apparel company																
		A proprietary process automation platform built on Microsoft Azure		A global Fortune 500 retailer																
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Darker color indicates higher value chain coverage: ● ● ● ●

# UST: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A Fortune 100 retailer	<ul style="list-style-type: none"> <li>• Automation</li> </ul>	<ul style="list-style-type: none"> <li>• The client was struggling with its manual data consolidation process during its merger with over 1,000 retail stores.</li> <li>• UST designed an automation solution for the client to reduce its data conversion cycle time by automating item mapping across different product divisions. It further helped the client improve accuracy in data conversion by standardizing data formats and improving data configurability.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved data quality by 25%</li> <li>• Reduced organizational costs by over 34%</li> <li>• Accelerated data conversion timelines</li> </ul>
A global apparel company	<ul style="list-style-type: none"> <li>• Automation</li> <li>• Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• The client was unable to generate insights for its business growth metrics with its existing on-premises data center.</li> <li>• UST facilitated cloud transformation for the client by designing an architecture to automate data flow between its existing on-premises data center to the cloud. It leveraged Azure environment to modernize the client infrastructure for end-to-end workflow automation.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved automation by 75%</li> <li>• Reduced wait time for code validation by 50%</li> </ul>
A grocery services company	<ul style="list-style-type: none"> <li>• Artificial intelligence (AI)</li> <li>• Automation</li> </ul>	<ul style="list-style-type: none"> <li>• The client wanted to enable a frictionless shopping experience for its retail customers by reducing their billing time.</li> <li>• UST leveraged its walk-in, walk-out frictionless shopping solution, which integrates AI, sensors, and cameras to improve the in-store customer shopping experience. It also helped store employees to generate sales and inventory insights by analyzing customer data through a mobile app.</li> </ul>	<ul style="list-style-type: none"> <li>• Provided a quick and touchless shopping experience</li> <li>• Increased store revenue</li> </ul>
A global paints company	<ul style="list-style-type: none"> <li>• User interface/user experience (UI/UX)</li> </ul>	<ul style="list-style-type: none"> <li>• The client was facing challenges to improve customer experience for consumers selecting wall paints. It wanted to offer a digital solution to help its customers visualize and select their wall paints.</li> <li>• UST developed a mobile application for the client, which enabled customers to experiment with colors and designs through their phones. The app further offers suggestions and guidance to customers in visualizing and designing their walls.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved customer experience</li> <li>• Facilitated over a million downloads of the designed mobile application</li> </ul>

# UST: RadarView profile

## Analyst insights

### Practice maturity



- UST leverages its innovation network comprised of its Infinity Labs and ecosystem partners to transform supply chain operations and in-store customer experiences for retail enterprises. It continues to strengthen its proprietary solutions and accelerators built on partner platforms with emerging technologies including AI, automation, and analytics.
- Optimizing supply chain is at the core of UST's digital services for the retail vertical. Through UST Omni, it offers predictive analytics capabilities to assist enterprises throughout the supply chain from demand forecasting to order requisitioning and tracing. Additionally, UST Omni enables enterprises to improve their demand forecasting accuracy by over 23% and reduce operational costs by over 8%.
- Further, it offers Internet of Things (IoT), ML, AI, and analytics capabilities through its Edge for Retail solution to transform in-store and online shopping experiences by showing personalized offers and services in real time. It also enables enterprises to customize this solution for different use cases and track customer experience from a centralized location.

### Investments and innovation



- In August 2020, UST invested in a California-based firm, Tasty, for advanced chemistry and AI for offering personalized shopping recommendations. It also offers technology-based recommendations for product development and inventory management to retail firms.
- In January 2021, it introduced contactless checkout capabilities through its Walk-In, Walk-Out solution, which is gaining traction among its retail clients.
- It continues to strengthen its co-innovation solutions with clients. In September 2021, it developed a temperature monitoring solution with Mydin, a Malaysia-based grocery chain. In February 2022, it also helped Nourish + Bloom Market develop an autonomous grocery store in partnership with Hitachi Vantara and Shekel Brainweigh.

### Partner ecosystem



- UST has invested in a comprehensive partner ecosystem with supply chain software vendors, cloud providers, and emerging technology vendors. It continues to invest in proprietary tools based on partner solutions to optimize its end clients' experience.
- It has a strategic partnership with AWS and has built UST SmartOps, its proprietary process automation solution on AWS cloud.
- It has over 700 Microsoft-certified professionals and continues to leverage Microsoft Azure services for digital transformation in the retail vertical.
- In 2020, it partnered with VSBLTY for its retail-specific solutions for use cases ranging from theft prevention and facial recognition to customer journey transformation.

# Wipro: RadarView profile



<b>Practice maturity</b>	★★★★★
<b>Investments and innovation</b>	★★★★★
<b>Partner ecosystem</b>	★★★★★

Delivers retail transformations with data-driven platforms and customer experience-focused solutions.

Practice overview	Industry-specific solutions/offerings		Sample clients														
<ul style="list-style-type: none"> <li>Practice size: 30,000+</li> <li>Active clients: 120+</li> <li>Delivery highlights: Operates in 55 counties</li> </ul>	ProDIG-e  Product Enrichment Engine (PEE)	An omnichannel product data orchestration platform for retailers  An analytics engine that derives insights from unstructured product data such as ratings, tags, and reviews															
<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>16%</p> <p>Share of retail, CPG revenue, Sept. 2021</p> </div> <div style="text-align: center;"> <p>2%</p> <p>YOY IT services revenue growth, Mar. 2021</p> </div> </div>	Wipro Holmes  Wipro Sight	An AI engine for making human-centric decisions such as financial planning and pricing strategy  A video analytics solution for real-time intelligence on in-store shopper behavior and operations															
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<b>Sourcing and procurement</b>																	

Darker color indicates higher value chain coverage:

# Wipro: RadarView profile

## Case studies

Client	Capability	Summary	Business Impact
A European apparel brand	<ul style="list-style-type: none"> <li>Augmented reality (AR)</li> </ul>	<ul style="list-style-type: none"> <li>The client wanted to improve its e-commerce experience to increase customer engagement and reduce returns.</li> <li>Wipro partnered with Scapic to jointly deliver a SaaS solution for easy creation and management of 360-degree 3D product visualization on its e-commerce website. Wipro augmented the solution with functionalities to provide relevant product information for online customers to increase engagement.</li> </ul>	<ul style="list-style-type: none"> <li>Conversions rose by 75% compared to product pages with flat photos</li> <li>A 60% reduction in returns</li> <li>A 300% increase in average time spent on individual pages</li> <li>150x more engagement on the canvas versus multiple images</li> </ul>
An American electronics retailer	<ul style="list-style-type: none"> <li>Analytics</li> <li>Artificial intelligence (AI)</li> </ul>	<ul style="list-style-type: none"> <li>The client needed a unified view of customers across all touchpoints and analytical capabilities for personalization.</li> <li>Wipro created a customer data mart to provide complete customer information. The data mart enabled a single data source across channels such as e-commerce websites, CRM systems, kiosks, microsites, and stores. It also developed models to deliver targeted marketing campaigns.</li> </ul>	<ul style="list-style-type: none"> <li>A 20% improvement in customer engagement on website</li> <li>A 5% improvement in promo effectiveness</li> <li>A 200-basis point improvement in enterprise net promoter score (NPS)</li> </ul>
A US-based office supplier retailer	<ul style="list-style-type: none"> <li>Analytics</li> <li>User interface/user experience (UI/UX)</li> </ul>	<ul style="list-style-type: none"> <li>The client wanted to reinvent the mobile shopping experience for its customers and generate new revenue opportunities.</li> <li>Wipro redesigned the client's mobile application and modernized the user interface (UI) experience. The application was quick and responsive due to its modular architecture and focused on new customer segments, including work-from-home customers. It also implemented a personalized experience with offers based on customers' purchase history.</li> </ul>	<ul style="list-style-type: none"> <li>Increased repeat purchases by 30%</li> <li>Improved customer experience</li> </ul>
A consumer goods company	<ul style="list-style-type: none"> <li>Blockchain</li> </ul>	<ul style="list-style-type: none"> <li>The client wanted to reduce revenue losses with reliable, anti-counterfeiting solutions.</li> <li>Wipro developed a blockchain-based tracking solution that enabled supply chain partners to update the status of items as it traversed from the point of manufacture to the point-of-sale, along with product origin information. The solution provided real-time visibility on a product and enabled tracking of its components.</li> </ul>	<ul style="list-style-type: none"> <li>Provided end-to-end visibility</li> <li>Reduced compliance cost</li> </ul>

# Wipro: RadarView profile

## Analyst insights

### Practice maturity



- With a large client base of leading global retailers and 22 years of experience in retail, Wipro's Consumer Business Unit accounts for 16% of its total revenue. Its success in the industry is driven by its consumer experience-led solutions and tech modernization with cloud migrations.
- Its digital offerings span across the retail value chain, from merchandising and store design to online and offline customer experiences. Digital solutions contribute 64% to the overall retail business, driven by a broad portfolio of next-gen offerings supported by AI-based platforms such as Wipro Holmes, Wipro Sight, and ProDIG-e.
- It increasingly invested in assets and platforms to address retail sector needs such as intelligent stores, marketplace connectors, blockchain-based supply chain tracking, and ML-based demand forecasting. It developed an extensive suite of customer experience and smart store solutions that are helping clients increase their in-store revenue. These include smart signages, electronic shelf labeling, proximity-based engagement technologies, real-time video analytics, shopper behavior analysis, and a vast array of payment solutions to identify and target customers with a personalized experience.

### Investments and innovation



- Over the past three years, Wipro has been on a growth spree across industry verticals including retail. It made its biggest-ever acquisition in 2021 with Capco, a financial services digital transformation firm. Other acquisitions include Edgile and Ampion in cybersecurity and LeanSwift in e-commerce. In 2020, it acquired Rational Interaction for enhancing its customer experience offerings and IVIA for its specialized retail IT services.
- With dedicated innovation centers and prototype labs, it is constantly incubating new solutions and patenting its ideas in retail, such as avatar-based virtual shopping, virtual reality-based immersive shopping, fraud identification using blockchain in supply chain, and live video analysis for personalized shopping using computer vision and machine learning (ML).

### Partner ecosystem



- Wipro leverages its strong partner ecosystem to deliver end-to-end digital transformations. It has alliances with leading hyperscalers such as Microsoft, Amazon, and Google for cloud capabilities. Among technology players, it partners with IBM for its enterprise and commerce solutions, Oracle for its retail suite, and Adobe for its customer experience cloud, among others. It has a strong network of niche retail industry partners like Happy Returns, AgilOne, Syte, Infor, Indyme, and o9 Solutions that strengthen its retail solutions.
- Wipro Ventures, its strategic startup investment arm, is currently engaged with 16 startups to build innovative enterprise software solutions in emerging areas such as conversational AI and the Industrial Internet of Things (IIoT).

# Zensar: RadarView profile



<b>Practice maturity</b>	★★★
<b>Investments and innovation</b>	★★★
<b>Partner ecosystem</b>	★★★★

Delivers retail transformation with customer experience-led engineering, hyperpersonalization, and IT modernization services.

Practice overview	Industry-specific solutions/offerings			Sample clients
<ul style="list-style-type: none"> <li>• Practice size: 4,700+</li> <li>• Active clients: 50+</li> <li>• Delivery highlights: 33 global delivery centers across the US, Europe, and South Africa</li> </ul> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>14%</p> <p>Share of retail revenue, Mar. 2021</p> </div> <div style="text-align: center;"> <p>64%</p> <p>Share of digital revenue, Mar. 2021</p> </div> </div>	Digital Experience Accelerator (DEXA)	Ruptive	An omnichannel customer engagement solution to reduce customer churn	• An American department store chain
	Smart Blox	Infinity CRO	A human experience innovation platform to create dynamic personas and store experiences  A blockchain-based platform for counterfeit, loyalty, and warranty management in retail  A conversion optimization product that improves digital revenue using customer behavioral insights	• A multinational technology company • An Australian supermarket • A British auction house • A South African retail company • An American home-furnishings company
Partnerships/alliances	Value chain coverage			
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p> <b>Manhattan Associates</b></p> <p>Implemented digital inventory, supply chain, and omnichannel solutions</p> </div> <div style="width: 45%;"> <p> <b>IBM</b></p> <p>Implemented an order management solution based on the IBM Sterling cloud</p> </div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p> <b>ThoughtSpot</b></p> <p>Leveraged its advanced AI and data analytics to predict and improve CX</p> </div> <div style="width: 45%;"> <p> <b>ORACLE</b></p> <p>Leveraged its retail cloud and SaaS applications to enhance retail business operations</p> </div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p> <b>Microsoft</b></p> <p>Leveraged its Azure IoT platforms and cloud services</p> </div> <div style="width: 45%;"> <p> <b>Adobe</b></p> <p>Provided digital experience platform solutions using Adobe Experience Cloud</p> </div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p> <b>ptc</b></p> <p>Implemented its IoT-based platform for retail clients, offering Smart Shelf Twin and Smart Cart</p> </div> <div style="width: 45%;"> <p> <b>Google Cloud</b></p> <p>Provided cloud-based digital experience platforms and enterprise applications for retail</p> </div> </div>	Customer engagement Fulfillment In-store commerce Inventory management and warehouse operations Marketing Online commerce Sourcing and procurement			

Darker color indicates higher value chain coverage:



# Zensar: RadarView profile

## Case studies

Client	Capability	Summary	Business impact
A British auction house	• Blockchain	<ul style="list-style-type: none"> <li>The client wanted to host a first-of-its-kind, live, virtual auction simultaneously across four cities, providing a modern auction experience.</li> <li>Indigo Slate, a Zensar company, leveraged its experience of executing virtual events to deliver a seamless online show with on-air and in-room graphic designs and live communication technologies. It developed a mobile application for the auction and implemented blockchain to generate token-based transactions to authenticate and execute the exchange.</li> </ul>	<ul style="list-style-type: none"> <li>Over \$420 million in sales on the day of auction</li> </ul>
An American department store chain	• Cloud	<ul style="list-style-type: none"> <li>The client wanted to modernize its warehouse management system (WMS) to support omnichannel customer fulfillment.</li> <li>Zensar migrated the retailer's legacy system to a cloud WMS using existing and custom IPs. It helped maintain a unified supply chain for in-store replenishment and direct-to-consumer fulfillment. The solution resulted in significant improvements in its operations at scale and provided a scalable business model and platform.</li> </ul>	<ul style="list-style-type: none"> <li>A 25%–30% increase in annual order fulfillment</li> <li>A 15%–20% improvement in picking productivity</li> <li>1.5M orders fulfilled in a single peak day</li> </ul>
An American home-furnishings company	<ul style="list-style-type: none"> <li>Augmented reality/virtual reality (AR/VR)</li> <li>Cloud</li> </ul>	<ul style="list-style-type: none"> <li>The client wanted to bring its galleries online in an innovative style to boost sales during the pandemic.</li> <li>As a strategic partner, Zensar managed its client's major applications such as point-of-sale (POS), order management system (OMS), and WMS. It implemented a VR solution for its galleries to provide a luxury in-store experience online. It also upgraded the infrastructure to a high availability site reliability engineering (SRE) model to support e-commerce 24x7.</li> </ul>	<ul style="list-style-type: none"> <li>24x7 availability</li> <li>Over 20% productivity gains and OPEX savings</li> </ul>
A South African retail company	• Cloud	<ul style="list-style-type: none"> <li>The client was looking for a single omnichannel commerce platform for multiple trading divisions, retail brands, and sales channels.</li> <li>Zensar built an Oracle-based, unified commerce platform using its multisite framework. The solution helped launch brand sites in multiple languages with features like shared shopping carts across brands.</li> </ul>	<ul style="list-style-type: none"> <li>Platform for multiple trading divisions</li> <li>Convenience and enhanced experience for its 100K members</li> </ul>

# Zensar: RadarView profile

## Analyst insights

### Practice maturity



- Zensar has an extensive portfolio of services across the retail value chain. With a large client base, it generates about 14% of its overall revenue from the retail industry.
- Following its strategy of “Return to Digital,” it has laid strong emphasis on digital solutions to expand its market presence. It has developed multiple digital retail offerings and platforms such as digital supply chain, customer experience transformation, Demand Nova, and Smart Window. It has also differentiated its services with offerings like Digital Experience Accelerator (DEXA) and Infinity CRO aimed at increasing conversion rates of online customers.
- It is strengthening its portfolio with advanced solutions like blockchain-based ZenSmartBox, computer vision and natural language processing-driven sentiment analysis, and AR/VR-led immersive shopping experiences. It has demonstrated advanced capabilities in blockchain by hosting a one-of-its-kind virtual auction for a British auction house, based on a blockchain network to authenticate multimillion-dollar transactions.

### Investments and innovation



- Zensar has prioritized its acquisitions based on three key parameters: capability enhancement, increased access to skills, and market access. In 2021, it acquired M3Bi, which enhanced its capabilities in the area of data engineering, analytics, and artificial intelligence/machine learning (AI/ML).
- With its applied research labs in India, it is developing cutting-edge innovations in AI, AR, the Internet of Things (IoT), deep learning, and blockchain. For example, it has demonstrated high-value extended reality solutions like virtual/augment walkthroughs, shopping experiences, and try-ons.

### Partner ecosystem



- Zensar utilizes strategic partnerships and alliances to deliver maximum business impact to clients. It has platform relationships with Azure and Google Cloud Platform to drive customer experience (CX), software engineering, cloud, and data capabilities. It leverages technology partner solutions like IBM Sterling Order Management, Adobe Experience Cloud, Oracle Commerce Cloud, ATG Web Commerce, and Salesforce Commerce Cloud for retail and marketing solutions.
- Among niche retail players, it works with players such as Thoughtspot for its search and AI-driven analytics platforms, Liferay for its digital experience platform, and PTC for its ThingWorx platform, which is a collaborative IoT retail platform.

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