



Customer-First Order Lifecycle Management

Putting the customer first
through omnichannel retail's
greatest challenge

► An Aptos White Paper

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Engaging Customers Differently.

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Keeping up with the customer is a never ending journey

While e-Commerce as we know it has been around for nearly thirty years, complex omnichannel fulfillment, including real-time enterprise inventory, same-day shipping, and numerous fulfillment options that include the store, is a relatively recent phenomenon, and one that customers are accepting as the “new” retail reality.

According to the NRF:

- 80 percent of consumers believe these innovations have improved their online shopping experience
- 66 percent said that technology improved their in-store experience
- 3 percent said that it had improved their experience shopping via mobile.

These omnichannel capabilities are not only helping increase customer loyalty, but are quickly helping remove the uncertainty from shopping—something the National Retail Federation (NRF) credits as a major driver in why customers select retailers and brands.

For many retailers, omnichannel capabilities are still a work in progress, but we are starting to see some trends emerge, especially in terms of order fulfillment and management from the industry’s biggest brands:

- **New retail partnerships for purchasing and returning items:** Convenience is king, and retailers know it. Toys R Us and Target have recently partnered, allowing shoppers to complete their ToysRUs.com orders at Target.com. Walgreens and FedEx have partnered to make online returns more convenient, and shoppers can now pick up their Urban Outfitters, Free People and Anthropologie orders at local Walgreen stores.
- **New shipping options for quicker deliveries:** To keep up with Amazon’s one-day shipping, Macy’s recently announced it will relaunch same-day shipping, allowing customers to filter available inventory by zip code. Not to be outdone, Walmart currently offers unlimited same-day grocery delivery for a \$98 annual fee in four markets and will be expanding to 200 markets in Q4 of 2019 covering 50% of the U.S. population. Target now offers a dedicated same-day delivery section of its website via Shipt.
- **New and improved pickup locker options for online orders:** Home Depot introduced pickup lockers for online orders in 1,100 locations, while Amazon is working to double down on its locker network. Amazon’s goal is to evaluate over 1,000 new locations for its lockers every month.

Even though progress has been made to get products into the hands of shoppers quicker than before, it’s clear that we have come to learn a time-tested order management truth: keeping up with ever-expanding customer expectations for visibility, flexibility, speed and price is still really hard.

Part of why things are so challenging is the speed at which shopper expectations are escalating. While we have seen shopper expectations expand before, we’ve never seen them expand at the pace they have in the past few years. **In less than a decade, customers have evolved from relatively satisfied online shoppers with little appreciation for connected experiences to a population of omnichannel juggernauts, effortlessly shifting across channels and touchpoints.** They expect retailers to offer personalized, informed and empowered experiences complemented by virtually limitless fulfillment flexibility.

Retailers have zero tolerance for disappointment at any of the countless steps in today's complex, winding, shifting shopping journeys. It is critical for retailers to not only utilize the right tools that will expand their offers but to make the right commitments to satisfy increasingly demanding shoppers. In short, retailers must ask themselves, "Will this investment help meet shopper expectations?"

Currently, most major order management solution providers make inventory optimization the focus of their investments. While there is certainly value in that approach, something gets lost along the way—the customer. By using an inventory-centric approach, retailers may miss the mark on meeting those shopper expectations and will likely miss the principle that has guided successful retailers since Harry Selfridge reinvented retail over 100 years ago: the customer is always right.

In this paper, we will make the case as to why customer-first OMS should be the guiding light to keeping pace with rapidly shifting shopper expectations:

- ▶ We will introduce research that describes just how difficult it is to keep pace with the consumer.
- ▶ We will share the findings from benchmark research we sponsored to specifically understand where retailers are struggling and where they are succeeding throughout the order management lifecycle.
- ▶ We will explore the clear and specific correlation between effective customer-centric order management processes and successful business performance.
- ▶ We will compare and contrast the customer-first order management approach with a supply chain-first order management solutions approach, and we will highlight what the differences mean to your ability to stay relevant to your customers throughout the entire shopping journey.

Keeping pace with shifting shopper expectations is more difficult than ever

To many retailers, the long list of fulfillment variations most customers expect must feel endless. BOPIS (Buy Online Pick Up In Store) is really just the beginning, and as shoppers become more connected and creative, the number—and variety—of options they expect continues to increase. After all, most shoppers are buying items on a variety of channels: 70% buy clothing both in-store and online.¹

So, what exactly do shoppers today expect? A summary of recent research helps paint a picture of the comprehensive expectations that consumers bring with them to every shopping journey:

Seamless Channels

Research and experience tell us that as shopping journeys continue to evolve, consumer expectations and requirements increase exponentially. Today, shopping easily across multiple channels is essential: 86% frequently shop in a store, 46% frequently shop online and 44% frequently shop via mobile.

Despite consumers expecting the ability to shop seamlessly across channels—e.g., to start the sale anywhere and to finish the sale anywhere—only 7% of retailers currently provide a complete unified commerce experience, according to a recent report by BRP.² However, retailers are well aware of this discrepancy: another 50% plan to implement unified commerce in three years.

Quick, Fast Shipping

Amazon Prime has completely changed the shipping and fulfillment environment in a matter of years. Whereas consumers expected deliveries to arrive in a 9-day delivery window in 1995, shoppers expected deliveries within 24 hours in 2018.³ In addition to speed, consumers expect delivery costs to be free: nearly 40% of consumers expect free two-day shipping.⁴

This leaves fulfillment success almost entirely on the shoulders of retailers. Organizations are currently charging customers only 80% of overall delivery cost, a number that won't change any time soon, because only 1% of customers are willing to absorb the total cost for last mile deliveries.⁵

An Integrated Store

Despite long-standing forecasts of the demise of the store, its appeal continues to climb and it has become an essential part of most shoppers' journeys. In fact, 61% of shoppers would rather shop with brands that have both physical locations and ecommerce sites, compared to brands that are only online.⁶

As for fulfillment's relation to the store, consumers love having options. The appeal of BOPIS has grown over the years. According to a National Retail Federation (NRF) survey, 70% of consumers aware of BOPIS have tried it, primarily to avoid paying for shipping. Impressively, the majority of shoppers who tried BOPIS believe it improved their shopping experience.

But shoppers hope for more than just BOPIS. We know that 63% would like to be able to use curbside pickup (tried so far by only 27%), 56% want merchandise delivered to the trunk of their cars (tried by 19%), and 50% want to retrieve purchases from a locker (tried by 16%).⁷

Product Visibility

No matter the terms of engagement, shoppers want honest insight into product availability and fulfillment: 51% of shoppers say sales associates need inventory visibility and 46% say they need the ability to look up product details.⁸

In addition, shoppers are tracking fulfillment of products across channels. In fact, 73% want the ability to track online orders across all points of interaction. Once the item is in hand, shoppers want flexibility for returns: 68% are more likely to choose a store offering an automated return process.

Not surprisingly, retailers are struggling to keep pace with customer expectations

As an industry, we've struggled to adapt to the pace at which expectations are expanding. Despite many retail leaders making significant investments—billions of dollars of investments—to offer new fulfillment options and services, the majority of the industry still falls behind. Only 38% of retailers say they have a clear and well-defined omnichannel order management strategy.⁹

While there are many reasons for our inability to keep up with shopper expectations, most experts agree that one primary cause for poor performance is slow recognition of the importance of integrated, customer-centric order management technology.

Despite the rapid expansion of expectations in the past few years, the majority of retailers have only recently come to realize the critical role that order management technology plays in their ability to fulfill omnichannel expectations. Fewer still have integrated their OMS technology with their POS and CRM platforms in order to connect the customer to the store, to the order and to fulfillment operations.

To better understand the state of order management adoption, the profitability of omnichannel order lifecycle management, and the relationship between OMS technology and omnichannel success, Aptos commissioned a comprehensive benchmark study from Retail Systems Research.

The research investigated retailers' challenges, their current capabilities, the profitability of their operations, the maturity of those operations and the role technology plays in their process. The research clearly showed that retailers are struggling to find solid footing. The surveyed retailers reported a plethora of challenges, particularly where customer expectations are concerned:

- ▶ Unpredictable consumer demand: 43%
- ▶ Need for greater fulfillment speed: 41%
- ▶ Shoppers' desire for free shipping: 38%
- ▶ Rising volume of cross-channel returns: 38%

As expected, the research also uncovered several findings that highlight the struggles retailers face when attempting to overcome these challenges:

- ▶ Only 54% of retailers said they had fully implemented tracking when fulfillment happens in a different location than demand.
- ▶ Just 52% provide internal inventory visibility across sales channels.
- ▶ Barely half (51%) offered online shoppers visibility to in-store inventory.
- ▶ Somewhat shockingly, only 48% of retailers track customer satisfaction with store fulfillment processes.
- ▶ Most surprisingly, only 48% had the ability to take, edit or view orders across multiple channels.

For the vast majority of retailers, full omnichannel maturity remains elusive. Only 43% of retailers rated their omnichannel experiences as even “barely competent.” **These struggles immediately beg several questions, including the question among the most important to every successful CEO: How many shopping journeys, in the midst of all these barely competent experiences, end in disappointment?**

How much risk are retailers willing to take with shopper loyalty?

Shopper intolerance of even mild disappointment has been well documented in the past few years, and mediocre experiences put customers’ loyalties in play, which makes the next research finding so surprising to us. Despite all the evidence of shopper intolerance and C-Suite focus on customer experiences, when the analysts at RSR dug deeper and asked how they would rate the maturity of their omnichannel operations, the results were truly disconcerting:

- ▶ 12% indicate that their omnichannel operations are differentiating
- ▶ 40% indicate that their omnichannel operations are performing
- ▶ 27% indicate that their omnichannel operations are competent
- ▶ 9% indicate that their omnichannel operations are inefficient
- ▶ 7% indicate that their omnichannel operations are inconsistent

Only 12% of respondents feel that their omnichannel experiences are “differentiating” while over 40% are struggling to achieve mere competency.

Reports that customers are unhappy and shopping satisfaction is slipping, then, should come as no surprise. **As an industry, customers are giving the retail industry’s shopping experience a C grade overall, scoring just 77.4 (out of a possible 100), according to a 2019 American Customer Satisfaction Index survey.**¹⁰

The expanding role of the store as a fulfillment option in so many shopping journeys also adds to the challenge of keeping the customer first. Operational challenges abound, and as they require people and processes that are neither hired nor optimized for fulfillment operations, these options are typically among the highest risk options. Table 1 below identifies the challenges and opportunities inherent in each store fulfillment option:

| Fulfillment Type | Complexities & Key Considerations | Impact on Store Operations | Optimal Time for Store to Perform This Task | How are Industry Leaders Succeeding? | The Aptos Customer-First OMS Advantage |
|-----------------------------|--|----------------------------|---|--|--|
| Buy Online/ Pickup In Store | <ul style="list-style-type: none"> Shopper traffic patterns Maintaining Inventory Levels (Safety Stock & Presentation) Allocation of in-store inventory Enterprise Inventory and Order Visibility Store Allocation based on an Omni-Channel forecast Space Utilization | High | <ul style="list-style-type: none"> When store is not busy; however, customer deadlines require ongoing pick/pack/ship operations | <ul style="list-style-type: none"> Relentless connectivity between channels Instant visibility to all-channel order activity & inventory positions Order "gatekeepers" to limit overpromising and/or unacceptably depleting store stock levels Task management tools manage Pick/Pack/Ship and balance between servicing customer and servicing store ops Advanced assortment & allocation processes optimize local inventory based on fulfillment demand to minimize handling Tight POS/OMS integration to allow for order changes while in store Task management tools assign and prioritize tasks to ensure store inventory is immediately reserved once ordered | <ul style="list-style-type: none"> Real-time integration between Digital Commerce/OMS/POS Real-time inventory fuels Available to Promise to protect store stock levels Order Broker manages order volume according to demand and store capacity In-store visibility to all orders via prioritized worklists Carrier integration and best rate shipping calculations Options for constant customer communication at any stage of order life cycle Options to add to transaction once in store for pickup Service Provider integration |
| By Online/ Ship From Store | <ul style="list-style-type: none"> Shopper traffic pattern Inventories (Safety Stock & Presentation) Labor & Space requirements for Pick, Pack & Ship Operations Enterprise Inventory and Order Visibility Service Provider Service Levels & PU&D Times Inventory Flow Constraints | Very High | <ul style="list-style-type: none"> Typically, most of these orders can be batched and shipped late in the day; however, customer demands may require ongoing pick/pack/ship operations Coordinated with store receipt of inventory to enable cross-dock like efficiency | | |
| Buy Online/ Ship To Store | <ul style="list-style-type: none"> Inventory flow constraints Store allocations based on an Omni-channel forecast Space utilization for Staging & Pickup flow | Low | N/A | | |
| Same-Day Delivery | <ul style="list-style-type: none"> Shopper Traffic patterns Maintaining Inventory Levels (Presentation) In-store order visibility Pick, Pack & Stage for pickup Counter Connectivity, PU&D Times | Very High | <ul style="list-style-type: none"> Customer demands will require ongoing pick/pack/ship operations | | |
| Endless Aisle | <ul style="list-style-type: none"> Safety stock levels Presentation stock In store order visibility Carrier pick-up times Pick Pack & Ship Outbound flow constraints | Very High | <ul style="list-style-type: none"> When store is not busy; however, customer deadlines may require limited ongoing pick/pack/ship operations Typically, most of these orders can be batched and shipped late in the day Coordinated with store receipt of inventory to enable cross-dock like efficiency | | |

Table 1: The Inherent Complexities and Operational Challenges of Store Fulfillment Options

Clearly, fulfilling omnichannel customer expectations is—or should be—priority number one for most retailers.

Moving beyond the status quo by moving beyond supply chain-centric order management

So exactly how do we go about fulfilling customer expectations throughout the order lifecycle?

There are no easy answers. The challenges are numerous, complex and dynamic. However, at Aptos, we believe that the first step to successfully keeping pace with customer expectations requires a new way of thinking about order management.

As the large body of evidence indicates, traditional approaches to order management that focus on optimizing supply chain efficiency and inventory productivity are clearly falling short with shoppers. Despite significant investments in supply-centric OMS processes, shoppers still crave—if not demand—more flexibility, more choices, more visibility, greater speed and lower costs. Study after study reminds us that satisfaction with the retail experience keeps slipping while expectations go unmet and limited choices leave customers uninspired.

It seems clear that putting profits ahead of experiences has not won enough shoppers, and that a course correction is now required for any organization hoping to remain agile enough to keep pace with shifting customer demands.

Our vision for omnichannel enterprise order management centers on an entirely new approach.

We believe that sustainable success can only be achieved through order management processes that anticipate, adapt and align to shifting customer expectations, rather than supply-centric processes that anticipate and align network inventory resources in order to optimize efficiency.

We believe that our solutions uniquely position us to help our retail clients put the customer first. Our platform holistically connects our order management solution to our point of sale and customer relationship management solutions to create interconnected experiences that empower shoppers with personalized and integrated choices that are rich with the flexibility they desire. Consequently, our interconnected and integrated platform gives our retail clients every possible chance of converting and keeping more customers.

By contrast, most order management solutions available today are decidedly supply-chain centric. Rather than helping retailers implement processes that align with the customer, these solutions prioritize supply chain challenges and opportunities. Of course, focusing on inventory productivity is not in and of itself a bad thing. Efficiency is almost always good. However, by definition, supply-chain centric solutions force customer needs to take a back seat to inventory concerns. Product roadmaps and development priorities typically center on optimizing inventory productivity and minimizing handling costs.

Customer needs are more often resolved as a byproduct of this approach, rather than making the customer the driving force behind every strategic decision. **When supply-chain issues are given top priority over customer experiences (and most attention and investment is focused on optimizing the flow of orders throughout a network), fulfilling shopper expectations will be left behind.**

It is time for Order Management to evolve

We believe that the sun is rapidly setting on the philosophy that mandates that customer experience optimization should take a back seat to anything, and certainly not supply-chain optimization.

Most leading research firms agree with our premise.

A recent Forrester Wave™ on omnichannel order management clearly articulates how the “OMS is the unsung hero of digital commerce:”

“Today’s customers are already engaging in omnichannel commerce and increasingly expect higher quality experiences across digital and in-store touchpoints...A growing demand for omnichannel fulfillment and experiences is forcing retailers to respond or risk falling behind in delivering on their customers’ expectations. Omnichannel commerce remains a top investment priority for digital commerce leaders. And a well-oiled OMS lies at the heart of these initiatives.”¹¹

Gartner’s *Market Guide for Retail Distributed Order Management Systems* also discusses the need for customer-centric solutions, and they do so in extremely plain language:

“Consumers are expanding their use of shopping options, thus increasing order fulfillment complexity for retail and direct-to-consumer companies, and driving investment in distributed order management systems.”¹²

IDC found the world market for order management growing at a rapid pace in its recent study:

*"Growth in the order management market is driven by the need for omni-channel 'buy anywhere, fulfill anywhere' processes in digital commerce. As the digital commerce world evolves, so too does the demand for modern order management applications."*¹³

Finally, retailers, too, are beginning to recognize and invest in this paradigm shift. **More and more retailers now recognize that staying competitive means putting the needs of the customer first**, according to a recent Retail Systems Research Profitable Customer Engagement survey, sponsored by Aptos:

When asked about the primary objectives for their cross-channel strategies, the top two priorities, by far, for both retail "winners" and all others, were customer-centric: saving the sale and offering options and prices that will keep shoppers away from the competition (69% and 67%, respectively). Supply-chain centric priorities such as inventory productivity, high margins and even out of stocks are much further down the priority list.

The study also identified a correlation between order management effectiveness and winning performance. Sixty-three percent of retail winners consider their cross-channel fulfillment operations to be very profitable, as compared to only 17% of all other respondents. Additionally, there is a wide discrepancy between winners and all others when asked which omnichannel order management processes are fully implemented:

| | Winners | All Others |
|---|---------|------------|
| In-store visibility to consumers' online shopping | 74% | 24% |
| Internal inventory visibility across all channels | 74% | 28% |
| Tracking in-store fulfillment costs | 71% | 24% |
| Ability to take/edit/view orders across channels | 65% | 24% |
| Tracking customer satisfaction with store fulfillment | 59% | 34% |

Given that every one of the processes investigated above is directly related to the quality of the customer experience, **it seems fair to infer that successful execution of customer-centric order management processes has a direct impact on retail performance.** The RSR study's authors took the relationship between winning performance and customer-centric order management processes one step further:

"Retailer Winners tend to drive the priority behind unpredictable consumer demand, rising volumes of consumer returns, and consumer expectations for fast shipping...[and] when comparing Retail Winners' top priorities to their peers, it becomes clear that these Winning retailers have firmly kept their focus on consumers and not competitors...Winners stay fixated on issues defined by consumers, rather than competitors."

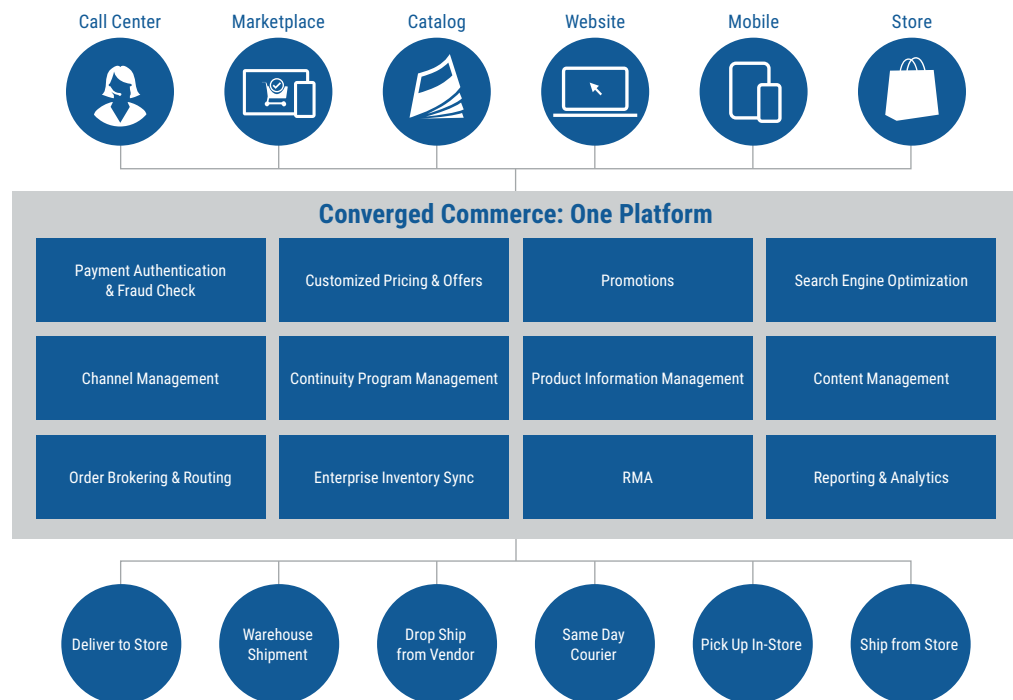
The evidence is clear: It is time to move beyond a singular focus on the supply chain and logistics, because without the customer, the supply chain becomes irrelevant.

Aptos Enterprise Order Management: Putting the customer first

From day one, we have understood the critical importance of creating an order management platform that empowers retailers with the agility required to anticipate, align and quickly adapt to ever-shifting customer expectations.

So we established a single commerce platform, built from the ground up to ensure that digital commerce, content management, product information management, and all things order management are completely connected. Because of this visionary decision, the platform is, by definition, inherently customer-centric.

All applications are completely interdependent, and changes in one application directly impact all others, and all development processes must therefore account for and optimize every change throughout the platform.



Any changes or enhancements made to the transaction management applications to account for shifting customer expectations are immediately accounted for throughout the entire platform. And the same holds true for any changes made to the order management application: These changes are accounted for in all transaction management applications across the platform.

Our corporate position, “Engaging Customers Differently,” reflects our commitment and unparalleled ability to put the customer front and center, and our guiding philosophy is simple: One integrated platform ensures that the entire enterprise is armed with a single view of every order to work seamlessly together to put the customer first.

So, then, how does our order management philosophy translate into giving our clients the ability to meet shopper expectations?

In addition to being a holistic part of our digital commerce solution, Aptos Enterprise Order Management connects all in-store and digital touch points, including complete integration with Aptos POS and Aptos CRM, ensuring a unified and integrated view of the customer, the online/offline intersection of commerce, order brokering, order management, order fulfillment, logistics, analytics and everything in between:

- ▶ Our Singular Retail platform connects our order management solution and our CRM solution to empower every channel with personalized options, preferences and offers that are unique to each shopper and differentiating for the retailer.
- ▶ Our Singular Retail platform instantly connects every order to every store to ensure seamless integration and execution of every order that in any way touches the store, whether it is pick up in store, ship from store, ship to store or return in store.
- ▶ Our Singular Retail platform delivers real-time order brokering logic that is integrated to our inventory, warehousing and merchandising solutions that connect shopping cart options to critical measures that drive retailers' abilities to keep their promises: Available to Promise, Capable to Promise and Profitable to Promise.
- ▶ Real-time inventory visibility from across the enterprise, combined with powerful order brokering and sourcing logic, ensures that every order meets each customer's expectations in the most profitable manner. Each order is monitored and tracked throughout the lifecycle, and exception alerts ensure that orders are fulfilled on time with minimal disruption or disappointment.

Our mission: Delivering informative, personalized, responsive, empowering and reliable capabilities throughout the order management lifecycle. Our passion: Making it easy for retailers to say "Yes" to more customers, more often:

Informative: *Data that Drives Shopper Decisions*

Knowledge is power and informed shoppers typically turn into happy customers. The trick is to give them the information they need when and where they need it in order to make purchase decisions, and to answer every inquiry with confidence:

Is my size in stock in my local store?

Yes, we can show you that.

What are the fastest delivery options?

Yes, we can show you that.

What are the cheapest delivery options?

Yes, we can show you that.

Can I pick up my order in store in 15 minutes?

Yes, you can.

Personalized: *Relevant, Timely and Unique to Each Shopper*

Shoppers today have too many choices. By helping them narrow the list with personalized options and offers, and by making their journeys efficient by remembering their history and choices, retailers can bring those shoppers back time and time again:

Does my loyalty status entitle me to free shipping?

Yes, it does.

Is it possible to set up an automatic monthly re-order based on my purchase history?

Yes, it is.

Is my profile data shared across channels to minimize order entry time?

Yes, it is.

Will store associates have access to my order history?

Yes, they will.

Responsive: *Adapting to the Shifting Needs of Every Customer*

Customers are impulsive, unpredictable and impatient. Keeping them happy means having the ability to give them the answers they desire as expectations shift:

A different size from another store today?

Yes, we can do that.

Split the order between home and work?

Yes, we can do that.

Ship the order to the store to save shipping?

Yes, we can do that.

Promise an item from a PO to save a sale?

Yes, we can do that.

Empowering: *Shopping on the Customer's Terms*

Consumers expect flexibility and options throughout the shopping journey. Those who empower shoppers with maximum choice have the best shot at earning maximum wallet share:

Start an order online and complete it in store?

Yes, you can do that.

Ship one order to three shipping locations?

Yes, you can do that.

Ship part of an order overnight, part ground?

Yes, you can do that.

Order online, pickup in store, return to data center?

Yes, you can do that.

Reliable: *Consistently Keeping Promises*

Customers have little patience, and they have even less tolerance for disappointment, especially once their order is placed and money is collected. Keeping them coming back requires flawless execution and relentless communication:

Will my order be ready when I get to the store?

Yes, you can count on it.

Will my order arrive in time for mom's birthday?

Yes, you can count on it.

Will you have a record of my order no matter where I return it?

Yes, you can count on it.

Will store associates be able to answer my order questions when I arrive for pickup?

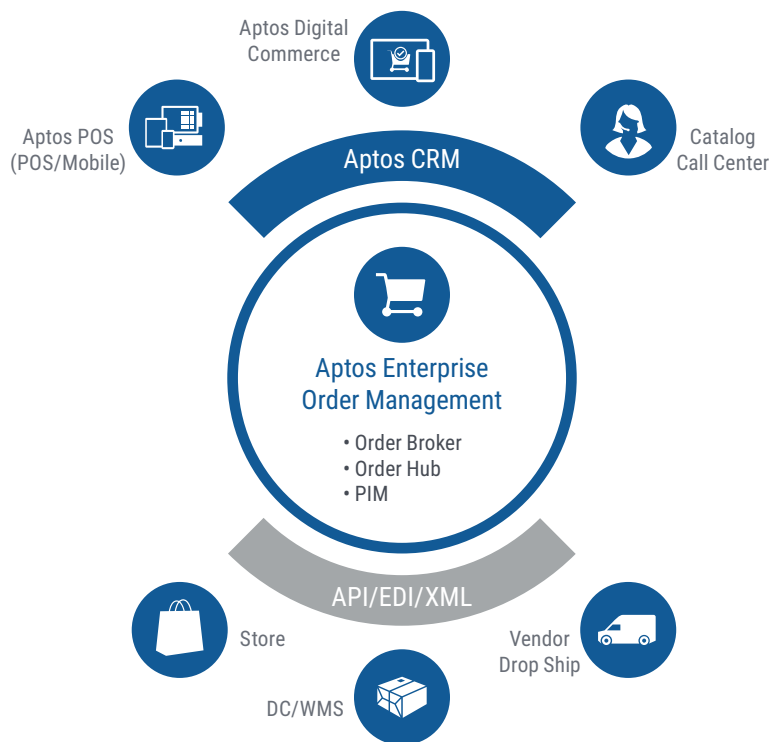
Yes, you can count on it.

Ever-increasing consumer expectations for order delivery and pickup flexibility, options and speed make it more important than ever to have an integrated arsenal of order management tools capable of managing high volumes of orders across multiple channels and locations.

With our customer-first Enterprise Order Management platform, retailers can tap into the power of a single, integrated view of the customer, inventory, and the order to profitably manage every order throughout its entire lifecycle to ensure customer expectations are consistently met.

A Centralized Commerce Hub

No matter the retail channel, Aptos Enterprise Order Management serves as a central commerce hub to ensure efficient, profitable and on time execution of every order through every fulfillment option.



Aptos Enterprise Order Management stands out in the world of order management as it enables retailers to synchronize shipments of complex orders, understand drop-ship data formats and processing, support multiple suppliers with varying inventories and integrate with existing systems—a formula for the type of omnichannel buying scenarios today’s customers demand and the type of order management that can take your enterprise into the future.

Aptos Enterprise Order Management puts the customer first, which leads to relationships that last.

Contact us to learn how Aptos can help your organization deliver seamless experiences that truly put your customer first.

Source:

- ¹ Google/Ipsos, "U.S. Shopper Tracker Study," 2018.
- ² BRP, "2018 Customer Experience/Unified Commerce Survey," 2018.
- ³ McKinsey, "The State of Fashion 2019," 2019.
- ⁴ NRF, "Consumer View Winter 2019," 2019.
- ⁵ Capgemini, "The Last-Mile Delivery Challenge," 2019.
- ⁶ Google/Ipsos, "U.S. Shopper Tracker Study," 2018.
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- ⁸ Salesforce and Publicis.Sapient, "Shopper-First Retailing," 2018.
- ⁹ Forrester, "State of Online Retailing," March 2019.
- ¹⁰ ACSI 2019 Survey, August 2019.
- ¹¹ Forrester, "The Forrester Wave™: Omnichannel Order Management Systems, Q3 2018," 2018.
- ¹² Gartner, "Market Guide for Retail Distributed Order Management Systems," 2018.
- ¹³ IDC, "Worldwide Order Management Applications Forecast, 2018-2022," 2018.

About Aptos

Aptos: Engaging Customers Differently

Aptos is the largest provider of enterprise software focused exclusively on retail. Our cloud-based Singular Retail™ solutions are trusted by over 1,000 retail brands in over 65 countries. With industry-leading omnichannel commerce and merchandise lifecycle management solutions, we help retailers develop dynamic and responsive assortments, streamline operations and deliver integrated, seamless experiences...wherever shoppers choose to engage. More than 1,300 colleagues share our collective passion for engaging customers differently, and we are committed to developing relationships built on trust and tangible value by partnering with our clients to create agile retail enterprises that are built to thrive in an era of constant change.

Learn more at info@aptos.com and www.aptos.com.

