Retail Survey 2017

What consumers are telling us

February 2017

kpmg.com

Introduction

For the third year running, KPMG in the UK has collated 1,476 responses from employees, surveying the purchase and returns experience across 283 brands and retailers. Our survey has been collated over an eight week period from November 2016 to January 2017, aimed at identifying trends and analysis from the Black Friday and Christmas spending period. Retail continues to be an industry experiencing tremendous change. The ability for executive teams to address this is imperative.

This report covers the following key themes:

Black Friday is now 'Black Four Weeks'

- Black Friday continues to extend its reach
- What did people buy?
- Retailers' approach to planning is becoming more sophisticated
- Savvy consumers are wising up to Black Friday discounts
- Black Friday backlash?

The 'mobile natives' are here

- Why are millennials so important?
- Mobile purchasing means consumers want their products anytime, anywhere
- The rise of the social networking shopper.
- Whatever generation, whatever sector, improving CX is essential

The evolution of delivery and returns

- 'Track my customer' will become just as important as 'track my parcel'
- Free returns is a key criteria for consumers, but at a cost to the retailer
- Last mile delivery services gets innovative

The store isn't dead!

- Stores are still an essential part of the journey – as a showroom and collection hub
- Click & Collect – clutter or a chance to sell?
- Changing role of the store is calling for a review of profitability

The rise of automated operations

- Beyond tracking & stock check
- AI & robotics in the value chain
- Automation is possible for smaller retailers

Outlook for 2017

- The perfect storm, but the perfect opportunity
- How can retailers ride the tide?

This years survey has been collated over an eight week period from November 2016 to January 2017.

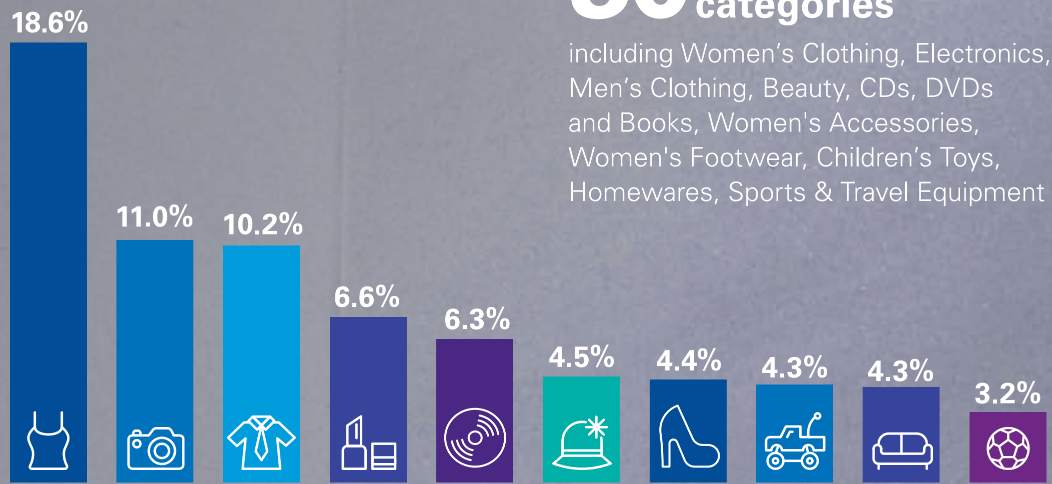
Using a combination of database cleansing and dynamic dashboard tools, we have analysed our findings across a sample of 283 retailers and brands, and 30 product categories. We have also used customised data scraping tools to examine the sales propositions of 50+ of the largest UK retailers.

283
unique brands and retailers

1,476
employee responses from KPMG in the UK

30 categories

including Women's Clothing, Electronics, Men's Clothing, Beauty, CDs, DVDs and Books, Women's Accessories, Women's Footwear, Children's Toys, Homewares, Sports & Travel Equipment



Respondent Generational Groups

18 or under	Generation Z
19-35	Millennials
36-51	Generation X
52-70	Baby Boomers
Older than 70	Silent Generation

Black Friday is now 'Black Four Weeks'

Black Friday continues to extend its reach

The Black Friday trend continues to re-shape the UK retail trading pattern, with the discount period extending up to a month for some retailers. However, our survey data highlighted that across those four weeks, 44% of total Black Friday purchases were made on the Friday itself, with the remaining purchases spread out over the wider 'Black Friday' period. The duration and number of promotions on offer varied greatly by retailer and by product category, with some retailers offering discounts across their entire offering, and others employing a more tactical and targeted approach.

What did people buy?

Overall, Women's Clothing, Electronics, Men's Clothing and Beauty were the most popular categories, accounting for 56% of the total Black Friday (27 November) purchase volume. Electronics promotions were spread across the longest period, with many discounts remaining for the full month. In comparison, Women's Clothing promotions were spread across a shorter 5-day period.

Interestingly, our data revealed that the volume of electronics purchases fell from 20% during the designated 'Black Friday period' to 9% in the regular, non-Black Friday period covered by the survey. This suggests that electronics remain one of the 'big ticket' items that consumers delay purchasing until Black Friday. This dovetails with the trend of consumers using more price comparison sites in order to find the best bargain, with 55% of those who purchased electronics on Black Friday making price comparisons during their path to purchase.

Retailers' approach to planning is becoming more sophisticated

The earlier, longer promotional period requires retailers to re-write the way in which they plan for their peak sales and promotional periods. Many retailers are following the successful example of discounters by managing product margins much more effectively, incorporating special buy lines into the buying process months in advance and only offering and promoting discounts on those selected categories or products.

Discounting too aggressively during Black Friday and not separately planning for the overall festive period can lead to misjudgement of pick ups and declines in rate of sale, resulting in either lower stock levels and reduced availability in-store during Christmas or heavy discounting and clearance sales implemented after Christmas in order to clear unsold stock. Such sales negatively impact margins, and our survey highlighted that 46% of purchases made outside of the 'Black Friday period' were still bought at a discount. Merchandisers need to consider historical sales patterns and keep their finger on the pulse of daily rates of sale on key lines. This will help them make the right call and maintain the right level of retail theatre to continue to delight their customers throughout the festive months.

Savvy consumers are wising up to Black Friday discounts

Now that Black Friday is firmly embedded in the retail calendar, consumers have 'wised up' and deliberately hold back spending in the weeks and days running up to Black Friday. This is reflected in our survey data which revealed that:

- 49% of Black Friday purchases were motivated by price.
- 74% of those who paid a discounted price would not have paid full price.

With the ever-growing presence of online retailers who sell a broad range of products across a number of brands and retailers, it has become relatively easy for savvy consumers to define how and where they are willing to spend their cash – with leading online department stores effectively becoming price comparison sites. 38% of respondents making Black Friday purchases made comparisons with competitor's prices or used price comparison websites.

Black Friday backlash?

Some premium brands opted out of Black Friday promotions entirely in order to maintain their brand positioning. For example, a UK high street fashion chain claimed that Black Friday discounts were deceptive, as products included in the promotions were often only worth their discounted price.[1] Retailers are increasingly conscious that from a consumer perspective, significant discounts are indicative of the true value of their products.

"Black Friday has now firmly established itself in the UK and is here to stay. Sales increased yet again in 2016 with the event now expanded over multiple days and moving increasingly online."

Paul Martin, Head of Retail, KPMG in the UK

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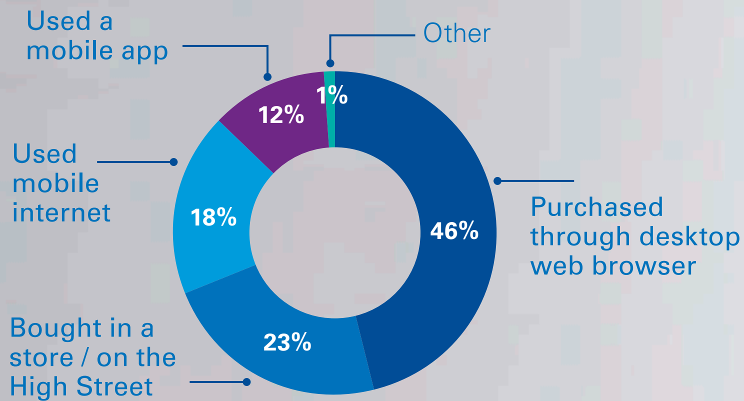
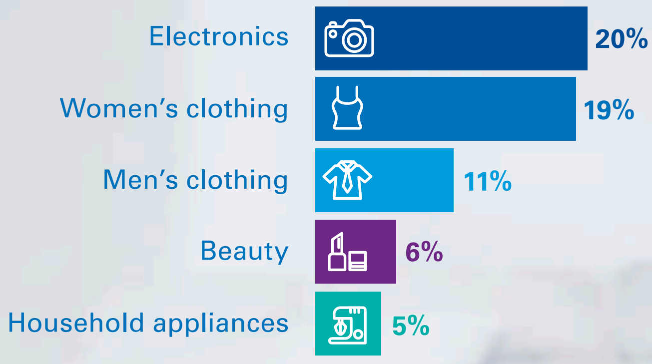
Black Friday period



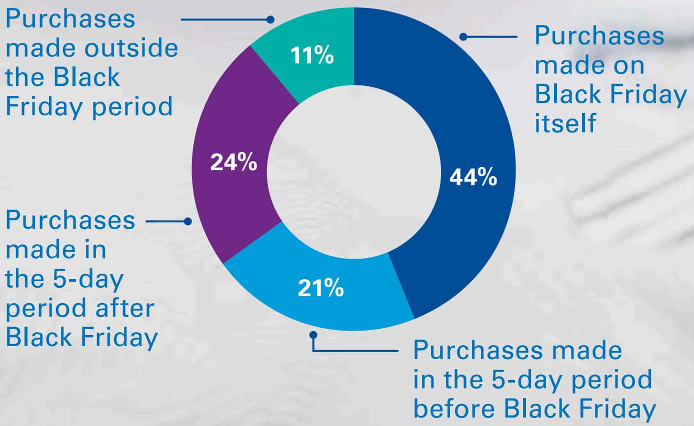
Top five categories purchased on Black Friday



49% of Black Friday purchases were motivated by **price**

46% of non-'Black Friday' purchases during the period were bought at a discount

Black Friday purchases were spread across a four week period



77% of those who made Black Friday purchases used the retailer's **online channel, including mobile**

The 'mobile natives' are here

Why are millennials so important?

Millennials constitute 25% of the UK population[(2)] and are the largest generation in Western history. Millennials in particular, and consumers at large, increasingly expect 'instant gratification' from their end-to-end path to purchase. The abundance of alternative products on offer from both traditional retailers and industry disruptors, and the ever-increasing ease with which consumers can make comparisons between retailers online, makes it ever harder for retailers to retain their millennial customers.

Survey data revealed that millennials were more likely to 'shop around' before making their purchases. Approximately 40% visited competitor stores (online or high street) before purchase, compared to 32% of Generation Z. This evidences the need for retailers to segment consumers by behaviour when pricing their products.

Brands across many industries rely on inertia and habit for loyalty, but millennials are fleet-footed, demanding and quick to take their business elsewhere. It is essential retailers understand millennial customer journeys and can cater to these.

Mobile purchasing means consumers want their products anytime, anywhere

Our data revealed that 28% of total respondents made purchases on their smartphones. Of these, 59% were millennials, compared to 31% Generation X and 5% Baby Boomers.

The rise of mobile shopping has altered temporal purchasing patterns, enabling consumers to purchase throughout the day when its most convenient – usually outside of traditional daytime working hours. Our survey data demonstrated that the fewest mobile purchases were made in the afternoon (24%), compared to 40% in the morning and 37% in the evening. The most popular hour for mobile purchases was 8pm (10%). This has logistical implications for retailers, as the window for orders dropping into the warehouse for fulfilment is becoming much longer and peaking (especially in promotional periods) in the morning and evening when consumers are commuting or at home.

Having understood the specific traits belonging to different consumer groups, retailers need to understand what this means in terms of forward planning. As users spanning a wider age range adopt mobile purchasing methods, retailers should be looking to ensure the online customer journey reflects this, creating seamless customer experiences.

The rise of the social networking shopper

The role of social media in the end-to-end purchasing journey has become more prominent over recent years for some generational groups. Our survey showed up to 5 times more social media use in the customer journey in the younger generations versus those over 35. Retailers are increasingly using less traditional forms of marketing to tap into the mind of the consumer and influence their purchasing decisions. The likes of Facebook, Snapchat and Instagram have become an integral part of the marketing mix for many retailers – especially in fashion, where the power of celebrity endorsement and social media trendsetters are strongest.

For example, retailers are experimenting with Snapchat to measure the popularity of new product ranges by asking customers to 'screenshot' their favourite products. Retailers can subsequently utilise this data to help with category planning and buying.

Whatever generation, whatever sector, improving CX is essential

Retailers are increasingly using data in order to analyse and transform customer experience (CX). KPMG Nunwood has developed a framework which highlights the six key pillars great customer experiences are built on. Businesses that deliver Personalisation, manage and deliver against Expectations, act with Integrity, Resolve issues when things go wrong, minimise Time & Effort and deliver Empathetic interactions are likely to be successful in the future. The creation of positive memorable experiences is becoming the new battleground in improving customer value

Understanding exactly what key customer segments expect from each of these pillars can be the catalyst for profitable change – guiding investments in customer experience improvement.

An analysis of what the consumer wants to experience can made by comparing detailed rational and emotional descriptions of a perfect retail journey with the customer journey that internal stakeholders are trying to engineer. By aligning the two, retailers can create a customer base of 'superfans' who will remain loyal and provide reliable profit.

KPMG Nunwood has developed a **Six Pillar Model** framework that helps organisations codify, analyse and transform customer experience.

"The 2017 consumer trusts their networks implicitly. Millennials and Gen Z no longer believe marketing comms. The end user now seeks validation from social networks and the crowd to tell us truthfully whether the product is any good. As a result we'll see PR and incidental endorsement replace traditional marketing channels."

Craig Ryder, KPMG Nunwood – Customer Experience Director

Most popular categories for Millennials that used social media

Electronics **16%**

Women's clothing **16%**

Beauty **14%**

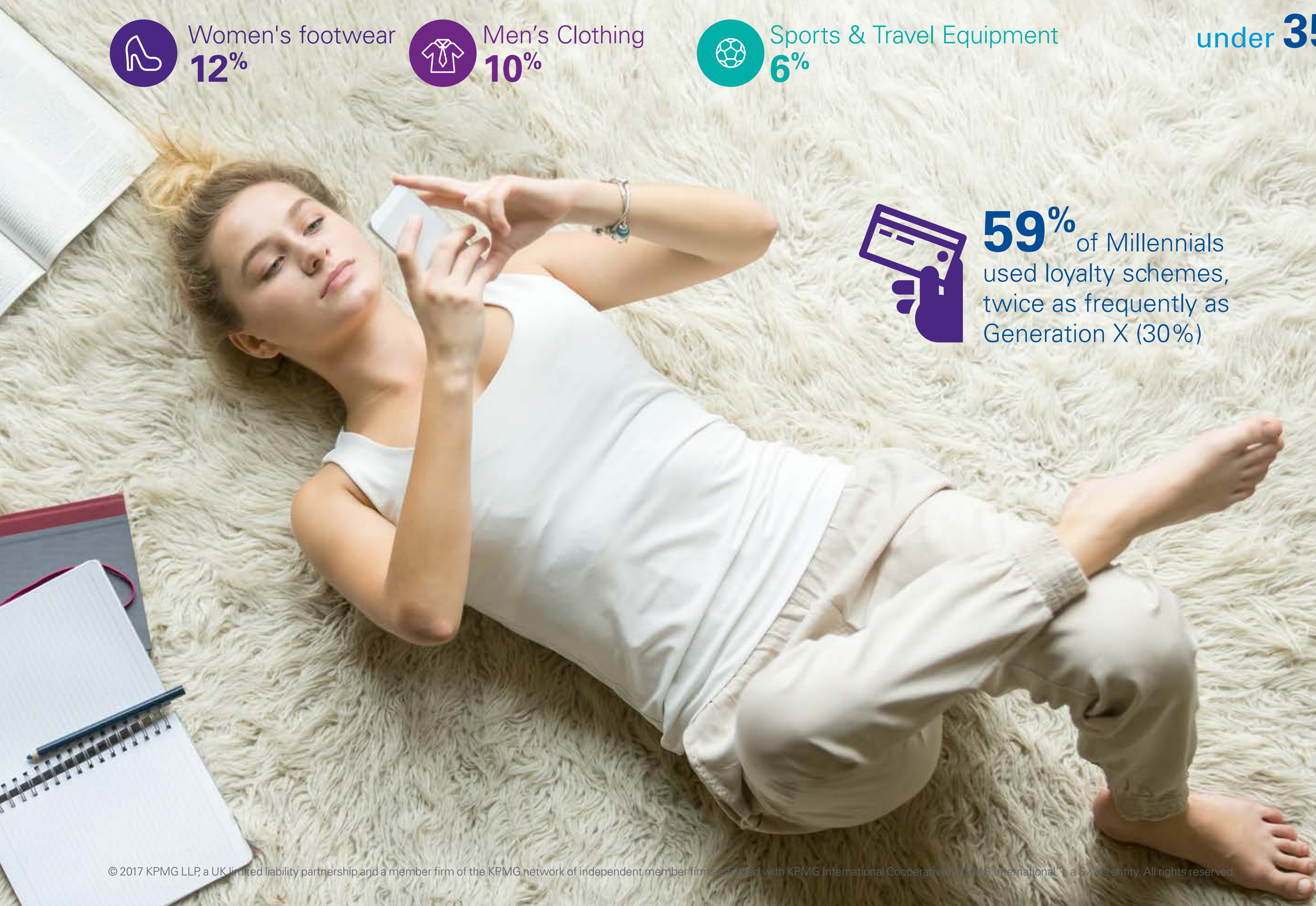
Women's footwear **12%**

Men's Clothing **10%**

Sports & Travel Equipment **6%**

Up to **5x** higher rate of use of social media by under **35s** vs over **35s**

59% of Millennials used loyalty schemes, twice as frequently as Generation X (30%)



Millennials constitute **25%** of the UK population

The evolution of delivery and returns

'Track my customer' will become just as important as 'track my parcel'

Communication between retailers and consumers has increased significantly with the introduction of delivery re-directs, drop off information and collection points. The tracking of a consumer's delivery preferences and profile will become increasingly important as parcel providers try to increase the 'first time delivery' hit rate, and gain a personal view on each consumer.

Using this analysis to 'track my customer' will allow retailers to understand the shopping patterns, delivery preferences, and returns profile of their customer base. Capitalising on the trends shown in this data will become imperative in providing a profitable online business.

Our data reveals there is still a balance between 'premium' next day and 'economy' 3+ day delivery services, with over 50% opting for a free 3-5 day economy service, as opposed to paying to receive their item faster. Understanding what consumers actually value in regards to delivery services is essential and could see 'track my customer' becoming just as important for retailers as 'track my parcel' has been for consumers.

Consumers are considering the delivery providers, returns and service offerings as a key part of their buying cycle. Retailers and their parcel providers need to understand patterns and preferences to make sure they offer the best service, as well as identify and manage loss-making fulfilment propositions.

Free returns is a key criteria for consumers, but at a cost to the retailer

The ability to return goods for free has become a hygiene factor for most consumers, but the process is becoming increasingly burdensome for retailers. 62% of our respondents deemed a free service the most important factor when returning an item, compared to 35% who stated convenience was most important. A recent KPMG in the US survey, 'The truth about online consumers' found that within fashion, consumers were three times more like to use 'returns policy' as a choice for deciding who they buy from.[3]

On average it took 6 days for respondents to receive reimbursement when returning via online methods. The desire to be reimbursed more quickly, combined with the 'safety' of returning in-store is likely to have made in-store returns more popular. This trend was reflected in the survey, with 34% of respondents who purchased online opting to return in-store.

We are now seeing an increased focus on streamlining the returns sector, as companies start providing returns e-platforms, optimal redirection of stock, an integrated returns process and an awareness of the consumer's reimbursement needs. Retailers must now integrate returns cost to serve in the total customer journey profit & loss calculation.

'Last mile' delivery services get competitive

Further helping the improvement in returns services, is the fact that the parcel delivery market has transformed into one that is digital, transparent, and flexible. The most significant advances have been made in the 'last mile' component of the delivery model which has been key to improving customer experience. The concept of 'last mile' delivery has seen urban-based delivery start-ups cutting out warehouses and distribution hubs altogether, responding to customer demands for instant delivery.

The 'gig economy' has become increasingly prevalent in urban areas, and especially notable in the food delivery sector. An example of this is an operating model of self-employed couriers to take food ordered via a smartphone app from virtually any chain or independent restaurant and drop it off within the hour of booking. This is bleeding into the retail industry, and some providers now collect products direct from high street retail stores in the same manner, so it is only a matter of time before the 'food and 'non-food' delivery sectors are fully integrated. Parcel carriers will have to adapt their operating model to take advantage of this model. We expect a rapid increase in the level of innovation and disruption in last mile delivery: an area to watch in 2017.

Retailer and parcel providers need to integrate their customer facing operations more fully so that consumers receive a seamless experience. This in turn will reduce the full cost to serve.

> "As consumer confidence grows in last mile delivery, it's imperative that retailers and parcel providers actively manage the returns process to ensure a profitable online offering."
>
> Iain Prince, KPMG Supply Chain Director

On average it took 6 days for consumers to receive **reimbursement** on returning items

62% of total respondents said that a **free returns service** was the most important factor for returning purchases

35% of respondents purchasing on mobile phone and apps between the hours of 7pm–10pm opted for next day delivery

50% of **Children's Footwear** and

35% of **Women's Fashion** online purchases were '**intentional returns**'

80% of online orders received free delivery

£5.39 average delivery price for those who paid

Total chosen delivery options

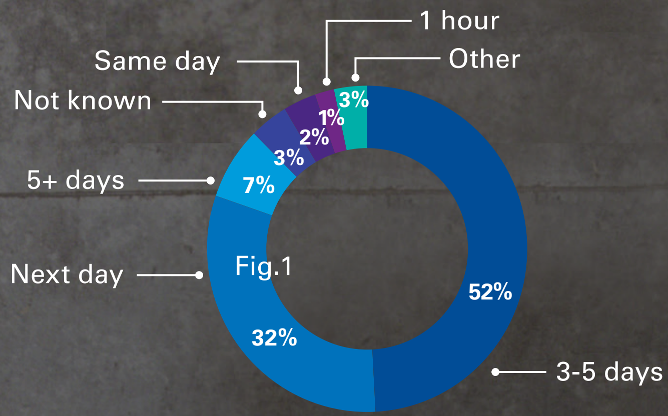


Fig.1

Promised Delivery Timescale	Average Delivery – Cost	% of Deliveries – Free
Next Day	£5.43	90%
Other	£7.00	86%
3-5 Day	£4.81	79%

The store is not dead!

Stores are still an essential part of the journey – as a showroom and hub

The physical store still has a role to play in the retail sector, despite the increasing rise of online, with 36% of respondents, up by 4% from last year, continuing to spend in store. Our survey also revealed that regardless of whether a purchase was made there, 40% of shoppers visited a store at some point during their purchasing journey. Retailers are responding to this by not just using stores as a means to generate direct sales, but to act as mini-depots for Click & Collect orders, BORIS returns (bought online returned in store), and to provide a showroom for products.

Today's shoppers may make their final purchase online, but they see physical shopping as a fun activity – a way to spend time, shop around and observe what's on-trend and on offer. Retailers and brands are therefore driving footfall to their physical stores by creating interactive experiences and 'retail theatre'. For example, large sportswear brands have used stores to run fitness classes after trading hours.[4] With need to create a positive customer experience at the forefront of retailers' minds, we expect to see more retailers reviewing their store set-ups to create a multi-purpose space.

Click & Collect – clutter or a chance to sell?

The rise in Click & Collect services has enabled retailers to increase footfall in stores. Our survey revealed a rise in respondents opting for Click & Collect services, with 21% of respondents choosing to collect their purchases via this method, compared to 14% last year. Our survey also revealed that, of respondents who returned an item purchased during the survey period, 51% of returned in-store, compared to 26% that returned via postage, and 15% via collect+ - regardless of the way they received the item. This suggests that returning to stores is still a preferred method for consumers, and a key opportunity for retailers to boost in-store sales.

Some retailers may have experienced an increase in footfall but argue that this merely serves to clog up the stores, and potentially lessens the quality of the in store experience. This year could therefore see the rise of smart store layouts, and the 'mobile' or 'co-located' fitting room. Retailers can leverage their Click & Collect space to act as both a drop-off point and fitting room. Our data tells us that Click & Collect only increased impulse buys in-store by 2%, so for retailers wishing to drive impulse buys, a more strategic placement of Click & Collect pick up points is required. For example placing designated collection points in locations that necessitate customers following specific shopping walkways, or placing fitting rooms next to the Click & Collect desk - enticing customers to try the items on before leaving the store, reducing the number of returns, and acting as a cross-selling opportunity.

Changing role of the store is calling for a review of profitability

The rise in online sales has meant that for many retailers' stores, the sales per square foot has decreased. With the NNDR (National Non Domestic Rates) revaluation set to impact UK property, we expect to see retailers looking to re-review store profitability and the store network in order to adapt to rent increases. This would include the quantity, size, and locations of stores.

"Today's consumers are looking for value, convenience and a unique experience. The role of the store is key in providing a showroom which delivers an outstanding service and an attractive and memorable retail environment."

James Tilley, KPMG Supply Chain Director

| Findings

40%

of total respondents used the store at some point in their path to purchase

21%

of those that made online purchases used Click & Collect

Of those, **64%** collected in-store rather than at alternative locations

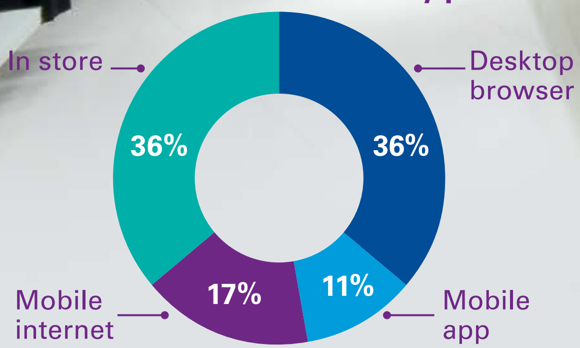
9%

that purchased in-store during the Black Friday period made **impulse** buys, down from **17%** last year

35%

of total online purchases were later **returned** in-store

Purchase methods during survey period



Interacted with the store during their path to purchase

Baby Boomers	52%
Generation X	37%
Millennials	40%
Generation Z	50%

2%

of those that used Click & Collect during the Black Friday period made **impulse** buys when in store

The rise of automated operations

Beyond tracking & stock check

Our survey data showed that 89% of respondents tracked or received delivery notifications for their purchases. Of those who did track their order, 59% used email as a means of tracking, 24% used the website or app, and 17% used text. Tracking has become an expected service for many consumers. Our survey also showed that, of the respondents who purchased online, 71% were able to check stock.

Over the past 5 years, the focus of many retailers has been on ERP, PIM, WMS and store stock management systems. While these are still important to get right, they are hygiene factors, and retailers are beginning to turn to the next wave of innovation.

Automation in the retail value chain

The pressure for retailers to improve productivity has led to a greater focus on the role that technology can play in creating efficient retail operations. Automation can offer efficiency improvements throughout the value chain, from the use of robots to pick and pack stock to RPA (robotics process automation) in stores and distribution centres.

Innovations in automation are increasingly being used to improve the customer experience. For example, there has already been significant investment from retailers in the use of 'AI chatbots' to offer 24/7 personalised support online.[5]

Automation is possible for smaller retailers. Why not create one engine with multiple brands?

There is no doubt that automation will require significant investment in terms of time and money, and that this is much harder for the smaller retailers than their larger competitors, especially during challenging trading conditions. Smaller retailers should consider how they can configure themselves in order to participate in this wave of automation.

We may witness a number of smaller retailers joining together to form one shared service centre function – creating one engine with multiple brands. This will allow the smaller retailers to reap large enough economies of scale to make automation financially viable. Larger retailers could also consider outsourcing processes if they are not doing so already, but automation may replace offshoring as the driver of lower costs (especially where the price point from the service providers is dropping).

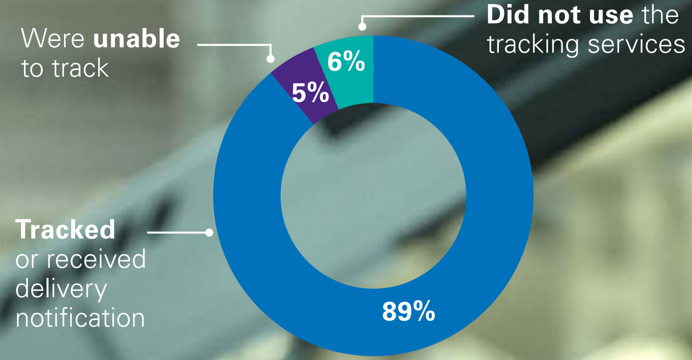
This should now be a key factor to consider in buying decisions related to outsourcing deals.

For further information on robotics in the retail field, keep an eye out for the upcoming KPMG Boxwood Robotics paper 'Robocalypse: Now? - What the fourth industrial revolution means for retail'.

"The required shift into increased automation will necessitate significant investment at a time when cash flow is impacted by depressed margins. Working Capital improvement should feature heavily in Retailers' plans as a means to support "self-funding" this investment."

Dom Carter, Head of Retail Working Capital Management

Tracking of total respondents,

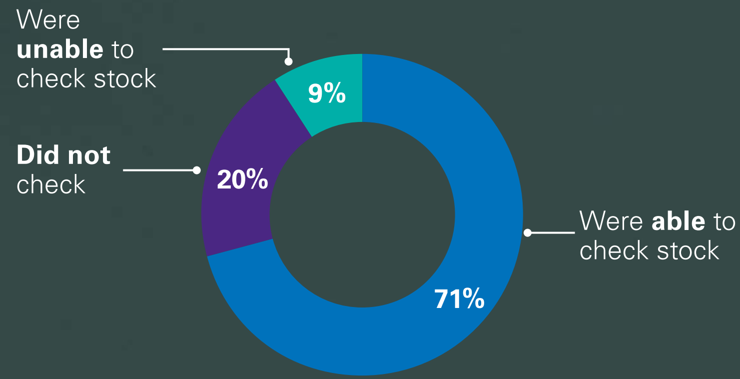


Of those who **purchase online**

43%

interacted with retailer, in store or online, on their path to purchase

Stock checking of total respondents,



Outlook for 2017

The perfect storm, but the perfect opportunity

There are a great number of disruptive factors facing the retail industry in 2017, and these will require retailers to act quickly in order to survive. Increases in GFR, rising labour costs and heightened property rates as well as Forex volatility will all be significant factors.

The result of the EU referendum in June 2016 will lead to increasing import prices, creating a higher cost base. Retailers will need to decide when and how to pass these costs onto the consumer, which some having done so already.(6) The speed at which the changes will occur is influenced by retailers' hedging policies. The potential upsurge in operating costs means that retailers need to be agile and plan how to survive the short term, whilst building the foundations for long-term survival. Retailers will need to become even more flexible in order to account for changes in micro economic factors.

The national living wage will increase by 4% in April 2017.(7) Following Brexit it is possible retailers may experience a fall in supply of 'cheaper' labour, pushing up labour costs. This has the potential to create further incentive for supply chain automation and 'de-manning'.

The upcoming NNDR revaluation is likely to have a large impact on UK property, and retailers with significant brick and mortar portfolios could face increased business rates.(8) This will put pressure on store profitability, and consequently result in further store closures. Retailers should reconsider the ideal shape and spread of their portfolios, and employ strategies to accelerate the reshaping. We would expect commercial negotiations with landlords to hand back properties, trigger rent reviews, and the exercise of break clauses to increase. In depth knowledge of the property market, will help retailers engage in more detailed negotiations with landlords.

How can retailers ride the tide?

Retailers can face the upcoming storm with the mantra of 'don't waste a good crisis'. Those retailers who feel unable to pass costs onto their consumers will look to drive efficiency saving programmes. Programmes including increased warehouse automation drive cost and availability risks. Some are adopting an 'outside-in' approach – conducting the 'PE lens' analysis that an external acquirer would conduct, to identify savings – or using an approach like KPMG's '4C' structured cost reduction for both GFR and GNFR categories.

The long-term view is that 35% of UK jobs are considered at high risk of automation over the next 20 years.(9) Whilst the investment in robotics and AI currently lends itself to larger scale businesses, smaller businesses may lack sufficient financial funding. It is therefore likely that we will see smaller retailers and brands merging their operations in order to join this wave of automation, creating the concept of one fulfilment engine with multiple brands.

Retailers and brands must also take advantage of data analytics to understand their consumers, and the cost base and profitability associated with their omnichannel operations. A bottom up view of where they make and lose profit across the product and store portfolio, and omnichannel operations twinned with a top down view on operating model, is required to drive profit.

The 'burning platform' for change is heating up, and the incentive to forensically review the cost base and make considered decisions, which are data driven and evidence based will increase. Retailers will need to leave no stone unturned to protect margins and ensure sufficient cash is generated to invest in the product portfolio, the customer experience, quality and innovation, IT (both customer facing and within the foundation of the business) - and still meet the returns expected by the share holders.

The winners in 2017 will be those that have a very firm grip on profitability across the estate, judge price increases and manage promotional activity most effectively in order to gain a first-mover advantage by becoming the customer champion, without damaging margins.

"We expect this perfect storm of margin pressure and weakening consumer confidence to drive significant merger activity between retail competitors in 2017 and beyond."

Rob Baxter, KPMG Partner – Private Equity

93% of respondents said that their shopping behaviour has **not changed** since the EU referendum

Reasons for behaviour change

Disruptive factors

- Depreciation of the pound
- Reduced consumer confidence and spending
- Increase in National Living Wage
- Business rate increases to store portfolio
- Forex hedging to expire
- Uncertainty about changes to Immigration and Labour rights for EU nationals

Where KPMG can help:

Over the past 12 months we have helped our clients by providing Supply Chain and Omnichannel services including:

Supply chain and inventory

- End to end review of warehousing, transport, returns, inventory and planning hotspots across the supply chain
- Supply Chain maturity assessment
- S&OP review and best practice process design
- SKU ranging and rationalisation
- Cost-to-serve and product and channel profitability
- Replenishment & Merchandising planning

Logistics & network design

- Warehouse and Logistics optimisation
- Process & operational review of logistics
- Dynamic routing and scheduling implementation
- Systems review and benchmarking
- Capacity review and modelling for peak periods
- Strategic network modelling via third party software

Procurement

- Focus on Cost, Cash, Consumption and Compliance opportunities ("4 Cs") to reduce GNFR and GFR spend
- Organisational design, skills assessment and gap analysis
- Analysis of supplier contract terms and margins
- Procurement function maturity assessment and benchmarking
- Cloud based procurement system implementations

Cash & working capital

- Understand operating cash cycles and how processes and policies for Accounts Payable, Accounts Receivable and Inventory impact cash conversion (including opportunities for indirect tax)
- Identify opportunities to release trapped cash and cleanse the balance sheet
- Drive cultural behaviour within the organisation and inform decisions

Customer & user experience

- Sales effectiveness and conversion
- Customer Data Insight & Analytics
- Omnichannel health check
- Digital integration
- Customer journey mapping to improve customer experience

Decision support & analytics

- Product Information Management
- Order Management and Returns analytics
- Assess appropriateness of existing MI & KPIs
- Introduce P&L accountability
- Test robustness of commercial model

Omni-channel transformation

- Omni-channel maturity assessment
- Outside-in thinking of leading organisations
- Identification of where to focus capability development to optimise return on investment
- Design of new ways of working to reflect seamless ways of working across channels
- Programme roadmap, structure, and governance to deliver omni benefits
- International expansion strategy

Technology

- Identify where key operations can be supported and enhanced by improved systems including enhanced IT governance to improve the quality of technology processes
- Programme Assurance: review of contract, support arrangements and costs of the current systems
- Microsoft AX/Dynamics implementations


Westfield
hmv
Westfield
TRUE RELIGION
1. create
2. weigh
3. pay

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