COMMERCE TRENDS

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National DCP unifies supply chain operations

Tarsus Distribution boosts efficiency by 60%

Food retailer Co-op delivers scalable capability

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COMMERCE TRENDS

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14

4

22

TABLE OF CONTENTS

Henri Seroux
Senior Vice President EMEA
Manhattan Associates

A winner's game

Commerce and supply chain go hand in hand. Something Amazon's Jeff Bezos and Alibaba's Jack Ma have known for years. Increasing visibility, agility and flexibility across their supply chain network made a commercial difference. Technology is the name of the game.

Supply chain, extended to the point of sale, is no longer just a cost centre. Fulfilling orders at lightning speed, personalising products & parcels and by offering customers additional services, your supply chain can turn into a revenue generating centre. Sophisticated technology makes this possible.

In this magazine we showcase National DCP, the company behind Dunkin' Donuts and Baskin Robbins, who see order, inventory and transportation information flow quickly across their new platform, giving unprecedented end-to-end visibility across their supply chain.

Tarsus, South African IT distributor, recognised the power of software solutions to improve customer success while enhancing retention through efficiencies and value. This resulted in a 3PL methodology that adds valuable services to end clients.

Technology also creates a competitive advantage in stores. Lamps Plus upgraded its point of sale (POS) system to provide a modern, omnichannel experience. The new system provides store associates with a holistic and comprehensive view of the customer so they can anticipate and quickly respond to their needs.

In today's environment it is not just revenue and profit that counts. Sustainability is taking centre stage. As Steve Banker from ARC Advisory Group shares: "Almost any supply chain software allows you to do more with fewer resources, but improvements in supply chain software also improve sustainability."

We'd love to show you how technology can help you to sustainably excel in all areas of commerce. What are you waiting for? It's a winner's game, contact us today.

antiquated to effectively scale up with the demands of a unified infrastructure. In came a refreshed system consisting of multiple new components, going live at once when ready.

Most ambitious program

According to Chris Lafaire, NDCP's Senior Vice President of IT, "'Project Freshstart' is the most ambitious program in our history. We combined four regional companies into one national firm, and then overhauled our entire IT network. Integrating TMS and WMS functions on one platform, merging it with our new ERP, Labour Management Systems, warehouse voice picking, web portal and data centre operations, and rolling it all out in just 10 months has been essential to the program's success."

Manhattan quickly rose to the top of the list of TMS/WMS/LMS providers. Its proven track record of designing and managing integrated platforms, deep experience with wholesale food distributors, the resources to execute the transition quickly and easily, robust training and support tools, and a scalable model that could be repeated as each region went live, melded perfectly with NDCP's needs.

Tightly integrated

With a tightly integrated TMS and WMS, NDCP manages its supply chain in ways it never has before. Order, inventory, and transportation information flow quickly across the Manhattan platform, giving NDCP unprecedented visibility from one end of the chain to the other. Rapid access to good information provides the flexibility to introduce dynamic transport routing into

what had been a static routing environment. The ability to incorporate multiple modelling scenarios enables NDCP to run routes more efficiently and take advantage of backhaul opportunities. Manhattan's technology opens the door for NDCP to leverage mobile applications in delivery operations. NDCP can fully unlock the value of its vast road infrastructure, capabilities that will become ever more critical as it expands its geographic coverage area west of the Mississippi and looks to double its distribution centre footprint.

Just 10 months

The system went live just 10 months after the revamp began - an impressive rollout timeframe by any measure. "We are in the early stages, but we couldn't be happier with our decision," Lafaire said. "Manhattan has a mastery of the technical issues and a thorough understanding of how our industry works. It grasps our objectives, and knows how to help us reach them. Manhattan is the perfect partner to help us cost-effectively capitalise on the tremendous opportunities that lie ahead of us."

A fresh start at Dunkin' Donuts
NATIONAL DCP UNIFIES SUPPLY CHAIN OPERATIONS

National DCP benefits from the total order-to-delivery visibility that comes with seamlessly integrating transportation and warehouse management systems. The company is more flexible in planning the drivers' schedules. Chris Lafaire, NDCP: "Our drivers log almost 45 million kilometres each year, so transportation is a key part of our cost structure and value proposition. Optimising our inbound and outbound road networks is central to making it all work."

Behind the famous Dunkin' Donuts and Baskin-Robbins brands is National DCP (NDCP), the $2 billion a year sourcing and distribution arm that ensures reliable product deliveries to more than 8,100 restaurant locations in the United States and abroad. As the IT and physical distribution backbone, NDCP is relied on by thousands of franchisees to serve up what their customers want, when and where they want it. In a move to optimise its physical and IT networks, NDCP launched a major initiative called 'Project Freshstart'. NDCP merged its four legacy regional businesses into one national company. It then rebuilt its IT capabilities virtually from scratch. Out went a 10-year old system too fragile and

CHALLENGE
NDCP needed to replace its 10-year-old IT system with technology that could scale up cost-effectively when deployed nationally. A more tightly integrated TMS/WMS was needed to provide visibility to schedule driver pick-up and delivery.

SOLUTION
NDCP selected Manhattan based on its ability to seamlessly integrate TMS and WMS. This enabled the company to optimise transportation processes and gain pipeline visibility from purchase order management to final delivery to the franchisee.

PROGRESS & RESULT
The tight integration of the transportation and warehouse systems is expected to drive a 3-7% annual reduction in transport costs, a 10-20% improvement in backhaul opportunities, and a 10-20% drop in waste and spoilage.

"WE CHOSE MANHATTAN BECAUSE OF THE ABILITY TO COST-EFFECTIVELY SUPPORT OUR EXPANSION AND HELP US FIND NEW WAYS TO DRIVE UP EFFICIENCIES."
Chris Lafaire, *Senior Vice President of IT, National DCP*

SOFTWARE DRIVES SUSTAINABILITY
IN THE SUPPLY CHAIN

Steve Banker is clear about sustainability. Manhattan Associates interviewed him as head of the supply chain & logistics consulting team at ARC. "When it comes to sustainability the key requirement is a willingness to set high goals and to commit to a multiyear period to try and achieve those goals."

What are the key challenges that we need to solve right now for sustainability in ecommerce?
"The ecommerce question is a good one, ecommerce is just inherently a less efficient way to do retail compared to before ecommerce became so big. Young folks are often more committed to sustainability than older generations. They today look at Amazon and say, 'Wow, that's a really cool company'. Technologically, Amazon is doing such interesting things, but do need to improve their approach to sustainability. Not just because of their internal processes but because they've pretty much forced all retailers to come up with an ecommerce omnichannel strategy.

Steve Banker,
*Vice President
Supply Chain
Management,
ARC Advisory
Group*

Who has the ownership for these solutions. Is that the supplier, vendor consumer, government regulation, or is it some combination of everyone?
"If you really want to drive sustainability, you must take it down to the consumer level as well as taking it down to the voter level. I know that there's a lot of people, if you do surveys, that will say, 'I am more likely to buy a product, even if it costs more, if it's green.' But that's not really true. The CEO of a big CPG company mentioned for example that when they took a good look at the data, only 15% of consumers were willing to pay more to get green goods. So, I think it comes down to us as consumers and us as voters."

"In the old days, you would fill up a truck with pallets deliver to stores. Now we're having shipments of just one or two goods, and they go by courier. Eddie Capel, CEO of Manhattan Associates, talked about this at Momentum in May this year. His idea is that we need to give choice to consumers, giving them the information needed to make an informed decision so that when a shopper buys online, they see sustainable options. You just say, 'Geez, if you want it tomorrow, we can ship it tomorrow. But if you can wait three or four days, we'll ship it not only at a lower cost, but here are the CO_2 benefits that will accrue if you do it that way.'"

Do you think there's a way to offer lower cost and be sustainable at the same time?
"Any supply chain solution is a sustainability solution. Almost any supply chain software allows you to do more with fewer resources. Two solutions that do this well are transportation management and supply chain design systems. When it comes to ROI, these are areas where you can get sustainability improvements for free. Our recent ROI research around transportation management systems showed the average business implementing a TMS, reduces their freight spend by 8%, while maintaining or even improving their service levels. That's one area where sustainability comes for free. I honestly don't know why more companies aren't pursuing it.

"Improvements in supply chain software improves sustainability. In supply chain management there's a real effort to use artificial intelligence, machine learning, as well as incorporating new data sources to improve performance. Existing products are just getting better and better based on these new technologies."

This article is a summary of the podcast with Steve Banker and Manhattan Associates. The full podcast can be replayed via www.manh.com/tms.

MEDI-MARKET REDUCES FULFILMENT COSTS

Founded in 2014, Medi-Market Group is considered a disruptor in the Belgian pharmaceutical and drugstore market with its aggressively low prices. In just five years, the company has quickly grown to 32 parapharmacies, 17 pharmacies and four beauty salons. In 2019, the company aims to open more than 15 stores and significantly grow its ecommerce business.

Medi-Market recently selected Manhattan's cloud-based solution Manhattan Active® SCALE to run its distribution operations in its 4,000-square-metre Belgian distribution centre in Nivelles. The solution will enable Medi-Market to improve warehouse productivity and decrease labour costs, giving it the ability to focus on expanding its market reach while substantially increasing pharmaceutical affordability.

The market-leading picking methodologies will expedite retail replenishment and online order fulfilment, and its optimised put-away and replenishment of picking locations will streamline key warehouse operations. SCALE's advanced inventory management tools will also provide Medi-Market with real-time stock visibility and accuracy.

Peter Bos, CIO and Supply Chain Director, Medi-Market Group
"Manhattan Active SCALE is an enabling technology for our future growth plans in our stores and online. To support this steep growth curve, we chose Manhattan's WMS technology to give us maximum flexibility and scalability so that we can go even further in providing affordable medical care to all."

Pieter Van den Broecke, Managing Director Benelux and Germany, Manhattan Associates
"One of the fastest growing drugstore retailers in Europe, Medi-Market is investing in innovative solutions which will help it accelerate its growth in Belgium as well as in nearby countries. The easy-to-implement, cloud-based solution minimises the use of Medi-Market's IT resources and provides it with faster implementation and quicker ROI. We are pleased to see our Manhattan Active SCALE being used to deliver optimal customer service."

Medi-Market Group is a Belgian retail group founded by Yvan Verougstraete in 2014. The group is active in the pharmaceutical and in the parapharmaceutical sector, offering close to 30,000 references in a.o. dermo cosmetics, skin- and haircare, food supplements, natural drugs and childcare. Medi-Market Group succeeded in transforming the market with low prices combined with a vast assortment and professional advice. Around 12,000 customers visit the shops every day, generating a turnover of more than 80 million euros in 2018. The group currently has more than 450 employees. Medi-Market Group continues its mission outside of the borders of Belgium with the recent acquisition of the parapharmacy chain Parashop Italia, and opening stores in France.

FORGET EVERYTHING YOU KNOW ABOUT POINT OF SALE

Forward-thinking retailers and demanding consumers now expect much more from the humble cash register at checkout. The next generation point of sale (POS) can be a significant point of commercial differentiation, giving retailers and brands an opportunity to offer information-rich customer experiences.

Customers crave personalisation, with 75 percent saying they are more likely to buy from a retailer or brand that knows them by name, recommends options based on past purchases or knows their preferences. As e-commerce has shown, offering such product recommendations based on purchase history creates proven conversion opportunities that most stores aren't currently able to capitalise on. That's because store associates lack a single view of all customer transactions across multiple channels, hampering their ability to personalise the in-store experience based on the shopper's buying habits. Real-time access to customer data, however, enables store associates to view their profiles, including purchase histories, average order values, online browsing habits, likes and dislikes, wish lists and loyalty status. Based on this granular information, sales staff can make highly personalised recommendations, nurturing their customers to achieve increased sales and repeat customers.

Shop the endless aisle

Online and in-store product assortments often continue to exist in silos. Even if employees have the ability to view online inventory in-store, the checkout process continues to remain separate between store and online purchases. Only a next-generation point of sale capable of processing unified basket transactions can bridge this gap. A real-time view of network-wide inventory will show the store associate if specific items are in stock on the premises or are available at another store or at a distribution hub. Customers will then have options of how and when they can complete their purchase—for example buy in-store, take away or order and have it delivered. Unified basket transactions at the point of sale are the key to a seamless omnichannel customer experience.

Customers hate queues

90 percent of consumers say they will avoid a store completely if a line is too long. The answer is mobile point of sale that gives store associates the freedom to walk the shop floor, delivering personalised experiences and recommendations, upselling and cross selling products before seamlessly taking payment with their mobile device.

Point of sale is clearly just one facet of the modern store environment. Modern retailers must be able to adapt faster than ever before. And that requires new thinking about systems, data, logistics and execution at every step along the buyer journey.

GRASP GOLDEN OPPORTUNITIES TO SAVE THE SALE AND INCREASE AVERAGE BASKET SIZE

Lamps Plus enhances shopping experience

Lamps Plus has successfully deployed Manhattan Point of Sale to deliver an advanced omnichannel shopping experience to its customers. Lamps Plus is the largest specialty lighting retailer in the United States, operating a thriving e-commerce business, along with 36 stores.

Lamps Plus decided it needed to upgrade its traditional POS system to a modern, omnichannel experience. Manhattan Point of Sale brings together selling, customer engagement and store inventory and fulfillment to help store teams deliver customer experiences with a single omnichannel system of record for managing customer interactions and transactions. The new software also allows Lamps Plus to choose from numerous hardware manufacturers, form factors and operating systems.

Clark Linstone, Chief Financial Officer, Lamps Plus: "Manhattan Point of Sale provides our store associates with a holistic and comprehensive view of the customer so they can anticipate and quickly respond to any need."

4
FUTURE TRENDS

At Manhattan Associates we have an eye on the future and see trends taking shape today that will change how retailers need to operate tomorrow.

Next-level sales forecasting: Using machine learning, effective control of orders will generate more accurate buying signals, which in turn will enable more dynamic inventory allocation and pre-ordering.

Channel demand patterns: Data insights will emerge from connected commerce systems that reveal how channel use is evolving over time. This will inform future fulfilment strategies and the best route to long-term growth.

Growth of drop ship: Direct-to-consumer shipments are already emerging as a new channel for fast, cost-effective delivery. Retailers can retain control of customer data but fulfil away from their own distribution centre. Supply chain and inventory management software must have the ability to adapt and scale in line with this trend.

Next-generation store experiences: Digital handheld tools are appearing in-store so that staff can improve the omnichannel experience. These give access to 'endless aisle' inventory, clienteling services, individual customer preferences, POS, delivery and loyalty capabilities, and, over time, will play a greater role in shopper journeys.

ARTIFICIAL INTELLIGENCE: WHAT DOES IT REALLY MEAN FOR RETAILERS?

Despite the progress that has been made around Artificial Intelligence (AI), retailers still need to ask themselves: what is the goal? What can AI really deliver – and what will this mean for consumers? Craig Summers, UK Managing Director, Manhattan Associates warns against falling for AI gimmicks if retailers are to leverage AI to its full potential, promoting predictability and above all, delivering a greater customer experience.

Craig Summers,
Managing Director UK, Manhattan Associates

Artificial Intelligence (AI) has undoubtedly become one of the biggest buzzwords of 2019 and its use within retail is only set to grow, not just for large market-leading retailers, but for retailers of all shapes and sizes across many sectors. Driven predominantly by the success and maturity of AI and Machine Learning (ML) platforms/solution providers and the pervasive growth and adoption of Cloud Service Providers, retailers are beginning to move past the marketing flurry that AI once was. Now, retailers are beginning to develop a legitimate appreciation of what it takes to properly evaluate, prepare and produce AI and ML-enabled solutions.

Confusing gimmick with experience
Online, in-store, in the warehouse, the opportunities to leverage AI and ML to improve retail operations are compelling – no wonder research predicts that retailers will spend $7.3billion on AI by 2022, more than tripling the average spend in 2018. However, before AI can be truly effective in the sector, the challenge of data quality, quantity and privacy must be addressed. Even with the volumes of data currently captured by many retailers, they often still struggle with utilising accurate, complete and contextual data – including historical data – to fully take advantage of the benefits AI can bring. Additionally, many customers are becoming less willing to share their data, which is necessary to truly make AI and ML models accurate and successful. In the rush to embrace innovation, it is easy to overlook these challenges and move focus away from the bottom line objectives, which should be: where is the ROI, and what is the implication for the customer experience?

> **AN AMAZING AI SOLUTION IN-STORE THAT USES A CUSTOMER'S HAIR AND SKIN TONE, SIZE AND STYLE TO RECOMMEND PRODUCTS, FROM HAIR STYLING TO MAKE-UP, FASHION TO ACCESSORIES, IS INCREDIBLY EXCITING.**

An amazing AI solution in-store that uses a customer's hair and skin tone, size and style to recommend products, from hair styling to make-up, fashion to accessories, is incredibly exciting. But unless every recommendation is available to buy in-store at that very moment, or if not, easily sourced and delivered to the customer's destination of choice, using AI in this way is nothing more than a gimmick. It may add a little levity to the shopping trip – but it does not provide a truly compelling and repeatable customer experience that delivers on the bottom line.

And this is the key: in today's highly competitive retail environment, the priority has to be on customer experience, satisfaction, and retention. Otherwise, customers will just easily drift over to another retailer within the overloaded omni-channel marketplace. Strong customer experience and satisfaction is not achieved through gimmicks, but through ensuring customers quickly get their hands on the products they're seeking. In practice, this means maximising stock availability – where it is needed, at the right time. It means achieving a slick warehouse operation that can fulfil both to store and direct to consumers without unaffordable – and often hard to find – additional workers. It means improving predictions to minimise discounting and maximising best-selling products. With this approach, retailers can achieve true customer satisfaction and loyalty, and therefore achieve higher levels of sales, and sales longevity.

AI in the future
Retailers that have embraced AI in the warehouse are already driving tangible improvements in efficiency and accuracy. By combining deep, high quality order history data with AI and ML to better understand the characteristics of order trends, including direct to consumer ecommerce orders, retailers can reconsider the pick, pack and ship processes. Schedules are being reorganised; resources redeployed; while orders can be seamlessly prioritised, and new delivery options enabled.

Furthermore, AI enables retailers to better manage the changing sales peaks, such as back to school or an unexpected April heatwave, as well as problems with shipping or haulage. Essentially, AI delivers more accurate and granular predictions that can be used to smooth out the entire logistics process in real-time. With differentiation and innovation at the core of AI, there has never been a better time for all types and sizes of retailers to leverage AI and ML to level the playing field with major retailers, not only to help neutralise and compete, but to differentiate and innovate. Retailers have shown in the past how they can embrace innovation, rise to a challenge and adopt the technology available – so now is the time for them to do it again.

Conclusion
In the future, AI will offer the chance to transform customer personalisation. It will support the most extraordinary innovations – both externally and internally – and support huge changes in the way retailers and customers interact. Aside from AI-driven, personalised and on-demand product creation (imagine the 'personalisation' we see today but heightened ten-fold), AI will enable highly accurate behavioural analysis that will ensure the retailer knows what a customer wants long before the customer has any idea.

Imagine virtual shopping networks with intelligent shopping assistants, with visual and conversational digital assistants for both consumers and retail staff; imagine just how interactive and innovative retailers can make the experience for their customers. But that is the future. And, let's be clear, such behavioural insight is of zero value if it cannot be backed up by a retail operation that is efficient and effective – and can automatically and consistently deliver every aspect of the customer experience.

AI is taking retail by storm but put the gimmicks aside: the real and attainable value of AI right now is to be gained by applying proven algorithms to drive essential supply chain improvements.

TARSUS BOOSTS EFFICIENCY BY 60%

With the speed of innovation and change within the South African hardware reseller market, Tarsus needed a solution to ensure that is was able to adapt rapidly and embrace and leverage this change. It was recognised that the existing legacy software solution and supply chain practices were a key inhibitor to this change and needed to be modernised. The solution was found in the Manhattan SCALE software application platform.

Tarsus was established in 1985. With more than 30 years of operation, is the longest-established IT distributor in South Africa. Tarsus Distribution distributes the world's leading IT hardware brands to the Southern African reseller channel.

But the Southern African market is changing. Tarsus needed to invest in a new IT solutions for its supply chain. The company wanted to improve its long-established solutions and processes through the Manhattan SCALE software application platform. The company also chose to partner with Supply Chain Junction to leapfrog legacy and grow the business by developing their unique distinctive services in the market.

Program for change
Tarsus embarked on a journey to implement a data driven and process-oriented program for change, focused on their end customer success. Manhattan and Supply Chain Junction were there to ensure the company turned its vision into a reality.

Tarsus aimed to achieve the following objectives when they started their journey:

- Extend and optimise current warehouse offerings and solutions.
- Implement change in the culture of the firm. This was presented as the biggest challenge but became the biggest opportunity.
- Reduce costs, as well as increase internal efficiencies through labour force optimisation and staff empowerment.
- Drive a customer-centric approach which would improve their customers' experiences.

Greater efficiency
The entire process - beginning with aligning needs and expectations and then implementing the system - took a year and a half. But Tarsus began seeing positive results within two months of going live.

Manhattan SCALE was implemented in a systematic and phased manner. Standardisation, automation and optimisation of processes resulted in a reduction of staff requirements, and also improved operations through a customer-centric approach. Thanks to data optimisation tools in the new technology, Tarsus was able to be more proactive in ensuring customer satisfaction. Pick path sequencing, in conjunction with Inventory ABC analysis and related warehouse layout, increased overall efficiency by a stunning 60%. The newly optimised and mapped-out pick path reduced picker travel time in the warehouse by a massive 35%. This has been a crucial element in achieving the high efficiency in customer service.

Cultural impact
The pedigree of the Manhattan solution, paired with Supply Chain Junction's consulting expertise and project methodologies, ensured an elevated operational system that would propel Tarsus' customers' success. Finally, positive outcomes of the change in software and processes – in such a short timeframe – quickly settled the disruptive nature of the change. Instead, the teams were excited about the shift to a growth and efficiency mindset.

Though there was initial employee pushback when asked to move away from the familiar, Tarsus as whole recognised the way forward lies in using innovative solutions to price competitively, developing internal and external infrastructure, and establishing new skill sets, strategies and out-of-the-box thinking.

Long-term success
By investing in Manhattan SCALE, Tarsus recognised the power of solutions that raise customer success and enhance retention through efficiency and value. This resulted in a 3PL methodology which leveraged existing assets and infrastructure while adding valuable services to end clients. Tarsus achieved the following:

- Pick rate productivity improvements in excess of 60%.
- Labour force reduction of 25% and elimination of overtime.
- Inventory accuracy greater than 99%.
- Business growth challenges met and exceeded through optimisation processes.
- Reduction of ongoing MHE costs.
- Increased sales and customer satisfaction, driving new momentum in demand generation.
- Growth in profitability due to huge improvements in internal quality and effectiveness.

Thanks to Manhattan SCALE and Supply Chain Junction, Tarsus has set itself apart in marketplace. It has proven that it can implement 3PL customers in timelines in accordance with international standards, with high marks for customer satisfaction. With solid technology foundation in place, Tarsus can move into the future knowing future success is within its reach.

CHALLENGE
Tarsus Distribution had a decades-old warehousing system, outdated processes and practices and needed to plan for rapid change in the technology distribution industry.

SOLUTION
With Manhattan SCALE Tarsus was about to bring its customer-centric business model to life by streamlining processes and improving customer service.

PROGRESS & RESULT
Pick rate productivity improved more than 60%, inventory accuracy increased to greater than 99%, and the labour force was reduced by 25% along with an elimination of overtime.

"NOT ONLY HAS MANHATTAN SCALE REMOVED ERRORS AND INEFFICIENCIES, IT HAS IMPROVED PRODUCTIVITY THROUGH FLEXIBLE AND OPTIMAL PICK PATTERNS."
Tim Proome, *Head of Supply Chain, Tarsus*

WHO WOULD'VE THOUGHT THAT SUPPLY CHAIN WOULD EVER BE COOL AND SEXY?

Wasn't life easy in logistics back in the days when customers still came to our stores, and took their purchases home with them? We had to ensure we had the right items in stock, of course, but we could focus our logistics efforts on improving efficiency and reducing costs. But while smooth-running logistics had some impact on retailers' margins, it had little to no effect on their revenue. Logistics was simply not a significant factor in creating a competitive edge.

"NOW THAT GOOD EMPLOYEES ARE HARDER TO FIND, IT IS MORE IMPORTANT THAN EVER TO BUILD CLOSE-KNIT TEAMS OF PEOPLE WITH DRIVE AND ENTHUSIASM."
Henri Seroux, *Senior Vice President EMEA, Manhattan Associates*

How times have changed! Today the customer is a mighty ruler, dictating how retailers should behave with just a wave of their hand. What matters most is not the cost of those logistics activities, but that the goods end up in the right place at the right time and at the right speed. After all, the ruler's wrath is merciless: one false move can be fatal, and consumers move onto another competitor who can meet their demands and expectations.

Henri Seroux, Senior Vice President EMEA at Manhattan Associates, explains that consumers now take note of retailers' logistics performance: "Logistics never used to be an everyday topic of conversation, but now it's not unusual for logistics professionals to suddenly find themselves discussing their work at parties or with their friends and family. Logistics is back in fashion!" Warehouse managers have got a sparkle in their eyes once more, he says. By fulfilling orders at lightning speed, personalising products & parcels and by offering customers additional services, they can really make a difference. "Logistics has become an essential part of an organisation's business strategy. Who would've thought that warehouse management could ever be cool and sexy?"

Ideally, everyone involved in the process should have that same glimmer – from the warehouse operatives who pick and pack the items, the drivers who jump in and out of their vans to personally deliver (and sometimes even install) the ordered goods, to the store associates who provide tailored advice to assist shoppers in their buying decisions. Eager, enthusiastic and motivated people inject that extra touch of spirit that is so important in the battle for the consumer's favour nowadays. **>**

TIME TO CLOSE THE GAP

In recent years, retailers have invested in state-of-the-art technologies to improve customer satisfaction with the shopping experience. The top priority is consumer convenience. Technology is facilitating faster and more efficient shopping. So far, online retailers have been the ones setting the trends in terms of logistics processes, convenience and the customer experience, but it is now high time for traditional retailers to close the technology gap. Brick-and-mortar retailers can benefit from offering shoppers the chance to try before they buy and to take products home with them immediately.

On behalf of Manhattan Associates, research firm Multiscope (Netherlands) and YouGov (Germany) surveyed over 3,000 consumers on their wants, needs, expectations and buying behaviour. Two important conclusions for traditional retailers:

CONCLUSION #1: The physical store has not lost its appeal

Despite frequent claims to the contrary, physical stores have definitely not lost their appeal. According to our panel, they regularly visit physical stores, in particular to try a product or be able to take it home with them immediately. End-of-season sales or special offers are another reason for a lot of customers to visit a store. And of course, price is always an issue.

Recommendation for retailers: Physical stores still add significant value for shoppers. In fact, in the future, stores are expected to play a bigger role in the delivery (ship-from-store), pick-up (click-and-collect) and return of online orders. It is advisable for retailers to start putting the relevant systems in place now in order to ensure this logistics process runs smoothly.

What are the deciding factors when shopping in a store? (In percentages)

PRICE
- 59
- 66

TAKING PRODUCTS HOME IMMEDIATELY
- 60
- 62

TRYING OR TESTING PRODUCTS
- 62
- 48

END-OF-SEASON SALE / OFFERS
- 52
- 41

HELPFULNESS / FRIENDLINESS OF STAFF
- 44
- 35

(PRODUCT) ADVICE / KNOWLEDGE
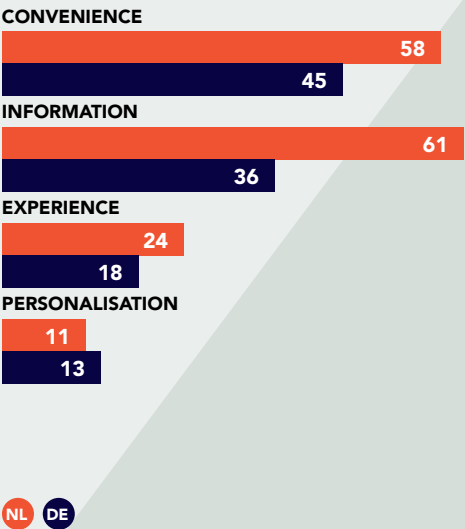- 38
- 34

NL DE

CONCLUSION #2: Consumers have high expectations of technology

Convenience is key, and online and offline retail are clearly no exception. Our respondents want technology to be used to speed up and simplify processes – specifically to improve the provision of information and to make financial transactions easier. Additionally, almost a quarter of the customers would like to see technology used to create a unique shopping experience.

Recommendation for retailers: It is high time for brick-and-mortar retailers to integrate the efficiency and convenience of online shopping into their physical stores. For example, with the right technologies retailers can give shoppers easy insight into product availability, amend orders after they have been placed and offer a fast and hassle-free payment process. Improvements such as these will not only simplify the shopping experience but will also create a consistent omnichannel experience for consumers.

How can technology help to improve the shopping experience? (In percentages)

CONVENIENCE
- 58
- 45

INFORMATION
- 61
- 36

EXPERIENCE
- 24
- 18

PERSONALISATION
- 11
- 13

NL DE

"Good employees can be hard to find, it is now more important than ever to build close-knit teams of people with drive and enthusiasm. Across Europe there is already a shortage of truck drivers, as well as also increasingly difficult to recruit warehouse operatives across large parts of the continent. The use of mobile and flexible robots in warehouses and self-driving trucks could partially solve these problems in the longer term, but we will still need humans for the foreseeable future. And it's important to deploy people in roles that make the very most of their talents and abilities," states Seroux.

Improved productivity
Enabling technology that drives this is available. One such tool is labour management software which visualises the performance of employees in various warehouse roles. Depending on the workload, they can be deployed where they generate the most value. "The team leader has access to an app that shows how everyone is performing. Those insights form the basis to take the right action at the right time and entering a dialogue with the employees – not necessarily to spur them on, but rather to make their work more enjoyable and to proactively avoid them becoming overstressed. This automatically improves productivity."

Technology can also help store associates to generate more revenue. Armed with a tablet that provides tailored advice based on each consumer's customer profile, online activity and purchase history, store associates transform into personal shopping assistants. Not only that, but employees who add more value for shoppers feel better about themselves and are more motivated. "Imagine how a store associate feels when – thanks to a mobile device– an in-store shopper knows more about products and prices. When employees know their customers, they can provide better advice, make relevant special offers and perhaps even start a personalised marketing campaign – such as sending them an email to say that a new shirt in their favourite colour has just arrived. An employee who acts more like a personal shopper rises in status and will ultimately sell more."

Empowering employees
Humans will never be replaced even though technology may well take over certain manual tasks. Quite the opposite, in fact: technology enables a company to make better use of its people's talents. Seroux calls it 'empowering employees'. "Employees are more motivated if they are better informed, feel heard and do work that suits them and they can excel at. Their pride and self-confidence grow, and that pays dividends in the long run."

Personal contact between associates and consumers is more important than ever in today's digital age. After all, it is a key element in the shopping experience; it's one of the main reasons that people still visit stores. Seroux: "Retailers that excel by using technology to enable their staff to create a fabulous customer experience, across the digital omnichannel environment, from contact centre, store, social teams and more, will drive not only customer loyalty but grow revenue through a holistic view of customers, real-time insight and engagement that not only connects the enterprise but truly enables customer connectivity. So, with a connected, agile and flexible solution, supply chain is certainly cool and sexy."

YOU CAN'T SECURE WHAT YOU CAN'T SEE

When your company's name appears in the press, the story should be about your fantastic third-quarter earnings, improved year-on-year same-store results, and the efficiency of your supply chain. You never, never, never want to see a news story about a huge data breach that exposes private, GDPR-regulated information about your employees – or your customers.

Yet such breaches happen far too often, as we all can see by reading our favorite newspaper or website. What can you do to prevent this? The first step is to know what you have in terms of data, systems, applications, users – and third-party actors like suppliers, customers, partners, consultants, and contractors. This can be particularly complicated in retail, because of the complexity of managing stores and e-commerce, as well as a v-e-r-y long supply chain with complicated logistics. However, there are no excuses. Every company needs to keep your confidential data out of the hands of competitors, while assuring customers and partners that you are safe to do business with.

Alan Zeichick,
Director of Strategic Communications, Oracle

Threat visibility

Threats are everywhere, thanks to both external agents (hackers) and internal hazards (disgruntled employees). Confidential data, including inventory, financial, pricing, business plans, and customer info, is stored in data centers, laptops, mobile devices, and cloud services. Maintaining security across these systems is no easy feat. Meanwhile, rules and government regulations are tougher.

The big first step is to gain threat visibility across all platforms. Until you've accomplished that, you can't determine the risks, and establish priorities to manage those risks. You can't secure what you can't see. Your top goal for the next year should be to gain true visibility into your cloud, mobile, and on-premises assets, and to understand the external vulnerabilities - and be able to quickly see and correlate risk and incidents across all those platforms.

Tell-tell signs

Having data spread across multiple tiers of applications and cloud services, and sometimes out on unauthorised services, can greatly impact the organisation's ability to have unified visibility and correct incidents to determine vulnerabilities and see attacks.

For example, hidden in the mounds of security log files generated every second across every enterprise could be the fingerprints and tell-tell signs of an attack. But here's the problem:

only 16% of chief information security officers are able to collect, analyse, and respond to 75% or more of their security event telemetry, says the Oracle and KPMG Cloud Threat Report 2019.

The key to avoiding bad incidents is increased visibility by the security team. Everywhere. That means seeing things both inside and outside the classic 'network perimeter' because, let's be frank, that perimeter no longer exists.

Obsolete notion

Thanks to cloud computing, mobile devices like smartphones, and the internet of things, the classic perimeter is an obsolete notion. This means that security and IT staff must change assumptions about safe traffic, trusted users, and the idea that there is a single demarcation point between public and private clouds.

Indeed, the new perimeter has been pushed up into the cloud and into the hands of every user in the form of their identity. You'll need every employee to help make sure that data is safe and secure, and stored inside sanctioned applications. That means finding out about unapproved applications, and even approved applications used in unapproved manners.

Never forget that security is first and foremost a cultural norm. If it is not a cultural norm, you won't have true visibility into all the data. You can't secure what you can't see.

ORACLE®

Dave Robertson,
*Retail IT Director,
Co-op UK*

Today, Co-op is one of the world's largest consumer co-operatives, with 4.65M active Members, turnover in excess of £10BN, and interests spanning food, funerals, insurance, legal services and health.

The Co-op aims to operate at the heart of local community life - championing better ways of doing business. In September (2016), Co-op rejuvenated its Membership proposition, this followed a move back to its iconic clover-leaf design "Co-op" logo, a logo which doesn't just stand for a business, or even a family of businesses. It represents a powerful idea with values and principals. It represents a way of doing business that's stood the test of time – 175 years this year.

The many challenges society faces today are considerable - and the Co-op has to be ambitious, not only for its business, but for the communities which it serves. It wants those communities to understand how choosing the Co-op benefits them. To think of Co-op as something different, something that brings people together and keeps them together. It runs its business differently because it is owned by its Members.

CO-OP DELIVERS SCALABLE CAPABILITY

Co-op is a story 175 years in the making, founded in 1844 by The Rochdale Pioneers, people who cared about their community and fought to change society for the better with fairness, education, inclusivity, and equality among the values still at the very heart of everything that the Co-op does.

CO-OP CONTINUES TO INNOVATE AND INVESTS TO MAINTAIN COMPETITIVE ADVANTAGE WITHIN THE CONVENIENCE SECTOR. DELIVERING EASE, CONVENIENCE AND CHOICE FOR TIME-PRESSED SHOPPERS.

It works to create value in its communities and supply chain - whether this is support for local suppliers; its pioneering work with Fairtrade - where Co-op was the first retailer to bring Fairtrade bananas to the UK; campaigning for greater protection for victims of modern slavery; alleviating water poverty in some of the world's poorest communities; investment in Co-op Academy Schools and, its ground-breaking campaigning for Safer Colleagues, Safer Communities, Co-op invests in changing societies for the better.

How it runs its business creates value for the communities it serves – the many £Millions Co-op returns to local causes through its Membership scheme is a very big example of this, but there are many more ways in which it gives back. Its Stronger Co-op, Stronger Communities plan is helping customers recognise that choosing Co-op means choosing to do good for community. Co-op wants to help create stronger, more connected communities, which is why it launched the Endangered Spaces campaign in partnership with Locality, aiming to protect 2,000 community spaces by the end of 2022.

The Co-op today has 2,600 food stores, and in a challenging economic environment has seen over 20 consecutive quarters of like-for-like sales growth. It also supplies over 5,000 other stores including those run by independent co-operative societies; franchisees and independent operators through its acquisition of Nisa Retail Limited.

It has worked hard to ensure it remains relevant to all generations, in particular younger co-operators – this year Co-op operated a deposit return scheme for plastic bottles to reduce pollution and littering at its pop-up shops at some of the UK's biggest music festivals, including: Download, Isle of Wight, Latitude and Creamfields.

Its Members also backed a move to accelerate action to reduce impacts on our natural world. Co-op has committed to accelerating steps to curb Green House Gas (GHG) emissions and backs global goals to limit warming to the most stringent of targets. In the last year alone, Co-op reduced GHG emissions by 20%. It has the lowest plastic footprint of any retailer, was the first UK retailer to make compostable bags widely available and, will eradicate hard-to-recycle plastic from stores.

The Co-op continues to grow, the strength of its business can be seen by its underlying financial position and the increasing impact it is having in communities. Earlier this year, Co-op was awarded the "Grocer of the Year" title at The Grocer Gold Awards. It continues to innovate and invests to maintain competitive advantage within the convenience sector. Delivering ease, convenience and choice for time-pressed shoppers. Last year (2018), Co-op became the first retailer to trial autonomous robots. It launched e-cargo bike deliveries and explores exciting online and digital propositions; developed the capability to offer Franchises at scale and, continues to invest in opening new stores, in particular in transport hubs, key city locations, residential apartments and Universities.

It believes co-operation today, as a way of getting things done and making changes for the wellbeing of society, is more relevant than ever.

It has worked to evolve its supply chain, working with strategic partners such as Manhattan to deliver scalable capability, and to support the creation of a sustainable and efficient logistics operation which delivers what its Members and customers want, need and care about, conveniently.

THE ONLINE PARADOX –
HOW TO PROFIT FROM E-COMMERCE

For years now, retailers have been facing the inconvenient truth of needing to incur the incremental costs of consumers shifting from in-store to online shopping, to the detriment of profitability. To meet consumers' expectations, retailers have had to survive in the (often) margin dilutive world of e-commerce.

Worldwide, online shopping contributes to 12% of global retail sales (more than 20% in mature markets) and this is expected to grow with nearly 50% by 2021. This increase of online sales also means a shift from store-based fulfilment to home-fulfilment. When one considers a 100 euro in-store grocery basket delivering between 2 and 6 euros in profit, while home delivery typically entails an extra 7 to 13 euros of costs, it does not take a mathematician to conclude this has a potentially fatal impact.

This is what we call the Online Paradox: retailers need to move their business online in order to stay relevant, but every transaction that moves from offline to online requires massive upfront investments, and tends to be less profitable or potentially margin dilutive. Retail used to be based on the consumer doing the fulfilment themselves in the stores. Yet now we're all increasingly setting the expectation that this massively value-adding activity can be owned by the retailer without getting fully reimbursed for this service. And this expectation of service keeps growing: shorter lead times, smaller delivery windows, easier returns, etc.

So what is a retailer to do? If we assume that saying no is not an option, the question then becomes how to minimise the margin impact. This comes down to two key questions: how to optimise the commercial model to ensure the consumer pays his fair share and how to set up the operation to ensure that costs are as low as possible?

Commercial model
Lots of retailers started with free home deliveries, but more and more retailers in recent years have come back on that decision. Beyond iterating the price of the unit fulfilment service, there appears to be four levels of response:
- Setting up the pricing in a modular manner, along the dimensions of product type, delivery speed, window width, etc.
- Encouraging lower fulfilment-cost propositions such a click & collect from store or 3rd party locations.
- Introducing a fulfilment subscription, to encourage more deliveries and thereby spreading the costs across multiple fulfilments.
- Integrating the fulfilment service into a subscription proposition a la Prime.

All of these responses, however, mandate a granular understanding of both customer behaviour and activity-level costs. Not going to this granular level is not an option.

Operations model
Since the commercial model is typically not enough to pivot into profitability, the operations model is the second domain that need explicit focus. The majority of the incremental costs arise from the physical product movement to the consumer, and specifically from the inefficiency of asset utilisation (driver and vehicle). Drop density is the most relevant variable to influence.

Drop density is mainly driven by two components. One component is minimising the travel time versus number of drops. Retailers around the world are experimenting with e.g. dark stores, regional hubs, pick-from-store in part to address this parameter. The second component is maximizing the consolidation of orders in a single trip. Experiments with so-called milk-runs, whereby the customer is told when the delivery will arrive, also zoom into this domain.

For the operations side, however, the same prerequisite applies - a granular understanding of the key costs drivers and a proactive and holistic management of these drivers is necessary.

Kevin Overdulve,
Director in Logistics & Distribution, Deloitte Consulting

Mark-Jan Grootenboer,
Senior Manager Strategy & Operations, Deloitte Consulting

Deloitte.

THE EVOLVING ROLE OF B2B COMPANIES

The role of wholesalers is changing. Whereas they used to be the link between manufacturers and retailers/contractors, wholesalers are now increasingly becoming service providers. They need to adapt if they are to keep pace with the changing face of wholesaling, and digitalization can help them to do so – in the shape of an advanced warehouse management system (WMS) and order management system (OMS), for instance.

Pieter Van den Broecke,
Managing Director Benelux and Germany, Manhattan Associates

Pieter Van den Broecke from Manhattan Associates is an expert on the changing role of wholesalers. "Traditionally, wholesalers served an important function in the value chain. They formed the physical link between the manufacturers and the companies selling to end users. That automatically made them a key communication channel for manufacturers too, but that role has now been taken over by the internet. Physical contact is no longer necessary in order to do business." For example, more and more manufacturers are in direct contact with end users through their own online stores. "Moreover, online marketplaces such as Amazon mean that end users can obtain products more quickly and conveniently. Nowadays, Amazon is used not only by consumers, but also by companies that need specific professional supplies. There's a clear trend towards everyone in the value chain wanting to get as close to the end user as possible, and the traditional role of the wholesaler does not support that."

Against that backdrop, it seems that wholesalers are in for a very rough ride. Van den Broecke is not quite so pessimistic, as long as wholesalers start to take action fast. "If they want to secure a role for themselves, they will need to be able to offer the same service, speed and reliability as Amazon – that's a must. Besides that, wholesalers have to ensure they stay relevant by differentiating themselves not only from their competitors, but also from the manufacturers themselves. In contrast to manufacturers, wholesalers have the benefit of physical stores, and they can set themselves apart from Amazon by providing an on-site service centre. As a result, we're seeing growth in service centres."

Speed

Additionally, something needs to change in the relationship between the wholesalers and their customers. That relationship has traditionally been a transactional one, but Van den Broecke explains that it must now become based on emotion: "Even business customers are consumers when they are at home on the couch. They buy goods online, read reviews and appreciate good service. They want the same things in their business lives." Wholesalers that stubbornly continue to take the traditional approach will not survive, he says. "Because others around them will change. Getting as close as possible to the end user means being proactive. Business customers expect the same experience that they receive as consumers, so 'fast delivery' doesn't mean in three days' time, but tomorrow – and preferably even today."

Agility

Executing to those delivery windows calls for outstanding logistics to get orders to the right destination quickly. "You must be able to deliver on that promise, such as by opening small distribution centres and service points where customers can collect their orders. Ensuring that goods are in the right place at the right time is a complex process," continues Van den Broecke. "To implement the necessary technological change, a company certainly needs a technology-minded board of directors because you can only achieve all this with an advanced warehouse management system (WMS) and order management system (OMS). After all, in addition to your current software you need an extra layer that can cope with customers' new demands." Van den Broecke has noticed that a large number of wholesalers are already on the right track: "It's easier for the smaller operations who are more agile, and that's much more of a challenge for bigger wholesale companies. Organisational agility is key."

More information for wholesalers:
manh.com/en-nl/wholesale

This interview with Pieter Van den Broecke appeared previously in evofenedex magazine.

7 QUESTIONS TO CONSIDER

The success of your wholesale business depends on your ability to exceed customer expectations: are you winning at each decision point?

What does your customer need?

Harry, a carpenter, needs material to build a fence for his customer. Harry needs reliable and accurate product information and delivery times from his supplier to keep his promise to the customer.

How will your customer engage with you? Online? Over the phone? In your depot?

Harry knows what he needs — now he has to find a way to buy it. When he searches online for the best price means every supplier is just a click away, while the demand for fast delivery puts the speediest fulfillers into pole position.

Will your customer buy from the fastest or the cheapest supplier?

Travelling between jobs, Harry happens to pass one of your depot branches and stops to see if the fence is in stock. Does your service point rep have the tools and information to secure the purchase?

What's the best method of delivery?

Harry pays, and while he's there, he also orders a number of other items.

He selects these to be delivered directly to his address.

How do you maintain your profit margin?

Harry's material needs to be in store for pick up by midday tomorrow. To do this, your fulfilment network has a number of options. It can drop-ship the item directly from the supplier, source the item from one of your regional distribution centres or send the item from a local depot.

How do you fulfil every order efficiently?

Harry's fence arrives in your depot at 11:00 a.m. the next day. He collects the material, knowing he can deliver on his promise and finish the job with a happy customer.

Can you deal with exchanges and returns as efficiently as possible?

Harry needs to return one of his purchased items. A flexible returns process is a benefit to both your customers and you.

DISCOVER MANHATTAN'S CUSTOMER COMMUNITY

One of our main customer-focused global initiatives are the product councils: customer-led communities that gather several times a year during user group meetings to discuss ideas and enhancements, share experiences and provide feedback to the product management team on the product roadmap.

These product councils have a prominent place in Europe where we organise several user group meetings per year in different regions for maintenance-paying customers, both at a customer site as well as at our annual Manhattan Exchange event.

Recently we organised meetings at **L'Occitane** in France, **adidas** in Germany, **Antalis** and **ASDA** in the UK.

Nick Thompson, Logistics Director, **Antalis**

"Antalis has partnered with Manhattan for many years - it's a partnership based on achieving shared goals and the cultural fit means there are effective relationships at every level in both businesses. The user group is one of many ways in which our partnership thrives, meeting with other Manhattan customers is invaluable. The value is created by sharing best practice with old friends and making new friends feel part of the group from the beginning ."

Alexis Dusanter, International E-commerce Operations & Supply Chain Manager, L'Occitane

"Have you ever felt frustrated leaving a conference or an event with the impression of spending time reviewing lots of solutions versus real deep dive on topics and getting true insights from other companies? That's the reason why we decided to welcome a small group of Luxury and Fashion companies in an informal way, in order to facilitate discussions & learn from each other. It was a pleasure to welcome eight Manhattan customers in our offices, to spend a day altogether around omnichannel practices and transformation of our organisations. Thank you, Manhattan team, for the co-organisation, and all for this insightful moment!"

Mustafa Ozturk, Director Solutions Architecture, adidas

"We welcomed around 15 WMS customers in our distribution centres in Rieste, Germany for a 2-day meeting with round-table discussions around automation and site visit to both our distribution centres."

Rob Wilks, Senior Manager Solution Design, ASDA

"The user groups allow for networking and best practice discussions amongst Manhattan customers"

PUSH POSSIBLE®

KEEPING CUSTOMERS HAPPY:
STRIKING THE RIGHT BALANCE

It feels like we're stuck between a rock and a hard place when it comes to customer demand: Bend over backwards to please the customer and profits can be impacted; keep a close eye on operational costs and customer satisfaction can take a turn for the worse.

But there is help at hand. Here at Manhattan Associates we make it possible to create personal experiences that resonate with the customer whilst ensuring profitability is not compromised as a result of escalating costs. The secret is to simultaneously consider both the front-end commerce transaction, whether online or in-store, whilst also finessing the art of fulfilment in the back-end operation, it's the connectedness of these two elements that allow you to deliver both customer demand and business needs.

Georgia
Leybourne,
*Senior Director
International
Marketing,
Manhattan
Associates*

At the point of transaction all parties need to be able to make decisions based on real-time information:
- The customer needs to know the options for when and where they will take delivery of their goods (at home or in a store, today or tomorrow or whenever)
- The enterprise needs to offer up those options knowing if the stock is available, from where and how much it will cost to get it to the customer
- The website, call centre agent or store associate needs to be able to provide that information to the customer at the point of transaction, without delay and with certainty
- The warehouse needs to be able to layer in the single pick of an online order in amongst its bulk store replenishment shipments, seamlessly integrating man & machine dependent on workflow
- The store needs to be able to locate, pack and ship (or offer for collection) from their inventory in-store or from a delivery received from the warehouse

To enable this level of coordination with common view for all parties of the same information from the warehouse to the store to the call centre to the enterprise, all of these elements need to be connected. Manhattan Active® solutions provide this breadth of connectivity with sophisticated algorithms instantly working through the permutations ensuring that a decision made in-store by a store associate can be efficiently supported in the warehouse.

Customers today want certainty and visibility over speed and price. Many of them are willing to pay more for convenience and most of them don't really need it same day, tomorrow or the next day will be just fine.

But... if you say you're going to deliver it at a certain time on a certain day, don't let them down.

And... if something changes then let them know, proactively, and offer alternatives.

Striking the right balance between meeting customer demand and ensuring operational efficiency drives customer loyalty and a healthy bottomline.

Find out more about Manhattan Active® solutions at www.manh.com/active.

PUSH POSSIBLE®

SAVE THE DATES

⋙ Manhattan MOMENTUM® 2020

ARIA RESORT & CASINO

Las Vegas, Nevada

17 – 20 May 2020

manh-momentum.com

⋙ Manhattan EXCHANGE 2020

KOSMOS

Berlin, Germany

5 – 7 October 2020

manh.com/exchange

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