



# How to Find the Right Omnichannel Platform for Your Business

---

A RETAILER'S RESEARCH GUIDE

CREATED FOR



salesforce

# Table of Contents

|          |                                                   |
|----------|---------------------------------------------------|
| <b>2</b> | <b>Try It On</b>                                  |
| <b>3</b> | <b>Expected ROI</b>                               |
| <b>4</b> | <b>Are you looking for a partner or a vendor?</b> |
| <b>5</b> | <b>Project Timeline and Budget</b>                |
| <b>5</b> | <b>Ongoing Budget</b>                             |
| <b>6</b> | <b>Data</b>                                       |
| <b>6</b> | <b>APIs</b>                                       |
| <b>6</b> | <b>SaaS</b>                                       |
| <b>7</b> | <b>User Interface</b>                             |
| <b>7</b> | <b>CTA</b>                                        |
| <b>8</b> | <b>Retailer Questions</b>                         |

Implementing omnichannel brings huge rewards, but it is not without its complexities or challenges. **It's more than buying another system — it's a different way of operating as a retailer.** With that in mind, we've compiled a guide of the most important considerations to drive your research and help you make the best technology choice for your business.



## Try It On.

If there's only one thing you do to evaluate a technology, it should be this: *shop at a retailer that is running its retail stores on it today.*

- Is the store experience what you want for your own stores?
- Is the retailer using the features you want to implement?
- Do the associates like the technology?

# Expected Return on Investment

Operating as an omnichannel organization drives value for every group in your business. It's not only about providing a consistent customer experience across channels, although that is a huge reward. Omnichannel retailing makes your business more efficient. By enabling sales channels to leverage each other for data, inventory, service, and more, every stakeholder from headquarters to stores will achieve maximum productivity.



## Retail

- Improve store conversion rate by connecting customers to any item with endless aisle.
- Drive store traffic with buy online pickup in-store (BOPIS) and buy online return in-store (BORIS), and create upsell opportunities.
- Improve customer data capture with endless aisle and digital receipts.
- Improve associate productivity with clienteling.
- Improve full-price sell-through by leveraging store inventory across the entire enterprise.

## Ecommerce

- Boost ecommerce conversion rate with better fulfillment options, such as BOPIS, BORIS, or ship-from-store.
- Improve margins through intelligent order routing and shipping options.
- Improve customer service with access to full customer information and order history across all channels.

## Operations

- Improve margins by selling store inventory at risk of markdowns.
- Facilitate inventory allocation by selling inventory regardless of its location.
- Understand which items do and don't require discounting.
- Improve sales measurement and attribution across stores.
- Better target promotions and marketing efforts across digital and offline.

# Are you looking for a partner or a vendor?

With a traditional software vendor, you get a load of code that you are free to use as you wish. It's a very transactional relationship. As a result, ongoing support and software modifications turn into added costs. The software and your experience with it are two separate things. Since you will not want to replace this system every year, it's important to make sure that you and the vendor are well aligned.

A partner stays close to you at every stage of the relationship. From sales, through to technical implementation, store rollout, and growth. This entire journey should be considered part of the purchase. Omnichannel capabilities aren't usable if the platform isn't integrated with your tech stack correctly. Store systems won't boost sales if associates aren't properly trained. A partner is aligned with you the entire time, helping you to define and refine your goals time and again.

Many of these questions are best answered by speaking with some of the vendor's existing customers.

- **Did the vendor deliver what was promised during the sales cycle?**
- **Has the platform been stable during peak sales periods?**
- **How have support cases been handled?**
- **What technical and retail support services are included with the software?**
- **What role does the vendor play during the store rollout and training?**
- **How much has the system evolved and improved since implementation?**



# Project Timeline & Budget

Some complexity is inherent in omnichannel implementation as it involves connecting many of your critical business systems to create a seamless technology platform for your customers, associates, and business users.

A proper project should allocate sufficient time for planning, development, testing, and rollout. So, if the project is inexpensive, it is likely the implementation will not truly enable your omnichannel customer journeys.

However, the project should not be a neverending story either. If an implementation drags on and is accompanied by surprises and mounting change requests, then the platform is likely not mature or not software-as-a-service (SaaS).

- **What is your project timeline and budget?**
- **Can the vendor provide a standard project plan for an implementation, including QA and store rollout?**
- **How are customizations applied to the base code?**
- **What is the effort to set up a new pop-up store?**
- **What limitations does the subscription have on the number of devices/lanes/users?**

# Ongoing Budget

Complex integrations and customizations require maintenance. This can become very expensive if the vendor's business model depends on services and consulting revenue. Internally maintaining these systems can be equally as expensive. Only very rare, large retailers are able to consistently innovate with their own systems. For most retailers, technology should be an enabler of the main business, rather than a core focus. To this end, it is better to find the right technology partner to handle maintenance, security, support, and new feature development.

- **What resources do you have to support the technology?**
- **Are you prepared to support the technology in perpetuity?**
- **Can you recruit the talent required to build the desired technology?**

# Data

A single source of truth is key to omnichannel operations. An omnichannel platform must maintain real-time records of inventory, customers, and orders and make the data available to all customer touchpoints. Without this, cross-channel customer journeys such as endless aisle, buy online return in-store, or store fulfillment would not work.



# APIs

Omnichannel requires integrations, and real-time integrations require a platform with a robust, open API. Not only does this enable you to get data in and out of the platform, but it also lets you build whatever you need on top of the platform. Make sure you take the time to review the vendor's API documentation thoroughly.

- **What integration methods does your platform support?**
- **Does the vendor have any other customers using your systems? (ERP, ecomm, etc.)**
- **Can the vendor provide a diagram of how they would integrate with your systems?**

# SaaS

Building a true software-as-a-service omnichannel platform is difficult and very resource-intensive. Most vendors advertise their product as cloud-native, yet few really are. Operating a SaaS omnichannel platform should be the company's primary focus, not an extension of a legacy point-of-sale or order management system.

If the technology is not SaaS, you'll have to pay for every upgrade. As a retailer, your money and resources are better spent elsewhere. For example, user licenses shouldn't be a problem as the cost of additional users on a true SaaS platform is marginal.

Even "cloud-native" or "hosted" vendors can have many of the drawbacks of "legacy" or "on-premise" vendors. An important distinction of a true SaaS platform is that all customers are running on the software – the same version with the same features.

- **Are the latest tech, compliance, and security feature updates handled for you?**
- **Can the platform scale with your business, without limits?**
- **Is version lock possible on your platform? If so, how do you avoid this?**
- **Are all of the vendor's live customers on the same version of the software? If not, how many different versions are there?**
- **How often are software updates released and are they required to be implemented in a specified timeline for product support?**
- **What is the current major version and when was it released?**

## User Interface

While the technology should be easy for you to maintain, it also needs to be easy for stores to adopt. An intentionally-designed user interface is important in enabling your store associates. It makes it quick and easy for associates to learn how to use the technology and provide customers with the desired brand experiences. Complicated and clunky designs or workflows will hinder store adoption and require constant training efforts as store teams turn over or grow.

The form factor also plays a role in adoption. Customers won't wait around for five minutes while a store associate enters data across multiple systems or devices. Similarly, an associate won't be able to make the same kind of impact during a customer interaction if they're trying to carry an oversized tablet as they show a customer an outfit.

- **What hardware is needed in each store to run your system?**
- **Do you support mobile form factors with native apps or wrapped web apps?**
- **Does the in-store technology match your brand aesthetic?**
- **How quickly would new associates be able to master the system?**



**Still have questions  
about becoming an  
omnichannel retailer?**

Speak to an omnichannel expert. →

# Retailer Questions

We recommend visiting retailers where the functionality you're looking to implement is already live. Use this list to help you determine which vendor is the right choice for you and your store associates.

## Online: Web & Mobile Function

- ☐ Can you see in-store inventory information for stores near you/of your choice?
- ☐ Does the in-store inventory information reveal stock quantity (in stock vs. low stock vs. out of stock)?
- ☐ Does the brand have shoppable Instagram content?
- ☐ Can you buy online and pick-up your items in store (BOPIS)?
- ☐ If you can BOPIS, can you schedule a pick-up time?
- ☐ Can you return an item bought online in the store (BORIS)?

## Call Center Function

- ☐ Can the call center access a customer's profile to see online and in-store purchase history?
- ☐ Can the customer order through the call center and pick up at a local store?
- ☐ Can the customer order through the call center and pick up one item at a store and have another shipped in a single transaction?
- ☐ Can the call center adjust delivery information after an order has been placed?
- ☐ Can the call center process a return/exchange?
- ☐ Can the call center lookup receipt/order information if neither are available?

## Associate Mobility

- ☐ Does the associate use a mobile or tablet device?
- ☐ Does the associate carry her mobile device on the floor?
- ☐ Can the associate use her mobile device for store fulfillment?

## In-Store: General POS Function

- ☐ Does the brand have a traditional cash wrap/checkout counter?
- ☐ Does the store advertise that it accepts Apple Pay or other contactless payments?
- ☐ Is customer information captured in any way (by an associate at checkout or distinct from checkout)?
- ☐ Can the associate access a customer's profile to see online purchase history?
- ☐ Can the associate access a customer's profile to see in-store purchase history?
- ☐ Is the associate able to modify the customer's shopper profile?
- ☐ Can the associate see/look up a customer's wish list?
- ☐ Can the associate see/look up a customer's online shopping cart?
- ☐ Does the associate have access to recommended or related products? (Cross-selling)
- ☐ Can the associate add items to a shopping cart or wish list for the customer to view later?
- ☐ Can the associate check inventory levels at other stores?
- ☐ Can the associate check his/her store's inventory levels?
- ☐ Can out of stock items be purchased from another store?
- ☐ Can out of stock items be purchased for delivery from a warehouse?
- ☐ Does the associate have to be at a counter to complete checkout? (i.e. with other tech/systems in close proximity)
- ☐ Can the customer buy an item in-store and have it shipped? (Instead of leaving the store with it)
- ☐ Can an associate place an endless aisle order from a mobile device?
- ☐ Can the associate combine an in-store order and an endless aisle order in a single transaction?
- ☐ Can the customer pay on his/her device without any external hardware? (i.e. using contactless card, Apple Pay, Google Pay, etc.)
- ☐ Does the customer's profile automatically populate with new orders after a purchase?
- ☐ Can the associate contact the customer outside of the store?
- ☐ Can the associate look up receipt/order information to return or exchange an item (if the receipt is not available)?