



CLIENTELING

Up Close and Personal



 RedPrairie®

SOLUTION OVERVIEW

Clienteling: Up Close and Personal

The Evolution of CRM

Most Retailers Are Just Beginning to Explore the Possibilities

For years, both the corner shopkeeper and the national department store have struggled with the same fundamental challenge: increasing the number of customer visits and the amount those customers spend with each visit. Certainly, understanding customers, having the right merchandise, and delivering the appropriate experience are levers that can be pulled, but achieving the right setting for each lever can be a challenge. Today's most successful retailers are learning to integrate Customer Relationship Management (CRM) techniques as both a strategy and a process to manage these levers in order to ultimately increase customer visits and spending per visit. These requirements go beyond the traditional, static CRM

data capabilities. It's all about making that data actionable into processes and best practices.

In practice, CRM has existed in retail as a manual process ever since shopkeepers first opened their doors. For over 100 years, salespeople have recorded shoppers' preferences, activities, and important dates in individual "black books."

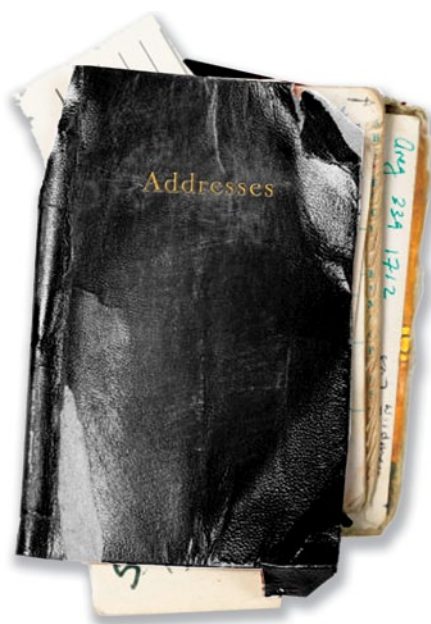
This pen-and-paper information is used to help service the same customers on an ongoing basis, and to maintain connections with

those customers through the years. Today, the industry is just beginning to define and capitalize on the capabilities of technology as an enabler of CRM, not just as a marketing function, but also as an actionable business strategy aimed at understanding customers and optimizing interactions to increase customer loyalty, retailer revenue, and company profit.

Instinctively, retailers understand their customers. They certainly know about management. However, applying the "relationship" element of CRM can be puzzling, since most customers want a good retail experience rather than a relationship with their retailers. Exceptions to this "no relationship" rule thrive at higher end retailers, where sales associates develop high-touch, personal relationships with select clients. This is a proven model that drives repeat customer visits and increases sales per visit. Obviously, this commission-based, highly-paid model is not applicable to – or appropriate for— all retail organizations. But its essential function – to apply the right touch of service and develop relationships with customers that deliver a lifetime of value – is one from which any organization can benefit if a way can be found to use available technology to scale it appropriately and cost-effectively.

"Those who have recently installed new applications like Clienteling software will generally be more successful at weathering the twists and turns because they've got the ability to do a better job of reaching out and connecting with shoppers."

– Citi Investment Research



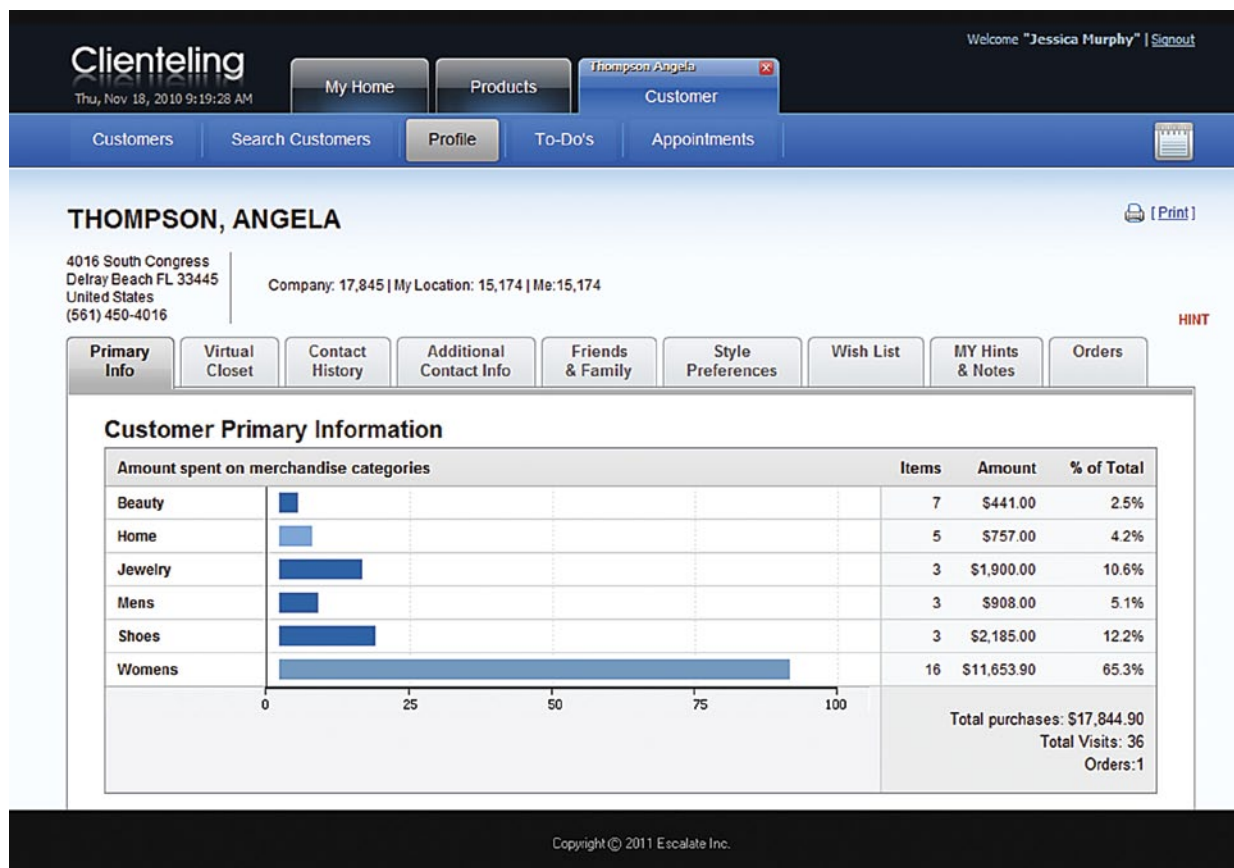
Clienteling: The Key to Sales Optimization

Delivering the Right Message to the Right Customer at the Right Moment

A blend of technology and business processes termed “sales optimization” is emerging to deliver on the promise of increased sales productivity. Sales optimization enables an organization to capture, organize, and distribute the collective sales knowledge of the organization to the salespeople who need it at the moment that they need it. Sales optimization “pushes” knowledge; it is proactive rather than passive. Being proactive is the defining characteristic of sales optimization.

Recent advances in technology have enabled RedPrairie to take sales optimization from theory to practice with the development of RedPrairie Clienteling: a proven sales optimization solution. The key component is an intelligent engine that organizes information and manages how and when to distribute that information.

RedPrairie’s Clienteling solution delivers a suite of sales and marketing applications built upon the intelligent engine to create product, customer and process management tools that drive proactive sales management practices, and help deliver the right message to the right customer at the right moment.



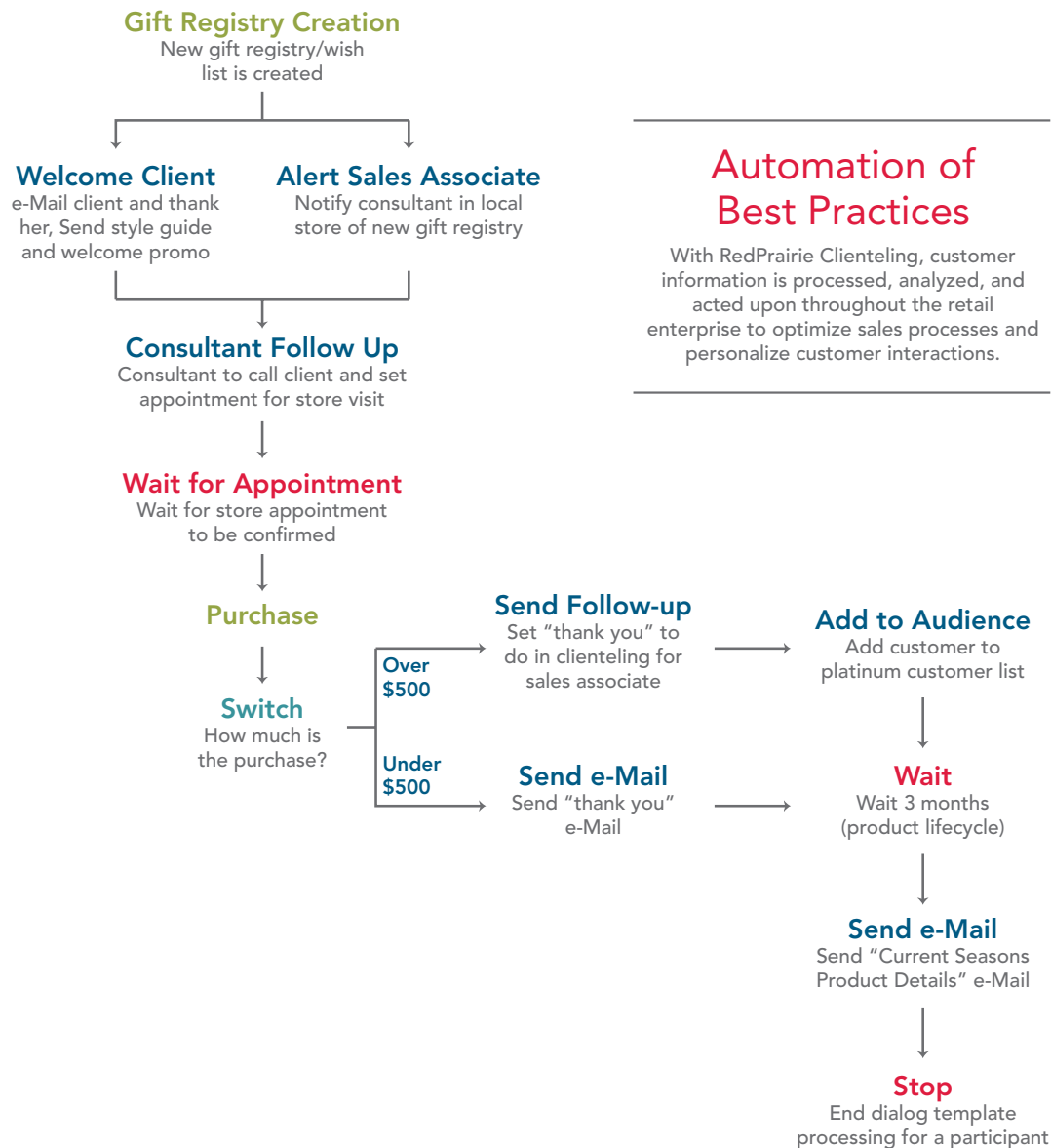
RedPrairie Clienteling sends guidance to salespeople at the moment it is most helpful, improving their tactics and leveraging the best practices of the organization.

Fueling the Intelligent Engine

Consolidating Customer Knowledge From Every Corner of the Enterprise

The “fuel” of RedPrairie’s intelligent engine is the knowledge that every organization accumulates about how to sell. For most retailers, that knowledge rests in the heads and Client Books of their best sales associates, or in the rich analysis performed by marketers and data analysts. RedPrairie Clienteling delivers value throughout the organization by sharing this knowledge easily with salespeople across the retail enterprise. This structured methodology for capturing and disseminating the collective wisdom of an organization is then easily leveraged by all salespeople to boost sales productivity and increase the number of peak performers throughout the organization.

1. **Record:** Sales activity between salespeople and customers is captured in various forms.
2. **Analyze:** Customer data is delivered to RedPrairie’s Business Intelligence and Analytic tools, complete with data mining capabilities suited to discerning patterns in a large quantity of data.
3. **Plan:** Marketers view the results of analytic processing to draw conclusions about how to best sell to different types of customers.
4. **Monitor:** The intelligent agent manages thousands of potential actions, and these all work best at different times. To regulate the timing of actions, a state machine keeps track of the current state of every monitored event.
5. **Deliver:** The intelligent agent retrieves the appropriate content from a repository and delivers it to the salesperson.
6. **Interact:** The salesperson then relies upon the RedPrairie’s Clienteling Dashboards for daily guidance.



Automation of Best Practices

With RedPrairie Clienteling, customer information is processed, analyzed, and acted upon throughout the retail enterprise to optimize sales processes and personalize customer interactions.

A Track Record of Success

Leading Brands Leverage RedPrairie Clienteling to Help Win the Battle for Customer Loyalty

Several of today's most high-profile and successful retail organizations have turned to RedPrairie Clienteling to help them achieve higher levels of sales optimization, salesperson productivity, and share of the wallet.

"Everything we do is focused on improving the customer experience and creating confidence with that customer. Clienteling is putting the 'life' of the customer into one seamless technology."

– Brooks Brothers

The screenshot shows the Clienteling dashboard interface. At the top, it says 'Clienteling' and 'Welcome "Jessica Murphy" | Signout'. The navigation bar includes 'My Home', 'Products', and 'Customers'. Below that is a secondary navigation bar with 'Dashboard', 'To-Do's', 'Appointments', 'Events', 'News', 'Lists', 'Messages', and 'Gift Registry'. The main content area is divided into several panels:

- Current Events (Top 5):** Shows an event named 'Vendor Trunk...' with a start date of '01/09/2011'.
- Messages:** Displays a notification: 'You have (1) new unread messages.' Below this is a 'To-Do's' section with a '[Print]' link. It lists tasks for 'Today(7)' and 'Next 7 Days(0)'.

Task	Today(7)	Total(7)
Appointments	0	
To-Do's	7	
Event Tasks	0	
Others	0	
Next 7 Days(0)		
Appointments	0	0
To-Do's	0	7
Event Tasks	0	0
Others	0	0
- Sales Associate 59 Book (11/11/2010):** Includes a 'Summary' button and a 'Search Products' link. It features a 'Task Compliance' table and a 'Sales / Clients' table.

	Total # Tasks	% Complete	% Complete on Time
Month to Date	116	80%	80%
Last Month	106	68%	68%

	Sales in Book	Total Sales	Active Clients
Month to Date	\$145942	\$226157	83
Last Month	\$134371	\$211543	83
- Flash News (Top 5):** Shows a news item titled 'Introduction...' published on '11/18/2010'.

At the bottom of the dashboard, there is a 'Quick Links' dropdown menu and a 'GO' button. The footer of the page reads 'Copyright © 2011 Escalate Inc.'

How RedPrairie Clienteling Works in the Retail Enterprise

Key Capabilities Drive Access, Analysis, and Action

Client Management >

- Real time client profile access and editing
- Detailed customer purchase history, brand preferences and other CRM data
- Cross-channel virtual closet with product recommendations
- Cross-channel customer contact and transactional history
- Holds, service tickets and alterations by client
- Gift registry & wish list management

Activity Management with Relationship Marketing >

- Event-triggered actions to sales associates
- Synchronization between corporate marketing and sales associate activities
- Follow-up associate reminders to suggest phone calls, email or direct mail
- System pushes suggested contacts based on corporate, store, department and personal "events"

Reporting >

- Actionable reporting on associate activities and effectiveness, including best practices
- Comprehensive customer analysis
- Flexible client query tool

Sales Associate Access >

- Personalized dashboards, calendars, action lists, and reminders
- Puts eCommerce capability into the hands of the Sales Associates
- Browser-based access at POS, kiosk, PC, Tablet, or mobile device
- Roles and permissions to control data access levels by different associates
- Event-triggered dialogs
- Synchronized, cross-channel dialogs: email, direct mail, web, call center, kiosk, and wireless device

The screenshot displays the RedPrairie Clienteling web application interface. At the top, there is a navigation bar with tabs for 'My Home', 'Products', and 'Customer'. Below this is a secondary navigation bar with options like 'Customers', 'Search Customers', 'Profile', 'To-Do's', and 'Appointments'. The main content area shows the profile for 'THOMPSON, ANGELA' with contact information and a 'Print' button. Below the profile, there are several tabs: 'Primary Info', 'Virtual Closet', 'Contact History', 'Additional Contact Info', 'Friends & Family', 'Style Preferences', 'Wish List', 'MY Hints & Notes', and 'Orders'. The 'Virtual Closet' tab is active, showing a 'Womens (1) Recommendations (3)' section. This section contains a table with columns for 'Womens', 'Sku No / Description', 'Store / Trans / Reg / SA Name', 'Details', and 'Delete'. The first row shows a pair of black leather pants with a quantity of 1. Below the table, there is a 'Recommended Items' section displaying three product thumbnails with their respective SKUs and descriptions.

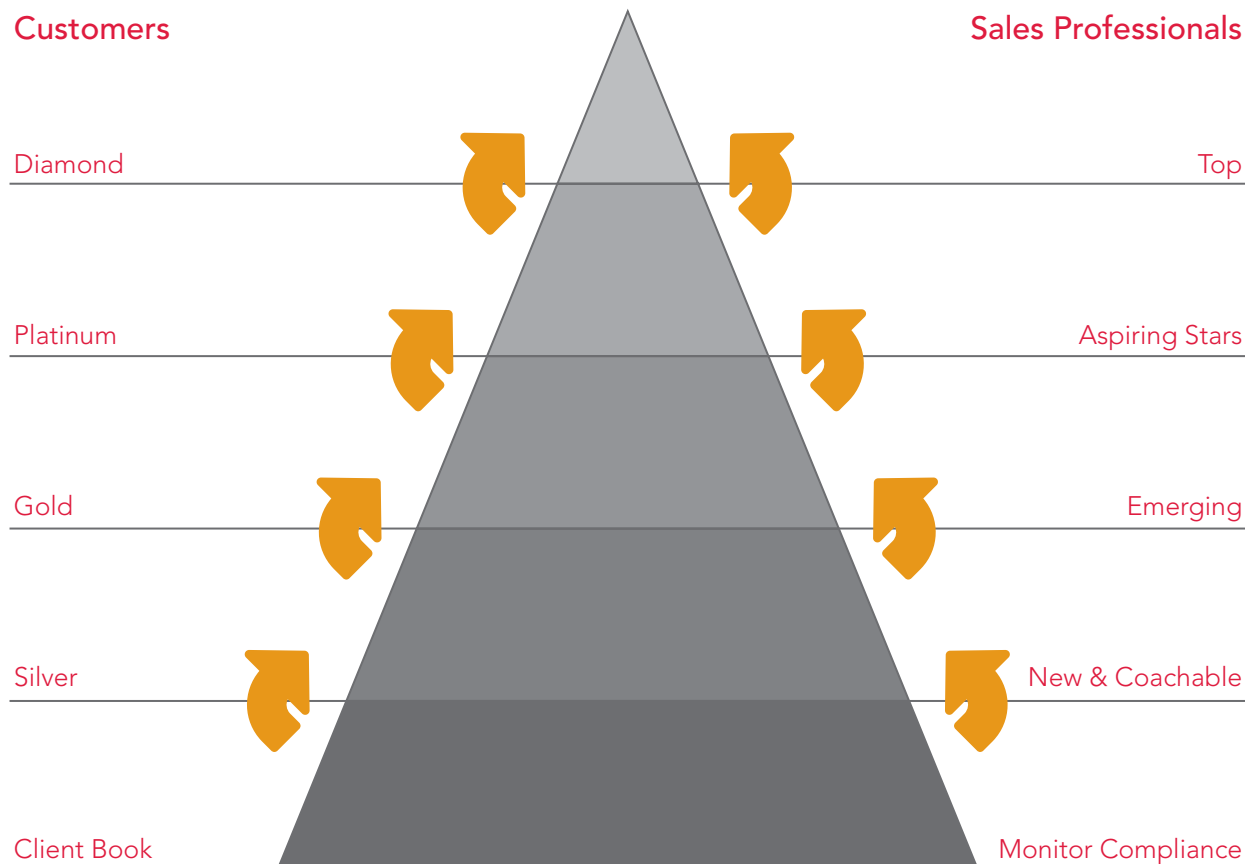
RedPrairie Clienteling: Delivering Tangible Value

Sales Optimization is Now Achievable

As knowledge is shared throughout an entire sales organization, the financial impact can be substantial. Sales optimization, when fueled by RedPrairie Clienteling can:

- Increase revenue per customer and per associate
- Increase customer visit frequency
- Increase average revenue per visit
- Enable management to automate best practices across all stores
- Increase conversion rates
- Decrease customer turnover
- Reduce discounting and returns
- Accelerate the learning curve for new sales associates
- Increase customer lifetime value

Today, companies are not satisfied with CRM investments that simply organize data and provide analytic tools. They are looking for a better way to achieve sales optimization. Forward-thinking leaders know that their company's collected sales experience is priceless, and they demand that this actionable information drive the daily activities of their sales force. RedPrairie Clienteling makes it possible to elevate the entire sales force, boosting customer loyalty – and revenue – considerably.



Clienteling helps organizations evolve their sales practices. Customer Loyalty is closely aligned with the effectiveness of the sales professional.

Solutions that Simplify the Challenge of All-Channel Commerce

Overview

Our clients are among the leaders in their markets, with high-profile brands like The Home Depot, Kohl's, Brooks Brothers, J.Crew, The Buckle, Hot Topic and Tommy Bahama, among the more than 500 names on our client roster. Our experience serving these 500 retail clients has taught us that those who treat every customer interaction as an opportunity to enhance their brand are the retailers who gain sustainable customer loyalty. We have built our business on a relentless commitment to delivering products, solutions and services that help our clients build passionate customers at every point of interaction. We help our clients create passionate customers by delivering a comprehensive set of solutions that simplify the inherent challenges of cross-channel commerce in the store, on the web, and over the phone.

e-Commerce

RedPrairie e-Commerce provides an open, scalable cross-channel application that enables retailers to deliver both an outstanding web shopping environment as well as a highly personalized vehicle for delivering store, merchandise, marketing and service information. The complexity of managing multi-brand, multi-national websites presents significant challenges for business and IT executives today. Targeting, managing, and publishing the right content and messages for customers, partners, and sales teams can be an overwhelming task. RedPrairie helps retailers address these challenges with a comprehensive e-Commerce application that delivers timely and relevant content across channels.

With powerful and flexible merchandising, integrated e-marketing, embedded analytics, and massive scalability, RedPrairie e-Commerce is a robust solution for retailers who seek to drive more revenue at a lower cost through a web-based channel. Combining the most advanced shopping, service and product information tools with a rich customer history and profile, the application delivers a platform tailored to the unique requirements of today's cross-channel environment.

Order Management

RedPrairie has been helping many of the world's leading retailers coordinate and communicate with their cross-channel customers for over a decade. Our Customer Order Solution provides retail partners like The Home Depot leverage with real-time tracking of multi-channel orders throughout the entire order life cycle to achieve best-in-class customer order capabilities. RedPrairie views Order Management as an integral part of the overall Commerce solution and has embedded these functional capabilities into the Commerce solution suite.

As a result, these and other retail partners have maximized revenues through seamless cross-channel integration, lowered costs by processing orders more efficiently and ultimately they have achieved greater brand loyalty by improving customer satisfaction levels in every transaction.

Loyalty Marketing

In today's retailing climate full of choice, it's becoming mission critical that every customer experience is personalized and seamlessly managed in every sales channel and every interaction.

For retailers still operating with disconnected silos of information between their different sales channels, building a loyal customer base can be challenging, if not impossible. Faced with a fractured customer view, these retailers are unable to personalize interactions in any of their channels as they find themselves either swimming in a sea of irrelevant, unorganized customer data in one channel or struggling with too little customer insight from another.

To help our retail partners address these issues, RedPrairie's Customer Loyalty solution provides a 360° degree view of the customer to build sustainable loyalty through consistent, relevant, and timely communication and outreach.

Solutions that Simplify the Challenge of Cross-Channel Commerce

Clienteling

As cross-channel shopping becomes the de-facto method of choice for most consumers, it becomes critical that every customer experience strategy incorporate a unified, customer-focused approach to every transaction. And since brick and mortar stores still represent the lion's share of revenue for most retailers, the in-store experience is the area that demands the most attention.

The reality for most retailers, however, is that their stores are disconnected from their other channels and the enterprise, and as a result they are unable to provide tight connections to critical data and activities store personnel require. This lack of timely information makes it difficult for store associates to provide the level of service that is only possible when they communicate effectively and frequently with their best customers.

To help our retail partners address these issues, RedPrairie's Clienteling solution connects the store to the enterprise to break down the silos that often exist between sales channels. This approach results in a complete 360 degree view of every customer in every channel, every time they visit your brand. To fulfill RedPrairie's mission to create passionate customers, we have invested heavily in bringing to market a Store Experience solution that ensures all store personnel have the tools they need to deliver personalized, relevant, and service-oriented interactions every time a customer walks through the door.



About RedPrairie

For more than 35 years, RedPrairie's best-of-breed supply chain, workforce, and all-channel retail solutions have put commerce in motion for the world's leading companies. Installed in over 60,000 customer sites across more than 50 countries, RedPrairie solutions adapt to help ensure visibility and collaboration between manufacturers, distributors, retailers, and consumers. RedPrairie is prepared to meet its customers' current and future demands with multiple delivery options, flexible architecture, and 24/7 technical and customer support. For a world in motion, RedPrairie is commerce in motion™.

To learn more about how RedPrairie solutions can optimize your inventory, improve employee productivity, or increase sales, visit RedPrairie.com or email info@RedPrairie.com.

1.877.733.7724 info@RedPrairie.com RedPrairie.com

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