Microsoft | Services

Microsoft Retail PCF

Microsoft and APQC Co-development

STRATEGY ▪ CONSULTING ▪ SUPPORT

Damir Vrankic, Vic Miles, and Ron Lamb
October 25, 2012

Agenda

Introductions

Microsoft

Context: Why APQC

Retail PCF Process

APQC Usage

Vic Miles

Damir Vrankic

Ron Lamb

Q & A

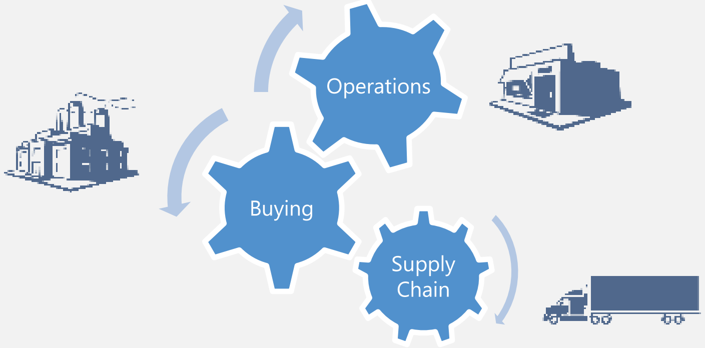
You may not know - Microsoft has large industry products/ solutions and consulting practices

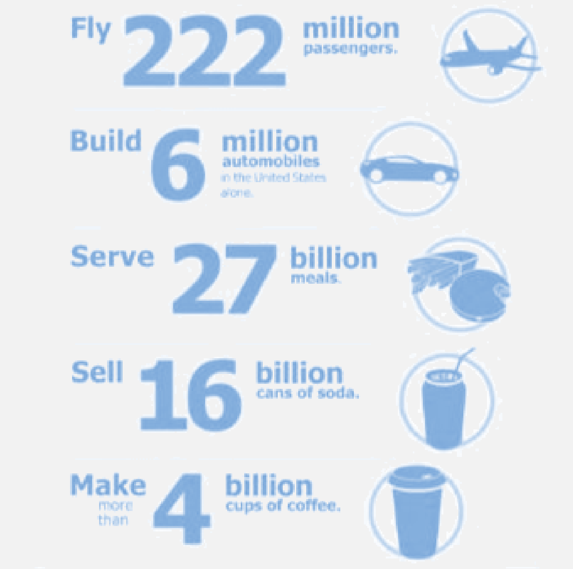
Retail is one of the largest Industry Practices

Vertical industry enterprise process experience

Largely covers Retail & Hospitality

Direct relationship with 13 of global top 20 retailers


Operations
Buying
Supply Chain


Fly 222 million passengers.
Build 6 million automobiles in the United States alone.
Serve 27 billion meals.
Sell 16 billion cans of soda.
Make more than 4 billion cups of coffee.

TESCO coles Royal Mail HYATT Coca-Cola Enterprises Inc. starwood Hotels and Resorts Levi's QANTAS

To better serve our clients we needed Business Capability reference model

Business Capability Reference Model

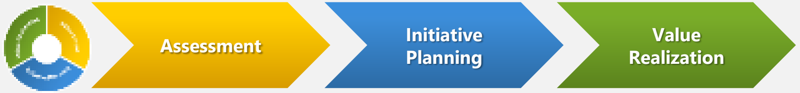
Business Capabilities

Key Requirements

1. Credible
2. Standard [schema]
3. Multiple industries

Enterprise Strategy Services

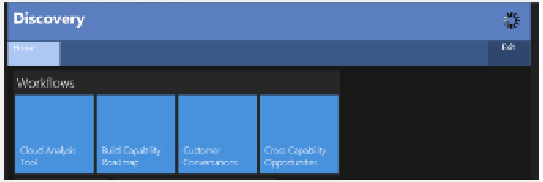
Value Realization Framework


Assessment
Initiative Planning
Value Realization

- Rapid value delivery
- Business driven architectural decisions

Industry Products and Solutions

- Operational assessment
- Business driven solutions


Discovery
Home
Edit
Workflows
Cloud Analysis Tool
Build Capability Road map
Customer Conversations
Cross Capability Opportunities

Selecting a Partner Organization

Key Requirements

1. Credible
2. Standard [schema]
3. Covering number of industries

APQC® Matching Requirements

1

550+ Member Companies

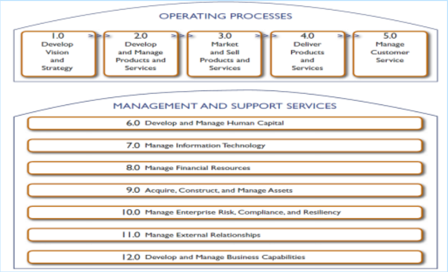
...from 45 industries

...and all major geos

...69% lager than $1B

All major consultancies use APQC

2


OPERATING PROCESSES
1.0 Develop Vision and Strategy
2.0 Develop and Manage Products and Services
3.0 Market and Sell Products and Services
4.0 Deliver Products and Services
5.0 Manage Customer Service
MANAGEMENT AND SUPPORT SERVICES
6.0 Develop and Manage Human Capital
7.0 Manage Information Technology
8.0 Manage Financial Resources
9.0 Acquire, Construct, and Manage Assets
10.0 Manage Enterprise Risk, Compliance, and Resiliency
11.0 Manage External Relationships
12.0 Develop and Manage Business Capabilities

3

11 industry vertical-specific PCFs

+ Cross-industry PCF

Benchmarking

Knowledge base

Licensing agreement

“Small” problem – no Retail-specific PCF available

Microsoft and APQC combined expertise to build Retail PCF

Microsoft

Retail industry expertise

- Seasoned Enterprise Architects driving development
- Network of SMEs providing feedback (EPG, Services, PG)

APQC®

Frame and process expertise

- PCF owners working on alignment , cataloging, cross-checking, etc.
- Formal membership review process

Microsoft Team

Microsoft Consulting Services

Damir Vrankic

Director Enterprise Strategy Program

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Ron Lamb

Retail Strategy Advisor

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Dave VanBerg

Retail Strategy Advisor

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Manik Sarkar

Enterprise Architect

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Business Architecture

Solution Strategy

Product Depth

Microsoft WW Industry

Vic Miles

Retail Technology Strategist

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David Dobson

Industry Solutions Manager

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Stephen Wood

Principal Platform Specialist

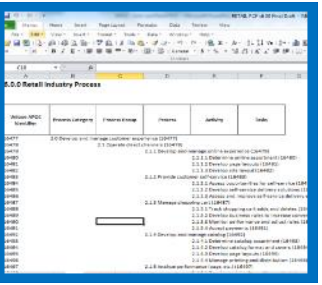
stewoo@microsoft.com

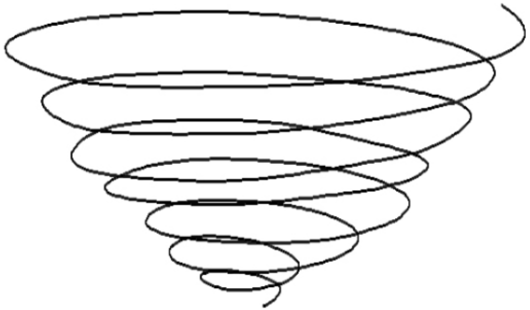
Challenge - Mismatch of Objectives

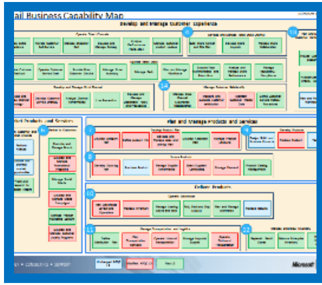
	APQC®	Microsoft
Key Objectives	**Normalization** to establish cross-industry standard structure and nomenclature	**Differentiation** to emphasize retail industry specifics
	Firm top-down structure and MECE to ensure singularity and uniqueness	**Flexibility** to drive competitive differentiation within retail industry
Primary Usage	Benchmarking and analytics	Rapid value realization through scenario enablement Solution mapping and definition

Breakthrough in Thinking – Converge on Process/Activity Level

APQC
Cross-industry
PCF





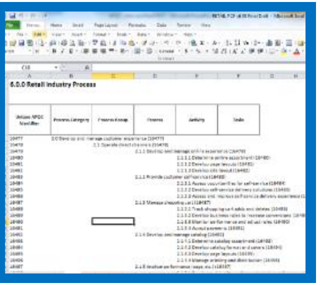


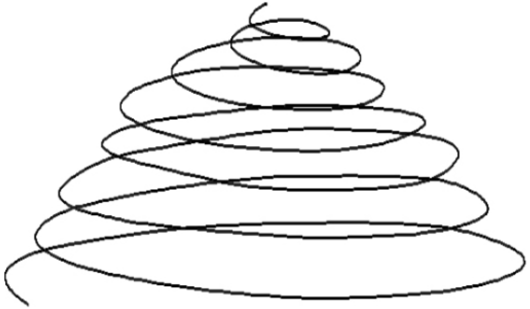
Microsoft Retail
Business
Capability
Map [Draft]

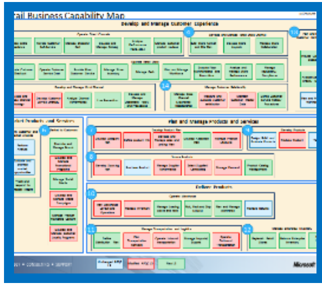
Convergence and Alignment

L3/L4
(Process/Activity)

APQC
Retail PCF



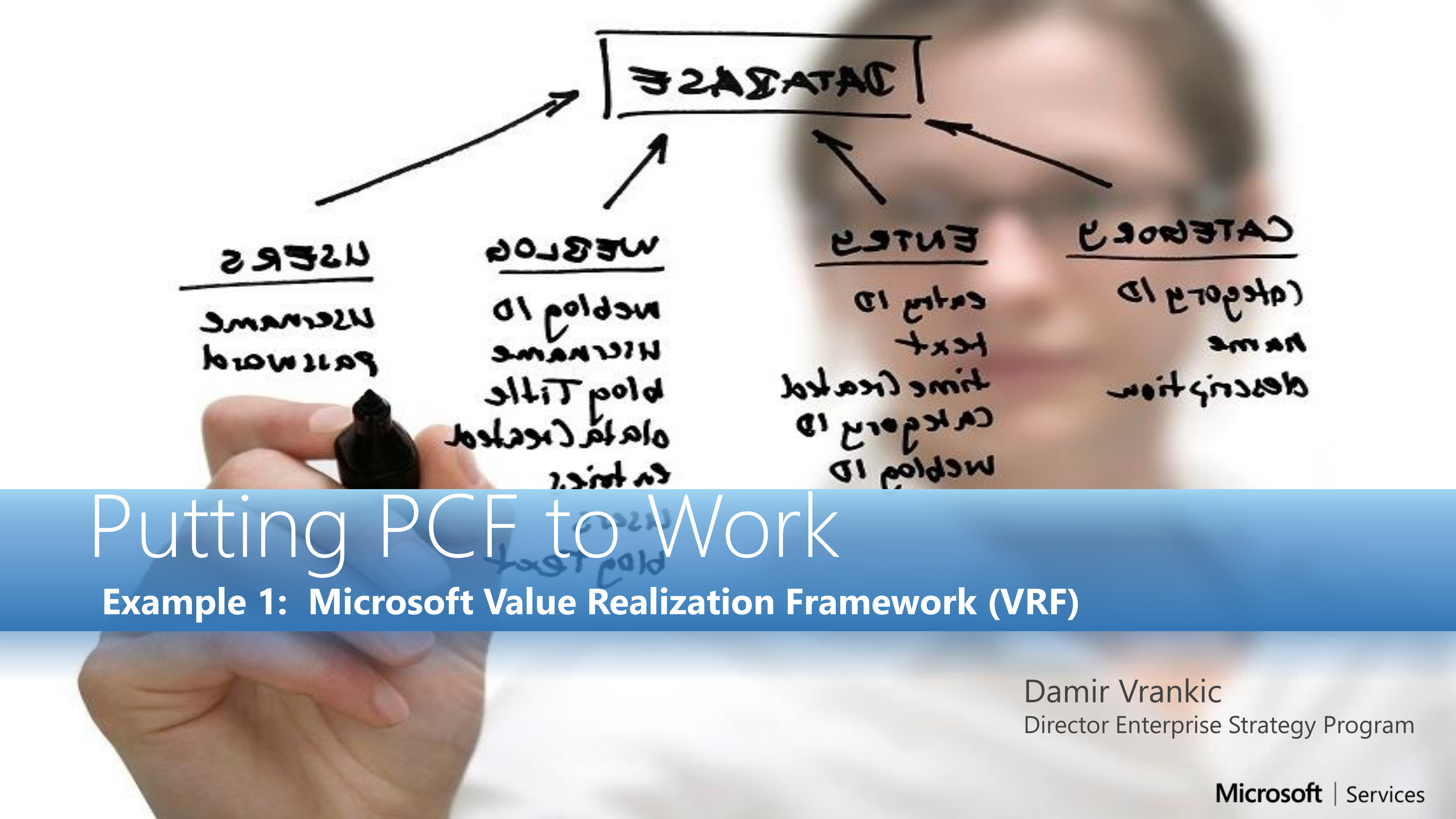




Microsoft Retail
Business
Capability
Map [Final]

Better Together

	APQC		Microsoft		Win-Win
Key Objectives	**Normalization** to establish cross-industry standard structure and nomenclature	+	**Differentiation** to emphasize retail industry specifics	→	**Retail Industry relevant PCF …** **… within standard structure**
	Firm top-down structure and MECE to ensure singularity and uniqueness	+	**Flexibility** to drive competitive differentiation within retail industry	→	**Flexible building blocs …** **… following disciplined schema**
Primary Usage	Benchmarking and analytics	+	Rapid value realization through scenario enablement Solution mapping and definition	→	**Measurement supported value realization method for Retail**



Putting PCF to Work

Example 1: Microsoft Value Realization Framework (VRF)

Damir Vrankic
Director Enterprise Strategy Program

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EXAMPLE 1 – Rapid value realization through scenario enablement

BUSINESS SCENARIO: Shop Anywhere – Fulfill Anywhere

Enable desired multi-channel customer shopping behaviors including:

- **Order online – pick-up in store**
- **Buy in store – drop-ship from warehouse**
- **Buy online – return in store**

Business Scenario (NARRATIVE)

John is an sales executive at a software company, who started out as an systems engineer. A true technophile, John likes to have the latest and greatest consumer electronics. Unfortunately, all of the wireless devices he and his family have acquired don't easily share digital media like music and movies. He's decided it is time to invest in a integrated system for his home.

<The Magic Happens>

John was able to order a new integrated media system online, have it delivered from the local store, and installed by an expert the same day. That weekend John was able to view digitized videos of his family while his children streamed a new movie.

Key Challenges

- Inventory Level Integration
- POS log latency
- Labor forecasting and Workforce planning
- Available To Promise across the channels
- Consistent Customer profile across channels

Shop Anywhere – Fulfill Anywhere

Enable Omni-channel customer shopping behaviors including

Order online – pick-up in store
Buy in store – drop-ship from warehouse
Buy online – return in store

Business Capabilities*	Requisite Capability Level
5.1.2 Manage inventory(16683)	Defined
2.3.6 Plan and manage workforce (16552)	Defined
2.3.4 Manage store inventory (16539)	Defined
5.1.4 Pick, pack, and ship (10356)	Defined
2.1.3 Manage shopping cart (16487)	Defined

Individual Competencies	Requisite Proficiency Level
Consultative selling	Knowledge
Customer service	Knowledge
Computer skills	Knowledge
Complex problems solving	Awareness

Technology Capabilities	Requisite Maturity Level
Reporting and Analysis	Rationalized
Integration	Rationalized
Line of Business Platform	Rationalized
Custom Development	Rationalized

*Source APQC Retail PCF APQC

High PRIORITY	INNOVATION	
	BUSINESS LED	IT LED

Microsoft Services *Enterprise Strategy*

AFFECTED ROLES

Role	Type	Responsibilities
Store Customer Service	Human	Returns and adjustments
Back-room Stock Clerk	Human	Monitor Sales Floor Inventory
Warehouse fulfillment clerk	Human	Pick and Pack online orders
Inventory management	System	Manage store/DC/FC inv.
Order management	System	Manage online orders

TYPICAL BENEFITS

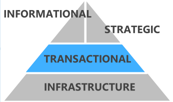
Benefit (organization)	Type	Key Performance Measure
Revenue growth	Financial	Revenue per customer
Online shopping card conversion	Quantifiable	Conversion rate (%)
Customer satisfaction	Qualitative	Relative scale or %
Customer loyalty	Quantifiable	Shopper frequency

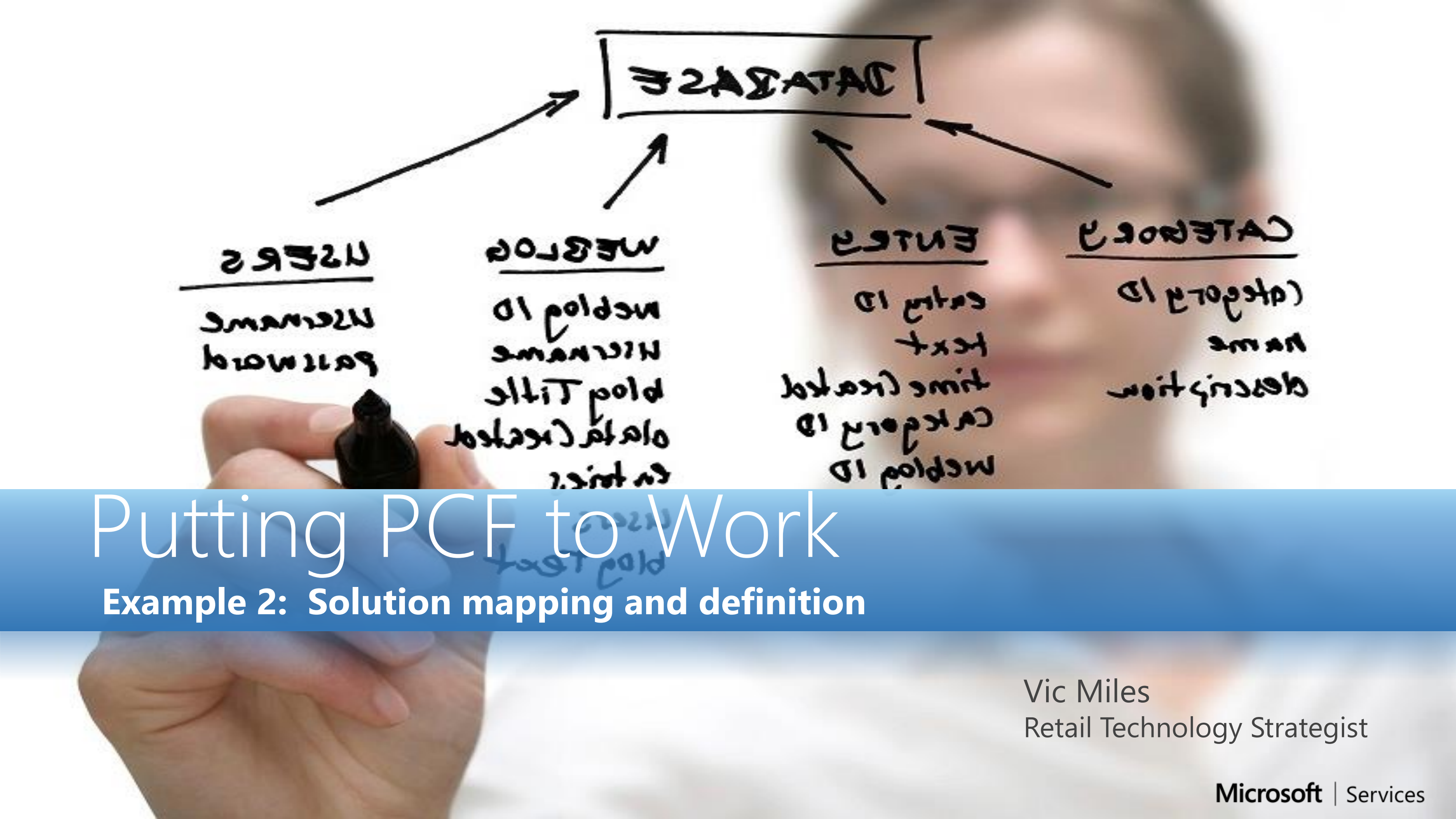
TYPICAL RISKS

Risk	Probability.	Impact	Strategy
Inventory outage	High	Medium	System
Decreased productivity in the store	High	Medium	Process definition
IT system changes not provisioned on time	High	High	Initiative planning

PRODUCTIVITY	COST	REVENUES	RISK
↑	↓	↑	↑

STRATEGIC	HIGH POTENTIAL
KEY OPERATIONAL	SUPPORT




DATABASE
USERS
username
password
WEBLOG
weblog ID
username
blogTitle
dateCreated
entries
ENTRIES
entry ID
text
timeCreated
category ID
weblog ID
CATEGORY
category ID
name
description

Putting PCF to Work

Example 2: Solution mapping and definition

Vic Miles
Retail Technology Strategist

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Marketing the Value of the PCF

CONSUMER TOUCH-POINTS

- **In-Store Kiosk**
- **Web Store**
- **Mobile App**
- **Call Center**
- **Store**
- **Ads**

DEVELOP AND MANAGE CUSTOMER EXPERIENCE

DEVELOP AND MANAGE OMNI CHANNELS

- Develop and Manage Channel Strategy
- Develop Customer Service Strategy
- Direct Delivery Management
- Provide Customer Self-Service
- Manage Social Media
- Deliver Digital Products

BACK-OFFICE CAPABILITIES

- Floor Merchandising and Promotions
- Inventory Management
- Pricing & Promotions
- Exception Management
- Provide Floor Customer Service
- Mange Cash

FRONT-OFFICE CAPABILITIES

- Operate Customer Checkout
- Operate Customer Service Desk
- Execute Loyalty Program
- Specialty Services
- Inventory Tasks

CUSTOMER RELATIONSHIP MANAGEMENT

- Manage Omni-Channel Experience
- Operate Customer Call Center
- Measure and Evaluate Customer Satisfaction
- Maintain Customer Master Data

STORE OPERATIONS

- Plan & Manage Workforce
- Manage Store Inventory
- Manage Store Performance
- HQ Collaboration
- Operational Compliance

MARKET PRODUCTS AND SERVICES

MARKET TO CUSTOMERS

- Develop & Manage Promotional Programs
- Promote & Manage Brands
- Track & Respond to Shopper Insight
- Develop & Manage Media Campaigns
- Manage Product Marketing Content
- Develop & Execute Customer Loyalty Programs

PLAN AND MANAGE PRODUCTS AND SERVICES

MERCHANDISING

- Manage Product Development Lifecycle
- Source Products
- Develop Product Plan
- Manage Product Master Data
- Develop & Manage Sales & Pricing Plan
- Perform Customer & Market Analysis
- Develop Allocation Plan
- Category & Basket Analysis
- Supplier Collaboration

SUPPORT FUNCTIONS

MANAGE RETAIL IT

- Corporate Applications
- Solutions Life Cycle Planning
- Develop Digital Experience
- Business Intelligence
- Develop the Enterprise IT Strategy
- Content Management Strategies
- Mobile Strategy
- Real-Time Transaction Processing

CORPORATE FUNCTIONS

- Asset Management
- Human Resources Strategy
- Portfolio Management
- Provide Legal Services
- Performance Strategic & Tactical Planning

GOVERNANCE & COMPLIANCE

- Manage Regulatory Compliance
- Risk Management
- PCI Compliance
- Implement Security Controls

CENTRAL OPERATIONS

- Manage Store Collaboration
- Manage Loss Prevention
- Site Planning

DELIVER PRODUCTS

SUPPLY CHAIN & LOGISTICS

- Manage Transportation & Logistics
- Distribution Planning
- 3rd Party Distribution
- Yard & Fleet Management
- Global Supply Chain (imports)
- Manage Enterprise Inventory
- Manage Inbound Product
- Replenish Fulfillment Centers
- Plan Transportation Network
- Replenish Retail Stores
- Pick, Pack and Ship

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Retail Capability Map

CONSUMER TOUCH-POINTS

In-Store Kiosk

Web Store

Ads

MARKET PRODUCTS AND SERVICES

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DEVELOP AND MANAGE C

DEVELOP AND MANAGE OMN

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ORATE FUNCTIONS

- gement
- Human Resources Strategy
- lio gement
- Provide Legal Services
- Performance gic & al Planning

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DELIVER PRODUCTS

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- Replenish Retail Stores
- Pick, Pack and Ship

PCI Compliance

Implement Security Controls

Site

osoft | Retail Solutions

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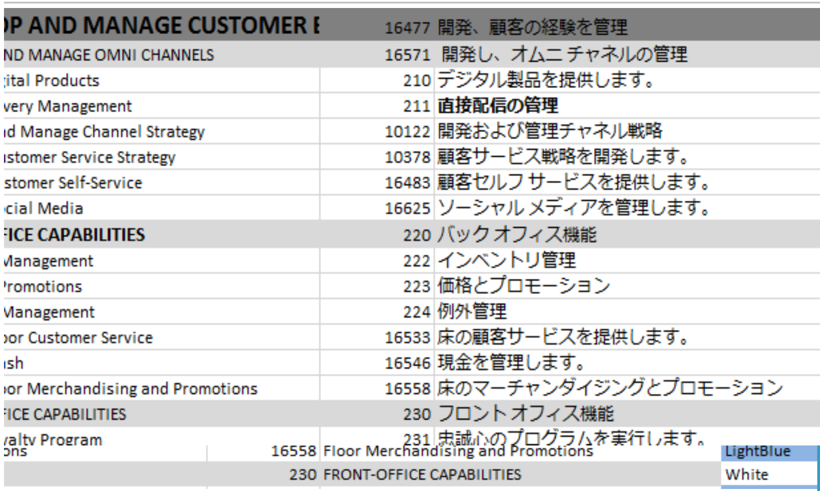
Step 1 – Solution Mapping (localized)

Use to identify

Microsoft strengths

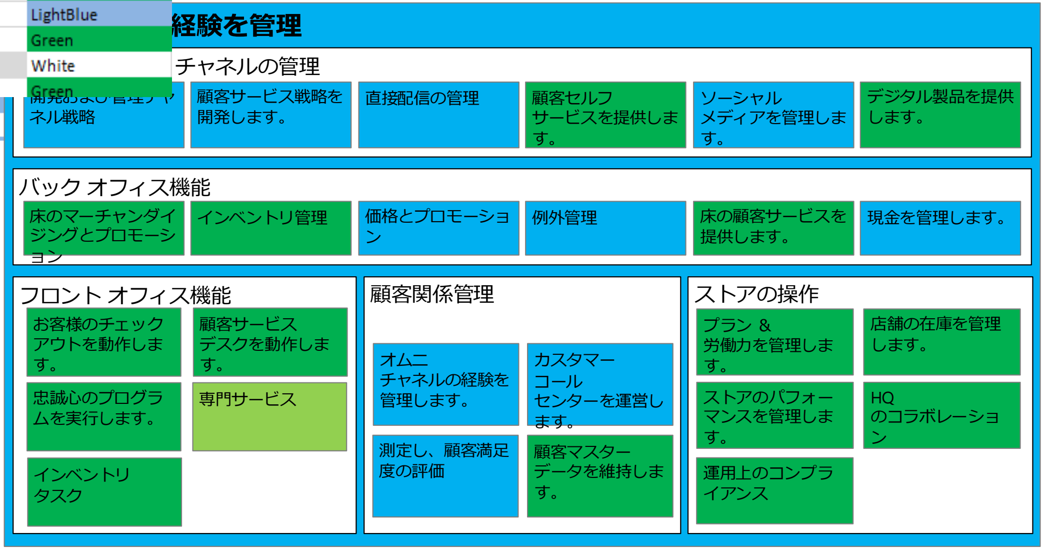
Client priorities

Strategy Definition



P AND MANAGE CUSTOMER E	16477	開発、顧客の経験を管理	LightBlue
ND MANAGE OMNI CHANNELS	16571	開発し、オムニ チャネルの管理	White
ital Products	210	デジタル製品を提供します。	Green
very Management	211	**直接配信の管理**	LightBlue
d Manage Channel Strategy	10122	開発および管理チャネル戦略	LightBlue
stomer Service Strategy	10378	顧客サービス戦略を開発します。	LightBlue
stomer Self-Service	16483	顧客セルフ サービスを提供します。	Green
cial Media	16625	ソーシャル メディアを管理します。	LightBlue
ICE CAPABILITIES	220	バック オフィス機能	White
Management	222	インベントリ管理	Green
romotions	223	価格とプロモーション	LightBlue
Management	224	例外管理	LightBlue
or Customer Service	16533	床の顧客サービスを提供します。	Green
sh	16546	現金を管理します。	LightBlue
or Merchandising and Promotions	16558	床のマーチャンダイジングとプロモーション	Green
ICE CAPABILITIES	230	フロント オフィス機能	White
alty Program	231	忠誠心のプログラムを実行します。	Green
ons	16558	Floor Merchandising and Promotions	LightBlue
	230	FRONT-OFFICE CAPABILITIES	White

Data driven formatting



経験を管理

チャネルの管理

- 開発および管理チャネル戦略
- 顧客サービス戦略を開発します。
- 直接配信の管理
- 顧客セルフ サービスを提供します。
- ソーシャル メディアを管理します。
- デジタル製品を提供します。

バック オフィス機能

- 床のマーチャンダイジングとプロモーション
- インベントリ管理
- 価格とプロモーション
- 例外管理
- 床の顧客サービスを提供します。
- 現金を管理します。

フロント オフィス機能

- お客様のチェックアウトを動作します。
- 顧客サービス デスクを動作します。
- 忠誠心のプログラムを実行します。
- 専門サービス
- インベントリ タスク

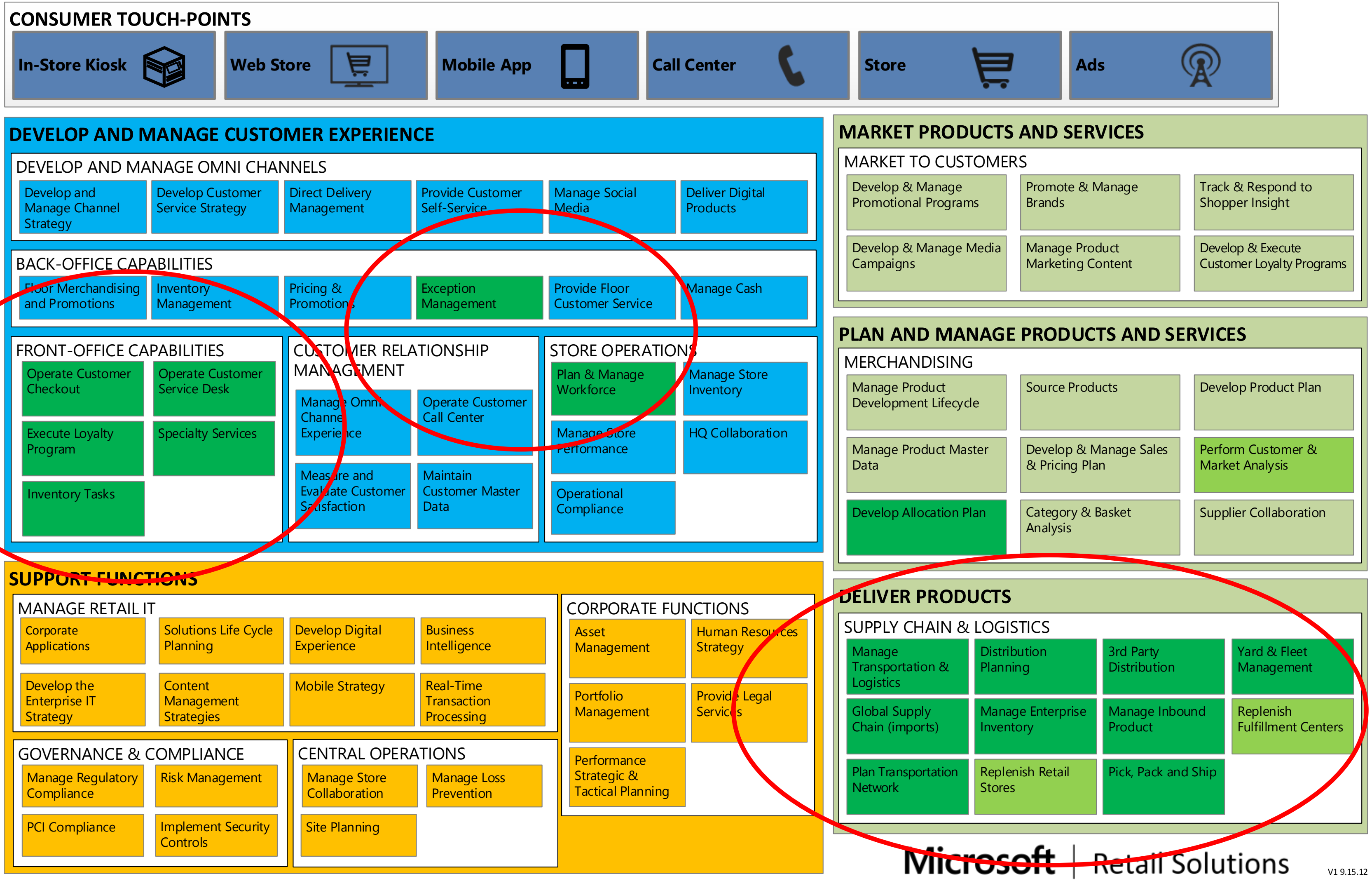
顧客関係管理

- オムニ チャネルの経験を管理します。
- カスタマー コール センターを運営します。
- 測定し、顧客満足度の評価
- 顧客マスター データを維持します。

ストアの操作

- プラン & 労働力を管理します。
- 店舗の在庫を管理します。
- ストアのパフォーマンスを管理します。
- HQ のコラボレーション
- 運用上のコンプライアンス

Step 2: Solution Needs View



CONSUMER TOUCH-POINTS

- In-Store Kiosk
- Web Store
- Mobile App
- Call Center
- Store
- Ads

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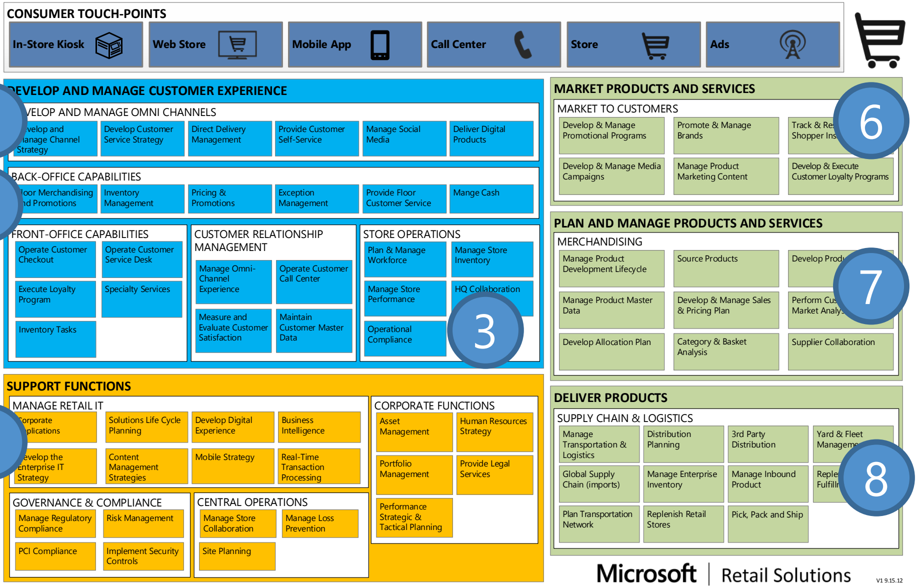
Drive APQC Benchmarking

Capability Mapping

Microsoft Industry based Maturity Model

Industry Standard Benchmarks



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Microsoft | Retail Solutions

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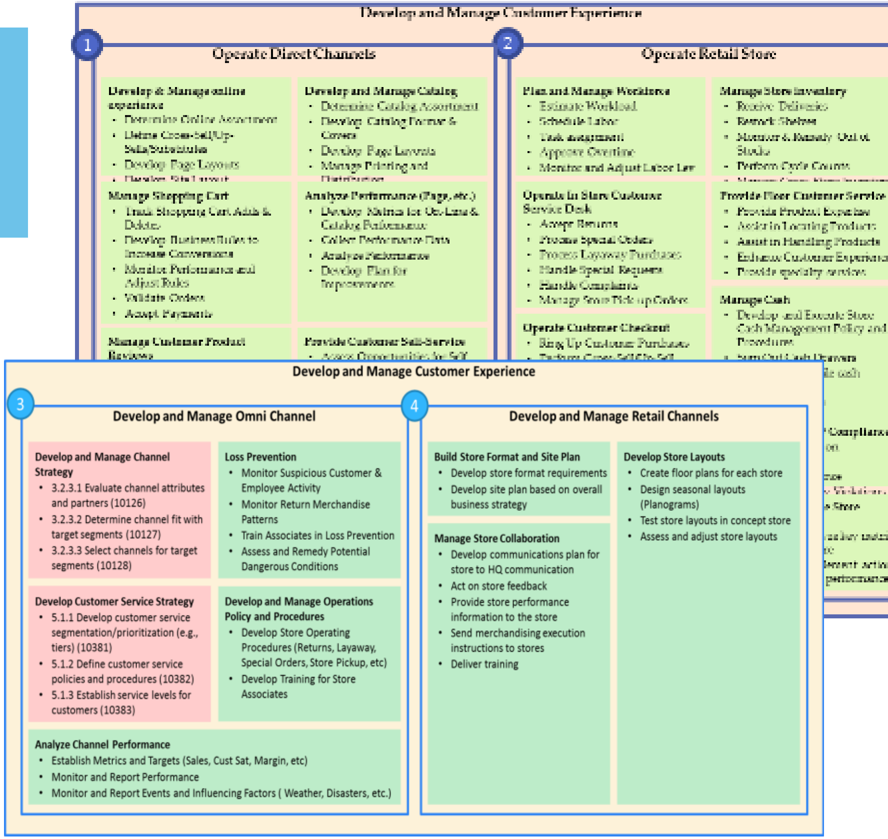


Develop and Manage Customer Experience

Operate Direct Channels

- Develop & Manage online experience
- Develop and Manage Catalog
- Manage Shopping Cart
- Analyze Performance (Page, etc.)
- Manage Customer Product Reviews
- Provide Customer Self-Service

Operate Retail Store

- Plan and Manage Workforce
- Manage Store Inventory
- Operate In Store Customer Service Desk
- Provide Floor Customer Service
- Operate Customer Checkout
- Manage Cash

Develop and Manage Customer Experience

Develop and Manage Omni Channel

Develop and Manage Channel Strategy
- 3.2.3.1 Evaluate channel attributes and partners (10126)
- 3.2.3.2 Determine channel fit with target segments (10127)
- 3.2.3.3 Select channels for target segments (10128)

Loss Prevention
- Monitor Suspicious Customer & Employee Activity
- Monitor Return Merchandise Patterns
- Train Associates in Loss Prevention
- Assess and Remedy Potential Dangerous Conditions

Develop Customer Service Strategy
- 5.1.1 Develop customer service segmentation/prioritization (e.g., tiers) (10381)
- 5.1.2 Define customer service policies and procedures (10382)
- 5.1.3 Establish service levels for customers (10383)

Develop and Manage Operations Policy and Procedures
- Develop Store Operating Procedures (Returns, Layaway, Special Orders, Store Pickup, etc)
- Develop Training for Store Associates

Analyze Channel Performance
- Establish Metrics and Targets (Sales, Cust Sat, Margin, etc)
- Monitor and Report Performance
- Monitor and Report Events and Influencing Factors (Weather, Disasters, etc.)

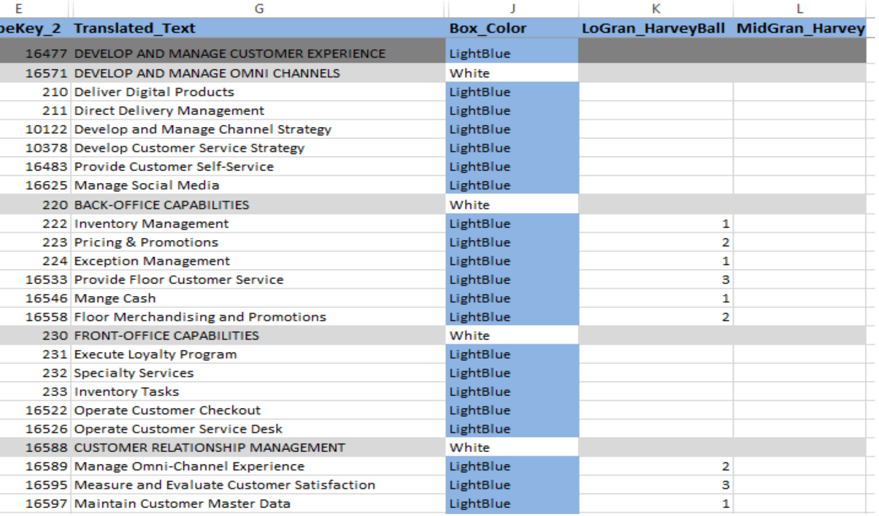
Develop and Manage Retail Channels

Build Store Format and Site Plan
- Develop store format requirements
- Develop site plan based on overall business strategy

Manage Store Collaboration
- Develop communications plan for store to HQ communication
- Act on store feedback
- Provide store performance information to the store
- Send merchandising execution instructions to stores
- Deliver training

Develop Store Layouts
- Create floor plans for each store
- Design seasonal layouts (Planograms)
- Test store layouts in concept store
- Assess and adjust store layouts

Benchmarking / Strategy Planning



E	G	J	K	L
eKey_2	Translated_Text	Box_Color	LoGran_HarveyBall	MidGran_Harvey
16477	DEVELOP AND MANAGE CUSTOMER EXPERIENCE	LightBlue		
16571	DEVELOP AND MANAGE OMNI CHANNELS	White		
210	Deliver Digital Products	LightBlue		
211	Direct Delivery Management	LightBlue		
10122	Develop and Manage Channel Strategy	LightBlue		
10378	Develop Customer Service Strategy	LightBlue		
16483	Provide Customer Self-Service	LightBlue		
16625	Manage Social Media	LightBlue		
220	BACK-OFFICE CAPABILITIES	White		
222	Inventory Management	LightBlue	1	
223	Pricing & Promotions	LightBlue	2	
224	Exception Management	LightBlue	1	
16533	Provide Floor Customer Service	LightBlue	3	
16546	Mange Cash	LightBlue	1	
16558	Floor Merchandising and Promotions	LightBlue	2	
230	FRONT-OFFICE CAPABILITIES	White		
231	Execute Loyalty Program	LightBlue		
232	Specialty Services	LightBlue		
233	Inventory Tasks	LightBlue		
16522	Operate Customer Checkout	LightBlue		
16526	Operate Customer Service Desk	LightBlue		
16588	CUSTOMER RELATIONSHIP MANAGEMENT	White		
16589	Manage Omni-Channel Experience	LightBlue	2	
16595	Measure and Evaluate Customer Satisfaction	LightBlue	3	
16597	Maintain Customer Master Data	LightBlue	1	

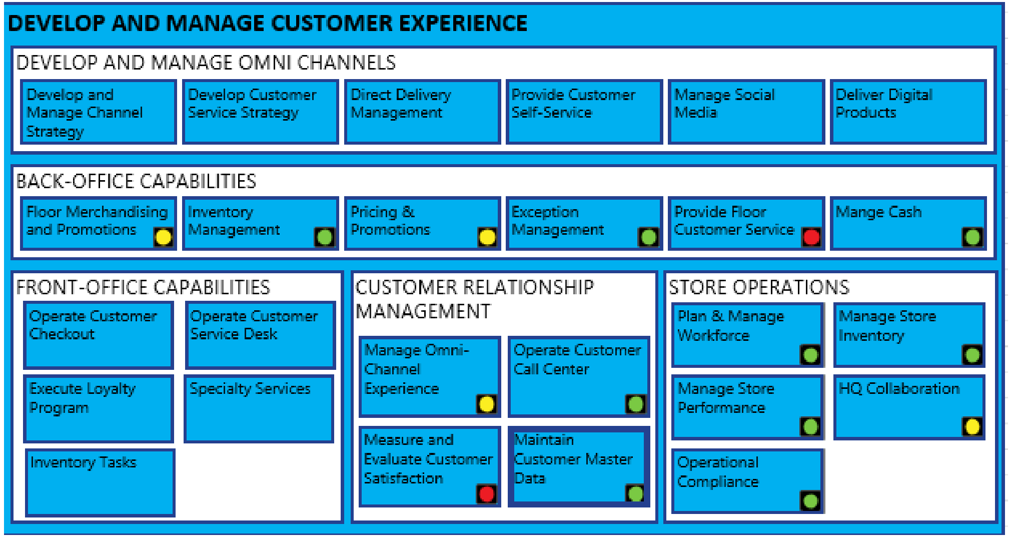
Maturity Assessment

Use to identify

Microsoft SME maturity assessment

Map to industry benchmark

Business impacting initiatives



DEVELOP AND MANAGE CUSTOMER EXPERIENCE

DEVELOP AND MANAGE OMNI CHANNELS
- Develop and Manage Channel Strategy
- Develop Customer Service Strategy
- Direct Delivery Management
- Provide Customer Self-Service
- Manage Social Media
- Deliver Digital Products

BACK-OFFICE CAPABILITIES
- Floor Merchandising and Promotions 🟡
- Inventory Management 🟢
- Pricing & Promotions 🟡
- Exception Management 🟢
- Provide Floor Customer Service 🔴
- Mange Cash 🟢

FRONT-OFFICE CAPABILITIES
- Operate Customer Checkout
- Operate Customer Service Desk
- Execute Loyalty Program
- Specialty Services
- Inventory Tasks

CUSTOMER RELATIONSHIP MANAGEMENT
- Manage Omni-Channel Experience 🟡
- Operate Customer Call Center 🟢
- Measure and Evaluate Customer Satisfaction 🔴
- Maintain Customer Master Data 🟢

STORE OPERATIONS
- Plan & Manage Workforce 🟢
- Manage Store Inventory 🟢
- Manage Store Performance 🟢
- HQ Collaboration 🟡
- Operational Compliance 🟢

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Questions?

Microsoft Enterprise Strategy Program (ESP)

http://www.microsoft.com/GoESP

Microsoft Retail Industry Solutions

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