

# 5 steps to a world class supply chain

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The importance of optimising the efficiency of supply chains and logistics and key transformation trends to reap rich rewards, improving resilience, and flexibility while reducing costs.

# Introduction

**The evolving challenges of a complex and increasingly costly global supply chain have encouraged some retailers to look for futuristic solutions, jumping to artificial intelligence (AI) and machine-learning. Arguably, for most retailers, it would be far better to focus on the fundamentals and improvements to their underlying logistics platforms.**

This special report by Retail Gazette and cloud-native consultancy, Ensono Digital looks at how careful analysis of supply chain structures and reassessment of the basics can reap rich rewards, improving resilience, and flexibility while reducing costs.

The last two years have seen a wave of new challenges for retailers, requiring businesses to explore sometimes experimental ways to cope with rapid change on multiple fronts in terms of how they serve customers. It has also been the period during which omni-channel has truly come of age, becoming a necessity as stores were forced to close or operate under restrictions globally.

However, regardless of channel, the supply chain has been under enormous pressure. While panic-buying meant that the unlikely bedfellows of toilet roll, pasta and flour were briefly in short supply, even until relatively recently consumers had been waking up to almost daily warnings about possible shortages of familiar brands. Few sectors were untouched, with clogged ports and sea containers stuck in all the wrong places and some specialist categories—cycling being a case in point—crippled by a complex criss-crossing supply chain.

However, panic-buying was not generally related to shortages, but rather behaviour and volume. This was difficult to prepare for, and came to a head particularly in the seaports outside of Los Angeles, while in the UK, 2021 started with images of huge lorry queues on the road to Dover, as hauliers were caught up in new Brexit red tape.

How will this be handled in the longer term picture with Brexit, customs, HGV driver shortages, and source material shortages, all of which are longer term and more prevalent risks? The real question is whether retailers can keep up with the demand and volume of the behaviours that are here to stay, driven by ecommerce and omnichannel.

While the worst of the problems are perhaps behind us, a fresh COVID-19 outbreak in China in March of this year is a reminder that the pandemic continues to disrupt, particularly among the Asian nations where many global consumables are manufactured.

As a result, the cost of shipping has skyrocketed. Until 2020, a 40-foot container along the world's major trade routes never exceeded \$2,000, according to The Economist research. It estimates shipping costs peaked at up to five-times this, at a record high of \$10,000. In times of high inflation and reduced consumer spending, it seems inevitable that retailers are going to have to rethink their differential shopping experiences, supply chains, and their reliance on certain territories or companies for manufacture.

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The pandemic amplified the issues with supply chain, but the challenge now is the 'technical debt' following years of underinvestment in software. The retail CTO certainly has a justification for making foundational changes to enable growth and innovation. One possible answer would appear to be nearshoring, bringing manufacture closer to the end consumer markets, which could be a potential boon for countries such as Mexico and Turkey, and in North Africa, and Central and Eastern Europe, serving the US and Europe.

Several major retail groups have already taken steps in this direction. Fast fashion giant Inditex now manufactures 53 percent of its fashions in European markets, while others—like Benetton—are also bringing production closer to home. This has served to boost manufacturing in Serbia, Croatia, Turkey, Tunisia and Egypt, with, says Chief Executive Massimo Renon, the aim of halving the business's production in Asia from the end of 2022. Hugo Boss CEO, Daniel Grieder, has also predicted that in future, more of the brand's goods will be produced closer to where they are sold.

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### **In the US, some of the country's most successful retailers are already introducing new initiatives.**

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This is not only a reliability issue—given the environmental and sustainability prerogative, fashion miles may well become another driver of a fundamental overhaul of global logistics over the longer term. Indeed, one of the residual impacts of the pandemic could be a much-reduced distance between maker and user.

The upshot of this transformational two years is a retail industry that is far more sophisticated in its supply chain modelling, though polarisation between those who have optimised and those who have been reactive has also become more apparent. For the top performers, to be outstanding it is now often the smaller details that make for the most impactful consumer results, and some of the world's largest retailers have been at the forefront of introducing supply chain innovation.

Interestingly, despite the buzz about super-fast delivery services, dark stores, and automation—from factory robotics to delivery drones and autonomous vehicles—it is, in fact, getting the basics right that often elevates the delivery service. Before expensively reinventing or transforming their supply

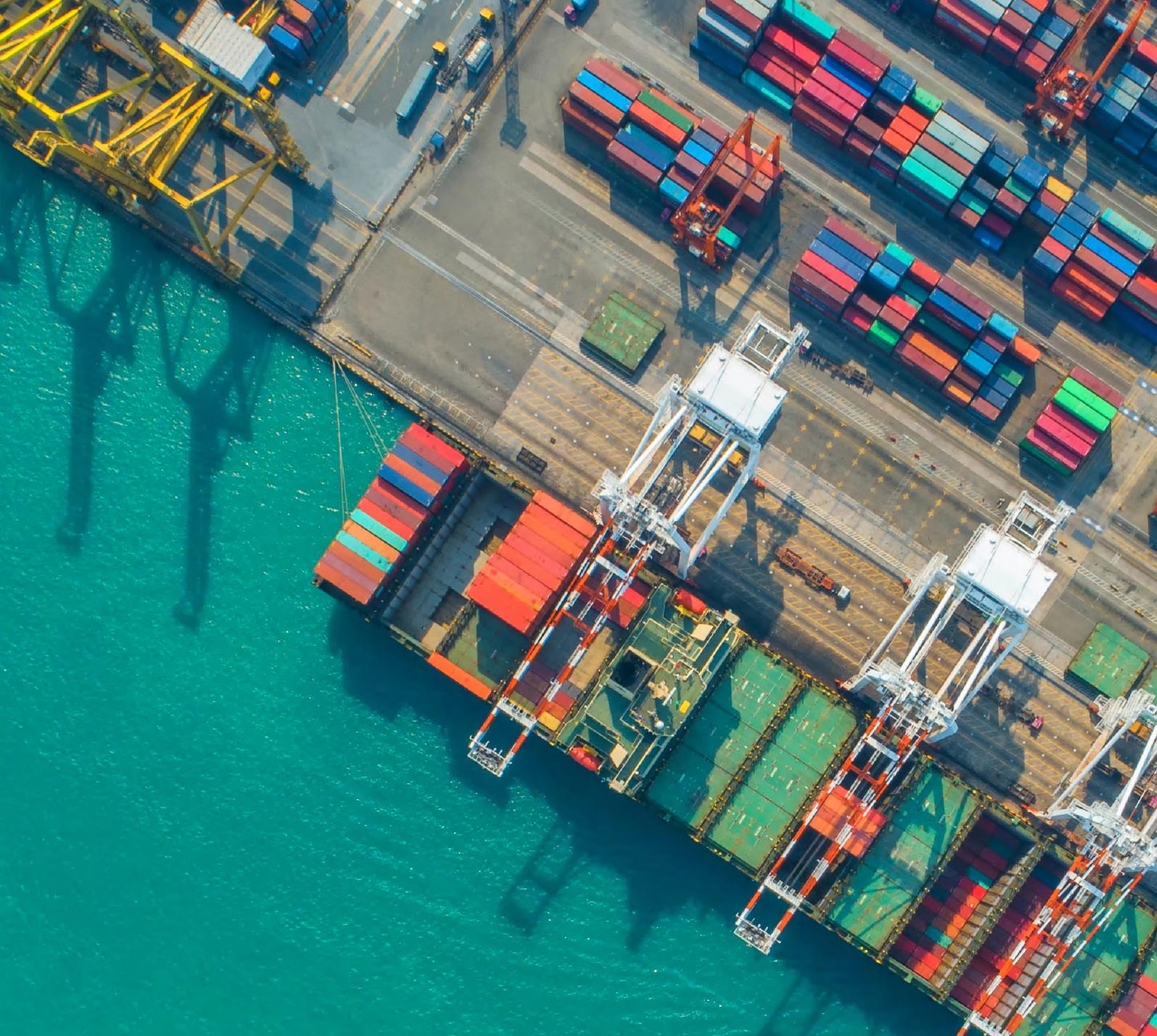
chain and logistics, retailers would often be better served by making time to take stock of the current supply chain systems and make sure they are fit for purpose and flexible enough for the future.

In the US, some of the country's most successful retailers are already introducing new initiatives general merchandise retailer Target has an app that allows shoppers to switch from pick-up in-store to drive-up, or choose to send someone in their stead, and all options are changeable in real time with a simple couple of clicks. In the UK, Sainsbury's has developed its offer to encompass its grocery stores, c-stores, Argos, and habitat brands, offering both online and click and collect.

What does seem certain is that change will remain a constant. The pandemic allowed consumers to control the shopping narrative because many elements became essential—from the urgency of receiving personal protective gear, to the fact that many could not go into physical stores. Retailers and brands were forced into action across every omni-channel initiative that they had ever even considered and against this backdrop, the need to simplify, optimise, and focus the supply chain has become crucial.



**In this report we look at five important steps retailers can take to optimise the efficiency of their supply chain and logistics as well as examining some of the key trends driving ongoing transformation.**



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# Making warehouses more efficient

- ✓ Warehouse as a service—Better economies of scale for retailers
- ✓ The realities of automation in warehouses
- ✓ Sustainability as a driver of change

Unsurprisingly, many retailers have struggled when faced with the myriad of recent challenges. The reduction in the availability of skilled HGV drivers, front line and warehouse staff means that retailers are looking to reduce the time spent shipping goods, as well as working towards national targets to reduce carbon consumption and meet ever more stringent environmental objectives, all of which favours shipping products less often and in a more sustainable way.

More and more businesses will need to deliver against net-zero carbon commitments over the next few years and so look to reduce their carbon footprint further. With a long-term lack of investment in supply chain warehousing and logistics operations behind it, making warehouses more efficient is now a fundamental priority across the industry. The converging factors of changing customer behaviours, increased costs, the pandemic and—in the UK—the multiple challenges from Brexit have only served to highlight this requirement. While machine learning, forecasting and AI are exciting prospects, they are only relevant providing that a retail business has the right foundations, has picked all the lowest hanging fruit, and is executing the basics efficiently.



***Retailers have the opportunity to simplify warehouse processes with automation to make warehouse operatives' day-to-day better. Meaningful changes and efficiencies need to focus on making peoples' jobs easier, and allow them to focus on higher value tasks."***

**John Wilson**

Director of Warehousing and Logistics,  
Freemans Grattan Holdings

Predictive analytics are essential to get the right stock to the right place, but the core issue is how retailers can extract and utilise this information when—so often—systems have not grown with them and it has been hard to justify investment in new 'back office' technologies. By addressing this, by moving away from a spreadsheet-centric approach to managing and analysing data, the retail sector can more effectively utilise diminished warehouse real estate space, find economies of stock management, and the benefits of a more sustainable operation.

Another aspect is geo-political instability. While the UK and Russia have a relatively small trading base, connections between the UK and China are far greater and any disruption caused by sanctions or trading restrictions with the Chinese would have a far greater impact than those with Russia, and would require a major retail rethink.

One possible solution to managing these risks is to bring in more stock sooner, but there is another challenge to overcome when attempting to make the shift away from just-in-time supply chains. This demand-led approach requires the retailer to hold large warehousing capacity and, although the scale of growth of warehousing in the UK over the last 10 years has been considerable, warehousing costs are around three times higher than they were a decade ago.

There is not, therefore, the warehousing capacity to bring considerable amounts of stock into the country to stockpile, and supply chains have, historically, been designed in line with just-in-time stock management rather than building up stock locally.

Distribution centre take-up hit 55.1 million sq. ft. in 2021, surpassing the long-term annual average by 86 percent, according to the most recent figures from agency Savills. As a result, it said, supply has fallen to the lowest level ever recorded with a vacancy rate of just 2.9 percent.

Over the course of last year Savills logged 220 separate transactions, beating the previous high of 172 in 2020. While online retailers accounted for 35 percent of take-up, 3PLs, automotive, manufacturing and high street retail all also increased the amount of warehouse space taken in 2021.

Kevin Mofid, Head Of Industrial & Logistics Research at Savills said, "As a result of ongoing macro pressures including COVID-19 and Brexit, there remain huge pressures on supply chains that are having to adapt to a rapidly changing landscape."



***While many countries are contending with abnormal levels of demand, the UK is also having to deal with the full EU custom controls that came into play on the 1st January 2022. This has led to businesses looking to mitigate any potential delays by holding more inventory, which is starting to translate into increased demand for warehouse space.***

**Kevin Mofid**

Head of Industrial & Logistics Research at Savills

UK supply of warehouse space remains critically low and now standing at just 17.35 million sq. ft. Consequently, developers have responded to the prevailing market conditions and there is now 18.6 million sq. ft. of speculative space currently under construction.

**86%**

**long-term annual average after distribution centre take-up**

**2.9%**

**vacancy rate as supply has fallen to its lowest level**

**35%**

**of online retailers accounted for take-up**

For those retailers looking to bring in automation to existing warehouses, it is not that easy to reverse engineer that kind of technology into such spaces. But generally, most warehouses that are built today will have some degree of automation, whether this is just a conveyor system or robotic pick-and-pack.

"Space is running out and warehouses take time to build so businesses need to continue BAU to reinvest into warehouse space. But are these systems really ready to handle the switch to something shinier on the roadmap? Can their systems understand a robotic picking function?," asks Steven Jones, Engagement Director at cloud-native consultancy Ensono Digital. "In the meantime, retailers can focus on making what they have as efficient as possible. Where many already have infrastructure to manage dispatch—such as conveyor belts and critical mass counting systems—incremental changes like combining multiple orders can make a big difference to the bottom line and customer satisfaction."



Many small online sellers lack the capabilities of larger retailers in terms of warehousing, material handling systems, and logistics and hence are unable to run their stock management, distribution, and fulfilment at optimum efficiency. On the flipside, companies that possess these supply chain strengths benefit from fully utilised warehouse shelves and fuller delivery trucks, as empty space is wasted expense.

By relying on real-time analytics of metrics such as warehouse space, production-line speed and system accuracy, such companies can reduce costs, improve order accuracy, and minimise transit times. These metrics can then be deployed to open their excess capacity to other companies. For the 'host' company, this becomes an additional stream of revenue but must be closely monitored in real time to guard against disruptions in operations due to overselling capacity to clients.

**By 2025, North American supply-chain-as-a-service market is projected to reach**

**\$8 billion**

"This strategy of chasing the lowest cost manufacturing base around the world is over. The name of the game is supply chain resilience," says Chip Bergh, President and CEO, Levi Strauss & Co, World Retail Congress, Rome, April 2022.

"Retailers invest in warehouse real estate to drive growth, but often warehouse management systems don't keep pace. Historically, stakeholders have had a hard time justifying the ROI of back office systems. But a well-planned and well-executed supply chain management system, with the flexibility to support evolving operating models, ongoing cost pressures and more complex customer needs, is a key asset in driving growth," says John Wilson, Director of Warehousing and Logistics, Freemans Grattan Holdings.

This is where the global concept of warehousing as service has developed. A recent study shows that the North American supply-chain-as-a-service market is projected to reach nearly \$8 billion in size by 2025, growing at an annual 7.5 percent. Companies in multiple industries are taking advantage of this trend: Amazon.com through its Fulfilment by Amazon offering, Australia's Woolworths by sharing access to its supply chain through its primary connect services, and Cardinal Health by providing services through its OptiFreight logistics arm.

# 2

## Why consumers love visibility of supply chain

- ✓ Amazon scores on visibility over price
- ✓ Transparency over delivery is vital for consumers
- ✓ Filtering the need for speed could help retailers

**Customer experience and design details are equally crucial in both fulfilment and delivery offerings. Behind the scenes, retailers have had to respond to supply chain challenges by chartering cargo ships, drop shipping, launching marketplace platforms, buying up small delivery companies, and investing in autonomous vehicles.**

For consumers transparency of delivery lead times has become increasingly important. The ability of retailers to share accurate times for pick-up or home delivery in a world of uncertainty provides consumers with a sense of control over the last part of the purchase path. This includes providing warnings of delays proactively, not reactively. With an accelerating trend of large retailers expanding their e-commerce offerings with marketplaces, it is becoming even more critical to establish consistent communication and manage expectations between owned brands and those of others.

A benefit to transparent deliveries is trackable delivery information owned by the retailer versus the shipping service. Currently, a myriad of passwords and tracking numbers are often required for shoppers to trace an order, and retailers lose points with consumers when they complicate the already complex returns process by delivering in packaging that cannot be reused for returns.

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**The ability of retailers to share accurate times for pick-up or home delivery in a world of uncertainty provides consumers with a sense of control.**

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For many initiatives, Amazon has set the bar both in terms of customer service and the accessible price of its Prime service. While many businesses do not directly compete with Amazon, customers do not differentiate and expect the same experience regardless of category.

“Amazon has certainly been the major force in setting the expectation and increasing a customer’s perception of what a good fulfilment experience should be. The Amazon Prime promise is still what it was,” said Simon Evans, CTO, Ensono Digital.



Major grocery retailers serving dense urban areas are under increasing pressure to get products to consumers in the shortest possible time, sometimes in as little as 15 minutes and often for free or for a nominal fee. Where Deliveroo and UberEats led in food delivery, the likes of Getir, Gorillas and Zapp have followed in FMCG.

The rush for expedited shipping puts enormous strain on businesses where it could be appropriate—and not badly received—for retailers to proactively ask a customer when they're placing an order when they actually need a product to arrive. Such a strategy could reduce supply chain costs and allow the retailer to focus on those deliveries that truly need to be expedited at pace.

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**Major grocery retailers serving dense urban areas are under increasing pressure to get products to consumers in the shortest possible time.**

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“There has been probably too much move towards immediate delivery. That’s not sustainable. Four or five of these start-ups are just burning money. They’re not making a profit and there will be market consolidation. I’m sure over the next few years only one or two of the biggest will survive,” said Jones. “But the point around this is that consumer expectations are once again being pushed towards ‘have it now, your way’. And there’s a lot of suggestion that while there are services that offer this immediate delivery, there’s not necessarily that level of demand. I think many customers are happy with next day or next two days. They don’t really have the desire to have things in half an hour.”





Major grocery retailers serving dense urban areas are under increasing pressure to get products to consumers in the shortest possible time.

# 3

## Making the best of the real estate you have

- ✓ Localising supply using store estates for local distribution
- ✓ Delivering on the retailer promise to the customer
- ✓ Moving away from DCs to store and hub and spoke networks

**For many retailers their existing store estate offers opportunities to optimise the property already owned, which is often located close to the end consumer.**

Already an established trend, the use of stores and local distribution centres for fulfilment is going to increase.

"Making the best of the real estate you have is building trend away from the centralised fulfilment. The first generation of pureplay e-commerce specialists—such as Ocado and Asos—have invested huge amounts of money in big fulfilment centres, while most of the major supermarket groups have developed core hubs, on arterial motorways," said Jones. "Ocado has invested millions of pounds over 20 years to build out its incredible grid solution, using robots that move across the grid to pick and pack orders as they come in. While this shows that this level of warehouse sophistication is possible, it sets a high bar for the competition that's expensive to replicate."

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Ocado has launched a suite of further innovations that it says will enhance its automated Ocado Smart Platform (OSP), with the company's proprietary robotic picking and packing grid system upgraded to new lighter, more efficient fulfilment robots, and a lighter grid system that will be easier and quicker

to install. Known as the Series 600, the new bot will feature around 300 3D printed parts, resulting in a significantly reduced overall weight, cheaper build and running costs, and better serviceability. Overall, the streamlined new system will also allow the OSP to be located in simpler, existing buildings rather than in custom-made facilities.

Ocado Co-Founder and CEO Tim Steiner has also revealed a new on-grid robotic arm to assist with picking and stock management, using machine-vision, deep reinforcement learning and advanced sensing. The company has also launched Ocado Orbit, a new virtual distribution centre that the company says will enable smaller fulfilment centres closer to the customer, which are able to offer a large range in combination with short lead times.

Conversely, German discount grocer Aldi operates its click and collect from store. Rather than running a large fleet of small delivery vans from its fulfilment hubs, the supermarket group uses the staff already in-store to pick orders as they come in and have them ready for customers to pick them up.

Aldi has extended its click-and-collect after trials in September 2020, and continues to roll out the service across its 900-strong UK store footprint. Aldi also ran a rapid delivery service with Deliveroo during the pandemic focused on urban locations, though it ended the service earlier this year as consumers returned to stores and demand fell.



Across categories, brands with store networks have seen online orders grow and, in many cases, are struggling to fulfil these all centrally. As a result, there is an increased focus on regional hubs which are, effectively, large store formats with more storage so that they can do stock replenishment. These retailers are able to replenish in bulk into the regional hub from where they can carry out smaller replenishment to the node stores.

This hub and spoke approach is not new, but the imperative to use this type of approach has increased. The model reduces the reliance on HGV drivers—currently in short supply—and means that retailers can use smaller vans instead. From a sustainability perspective, this has the additional benefit of fuel efficiency and makes it easier and less expensive to meet customer expectations of next day, or fast-response click-and-collect.

The future, as a result, is less about having large fulfilment centres and more about a flexible use of existing supply chains, adjusting supply chains to handle a decentralised approach, and embracing a two-step replenishment approach to get stock closer to the customer, quicker and without necessarily opening huge distribution centres to handle demand. To cement this new normal, retailers need to build their systems to handle customer fulfilment properly. This includes reassessing the software in the supply chain to ensure it is robust and flexible enough to support the business as it grows.

With the increasing use of stores as mini-logistics hubs, operational hours become the next challenge. While supermarkets are typically open from early until late, this is not the case for all retail categories and locations raising the issue of whether stores—or sections of stores—may need to be staffed and running as fulfilment centres outside of store hours.

Early approaches to solve this has centred on locker systems. Amazon lockers are the most common branded collection nodes and this type of infrastructure could be made available for third-party retailers to use, provided that the product is within size restrictions. Recently Asda has begun trials on lockers, especially for returns, that are located in forecourts and in student campuses.

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*All the immediate delivery businesses are already taking advantage of existing infrastructure. By using the systems that Uber and Deliveroo have put in place these services can provide goods in very short timescales without the set-up costs of hiring a fleet of drivers and putting in the systems to manage them. Hence fulfilment-as-a-service is emerging as a viable proposition. It feels that fulfilment as a service is more advanced than we might think—it's there ready to be utilised."*

**Steven Jones**

Engagement Director at Ensono Digital

# 4

## Back to basics: The need for speed

- ✓ Understanding demand and working out the best way to deliver
- ✓ Drop shipping use remains very high
- ✓ Manufacturing location to stock requirements

One of the biggest challenges facing retailers and their supply chains is the need for speed. Is the future about super-fast delivery from the new generation of providers, or is it about managed speed and working with consumers to ensure that they receive their goods reliably at a time that realistically reflects their needs.

Drop shipping—ranging a product that is delivered direct from the maker—remains relevant, with many large brands using drop shipping so that they can offer greater than the sum of that their own warehousing on their websites. This well-established technique reflects the need for breadth and depth in the supply chain and is magnified by two of the biggest challenges facing retailers: competing with the seemingly endless stock available through Amazon, and managing enormous seasonal spikes.

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*Order experiences can make or break customer loyalty. Having a system that offers better order transparency can help retailers manage customer expectations and reduce packaging and carbon emissions through the choice to collate multiple orders."*

**John Wilson**

Director of Warehousing and Logistics,  
Freemans Grattan Holdings

While drop shipping offers some distinct advantages, most notably in terms of inventory and risk reduction, managing a drop shipping process in parallel with traditional supply chain systems is demanding for retailers, though the likes of Shop Direct and JD Williams have used it particularly effectively.

Any drop ship system will demand visibility and control to ensure that the supplier still delivers the promise with the customer, requires the retailer to hand over the last mile customer relationship to the supplier, and needs the retailer to be ready to manage problems through its central customer services department. To provide stock visibility, and to guard against overselling, the arrangement is also reliant on the retail and supplier inventory software talking to each other.

"It's a huge operational risk to a business when critical data is mastered inside a spreadsheet as it is often extremely resource intensive... It's good for prototyping and marrying up information so that you can then more structurally address it. But it's as if the whole world was built on them because it's so straightforward to combine the information. There's a lot of risk associated with it. And there can be a huge amount of effort to try and maintain them and keep them up to date. And there's always accuracy issues because they don't have the systemic checks or transactional control that you would get through a proper software system," says Steven Jones, Engagement Director at Ensono Digital.

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# 5

## The supply chain and a 360-degree customer view

- ✓ Many retailers still using spreadsheets to manage their stock
- ✓ Is it possible to grow without looking at upgrading systems?

**The world, it would seem, still runs on spreadsheets. However, while easy to use spreadsheets lack resilience, at risk of accidental deletion or editing that loses original data.**

It is quite common for logistics, warehousing and supply chain systems to be disconnected, with a warehouse management system from 20 years ago and a supply chain planning system that was implemented 15 years ago, yet with huge growth in the amount of orders or traffic that the warehouse handles over that time. As a result, there are often workarounds, which are often spreadsheet-based.

Where many retailers struggle in their supply chain function is to accurately marry up supply and demand. Which means if they are not aware of demands, they miss the opportunities to optimise their supply chain. And as demand has been volatile, indeed more volatile than ever in the last couple of years, this has highlighted those weaknesses.

If the best view a retailer has of their supply against their demand is carried out by an analyst or spreadsheet, then they have an opportunity to try and take a more systemic approach to planning and to understanding the drivers that their sales and their orders and their purchasing decisions.

“Supply chains need to keep up with customer service promises, consumer expectations and huge changes around customer preference and demand. It’s crucial that retailers have solid foundation to forecast seasonal peaks and detect anomalies, allowing the business to adapt and manage operations with agility,” says John Wilson, Director of Warehousing and Logistics, Freemans Grattan Holdings.

As many businesses have grown rapidly during the pandemic, their ability to manage supply effectively has been strained by that lack of systems. It is one thing to grow quickly, and another to sustain and maintain it while making sure that margins reflect the growth in sales and better solutions. Better software can help with that.

**“Supply chains need to keep up with customer service promises, consumer expectations and huge changes around customer preference and demand. It’s crucial that retailers have solid foundation to forecast seasonal peaks and detect anomalies, allowing the business to adapt and manage operations with agility.”**

**John Wilson**

Director of Warehousing and Logistics,  
Freemans Grattan Holdings

“You can win at the intersection between what customers value and what you offer. For us, in consumer electronics, the products are exciting but confusing and expensive, so customers value help, which is what large legacy retailers can provide like no one else. So that is where we need to focus, covering the lifetime of the product,” says Alex Baldock, CEO, Currys, World Retail Congress, Rome, April 2022.



As many businesses have grown rapidly during the pandemic, their ability to manage supply effectively has been strained by that lack of systems.

# Conclusion

**The core challenge for supply chain is one that is true across the retail sector—the customer has the power and the market drives success. Customers today have more choice than ever before and expect an unprecedented level of immediacy and service from every brand they shop with. With the rise of marketplaces and the prevalence of omnichannel retailing across all categories, competition is brutal. If you can't get the product to the customer when they want it, there's a pretty good chance that someone else can.**

Deep, relevant, timely insights are key. This is the age of big data after all and nowhere is this tenet of Omnichannel more valuable than at the heart of your supply chain. The right data will drive your ranging, merchandising, stock ordering, replenishment forecasts, fulfilment routes, delivery scheduling, and so much more. The good news is that the customer is more than prepared to hand over their part—with 46 percent of future shoppers (16-24) prepared to hand over personal data in exchange for new offerings from the retailer. The rest of that valuable data—the majority—already exists across your business, but might be buried in spreadsheets, legacy stock management systems, vehicle tracking data, and other silos. Unlocking access to that data, bringing it together with fit-for-purpose robust, scalable technologies and overlaying the right level of intelligence for your business will immediately open opportunities to streamline your stock management and design a warehousing and fulfilment model that gives your customers the choice they need without decimating your margins.

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**There is a vast opportunity available for retailers now.**

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With the analytics you need in place, it's time to look at your supply chain infrastructure. Recent international impacts of pandemic, Brexit, and even wars, have already put many retailers' supply chains under extreme pressure and the cracks are beginning to show. A considerable number are running aging back-office systems that, as they aren't as directly related to revenue, have historically been last in the



queue when it comes to investment. These systems are not going to support the recovery and growth of the business, and the teams developing workaround systems, relying on spreadsheets, and hand cranking analytics are going to start to show the strain too.

There is a vast opportunity available for retailers now. The rise of 3PL and supply chain as a service offering; the ability to use data to tailor fulfilment offers on-the-fly based on profitability, sustainability, or simply the retailer's ability to meet customer expectations; and—most impactfully—gaining and utilising business—specific knowledge to manage movement of stock through the business all mean that retailers—like customers—have a vast array of choice before them. Choose the fundamental-data; accurate warehouse planning and maximising return on real estate; consistent, transparent execution; and always, always analysing and learning—and this is where your investment into a world class supply chain will reap the benefits in the long term.

## CLOUD-NATIVE CONSULTING & IMPLEMENTATION

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