



MERCHANDISE PLANNING SURVEY



ANNUAL
SURVEY

2016

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Table of Contents

INTRODUCTION	3
2016 MERCHANDISE PLANNING SURVEY HIGHLIGHTS	4
WHAT ARE RETAILERS DOING TODAY?	5
FORMAL PLANNING PROCESSES	5
CHANNEL PLANNING	5
CROSS-CHANNEL ASSORTMENTS	5
INVENTORY MANAGEMENT	6
CURRENT SYSTEMS	6
HOW CAN RETAILERS OVERCOME TODAY'S OBSTACLES?	7
NEED FOR ADVANCED ANALYTICS	7
SYSTEM CHALLENGES	8
WHAT INTEGRATION ISSUES ARE RETAILERS FACING?	9
ALIGNMENT OF PEOPLE, PROCESSES AND TECHNOLOGY	9
A HOLISTIC PRICING STRATEGY	10
REAL-TIME DATA	11
SOCIAL MEDIA ANALYTICS	12
WHAT DOES THE FUTURE HOLD?	13
FORECAST-BASED CLUSTERING	13
DYNAMIC RE-ALLOCATION	13
CUSTOMER-OPTIMIZED INVENTORY	14
SOCIAL MEDIA-BASED PLANNING	14
CONCLUSION	14
SURVEY METHODOLOGY	15
ABOUT BRP	16
PLATINUM SPONSOR – LOGILITY	17

“While unified commerce is the desired model to which most retailers strive, planning organizations are struggling with the current lack of system, process and organization integration to support the necessary model.”

- Gene Bornac, vice president, BRP

Introduction


The traditional planning process is conceptually pretty straightforward: identify what to sell, to whom to sell it, at what price to sell it and then ensure the product is where it needs to be on time.

This, of course, is simple in concept but challenging in execution. Customers' demand for the ability to shop whenever, however, wherever they want – all while expecting merchandise to be available as needed and pricing to be consistent – makes it exponentially more challenging to plan and manage merchandise effectively.

Today's retailers wrestle with a myriad of business and IT issues as they strive for an efficient and effective omni-channel environment.

The common challenges include: current organization structure is not set up to plan and support an omni-channel environment, planning applications are ineffective and not integrated, and the current environment can't support the complex analysis of the high volume of data required to optimize planning decisions and meet customer demand.

71% of retailers do not even have formal omni-channel demand planning processes.

71% 
do not have formal omni-channel
demand planning processes

As retailers work towards the unified commerce model of a seamless holistic customer experience across channels, many have allocated budget to implement a single commerce platform and upgrade customer touch points for point of sale, e-commerce, mobile and catalog. However, most planning applications have not received the same attention.

The bottom line: planning organizations are not ready for unified commerce!

This environment sets the stage for BRP's 2016 Merchandise Planning Benchmark Survey to explore the current state of retail planning and to identify and understand retailers' priorities as they strive to meet the needs of today's customers.

In this report we will address some of the current issues and challenges that planning organizations are facing, the long-term goals that need to be in place to meet customer needs and fully implement unified commerce and the short-term tactics to move the organization in the right direction.

This report provides retailers the following insights:

- **Understand key industry trends in merchandise planning**
 - **Identify how your merchandise planning capabilities and processes compare to your competition**
 - **Discover practical ideas and opportunities to improve your planning**
-

2016 Merchandise Planning Survey Highlights



WHAT ARE RETAILERS DOING TODAY?

71%

do not have formal omni-channel demand planning processes

38%

plan brick-and-mortar as an individual channel

44%

have integrated planning teams but 86% need improvement



HOW CAN RETAILERS OVERCOME TODAY'S OBSTACLES?

44%

indicate that improving analytics is a top priority

21%

indicate that disparate systems and process challenges are the biggest planning obstacles

41%

plan to upgrade their omni-channel demand planning systems within two years



WHAT INTEGRATION ISSUES ARE RETAILERS FACING?

63%

have integrated the planning organization across channels but 75% need improvement

70%

have integrated planning business processes across channels but 83% need improvement

53%

have integrated planning systems across channels but 77% need improvement



What are retailers doing today?

The value added by employing formal planning processes is not going unnoticed in today's retail market.

Formal planning processes

Advances in planning tools support a wide range of merchandising and planning capabilities and have significantly expanded to support the omni-channel model of retail. Of the retailers surveyed, nearly all (91%) have a formalized merchandise planning process (**Exhibit 1**). In addition, more than half have formalized store planning and allocation processes.

Channel planning

One of retailers' key concerns and areas of focus today is the integration of people, processes and technology across channels to enable a seamless omni-channel experience. Despite progress, most retailers still plan channels individually and maintain separate assortments and inventories for different channels. Brick-and-mortar teams largely operate independently from e-commerce teams and vice versa. There remain opportunities for better integration across channels – and the people, processes and technology to support them – to enable the expected holistic customer experience.

To keep up with customer expectations and the competition, most organizations are working towards planning across channels. In the last year, much progress has been made. In last year's survey, 60% of retailers indicated that they still planned for brick and mortar separately from other channels. This year, that number has decreased to 38% of those surveyed (**Exhibit 2**). E-commerce is also making headway as this year only 15% stated that they plan individually vs. last year 49% planned individually.

Cross-channel assortments

Retailers are still looking to eliminate planning silos within the merchandising organization. Most retailers continue to work on integrating assortments across channels, as only 18% currently offer the same assortment across channels (**Exhibit 3**). This represents a significant improvement opportunity for retailers, as streamlining inventory availability is vital to enable a true unified customer experience. The consumer has been conditioned to view retailers outside of silos, and expects to get the merchandise she wants, when and how she wants it, regardless of channel separation.

Exhibit 1
Formal Planning Processes

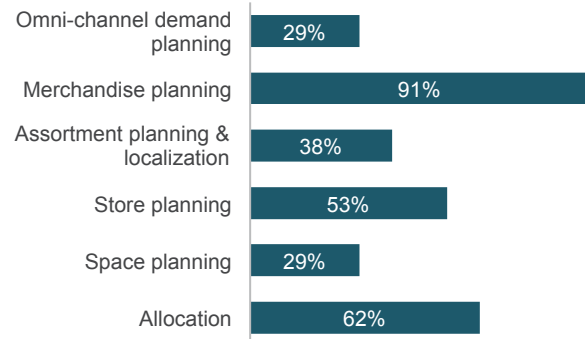


Exhibit 2
Current Channel Planning

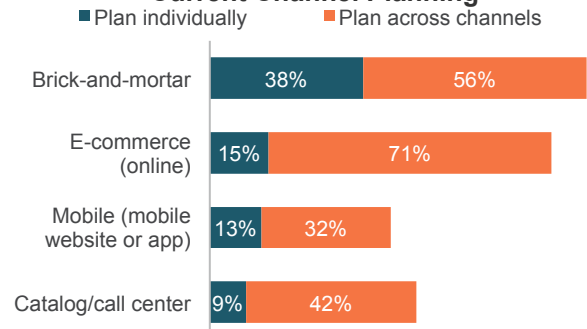
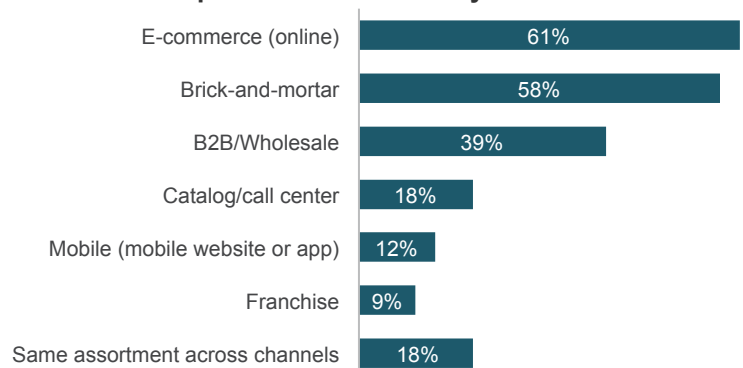


Exhibit 3
Separate Assortments by Channel



Inventory management

There continues to be advances made in the integration of inventory management across channels. In 2014, 69% maintained separate inventory across channels and by 2015 the number had dropped to 49% of the respondents, and this year the number has decreased further to 29% of those surveyed (**Exhibit 4**). Retailers are increasingly recognizing the importance of visibility to their inventory positioning to foster more proactive business decisions.

Current systems

A fully integrated channel-agnostic environment requires a solid technology foundation. According to the survey, retailers are starting to appreciate the urgency behind system improvements; however, transitioning from legacy systems and spreadsheets continues to be a challenge. The inability to fully embrace integrated systems will inhibit efforts to provide a truly omni-channel retail model. Those keeping pace with technological developments will find themselves at a definite competitive advantage until the rest of the industry catches up.

Unfortunately, spreadsheets are still prevalent in the planning process, especially in store planning (41%), assortment planning and localization (27%), and space planning (26%) (**Exhibit 5**). A number of retailers are using a combination of applications for their planning requirements especially for omni-channel demand planning and merchandise planning, representing potential for further systems integration.

Many retailers indicate their planning applications are lacking effectiveness, revealing more satisfaction with vendor or homegrown apps (**Exhibit 6**). Once implemented, there is a compelling value proposition for these systems that provide advanced planning functionalities over spreadsheets.

We are seeing progress in the integration of people, processes and technology; however, there are still many opportunities to fully integrate the organizational aspects of the planning process.

Exhibit 4
Inventory Management Across Channels

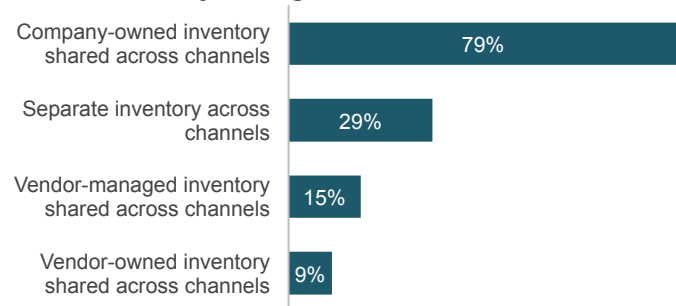


Exhibit 5
Application Type

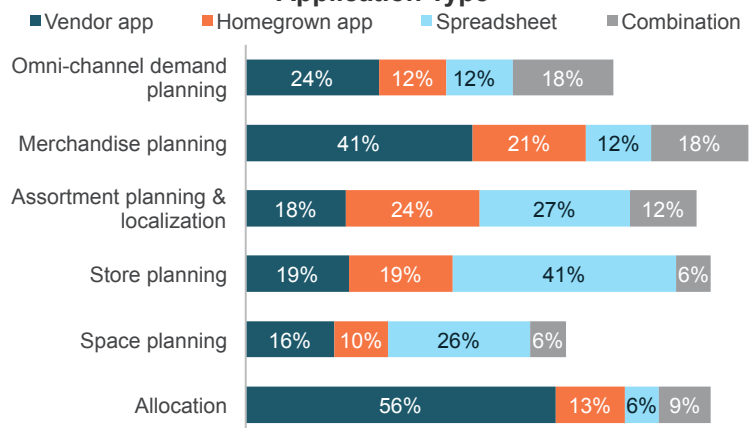


Exhibit 6
Application Effectiveness

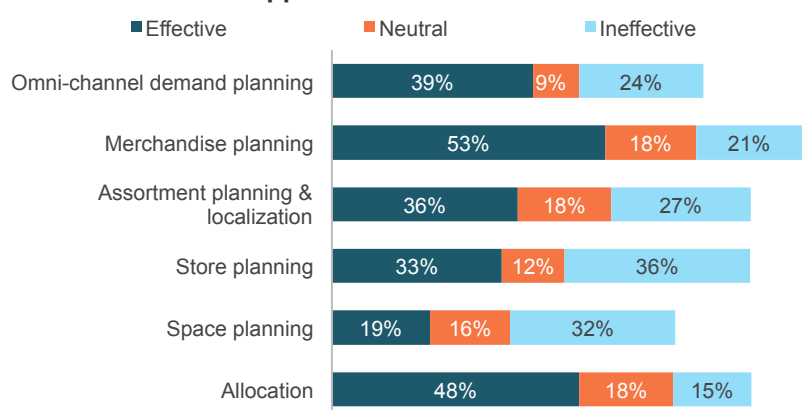
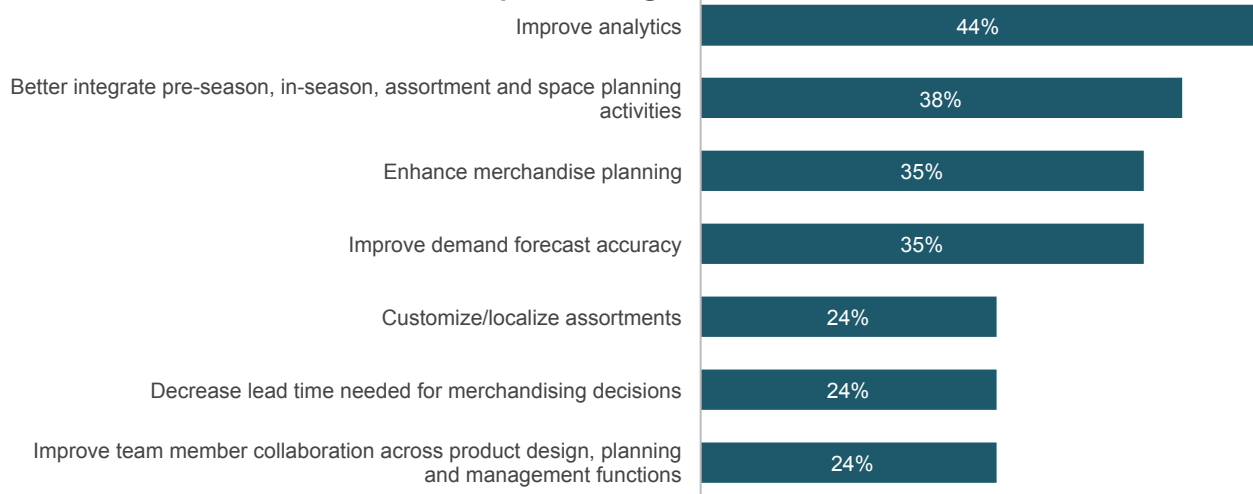


Exhibit 7
Top 3 Planning Priorities



How can retailers overcome today's obstacles?

In today's information-rich environment, business analytics play a key role in optimizing the effectiveness of merchandise planning.

Need for advanced analytics

Evaluating and incorporating all available insights in planning and allocation decisions greatly enhances outcomes. Merchants should consider using every data point available in the planning process, including: business intelligence, inventory movement, shopping behavior, customer relationship management (CRM), social media, clienteling data and customer demographics/segmentation.

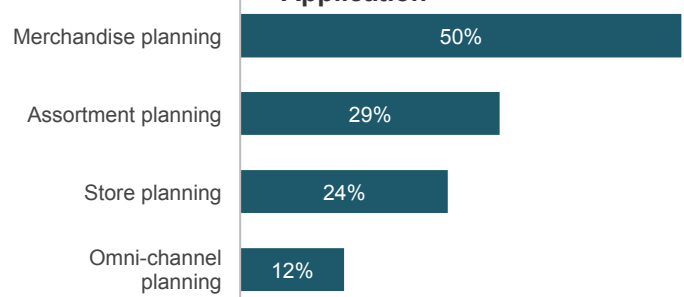
Retailers know that understanding the finer details of their business remains key in satisfying consumer demand, fulfilling inventory, and maximizing revenue. Analytics continue to be a key planning initiative with 44% of retailers choosing it as a top priority this year, as it was the top priority last year as well (**Exhibit 7**).

Strategic business questions are becoming more complex and cross-functional, requiring more disparate data to be referenced concurrently and connectedly to influence decisions. It is becoming essential for retailers to broaden their analytical capabilities to effectively address these complicated quantitative questions. Analytics provide advanced visibility into sales performance by channel, by assortment, and further by item, which helps guide more accurate planning and allocation decisions.

Half of the respondents currently utilize advanced analytics in merchandise planning while only 12% utilize it within omni-channel planning (**Exhibit 8**).

Analytics serve as an important tool to find and interpret meaningful patterns in customer and inventory data to support decision-making. Insight

Exhibit 8
Advanced Analytics Used in Planning Application

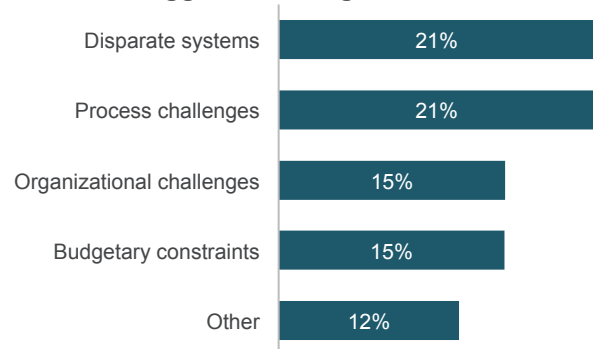


into customer demand, price sensitivity, reaction to promotions, demographics and more are key to drive merchandise plans and actions that maximize profitability. This is especially critical in an omni-channel environment, as understanding the preferences of disparate customer groups across different channels becomes more complicated.

Despite readily available data, retailers are still often challenged to successfully understand and utilize analytics. Among most organizations, the ability to leverage analytics to improve business performance lags intent due to a lack of organizational alignment and inconsistent processes.

Implementation of a successful unified commerce analytics approach requires organizational alignment across all business segments. Without organizational alignment, it is difficult to maximize the benefits that big data can bring to omni-channel performance. An additional challenge organizations face is reconciling inconsistent capabilities and processes across functions.

Exhibit 9
Biggest Planning Obstacles

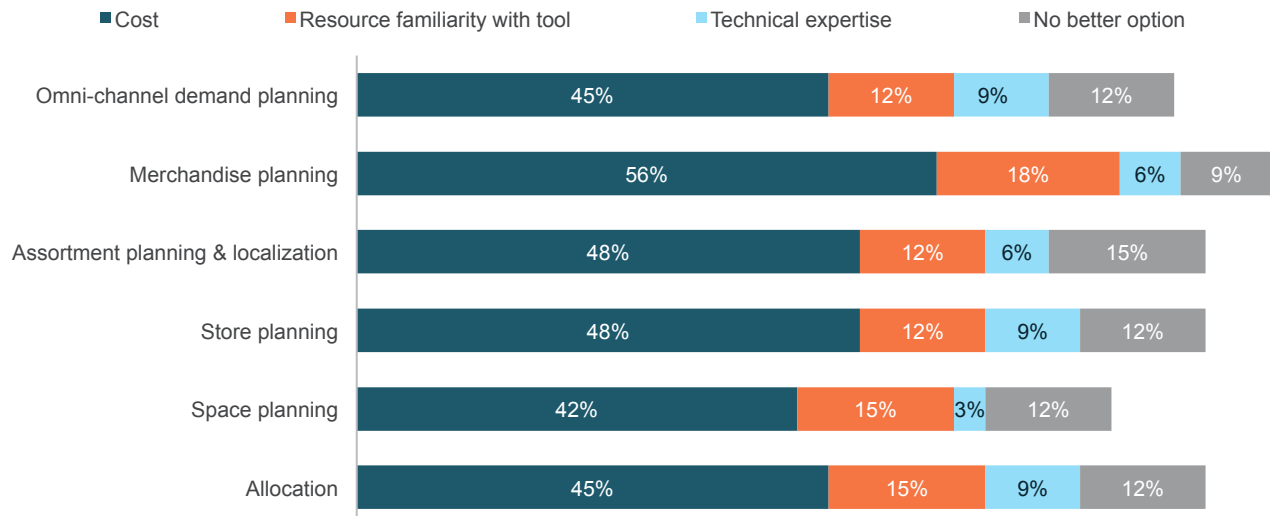


System challenges

For many retailers, delivery on their customer experience vision through an omni-channel environment is a transformative enterprise initiative, so it is no surprise that disparate systems (21%) and process challenges (21%) constraints are the top challenges for retailers (**Exhibit 9**). Trying to get budget allocated for back-end applications and processes can be difficult as applications for customer touch points typically garner more budget attention due to the perceived immediate impact. Reengineering processes and the culture change required to support new system capabilities is also a large undertaking. That said, the cost of doing nothing with the current planning organization or trying to leverage less than effective options, comes with its own cost, in missed expectations, disappointed customers and lost sales.

While retailers face many issues with their current planning systems, they have concerns with implementing new applications. Most retailers indicate that budgetary issues are the biggest concern (**Exhibit 10**). Others may have good intentions to upgrade their systems to accommodate an omni-channel environment, but struggle with what to do and how to do it.

Exhibit 10
Concerns with Changing Current Application

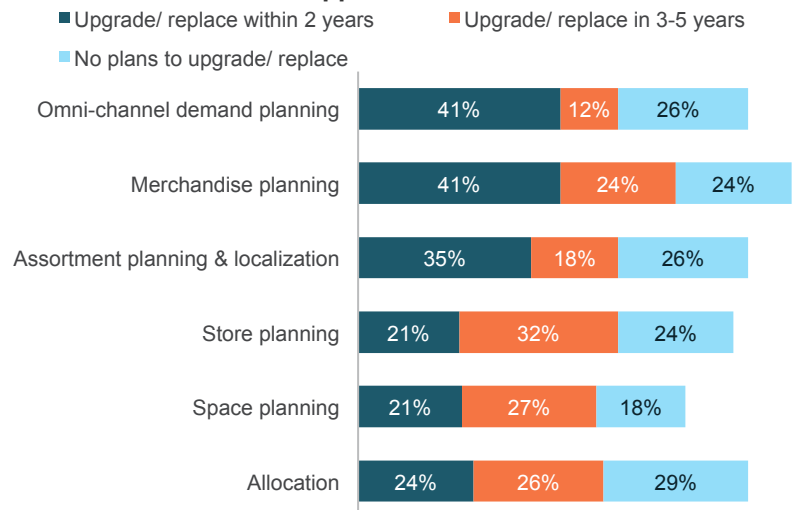


Overall, retailers are not happy with their applications, which leads to major planning application upgrades/ replacements planned for the next two years (**Exhibit 11**).

A combination of appropriate processes, tools and systems are necessary to fully support the omni-channel environment. Absent the right technology – with the processes and organization to support it – omni-channel strategies fail to achieve maximum efficiency and benefit for retailers. Best practices dictate the use of a full suite of planning tools working as an integrated system. This year's survey results reveal that while retailers realize that their current systems are inadequate and that there is a need for better tools, the situation cannot be remedied overnight. Retailers realize there is still significant opportunity to enhance their planning capabilities from a technological perspective.

Fully integrated solutions have not gained vast acceptance into the systems landscape at most retail organizations. Leveraging robust tools that allow for unified management of transactions across all channels will become increasingly vital for retailers who seek to succeed in a unified commerce world.

Exhibit 11
Application Plans



What integration issues are retailers facing?

Pursuing an omni-channel inventory strategy presents retailers with the opportunity to break down organizational silos and take advantage of synergies across the enterprise.

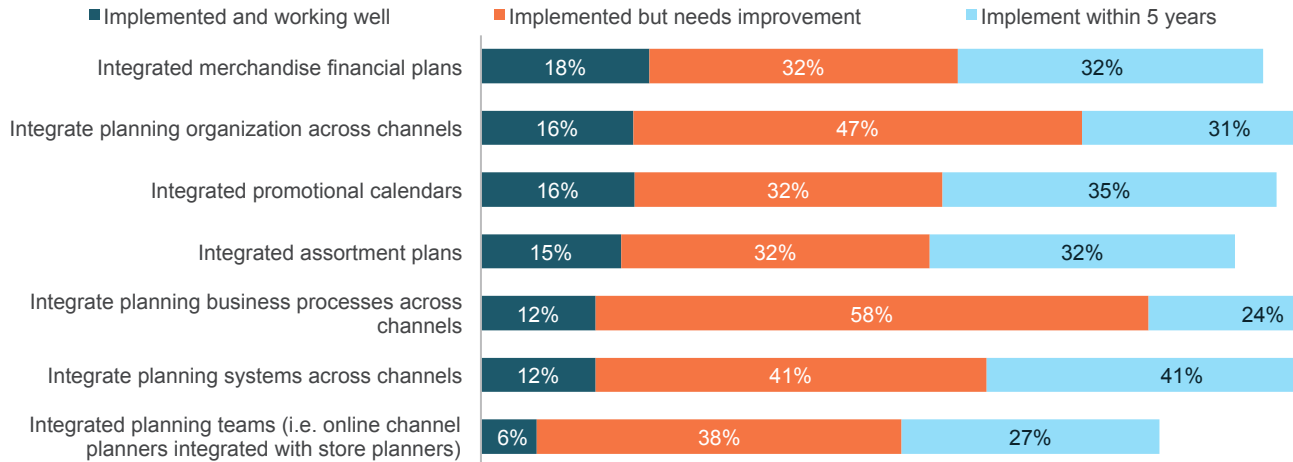
Alignment of people, processes and technology

A prevailing challenge for retailers is the shift of the internal culture and organizational mindsets to consider the enterprise universally, as opposed to in disparate segments. In some instances, retailers need to consolidate disparate teams into one unified team and eliminate redundancies. With advanced applications doing much of the heavy lifting, employees are able to take advantage of the data to formulate and execute better strategies. The integration of planning systems across channels gives planners enhanced insights, which enable them to make better strategic recommendations with respect to price, promotion and inventory.

Retailers are making strides in integrating their planning processes, organizations and systems across channels. Unfortunately, most retailers that have completed their integration initiatives indicate there is need for improvement (**Exhibit 12**). This issue may be a symptom of retailers' legacy systems that cannot truly support omni-channel operations or a unified organization. In many cases, the issue may be a combination of integration with manual processes, conflicting teams or technology patched together to reach across channels.

The survey revealed increased integration across omni-channel planning with more than half of the retailers having already implemented these initiatives (although most need improvement) and many have plans to integrate within two years. Compared to last year, more retailers have implemented

Exhibit 12
Omni-Channel Planning Initiatives



these initiatives, however, the areas that need improvement have increased at a higher rate. This is probably a result of many retailers taking the “just get something done” approach without considering all the processes that need to be changed.

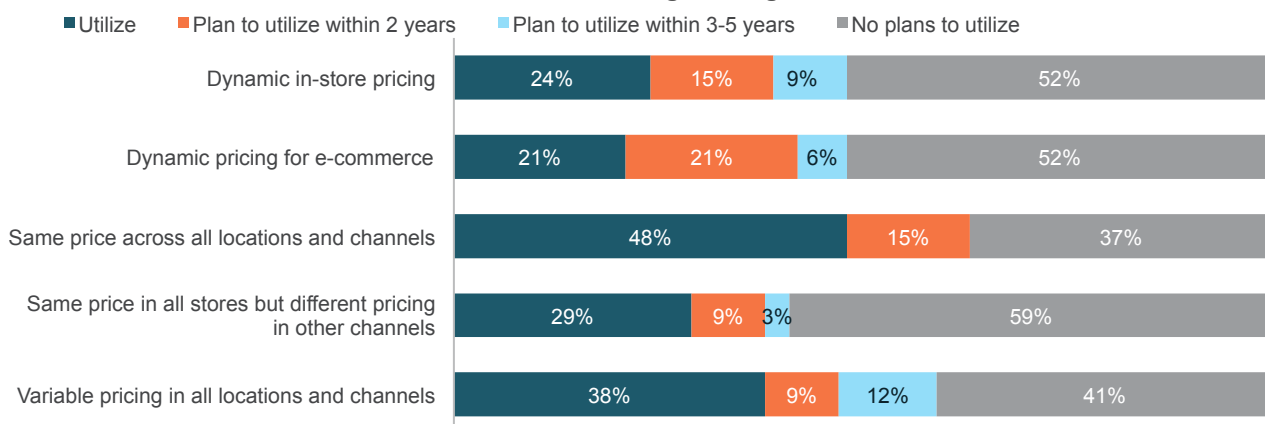
Part of breaking down planning silos includes disrupting the traditional alignment of planning teams. Historically, planning teams have been aligned around product categories by channel. Unfortunately, this does not work with the omni-channel model of retail in which sales are planned across the enterprise. It also creates misaligned goals where a planner puts the success of his or her channel ahead of the success of the company as a whole. Further, valuable lessons learned in one channel may not be shared with, and benefit, another. In order to achieve the synergies of omni-channel retail, planning organizations must be re-aligned, and sometimes consolidated, in order to create a more proactive and nimble organization.

A holistic pricing strategy

Strategic pricing is critical to effectively meet customer demands and minimize markdowns. Moving to an omni-channel environment makes pricing even more challenging as customers now have access to pricing from different channels.

The capability to strategically price goods throughout the season allows retailers to improve gross margins and profits. Currently, retailers typically formulate pricing strategies based on seasonality, store clusters and promotional calendars. Unfortunately, this dated approach is often inflexible and

Exhibit 13
Current Pricing Strategies



forces retailers to systemically take markdowns on items that would continue to sell at a higher price in certain stores. For instance, while swimsuits may typically not sell at full price in cold weather stores in December, stores in New York may be able to sell them (without markdowns or discounts) given their high traffic levels and number of international customers.

Traditional merchandise planning tools make it difficult, if not impossible, to execute a more nuanced pricing strategy. Also, older tools, that lack advanced analytics, might miss dynamic pricing opportunities and execute the same price at all stores in the same cluster.

Omni-channel planning tools allow retailers to take advantage of selling goods in the most profitable channel. While at first glance it may seem illogical to transfer goods from store to online fulfillment, an advanced planning tool will recognize at what price a store to online transfer makes sense.

Currently about half of the respondents utilize the same pricing across all locations and channels (**Exhibit 13**).

Retailers should look to move towards dynamic pricing across channels to maximize margins. While this is still a distant dream for most retailers, a cross channel dynamic pricing model would allow retailers to recognize customers and offer them the price that they are willing to pay, and that is most profitable to the retailer. Some retailers are already utilizing such technology on the web, but this same idea could find its way into more brick and mortar stores in the future.

Real-time data

With the advent of real-time business intelligence (RTBI) across the enterprise, retailers have access to product and customer intelligence whenever and wherever it is needed – creating the opportunity to enhance the merchandise planning process. (**Exhibit 14**) Savvy retailers realize the value of advanced analytics to tap into RTBI and use science to make better planning decisions in real-time.

Real-time analytics serve as an important tool in assisting retailers to find and interpret meaningful patterns in customer and inventory data to support decision-making. Insight into customer demand is key, particularly when used to drive actions that maximize profitability.

The quality of data available to retailers has never been richer and real-time data is becoming more available (**Exhibit 15**). Customers are increasingly interacting with retailers in a highly digital manner via online shopping and social media. These interactions produce valuable sets of data that can be instrumental when predicting demand and informing merchandise buying and planning decisions. Knowing the customer better than the competition does empowers the retailers to coordinate personalized promotions and marketing to drive sales and increase customer loyalty.

Exhibit 14
Customer Data Integrated into Planning Process

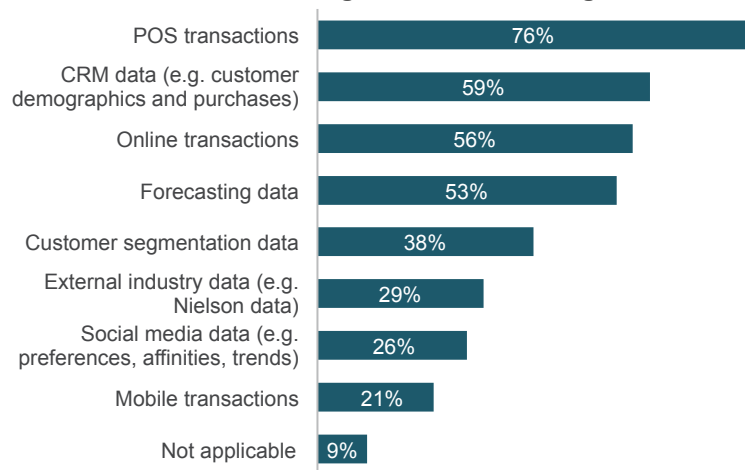
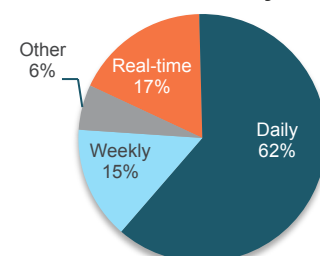


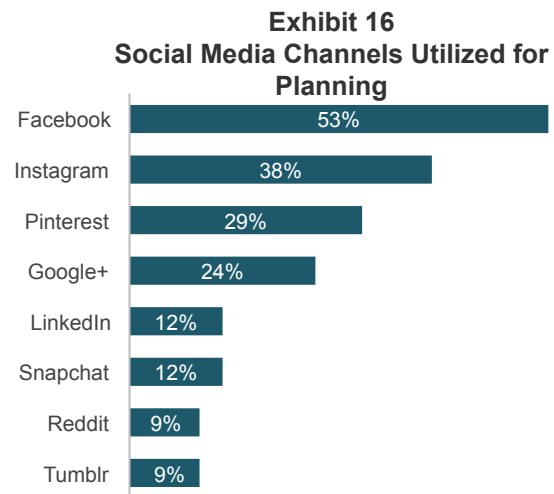
Exhibit 15
Timeliness of Sales Data Availability



Social media analytics

Social media provides a venue in which retailers can directly communicate with their customers and it is an extremely powerful tool for collecting and using customer insights to improve planning decisions. Retailers can understand who the customer is, what she wants, when and where she wants it, and even why she wants it based on social media postings and feedback. Currently, 65% of the retailers surveyed capture customer feedback via social media to use for planning purposes. This is slightly down from 71% last year. However, retailers are really still just scratching the surface when it comes to leveraging social media content for planning purposes.

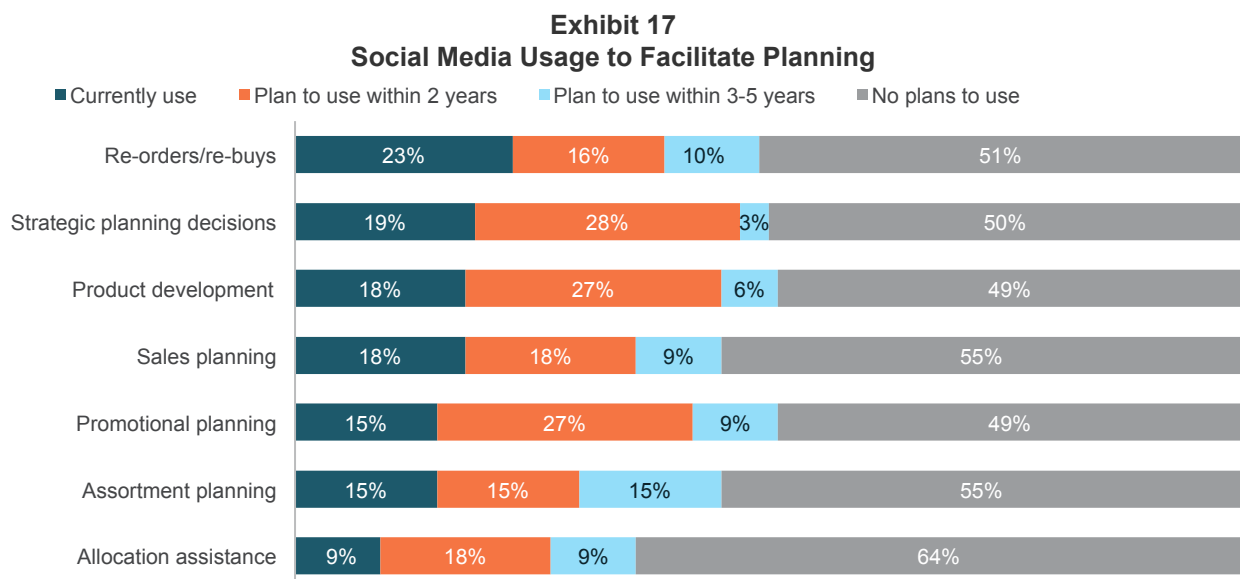
Social media analytics refers to the assessment, examination and interpretation of the interactions and associations of people, topics and ideas among social media sources such as Facebook, Twitter, Google+ and Instagram. Among the respondents, Facebook is the most utilized social media channel with 53% utilizing it for planning (**Exhibit 16**).



Observing and analyzing social media discussions and trends across many individuals and communities is often referred to as “crowdsourcing.” Social media crowdsourcing is a powerful tool that can be used to discern customer sentiment about a retailer’s products and services, which enables retailers to identify customer shopping trends. Retailers are beginning to access this plethora of customer insights for merchandise planning purposes.

The challenge with social media analytics is that it is still relatively new. Therefore, there are very few “tried and true” tools and best practices for retailers to use as a guide. However, social media analytics can offer significant benefits from customer insights, such as helping to align demand, sell-through merchandise, localize assortments and target pricing and promotions.

Re-orders/re-buys is the biggest area for social media data utilization with 23% currently utilizing it and 16% planning to use within two years. Within two years 47% of retailers plan to utilize social media data for strategic planning decisions (**Exhibit 17**). It is interesting that many retailers don’t see the value in utilizing social media data for allocation assistance (only 27% have plans for utilizing



social media data in assisting with allocation), as understanding customer insight seems like it would be important for re-allocating merchandise.

Social media represents a huge opportunity for retailers to be more customer-focused in their planning. Driving merchandise decisions based on customer desires and needs should improve the chances that retailers will buy and stock the merchandise that customers want to buy.

What does the future hold?

The innovative areas that retailers are focused on to improve planning in the future are store clustering, dynamic re-allocation and customer-optimized inventory.

Data analytics is becoming more and more complicated with the multiple data streams of customer transactions that are becoming more common. The challenge comes into play when trying to determine overall customer demand by channel. In a “channel-less” world, retailers are looking to find innovative ways integrate data to help optimize the merchandise planning process.

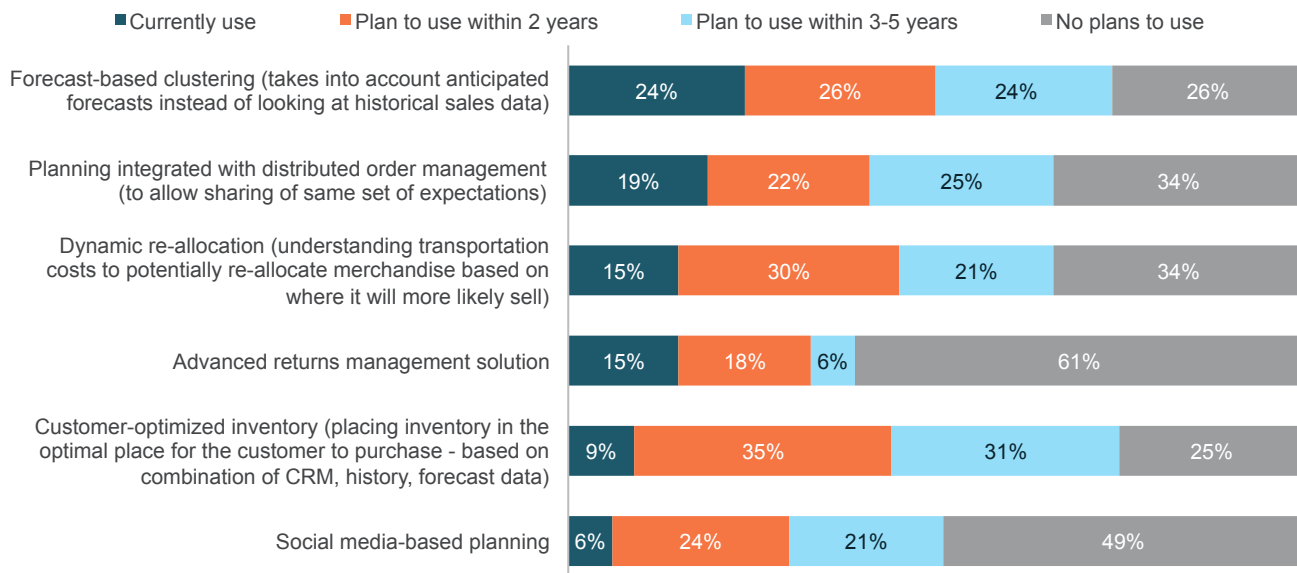
Forecast-based clustering

When dealing with planning across multiple channels, it is difficult to fully understand the origins of demand. How does a retailer manage demand when the customer journey crosses channels? Using statistical tools to identify patterns and cluster stores based on key attributes (geography, climate, size or customer demographics) helps improve forecast accuracy and assortments to anticipate customer demand. While only 24% of retailers are doing this today, within five years, 74% of retailers plan to use forecast-based clustering (**Exhibit 18**).

Dynamic re-allocation

Getting inventory to the right place at the right time is crucial to optimizing sales. While a unified commerce environment minimizes the effects of misallocating product, there are still costs associated with moving the inventory across channels or between stores to fulfill requests. With enterprise-wide inventory visibility and accessibility, retailers will have the flexibility to re-allocate inventory from one store or channel to another where it is most likely to sell. Additionally, this capability can provide cost-effective options to deliver product based on delivery location, whether it's a store or customer delivery. This dynamic re-allocation approach will factor in transportation costs to determine the smart

**Exhibit 18
Future Plans**



movement of inventory. Today, 15% of retailers are applying dynamic re-allocation techniques, but within five years, 66% of retailers plan to do it (**Exhibit 18**). Employing this strategy helps reduce obsolete stock and can increase customer satisfaction while minimizing costs.

Customer-optimized inventory

Analyzing customer demand, CRM, transaction history and forecast data can help retailers place inventory in the optimal place where consumers will most likely purchase it. While only 9% of retailers are practicing customer-optimized inventory strategies today, within five years, 75% of retailers plan to use these techniques (**Exhibit 18**). More importantly, understanding the customer further enhances the ability to be able to predict product selection to better accommodate demand. Is the product assortment resonating with the target customer? Are there any nuances that would affect the purchase decisions (local trends, weather, etc.)? Connecting a customer's history in the planning process facilitates the ability to meet the customer's needs while deepening the relationship with the customer.

Social media-based planning

The power of social media for merchandise planning is still being evaluated. While the platform can be an incredible listening tool, retailers are still working on understanding how this applies to their business. With only 6% of retailers currently leverage social media in the planning process and just over 50% looking to leverage it within five years, retailers are still hesitant on how this data can support planning (**Exhibit 18**). One of the challenges that needs to evolve over time is quantifying social media data into product decisions. How does a "like," an impression, or even a discussion translate to product selection and anticipated sales? While it provides anecdotal direction, the science is still in development.

Conclusion

Savvy retailers know they have a problem with their current planning tools – they are not capable of supporting the omni-channel environment that is necessary to satisfy today's customers. Retailers' understanding of the data, infrastructure, and what it all means needs to evolve. Many retailers are heading down the right road with some success, but it is a complicated process.

The good news is that there are a number of very good tools available to address the current planning needs, but the bad news is that getting the budget and resource commitments to upgrade systems is a huge challenge. Additionally, new technology is only part of the answer – to successfully meet the dynamic needs of a unified commerce world, the people, processes, and systems must be integrated. Key to success is having and developing the talent to manage these tools to support the business. Without the ability to evolve into the new way of thinking and planning, retailers will find themselves devolving back to "the way things have always been done." Harnessing the data and championing change will take time. The first step is to recognize the challenge and develop a long-term approach to integrate planning across channels.

Survey methodology

BRP conducted the 2016 Merchandise Planning Benchmark Survey in September and October of 2016 by contacting more than 500 top North American retailers. Through an online survey system, BRP gained insight into retailers' planning initiatives, priorities and future trends.

This paper summarizes the results and key findings of the survey, offers insight based on BRP's client engagements and overall retail experience and identifies current and future trends in the industry to offer retailers opportunities to continue to evolve and prosper.

The primary focus of this survey is the specialty retail segment with 40% of the respondents within the specialty soft goods category and 34% in the specialty hard goods category (**Exhibit 19**). The remainder falls into various other categories such as general merchandise and grocery.

Of the retailers surveyed, the breakdown in size based on gross annual revenue included a broad selection of Tier 1, 2, and 3 retailers with 74% of the respondents generating \$500M or more in annual revenue (**Exhibit 20**).

The respondents were primarily vice presidents in merchandising, planning and IT or C-level executives.

Nearly all the survey respondents operate within the brick-and-mortar world and most also have an e-commerce presence (**Exhibit 21**).

Exhibit 19
Company Category

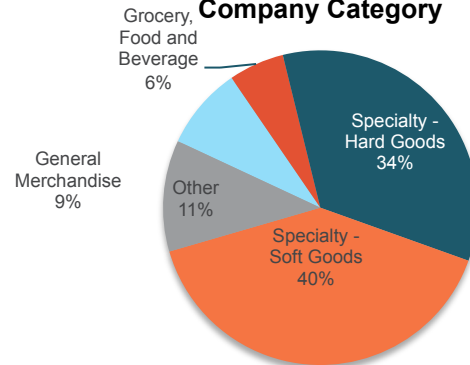


Exhibit 20
Company Gross Annual Revenue

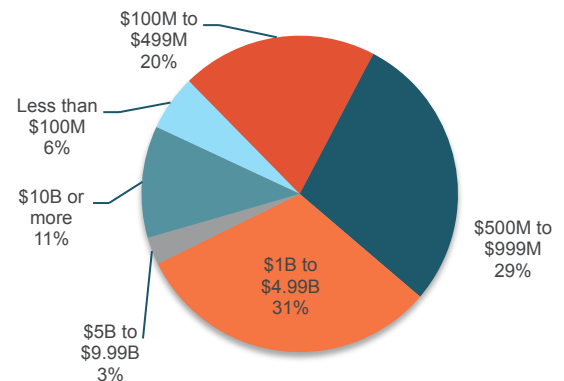
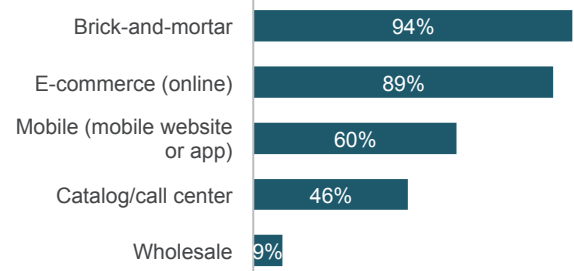


Exhibit 21
Operating Channels





About BRP

Boston Retail Partners (BRP) is an innovative and independent retail management consulting firm dedicated to providing superior service and enduring value to our clients. BRP combines its consultants' deep retail business knowledge and cross-functional capabilities to deliver superior design and implementation of strategy, technology, and process solutions. The firm's unique combination of industry focus, knowledge-based approach, and rapid, end-to-end solution deployment helps clients to achieve their business potential.

BRP's consulting services include:

Strategy
Point of Sale (POS)
CRM
Order Management
Supply Chain

Business Intelligence
Mobile POS
Unified Commerce
E-Commerce
Networks

Business Process Optimization
Payment Security
Customer Experience & Engagement
Merchandise Management
Private Equity

For more information or assistance on any of the topics covered in this white paper, please contact:

Ken Morris, Principal

(617) 880-9355

kmorris@bostonretailpartners.com

David Naumann, VP of Marketing

(916) 673-7757

dnaumann@bostonretailpartners.com

Kathleen Fischer, Director of Marketing

(330) 289-3342

kfischer@bostonretailpartners.com

Gene Bornac, Vice President

(336) 793-8803

gbornac@bostonretailpartners.com

Robert Cuthbertson, Vice President

(216) 571-9204

rcuthbertson@bostonretailpartners.com

Laura Sossong, Manager

(814) 244-6796

lsossong@bostonretailpartners.com

BRP Headquarters

Independence Wharf, 470 Atlantic Ave., 4th Floor, Boston, MA 02210

www.bostonretailpartners.com

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About Logility

Logility provides advanced retail planning and supply chain optimization solutions to more than 1,250 companies around the world, including Abercrombie & Fitch, Ann Taylor, Big Lots, Caribou Coffee, Groupe Dynamite, Modell's, The Men's Wearhouse, Tiffany & Co. and Tuesday Morning.

Logility helps merchandisers, allocators, and retail planners accurately forecast customer demand, develop profitable financial plans, create targeted assortments, optimize allocations and inventory investments, streamline store replenishment, synchronize supply chain planning, and achieve outstanding in-stock performance for Omni-Channel retailers. Our retail optimization solutions position products in front of customers more effectively and profitably by optimizing and automating merchandise planning and allocation, from demand plan to assortment plan, from distribution center to store door, from size and pack optimization to store replenishment.

In addition to delivering superior retail merchandise planning, allocation, and store replenishment, the comprehensive Logility Voyager Solutions™ suite provides world-class supply chain visibility, demand planning, supply and inventory optimization, sales and operations planning (S&OP), integrated business planning (IBP), manufacturing planning and scheduling, and transportation planning and management.

Featuring advanced analytics within a performance management architecture, the Voyager Solutions suite accelerates inventory turns and boosts bottom line profits by integrating data and business processes and uniting your organization with seamless global supply chain visibility from sourcing and production to store door and all points in between.

For more information please visit www.logility.com or email info@logility.com.
