

# Exploring Future Retail

## A Report from the Journey

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MINISTRY OF FOREIGN AFFAIRS  
OF DENMARK  
*Innovation Centre Denmark*



Lifestyle & Design Cluster.  
Denmark

SERVICE PLATFORM

# EXPLORING FUTURE RETAIL

## A REPORT FROM THE JOURNEY

BY MOGENS BJERRE

December, 2018  
**SILICON VALLEY**

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# PROGRAM OVERVIEW

All planned visits were successful and took place on time and as planned

Lifestyle and Design Cluster & Innovation Centre Denmark in Silicon Valley are delighted to host a digital boot camp for Danish retail and service companies, to explore the future within retail.

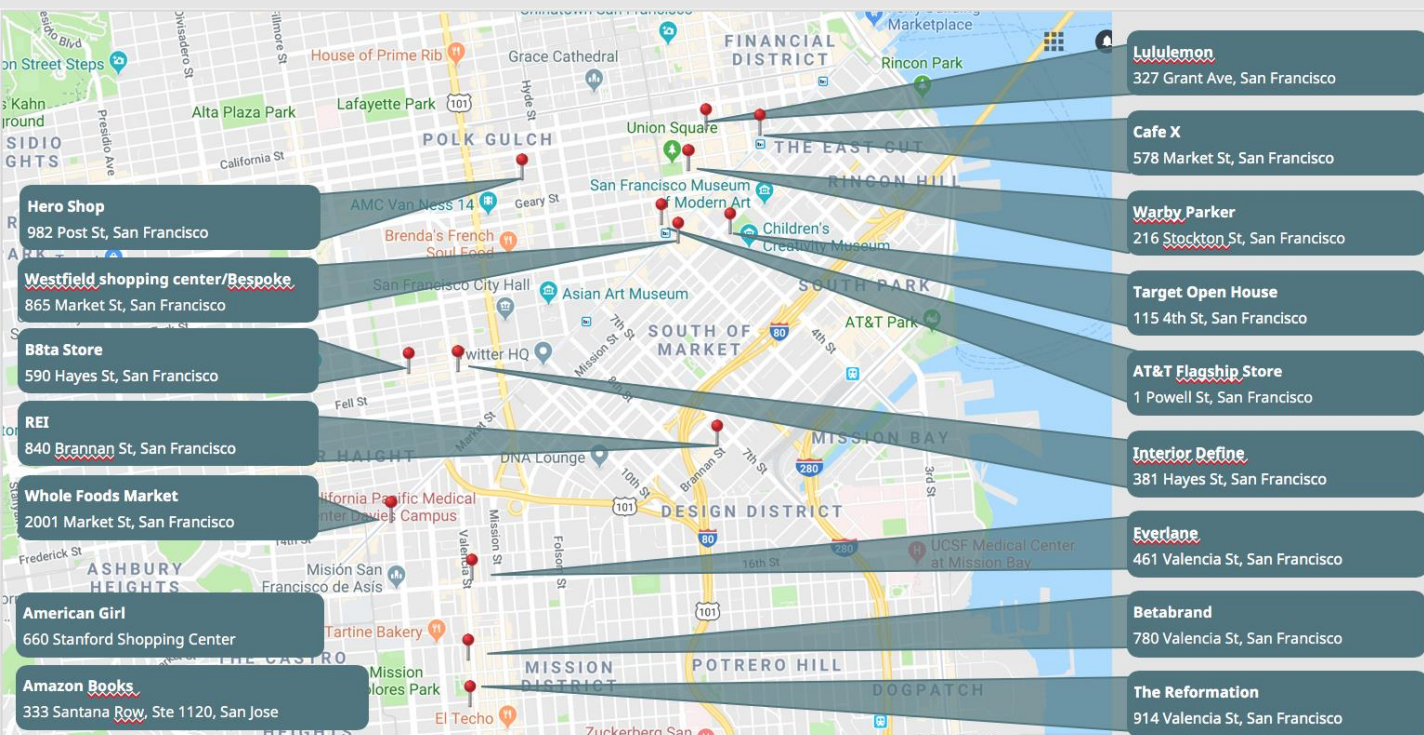
The program will explore and deep-dive into how current technology will change the conditions for retail and how new technology and business models support the development of new digital services.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
10.00 – 14.30  Trends within the Retail and Service Industry – <i>Jim Crawford, San Francisco</i>	10.00 – 12.00  The Amazon Landscape – <i>Amazon, San Francisco</i>	10.00 – 14.00  Getting Outside Help to Innovate + Networking event	10.00 – 11.30  Omnichannel and Product Customization – <i>Fluid, San Francisco</i>	10.00 – 13.00  Meetings and Lunch at Stanford University – <i>Stanford University, Stanford</i>
14.30 – 18.30  Retail Safari – <i>San Francisco</i>	13.00 – 14.00  3D Body Scanning Tech – <i>3DLOOK, San Francisco</i>	Guest speaker: <i>MemoMi Mirror</i> – <i>Plug and Play, Sunnyvale</i>	13.30 – 15.30  New Innovations Within Retail – <i>Bespoke, San Francisco</i>	
19.00 – 20.30  Evening Event with B8ta Store – <i>B8ta, San Francisco</i>	14.00 – 16.00  What's New in E-Commerce? – <i>Shopify, San Francisco</i>	14.15 – 16.00  A Fusion of Digital and Real Life Shopping Experiences – <i>Palo Alto</i>	16.00 – 18.00  Shopping with AI-Powered Checkout – <i>Standard Cognition, San Francisco</i>	
	17.00 – 18.00  Reflection – <i>Loews Sky Bar, San Francisco</i>	18.00 – 20.00  Stambord – <i>ByFounders, San Francisco</i>	18.00 – 19.00  Wine and Networking – <i>San Francisco</i>	13.30 – 14.30  Goodbye Juice – <i>Joe &amp; the Juice, Palo Alto</i>



# INTERESTING STORES TO VISIT

## OVERVIEW



## PROGRAM & EXPERIENCES

- Most participants checked in for dinner Sunday evening in Palo Alto, including our main speaker of the first day Jim Crawford. And then we started Monday morning in San Francisco.
- Transport back and forth was based on UBER being very flexible and made it possible for all participants to spend time together – discussing the pre-assigned themes in the 45-60 minutes it took in transit.
- For all transport slot we had pre-designed reflection questions, typically 3-4 questions – they can be reviewed in the end of the report.
- Jim Crawford set the scene by setting future retail in a historical context, supplemented by a retail safari in the streets of San Francisco. The day was wrapped up by a visit to B8ta (a retail chain selling beta versions (more or less) of products from numerous manufacturers).
- Next day was the day of technology companies with visits to Amazon, Shopify & 3DLock – all focusing on the opportunities created by new technology – departing from the existing technology and with peeks to the next generation technology.
- Day three focused on innovation and entrepreneurship – partly in Palo Alto and partly in San Francisco – all cases taking an outside-in perspective i.e. market/customer perspective. Visits included the innovation hub Plug & Play, including presentations (pitches) by 5 start-up cases that made discussions on innovation very concrete and tangible. The day was rounded off by a networking event at “Stambord” that provided opportunities to get personal and individual experiences with networking – the American way.
- The fourth day combined omnichannel perspectives and business models with the innovation methodology from The Vault and a visit to the innovation hub Bespoke, including presentations (pitches) by 3 start-up case – still at an very early development stage.
- Day five took us to Stanford – letting the perspectives and thoughts fly into the future and the big perspectives of how technology will influence our lives and the world – including the opportunities to do analysis and how to benefit from digitalization and Big Data.

## **TRENDS – THE GRAND PICTURE**

### **- TECH AS DRIVER**

### **- THE STORE HAS A NEW ROLE IN THE CUSTOMER JOURNEY**

### **- SERVICE AS A BUSINESS MODEL**

We saw many examples of how to work with good customer experiences in a service perspective – and how to empower employees. A clear management focus on the employee's responsibilities and role for delivering good service and good experiences. A key take away was: "Bad service is a consequence of bad management".

And there were many more take aways:

- If you don't exist on Instagram, you don't exist! – and increasingly the customer journey starts on the cell phone.
- CSR (Corporate Social Responsibility) is spanning wide as a concept and continues to grow – we saw examples from anything like paying fair prices to raw materials manufacturers, to offering jobs and education to ex-convicts. Transparency in- and out-side the company is a must, and "good citizenship" is expected. Customers expect to be able to "see" what's going on – if possible in all parts of the total supply chain.
- "Retail has to mimic biology", i.e. constant development, test and adaption – only the most adaptable companies will survive....This point was repeated over and over again, often followed by the comments that "You have to think like IT developers (they are always looking for improvements of their delivery) – and not like manufacturers of finished goods....".
- Technology is everywhere, either to help or assist, or as a mean to improve quality, increase employee competences, increase availability, increase security and last but not least convenience.
- Data and transaction history are used to predict customer needs – and in some instances even before the customer has expressed the need!.
- Innovation hubs are a business model in them selves – and they specialize in themes or industries.

China, Japan, and South Korea are showing the way, but remember that it takes place in a context where focus on GDPR etc. is very different from the EU. The use of personal data in China may in the future be used to link facial recognition in the public sphere to the individual's behavior on- and off-line. These data can then be used to control the individual's access to loans, train tickets, their children's education etc. All of a sudden "Big Brother" isn't that far away...

## TRENDS

### - TECH AS DRIVER

Tech as driver is not a question of letting technology be the driver *per se* and where it is possible, but about using technology where it can facilitate new solutions, new value propositions, or assist employees when solving tasks via new technology. Jim Crawford had a lot to add on this topic...

AI and machine learning should enhance or support customer's (or employee's) positive experiences in the customer journey – and, ideally – be used to predict customer needs, before they are explicated by the customer themselves. This would of particular interest, if the company can handle different value propositions to different *personas* or *segments* – i.e. no more "one size fits all".

Innovation is the hero everywhere and in all areas of the businesses. Solutions aim at being as intuitive as possible – one the examples was the tool "a le" which you intuitively understand how to hold and use – even without instructions!

Innovation is not regarded as being interesting in itself, but as a way to think, a mind-set in which you constantly search for opportunities for improving the existing way of doing business – and no idea is too small or too big.

Technology can be used to make non-qualified employees qualified, and ensure that they can help and support customers – even better than before.

The technological development might be summed up by looking af the development from "scan&go" (Walmart experiment\*), via "vending machines" to "amazon.go" using +200 cameras and +5.000 sensors in a store – i.e. changing the customer experience from "one hand shopping" to seamless shopping and soon the autonomous check-out (un-manned stores).

Technology doesn't work if it is implemented for the sake of technology – i.e. a big ipad in the store may not create customer value – it may look smart! But if it helps the customer access personal data, not stored on their own phone, or is a back-up of data on the phone, it may provide value.

\*the customer scanned the goods at the shelf, and then "re-scan" at check-out check-out, pay and leave – the experiment was dropped due to theft!

# TRENDS

## - THE STORE HAS A NEW ROLE IN THE CUSTOMER JOURNEY

There are many facts of the store's new role and the development is pointing in many directions – simultaneously! During the study tour we used the model below to structure thoughts concerning future retail concepts and business models...

### **New – what needs to be added**

From sales store to show-room

From presentation room to dialogue room

Hanging out there and spending time with other customers (and employees

Customers as co-creators and co-designers

### **Increase – develop further/more of**

Opportunity to order goods – also for hippping goods – delivery within few hours

Technology to support employees

Information about the total supply chain and how value (and cost) is distributed should be available

Assortment width increases – but often with one SKU in the store

Transparency in the supply chain – sharing internal information with customers

Omni-channel integration and coordination

### **Decrease – where we need to cut back/less of**

Assortment depth – only to a limited extent will it be possible to come in from the street and leave with the desired product

Square meters will be fewer – i.e. stores become smaller

Storage facilities are cut down – or disappears completely

### **Remove/eliminate – what no longer creates value**

Fulfill all customers' needs in the physical store

### **Keep – continue and/or improve**

Locations with high foot-fall/high traffic density

Employees equipped with a passion for service

## **TRENDS**

### **- SERVICE AS A BUSINESS MODEL**

New services will arise, not merely to sell products, but also using the logic of the circular economy and re-use products and underpin CSR in all aspects of the business.

New services will be able to educate and help the customer in making sound and safe choices – including challenging the customer (in a positive sense) – to try out new outfits, new colors, new designs or merely new combinations.

A key take away was the sentence: "Don't interrupt people, but serve them, know them & help them".

From sales person to consultant/trusted advisor – help customers to try products (might be by moving the dressing room from store to home), i.e. order – try – choose – return...

Customization (and personalization) was also a big theme across the visits. An example was the data you can access via google and the opportunity to work not only with a limited set of personas (often 3-5), but thanks to the data pool you could actually work with as many as 35 personas – that is if your business model is sufficiently flexible...

Especially in the apparel industry we saw many examples of use of data and historic transactions to provide suggestions to customers concerning new designs that could fit their existing wardrobe, or to suggest replacements in the wardrobe due to expected wear and tear (predicted based on average data on wear and tear)...

Convenience and speed also seemed to be of high relevance – especially in the bigger cities delivery can be as fast as 1 hour from order to delivery at the specified address. Or in some instances (example is Lewis) making adaptations to the individual customer in the store, while the customer is waiting.



# INDTRYK FRA



## JIM CRAWFORD

He has been a pioneer within the retail and service industry, doing multiple talks and he has worked as the Executive Director of The Global Retail Executive Council and as the Principal at Taberna Retail.

Design tænkning er meget forskellig afhængig af om man ser på IT/apps (bliver aldrig færdige – focus på discover og exploration) eller produkter (modnes og producers – focus på exploration)

“Anticipating your customers’ needs by being helpful in the relationship”.

### Historisk overblik – som var særdeles tankevækkende

1000 år før vores tidsregning dukker penge op

1176 De første auktioner

1565 Første indkøbscenter – Royal Exchange, London

1824 Det første stormagasin

1872 De første kataloger

1888 De første kuponer – get a free cola – første kendte forsøg på at påvirke kundernes købsintention

1893 Det første kasse-apparat

1916 Den første selvbetjente købmandsbutik

1937 De første indkøbsvogne introduceret

1974 Scannere til stregkoder

1980 “Moderns store era”

1994 e-commerce (Pizza Hut)

1995 Amazon.com (TRU og Target brugte amazon til salg)

Tidligere 2000’erne – tester alle mulige teknologier

Sene 2000’erne – social media

2010 Mobile retailing

Mobile devices overflødiggor investeringer i teknologi butikkerne – apps kan skabes umiddelbart! – det kan teknologi i butikkerne ikke!?

# INDTRYK FRA



## JIM CRAWFORD

Summer trends op i 6 trends – og gennemgik disse – dels hvad der ikke bør være formålet, og dels hvad der bør være formålet:

### Trend #1 Robotics

Ex Best Buy – men det er ikke nyt

Think in terms of combinations – synergy, not saving labour costs

- Space savings
- Security & hygiene
- precision in order taking
- 24/7 access/different operating modes at different times a day
- What personality should the robot have?



## TECH #1: ROBOTICS

### WHY?

- ~~1. LABOR SAVINGS~~
1. SPACE SAVINGS
2. SECURITY & HYGIENE
3. 24/7 ACCESS



# INDTRYK FRA



## JIM CRAWFORD

### Trend #2 Augmented Reality

You can see more details that you can in reality – IKEA catalogue + furniture (2013)

Information and choice at the beginning of the shopping journey – actually before the physical store

iButterfly in Japan, 2010, even brands could launch butterflies that could be converted into prizes

Google glasses worked for service technicians at Boeing Aircraft services

Japan automated retail = SHOP exhibition Marks

Hvordan kan/skal vi udtrykke vores brand vha teknologi?

Layered story telling – fx hos slagteren:

- Hvilke type kød, hvor kommer det fra, hvordan skal det tilberedes, hvordan skal det spises



## TECH #2: AUGMENTED REALITY

### WHY?

- ~~1. ENGAGE SHOPPERS~~
1. VISUALIZATION
2. MULTI-LANGUAGE
3. LAYERED STORYTELLING



# INDTRYK FRA



## JIM CRAWFORD

### Trend #3 Virtual Reality

Suspension of Disbelief – du glemmer at det ikke er virkelighed

Used to simulate different personas – wheelchair users, børn, ældre, m.fl.

Visualisere scenarier – og sikre forced human POV – Point Of View samt immersion og inspiration (indlevelse)



## TECH #3: VIRTUAL REALITY

### WHY?

- ~~1. „THE CASIS“~~
1. FORCED HUMAN POV
2. SIMULATION
3. IMMERSION & INSPIRATION



# INDTRYK FRA



## JIM CRAWFORD

### Trend #4 Drones

Selvkørende biler (en slag drone) – og lastbiler – og skibe

Selvkørende mini lastbiler (pizza delivery) – slow ground delivery, but fine for warehouse automation

??? Where would it work for retailers?



## TECH #4: DRONES

### WHY?

- ~~1. AIR DELIVERY~~
1. SLOW GROUND DELIVERY
2. WAREHOUSE AUTOMATION
3. ??? FOR RETAIL

# INDTRYK FRA



## JIM CRAWFORD

Trend #5 Artificial Intelligence

HAL in "Space Odyssey 2001" – from 1968

- Voice interface (Alexa, Siri, etc.)
- Data interconnections – answer, help
- Mechanical controls
- Control authority (who decides what brand you need?)
- Sentience/intent – in the future

We don't worry about privacy – but we worry about the abuse of privacy!



## TECH #5: ARTIFICIAL INTELLIGENCE

### WHY?

~~1. HAL 9000~~

1. DECISION SUPPORT
2. PROCESS MONITORING
3. REDUCING HUMAN ERROR



# INDTRYK FRA



## JIM CRAWFORD

### Trend #6 RFID

Invented during the Second World War by British when radar was introduced – when radar beams hit the plane – a number would be sent back!

- Bruges til registrering i den samlede supply chain
- Sikrer korrekt registrering og bedre lagerstyring
- Mulighed for at samle data på kunde adfærd i butikken – hvor går de hen med varerne?



## BONUS TECH: RFID

### WHY?

- ~~1. UBIQUITOUS RFID TAGS~~
1. IN-STORE INVENTORY VISIBILITY
2. SHOPPER BEHAVIOR DATA
3. [SLIGHTLY] INCREASED CHECKOUT SPEED AND CONVENIENCE

# INDTRYK FRA

## B

### B8TA

B8ta is a retail store renting parts of their physical space, for a subscription fee, to companies testing their products. In turn, B8ta provides the physical space and stellar customer service for the product.

12 butikker nu men målet er at nå 15 i år (2018)

Macy og Lowes har afdelinger i deres butikker, som er B8TA  
Første butik åbnede i 2016

Vores partnere (de der udstiller og sælger varerne) skal forpligte sig som minimum for 6 mdr.

Fx Google er den eneste der har skilte

Men andre brands med kun et produkt har også plads

De fleste partnere ser tilstedeværelsen i vores butikker som en kombination af marketing, markedsanalyse og beta-test.

Det er i øvrigt et godt eksempel på at butikken er et nyt sted i kunderejsen og service som forretningsmodel



# INDTRYK FRA



## AMAZON - Omar Valle, Business Development Manager

Amazon is currently holding the position as the largest e-commerce retailer with 49% of the US retail market (online). In total that is 5% of the entire US retail market (offline and online).

Amazon er blevet de facto standard for e-commerce, og er verdens største platform – parallelt med AliBaba i Kina.

Jeff Bezos har siden dag 1 sagt: "We want to be earths most customer centric company" .. are you customer obsessed?

Voice interface is huge og vi bygger øko-systemer omkring det.

Machine learning er rigtig spændende – tænk hvis:

- If you could predict... what would you like... what do you want to pay.. colour.. what if??

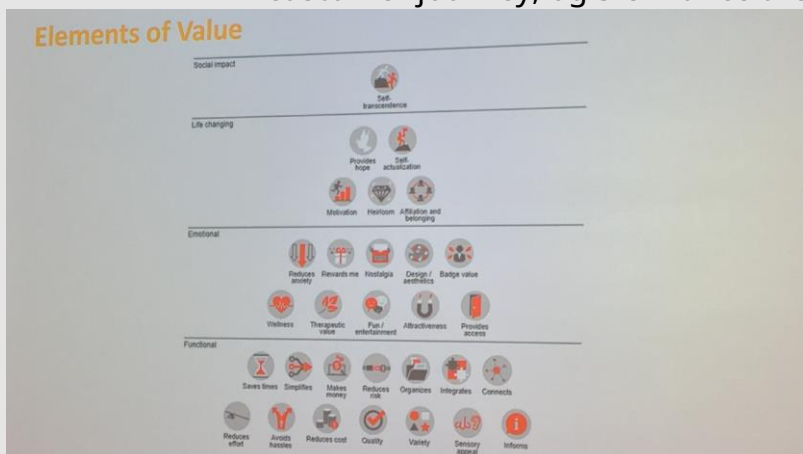
Vi tester grænserne for convenience .. drones... Amazon fresh og vi forsøger at sænke priserne, sikre større variation i tilbuddene til kunderne, få tingene endnu hurtigere ud til kunderne

Amazon brands... Experimenting with fashion Amazon echo & innovation across many domains

Butikker ... curated by geography Seradipity of going in to the store

How can we sell more to people... Build devices to support the customer journey, segment around pain points...

Tre gode råd: 1 know the customer , 2 understand the customer journey, og 3 enhance the experience





# INDTRYK FRA



## 3DLOOK - Whitney Joy Cathcart

Whitney is a retail investment executive in Bay Angels and Chief Strategy Officer at 3DLOOK



3DLOOK has developed an instant human body scanning and measuring technology for mobile devices, which doesn't require additional hardware, to change the way people solve many everyday problems. The company has already released two B2B products for apparel brands, retail, e-commerce, and manufacturing.

### Indtryk og kommentarer

The problem is that the apparel industry has a **100 billion dollar** fit and sizing problem

- High return rates
- Hard to measure
- Abandoned shopping carts
- Confused customers
- Ambiguous size charts

80% af de unge starter deres søgning på Instagram

Returns.. is a ticking bomb for retailers All come back to shopping online.



# INDTRYK FRA

## SHOPIFY



Shopify develops e-commerce platforms for online stores and point-of-sales systems. They only sell business-to-business and has worked with over 600,000 businesses.

Ser sig selv som marketing infrastrukturen i e-commerce virksomheder, og understøtter disse med at sætte deres virksomheder op og hjælpe dem i gang – vha af marketing IQ. Betragter sig selv som det bedste valg for selvstændige virksomheder, der ikke ønsker at blive domineret af amazon

"KIT" er navnet på den virtuelle marketing assistent, som baseret på data, kan sættes til at skruer op eller ned for marketingaktiviteterne.

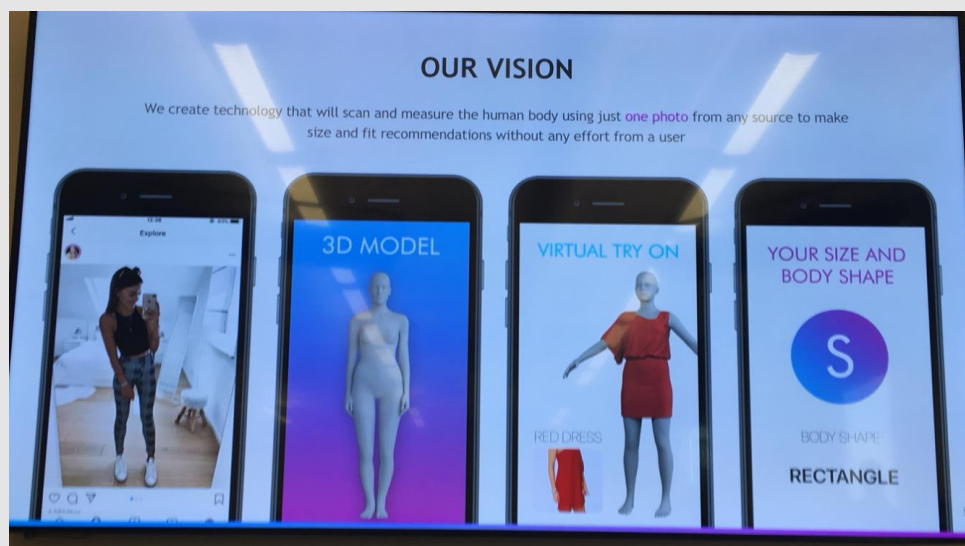
Åbner egen butik i LA i oktober 2018.

Reformation, LA – har varerne i et "testing room" med en touch skærm – og herfra bestille forskellige størrelser beklædning, der leveres i prøverummet

"The customer journey does not start in the store, but on the phone".

Er særdeles opmærksom på amazon, som de frygter vil blive alt for dominerende.

"The store has a fundamental new role in the customer journey".





# INDTRYK FRA

## PLUG AND PLAY

### PLUGANDPLAY

*Plug and Play Tech Center is a network accelerator and corporate innovation platform connecting startups with large corporations. It runs 50 accelerator programs per year and has 220 corporate partners and 200 venture capitalists in its ecosystem.*

In the first part of this session, we will hear about how Plug and Play have utilized help from outside to innovate.

In the second part of this session, there will be time to network with some of Plug and Play's partners.

Rigtigt mange virksomheder samlet på ét sted – systematiseret proces som man går igennem

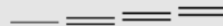
Spændende at se hvordan man dyrker mulighederne for gensidig inspiration – og samtidig samler virksomheder i "clustre", så man understøtter forudsætningerne for at der skabes gensidig inspiration

Culture impact

Proff of concept

- 5 meaningful introduction.. brand loyalty turnover effecientcy
- Deal flows.. 6 starups that meets with opportunities or challenges
- Roundtable.. innovation get lost top line or bottom line.. shared best practices





# INDTRYK FRA



## BYFOUNDERS

ByFounders is a Danish 'for founders by founders' early stage venture fund investing in Nordic founders. Their Founders Collective is consisting of 30+ successful Danish, Nordic & Baltic entrepreneurs of companies such as AirBnB, Vivino, Skype and Tradeshift.

Stambord is an informal meetup for Danes in San Francisco and the bay area. The event is two hours of networking over snacks and drinks and happens the first Wednesday of every month in 45+ cities all over the world.

Indtryk og kommentarer

Der var afsat 2 timer, og det varede 2 timer!

Lige på bolden/personen – er her noget for mig, eller ikke? – og så videre til næste person

Man kan blive medlem – også i Danmark, hvsi man har været uden for Danmark I mere end 2 år



# INDTRYK FRA



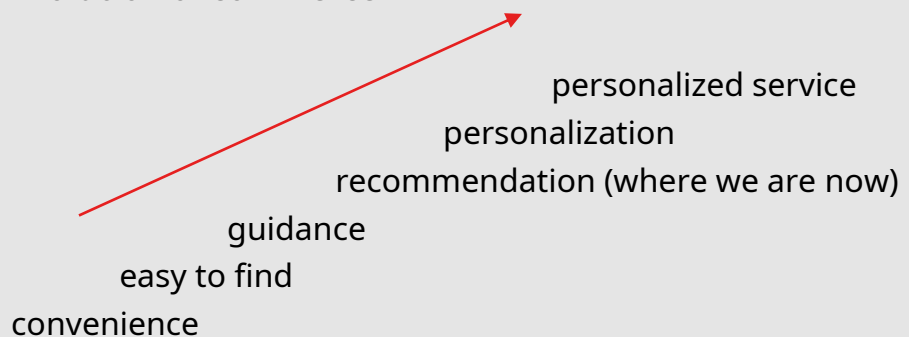
## FLUID – BRIDGET FORKLANET

Fluid is an online commercial agency, who specializes in omnichannel and product customization. They have a broad customer portfolio containing companies such as Google, Levi's, Rebook, Puma, and Estée Lauder.

Indtryk og kommentarer

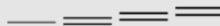
Omnichannel mestrene er lige nu Sephora – Color IQ device in the stores, Starbucks, Nordstrom & amazon prime – best expert (naturligvis)

### Evolution of commerce



Personalised service:

- Recognition, the hallmark of great service
- Anticipation, predict and pro-active – ex.: Stitch Fix
- Conversation, cornerstone of personalized service – this is how you can learn, serve and retain customers
- Omni-channel, customers don't think in terms of channels and devices, they think about your brand



# INDTRYK FRA



## FLUID

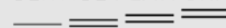
Fluid is an online commercial agency, who specializes in omnichannel and product customization. They have a broad customer portfolio containing companies such as Google, Levi's, Rebook, Puma, and Estée Lauder.

Og vi var jo hos VAULT, som faktisk har forsket i innovationsprocesser og metoder

1. Impossible
2. Impractical
3. Possible
4. Expected
5. Required

Koblet til deres 7 steps proces:

- 1 Look
- 2 Use
- 3 Move
- 4 Interconnect
- 5 Alter
- 6 Make
- 7 Imagine



# INDTRYK FRA

## BESPOKE

COWORKING • EVENTS • DEMOS

### BESPOKE

Bespoke is a trifecta of coworking, demo and event spaces located in Westfield shopping Center. It has been the home to more than 75 retail tech start ups and brands.

The spot in the mall allows the brands and entrepreneurs to access Westfield customers. Bespoke Events can accommodate anywhere from 30 to 1,200 people for conferences, workshops, hackathons, runway shows, trade shows or other events.

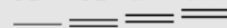
Bespoke Demo is a place where retailers and tech companies can debut products and do market research. Mall-facing rooms can turn into pop-up storefronts for brands to test their concepts with Westfield's 20 million yearly visitors.

Innovation on the spot – og mulighed for at “gå live” i test i centered.

Spændende måde at bruge et dødt areal i et center. Det handler om at “Reinvent space” og at sikre at “Space makes it accessible to people”, og faktisk er det sådan, at der jo ikke er traffic i løbet af dagen, så vi skaber liv i centered ved at det er en arbejdsplads, og så er centered faktisk nemt at komme til – bade logistisk og praktisk.

Som lejer hos bespoke skal der være en sammenhæng til butikkerne i centered: Similar client base • Organic client • Community rich • Partnership with brands retailers • Coworking space • Shared facility • 3 retail tech - competitors- contribute to ecosystem • Curate





# INDTRYK FRA

## LULULEMON

We were born from a love of daily sweat in 1998, the desire to innovate technical athletic gear and the appetite to build a community where we can live our best life. Get the low-down on our ever-evolving journey.

While Vancouver, Canada is where you can trace our beginnings, our global community is where you'll find our soul. Our manifesto is one way we share our culture with the community. It's an evolving collection of bold thoughts that allow for some real conversations to take place.

We know that yoga rejuvenates our bodies and calms our minds, and one of the ways we practice giving without expectation is by sharing our love for yoga.

Spændende måde at bygge et community omkring yoga og ikke mindst brugen af sportsbeklædning. Det er lykkedes at bygge et fællesskab, hvor medlemmer samles og udøver deres passion sammen. Det er således ikke blot brugen af beklædning de har til fælles, det er også holdningen til hvorledes man passer på sig selv og sin krop.

Mao. er det lykkedes at gå fra brand til bevægelse.





# INDTRYK FRA



STANDARD COGNITION

## STANDARD COGNITION

Standard Cognition is an artificial intelligence platform that allows buyers to grab what they want without having to go to a cashier in a physical store. The company is the first Amazon Go rival to develop a platform that enables stores to be cashier less.

Helt ny teknologisk løsning på hvorledes den betjeningsløse butik kan sættes op

Unikt – og endnu ikke færdigudviklet software – der er i stand til at genkende alle varerne i en butik med baggrund i deres fysiske udtryk – størrelse, form, farve

Har lavet aftaler med 4 retailers om at gå live – som test – I foråret 2019.

5 krav til autonomous checkout:

- Privacy
- Scalability
- Experience
- Flexibility
- Insights

Standard Cognitions testbutik ligger på Market Street, SF, mellem 6te og 7ende street, og er åben om onsdagen og fredagen – "Standard Market" – test og markedsanalyse – samtidigt. Avanceret software koblet til 27 kameraer.

Begrebet autonomous check-out kan foldes ud i tre niveauer:

Scan & Go – kunden scanner selv

Vending machine – kunden betaler og tager i udleveringen

Amazon Go – kunden bliver scannet undervejs



# INDTRYK FRA



Markus Pelger, Assistant Professor at the Management Science & Engineering Department at Stanford University. His research interests are in the areas of statistics, financial econometrics, asset pricing and risk management

.Markus will talk about a research project where they used satellite photos to optimize sales for retail stores.

Arbejder emd at evaluere risk with big data

- Buy stock.. optimal portfolio
- Alternative New data set.. satelit mobile..
- Advance research has location data... is there more customers at the store the stock price goes up
- Satellite data (pictures drones) how many parking lots are taken- predict future earnings for the company
- The news comes faster from data than for regular news
- ARE you mention more positive or negative on specific days and why

Start • Industry question or research question • Or revers engineering

- Having more and better service • Less privacy

Students • The entrepreneurial spirit

- Stanford
- Data analytics





# INDTRYK FRA



Kenji Kushida, Japan Program Research Associate at the Walther H. Shorestein Asia-Pacific Research Center.

His research interests are in the fields of comparative politics, political economy, and information technology. Kenji will give a talk about digitalization and big data.

Process power er blevet billigere og billigere = From million to 4 cent to 1 cent

- Google opdaterer hvert 3. år alle deres computere
- Open AI think tank.. (deep mind alpha goal zero)
- Moore's Law – kapaciteten doubles for hver 18 måneder
- Allerede i 2012 – var computere bedre til billedgenkendelse end mennesker..

If it department is doing what AI can replace.. but reverse and find cheap tool

- Not enough skilled people.. sensor into the machine (the screen will guide you)
- Paradigm change... person put together things.. exceptions are people best - robots can repeat

Top 20 skills

- Actual task, what task to do.. how much time
- Can it be solved by a AI
- Which is your vision ?
- What makes a good worker good?
- How can you free up time so the person can establish repoor

Cloud

- China - credit score - reflect loan train ticket • We will not use their it system • Look and get idea • What the customer didn't buy - Collect the conversation • You don't need the basic of it





# INDTRYK FRA



Kenji Kushida, Japan Program Research Associate at the  
Walther H. Shorestein Asia-Pacific Research Center.

Human • We are measured at time What is the value.. is a  
problem solving exercise  
If you are praised it releases a neuron  
Data .. gets from the really sales people What is your actual  
value How do you get feedback from people



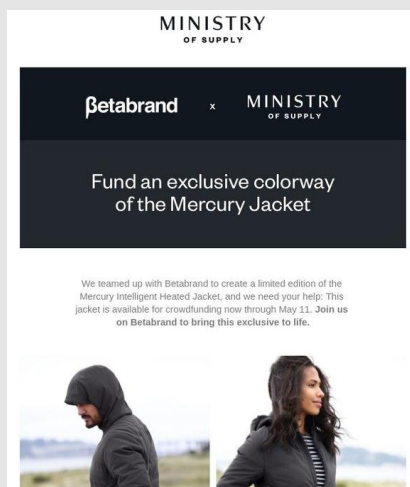
# **RETAIL SAFARI**

**INDTRYK OM KOMMENTARER TIL  
DE BESØGTE STEDER**

# INTERESTING STORES TO VISIT

## BETABRAND

- Betabrand is a clothing store, which also functions as a crowdfunding platform, where users can crowdsource clothing concepts, designs and prototypes into actual products. By October 2015, the company carried more than 300 crowd-created products in their catalogue.
- Indtryk og kommentarer
- Umiddelbart en smule skuffende i et retail perspektiv, men ideen om involvering og co-creation så ud til at fungere
- Systue og butik i ét betyder, at der ikke er langt fra id+e til prototype



# INTERESTING STORES TO VISIT

## CAFÉ X

- Customers order coffee through their app or a tablet and the robotic arm brews the coffee and 2 minutes after, the coffee is ready.
  - Cafe X partners with local bean roasters to give customers more options when building their drinks.
  - All drinks are priced \$3 dollars, with only a few exceptions.
- 
- Indtryk og kommentarer
  - Butikken var "bemandet" med en servicemedarbejder til at hjælpe, hvis der var behov for det!?
  - Ikke meget oplevelse – ud over at have "been there, done it, tried it" – men butikken bør ses som en fysisk manifestation af hvad der kan lade sig gøre med bestående teknologi
  - Dog skal det bemærkes, at kaffen først udleveres når der tastes en kode ved den ønskede luge. Indtil da, er det brygget, og sat til side
  - Fin kaffe, men ikke speciel kvalitet



*Robotic coffee shop – 578 Market Street, San Francisco  
Opening hours during weekdays: 7AM – 6PM*



# INTERESTING STORES TO VISIT

## EVERLANE

- Everlane are highly transparent about the true costs behind all products, making them committed to Radical Transparency. They have used their website and social media handles to offer customers a glimpse into its factories around the world, give voice to the workers making their garments, and share a price breakdown of each product they sell.

Indtryk og kommentarer:

Etik fylder meget sammen med transparens og sustainability. Er stærkt tilstede som influencer på social media.

Der arbejdes både med egne butikker og pop-up stores, men brandet ønsker ikke at være i centre.

Bredt aldersspænd blandet kunderne: 18-65 år. Har meget høje "returns".

Brandet skal opleves som levende og skal leves af medarbejderne.

### Transparent Pricing



True Cost - \$57.02  
Traditional Retail - \$425  
Everlane - \$138

### We Sell Exclusively To You

In traditional retail, a designer shirt is marked up  
8x by the time it reaches the customer.  
We do things differently.



JOIN EVERLANE

# INTERESTING STORES TO VISIT

## REI

- 12,000+ employees were given two Yay Days (paid time outdoors).
- Voted one of Fortune's "100 Best Companies to Work For" for the 20th straight year.
- In 2016, REI co-op invested \$9.3 million in nonprofits and continuously operate 100% on renewable energy.
- REI co-op membership costs \$20 for a lifetime membership and the company offers outdoor classes, events and adventure trips.

Indtryk og kommentarer:

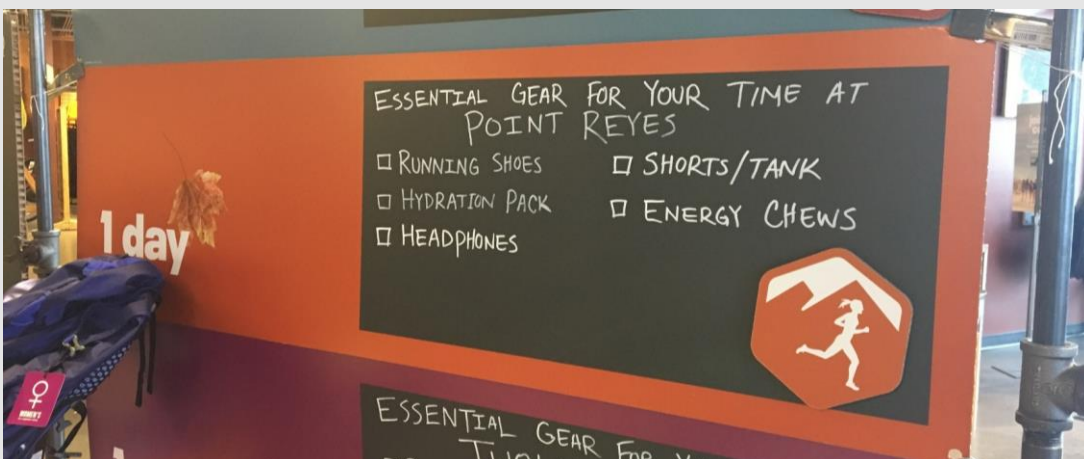
Tilpasser sortimentet til beliggenhed og de sportsgrene og aktiviteter der dyrkes i lokalområdet. Dette gælder dog primært i deres flagship butikker.

Derfor er butikken i San Francisco IKKE repræsentativ

Er ejet af kunderne – som et kooperativ

Alle kunder får 10%

Tager ansvar for kundernes brug af produkterne – har fx en cykel mekaniker ansat i butikken til at service kunderens cykler



# WORKBOOK

**EXERCISES, REFLECTION QUESTIONS  
WE WILL WORK WITH DURING THE  
WEEK – NETOP DETTE AFSNIT KUNNE  
BRUGES TIL AT GENTAGE EN RÆKKE AF  
ØVELSERNE I EGEN VIRKSOMHED**

**MONDAY, OCTOBER 1ST**

## **TRENDS WITHIN THE RETAIL AND SERVICE INDUSTRY**

### **✓ Reflection exercise:**

✓ What trends do you see as the most prominent ones?

✓ What will they do to your own business?

✓ How fast do you have to react to them

✓ Can you differentiate yourself by doing so?

- Disse spørgsmål er velegnede til refleksion, efter input om hvorledes den fremtidige retail scene vil se ud.
- Inputtet kan fx være denne rapport, men kunne også være en udefra kommende præsentation.

## **TUESDAY, OCTOBER 2ND**

### **SERVICE AS A NEW BUSINESS MODEL**

#### **Reflection exercise:**

- ✓What are the opportunities to pick up the low hanging fruits?
  - ✓Benefit from the inputs during the day?
  - ✓What do you see as the first step, the second step etc.?
- Disse spørgsmål er velegnede til refleksion, efter input om hvorledes den fremtidige forretningsmodel kan komme til at se ud – og samtidig et forsøg på at understøtte konkret handling(er).

## WEDNESDAY, OCTOBER 3RD

### INNOVATING WITH OUTSIDE HELP

#### Reflection exercise:

- ✓ Where can you turn to get outside help for innovation
  - ✓ How can you convince your most important stakeholders that innovation and/or help is needed?
- Disse spørgsmål er velegnede til refleksion, efter input om hvorledes man konkret kan komme i gang med innovation i egen virksomhed.
  - Skal der hjælp til ude fra?
  - Hvilke cases er brugbare til at overbevise beslutningstagere om at det er muligt?

## THURSDAY, OCTOBER 4TH

### OMNICHANNEL AND PRODUCT CUSTOMIZATION

#### Reflection exercise:

- ✓ Look for differences between the business models you are familiar with, and the ones introduced during the day.
  - ✓ Discuss the benefits and downsides of the differences
- Disse spørgsmål er velegnede til refleksion over forretningsmodeller, både ens egen og de, der fx er præsenteret i nærværende rapport.

**PREPARE AND PRESENT (IN 2-4 MINUTES) YOUR STRONGEST IMPRESSIONS AND THE IDEAS YOU HAVE FOUND TO BE PARTICULAR INTERESTING TO YOUR BUSINESS**

**TAKE AWAY EXERCISE: ORGANIZE YOUR NOTES, PICTURES, RECORDINGS, ETC. IN SUCH A WAY THAT YOU CAN WRITE OR DRAW YOUR OWN CONCLUSION OF THE TRIP – I.E. HOW WILL YOU PRESENT THE RESULT/OUTCOME WHEN YOU GET HOME?**

## REFLEKSIONSSPØRGSMÅL, ANBEFALINGER OG GODE RÅD

Innovation tager ofte sit udgangspunkt at i nye ideer og nye processer afprøves – nogle gange i eksisterende brancher, og andre gange som helt nye tiltag. For de eksisterende spillere i en branche kan innovation bryde kendte mønstre, både i forhold til forretningsmodeller og konkurrenceparametre.

Innovation (som leder til forandringer) vil derfor ofte betyde – at eksisterende brancher ser nye vindere og tabere.

Som eksisterende aktør, kan det være særdeles vanskeligt at skulle re-konfigurere den eksisterende forretningsmodel, og derfor bygger en række af de konkrete anbefalinger på at "seeing is believing". Med andre ord, kan det være vanskeligt at forestille sig andre forretningsmodeller.

Anbefalingerne er fokuseret på:

- 1. Refleksionsspørgsmål**
- 2. Prøv det**
- 3. Observér hvad der sker hos de nye aktører**
- 4. Følg nogle af Jeres kunder**
- 5. Sæt i gang**

# REFLEKSIONSSPØRGSMÅL

## Refleksionsspørgsmål

- Is it just an idea, in search of a problem? Or does it solve a REAL problem?...
- Is it just an idea or does the stores gain more traffic and more sales?
- Returns from WEB sales – opportunity or problem?
  
- **Customer obsession**
  - Start every process with the customer, and work backwards!
  - Does it help the customer or is it just noise?
  - Where will the costumers be and what will they expect?
  - How can we make the buying easy?
  
- **Long term thinking**
  - What will happen if we do not join, and are we ready?
  - Be stubborn on the vision, but flexible on the details!
  - What can we do to follow up on some of the trends?
  - Do the technology have to be 100% before we go?
  
- **Embrace the external trends!**
  - And know, that you don't know, what you don't know!
  - And then choose what we can do to differentiate our self or..
  - Startups, new thinking, and WS/Retail!
  - If you want to be inventive, you have to be willing to fail! – are there any low hanging fruits? – and what does it take to be a first mover?
  - Amazon is coming to an industry near you – what to expect?

## ANBEFALINGER OG GODE RÅD

### Prøv det:

- Prøv at være kunde hos de nye spillere, registrér dig som kunde, læg en prøve-ordre, reflekter over din egen oplevelse, læg mærke til hvad der gøres for at gøre din oplevelse positiv
  - Læg mærke til hvor hurtigt de reagerer på din tilmelding og hvordan de byder dig velkommen
  - Observer hvordan de søger at lære dig at kende
  - Læg mærke til hvordan de følger op på din ordre
- Klag over en del af varerne/servicen, og oplev hvordan dette håndteres – du kan evt. overveje at teste grænserne for leverandørens tålmodighed

### Observer:

- Lav en liste over de virksomheder, du/I finder interessante og spændende – og kig dem efter i sømmene, check anmeldelser fra eksisterende brugere – læg mærke til hvad det er brugerne kommenterer på – positivt såvel som negativt
- Tal med andre kunder om oplevelsen – og hvad de lægger vægt på
- Inviter gæster (medarbejdere og/eller ledelse) fra nogle af de virksomheder du/I synes gør det godt. Lyt til deres forretningslogik, og hvordan de selv forstår deres egen forretningsmodel, og ikke mindst hvor du oplever at den er mere fleksibel end din egen forretningsmodel. Lad medarbejdere, der har lyst være med, og lyt til deres spørgsmål og refleksioner
- Mange virksomheder arbejder med loyalitetskoncepter. Nogle af disse er endog meget succesfulde, mens andre er ligegyldige. I en rapport fra 2015 blev 10 forskellige loyalitetskoncepter undersøgt, og fælles for de succesfulde var, at kunderne oplevede dem som transparente og relevante (gav et let forståeligt belønning til loyale kunder) – fx tilbyder mange bagere at kunden får det 7. brød gratis

# ANBEFALINGER OG GODE RÅD

## Følg nogle af Jeres kunder:

- Følg nogle af Jeres egne kunder i hverdagen, og lyt til hvad de oplever som godt/skidt, og hvordan de oplever deres egen brug af nogle af de innovative løsninger.
- Er der muligheder i at tilføje services. Oplagt er pakning så kunderne kan hente selv, men levering til den ønskede adresse, tage retur emballage med, etc. Her handler det om at lytte til de begrænsninger/-udfordringer kunderne oplever – både i forbindelse med hverdagens udfordringer og i mere specielle situationer som fx holde bryllup, konfirmation, runde fødselsdage eller andet

## Sæt igang

- Lav nogle innovations-sprint og begynd at lave test i én eller to butikker (eller blot afdelinger) – gerne sammen med en butikschef, der synes det er spændende.
  - Start småt og simpelt – test ideen, og lav markedsanalyse samtidig, som McDonald's fx gjorde da de testede om McSpaghetti var en god idé. Ved blot at sætte et skilt på disken med nyheden om McSpaghetti og en pris, kunne de få information om hvor mange kunder der var interesseret, og hvad deres forventninger var – uden af have produktet i køkkenet! – kunder der gerne ville købe fik så en rabatkupon til den eksisterende menu
  - Led efter lavt hængende frugter/muligheder – lad medarbejderne lave en liste over hvad (allerede nu oplever) de gerne ville hjælpe kunderne med
  - Led efter ressourcer i alle dele af din/Jeres forretning (og i alle personalegrupper) – invitér til innovationsarbejde for alle som har lyst til at være med
- Hold fast i tanken om, at eksperimenter er vejen til læring, og, at det ikke handler om at finde den perfekte løsning fra starten. Her handler det om at arbejde ud fra devisen "gad vide om man kunne..", og lad den/de medarbejdere, der har lyst få lov til at prøve ideen af..

## ANBEFALINGER OG GODE RÅD

- Specielt for større organisationer gælder, at tanken om at standardisere alt har været et glimrende forretningsprincip, men er det ikke mere. Forandring er nøglen til løbende videns udvikling, og det handler derfor i ligeså høj grad om et mind-set, hvor noget standardiseres, og at kreativiteten sættes fri i andre dele af organisationen
- Etablér et lille team (gerne flere!) med meget frie hænder, og giv dem budget!
- Investér i mindre, men innovative virksomheder, og vær med til at hjælpe dem på benene og lær af deres tilgang
- Innovationssprint er en metode til udvikling af nye prototyper. Metoden er beskrevet her hos Dansk Design Center:  
<https://danskdesigncenter.dk/da/vaerktoej>