

# WINNING STRATEGIES FOR THE DIGITAL SHELF

PRESENTED BY

Gregor Murray

Chief 'So What' Officer, DCG

**POWERED BY** 





Globally trusted, independent source of Digital Commerce capability intelligence

Enabling the best-informed Digital Commerce capability decisions, unlocking digital and digitally-influenced growth through actionable intelligence



























## MOST ADMIRED BRANDS IN DIGITAL COMMERCE





COMPILED ANNUALLY FROM THE VOTES OF ALL DCG BENCHMARK PARTICIPANTS

+4k	Votes in 2024
183	Unique Manufacturers Referenced
5	Geographies Covered

FULL REPORT ON THE MOST ADMIRED BRANDS GLOBALLY & BY REGION





# **SEEC – THE 45 DIGITAL COMMERCE CAPABILITIES**



# **STRATEGY**

Environment

VISION Market

Objectives

Leadership

- **Brick & Click**
- eB2B

Pureplay **CHANNELS** 

Marketplace

- DTC
- Social
- **Quick Commerce**
- Channels (All)

DATA

# **ENABLERS**

Technology & Al & INSIGHTS

**Algorithms** 

Full Funnel Marketing

**Content Guidance** 

Search Guidance

Digital Shelf

Data & Insight

Investment & eRGM

Category Guidelines

Iteration & Improvement

INNOVATION Portfolio

People Forward

People Resources

**DRG. DESIGN** PEOPLE & Structure **Functions** 

**Partners** 

# **EXECUTION**

Retailers

Digital Retail Media

**ACTIONABILITY** Customers

Brands & SKUs

**Content Optimisation** 

Search Optimisation

Ratings, Reviews, **Events & Activation** 

MEASUREMENT Leading Key **Customer Indicators** 

REPORTING Lagging Key Performance Indicators

LEADERSHIP Digital Mindset

Thought Leadership

Leadership Capability

Test & Learn

Digital IQ OPERATIONAL

Ways of Working

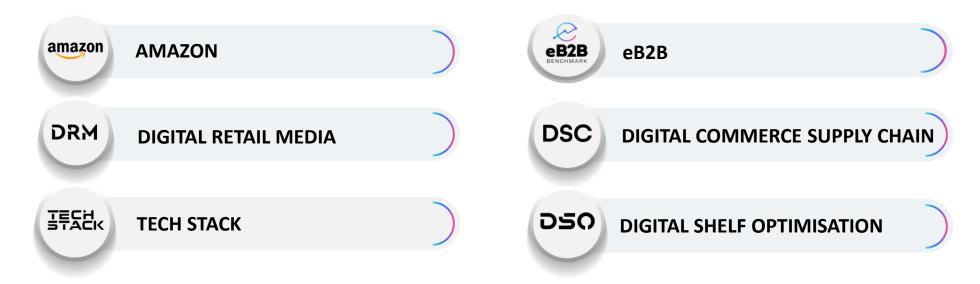
Processes & Operations

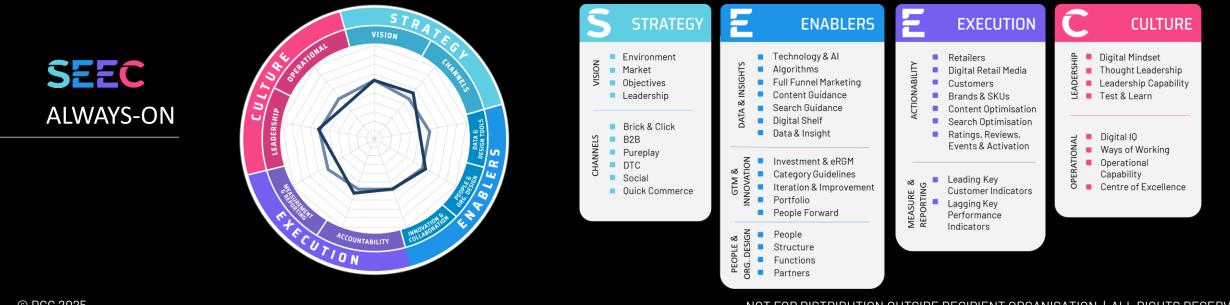
Centre of Excellence

Capabilities mapped to Digital Commerce/ eCommerce, Leadership, Commercial, Marketing, Insights & Analytics, Supply Chain, IT, Finance and HR.

## DIGITAL COMMERCE INTELLIGENCE

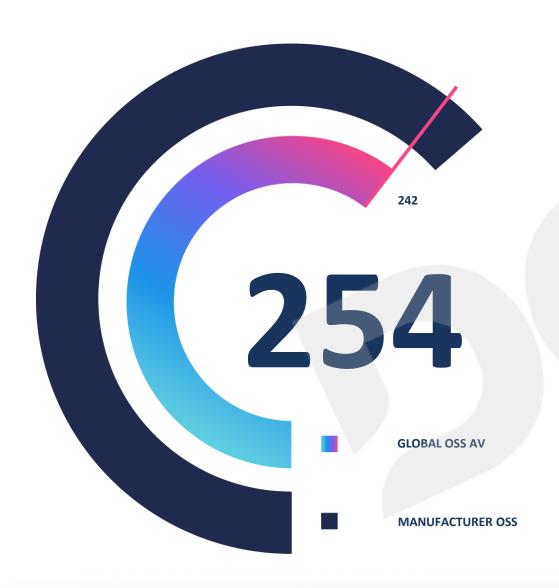






# ONE SEEC SCORE ('OSS')

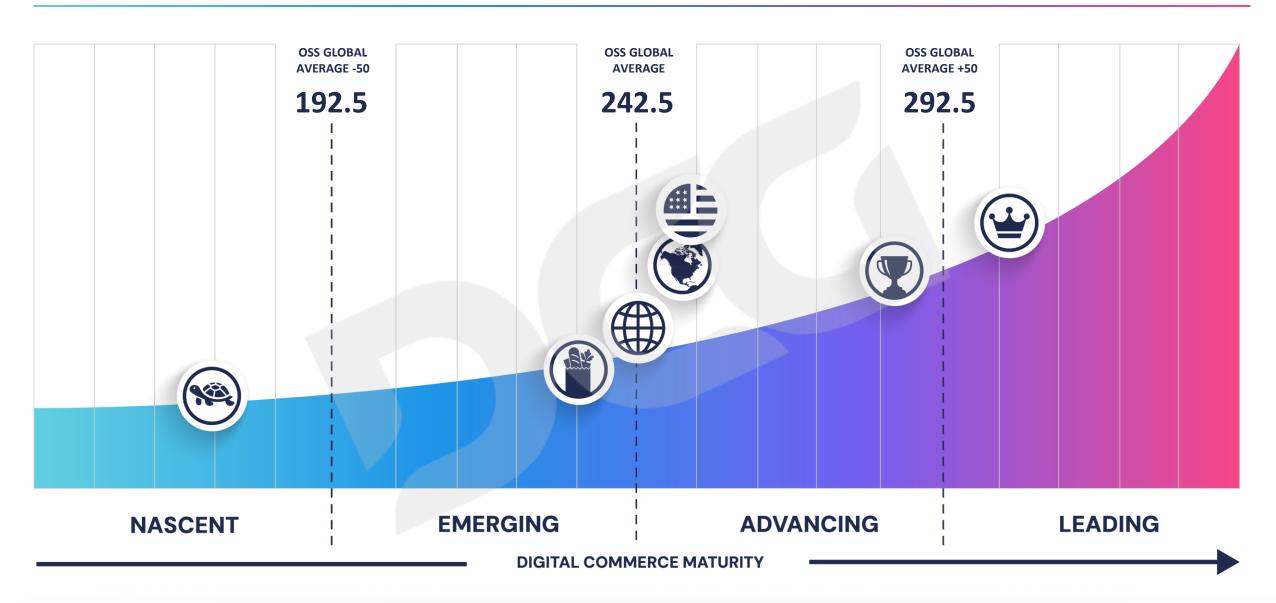




GLOBAL 'ALL MANUFACTURER' OSS AV.	242 +12
NORTH AMERICA 'ALL MANUFACTURER' OSS AV.	246 +8
USA 'ALL MANUFACTURER' OSS AV.	249 +5
PACKAGED FOODS 'ALL MANUFACTURER' OSS AV.	235 +19
GLOBAL 'LEADING 10 MANUFACTURERS' OSS AV.	283 -29

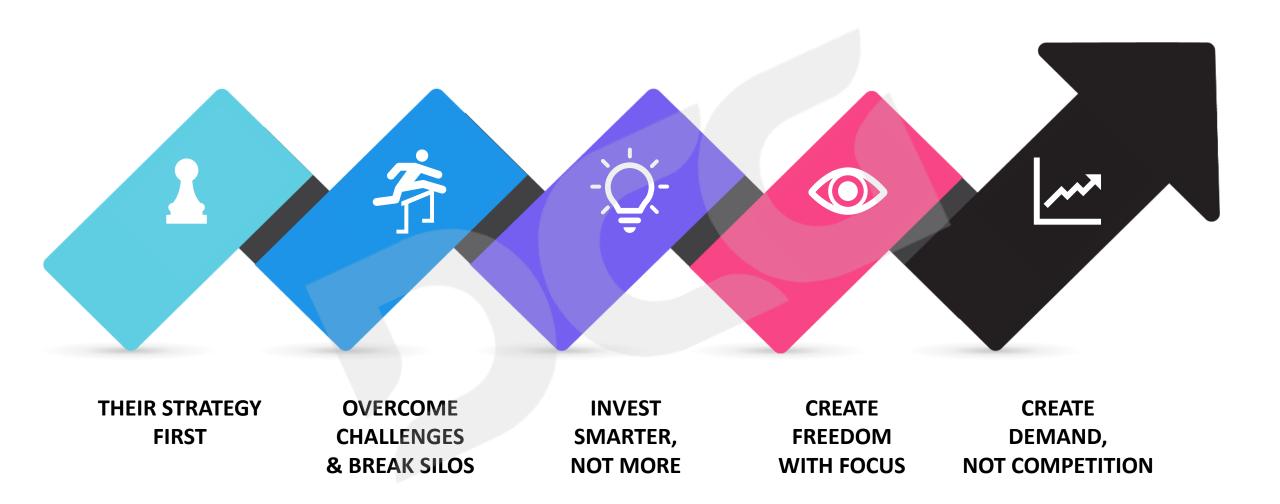
# **ONE SEEC SCORE MATURITY CURVE**





# WHAT THE DIGITAL COMMERCE LEADERS HAVE IN COMMON





# THE \$ BENEFITS OF BEING A LEADER





ONE SEEC SCORE

242

**AVERAGE YOY GROWTH %** 

6.13%

INCREMENTAL \$ GROWTH YOY\*



**ONE SEEC SCORE** 

249

**AVERAGE YOY GROWTH %** 

9.61%

**INCREMENTAL \$ GROWTH YOY\*** 

\$1.7 m



ONE SEEC SCORE

283

**AVERAGE YOY GROWTH %** 

14.3%

INCREMENTAL \$ GROWTH YOY\*

\$4.1 m

**\$41m** in incremental growth for every \$500m in digital commerce revenue

<sup>\*</sup>US benchmark intelligence based on every \$50 million of digital commerce sales





THEIR STRATEGY

THEIR CUSTOMERS

THEIR PROFITABILITY

THEIR RETAILERS

# **OVERCOME CHALLENGES & BREAK SILOS**



#### 20 COMMON CHALLENGES IN DIGITAL COMMERCE

Budget & Investment

Data Accuracy & Utilisation

Digital Shelf Performance Retail Media & Digital Advertising ROI

AI & Automation

Leadership & Internal Alignment Roles, Responsibilities & Capabilities Omnichannel Strategy & Execution Measurement & Performance Tracking

Retailer Relationships & Execution

Pricing & Profitability

Content Management & Syndication

Assortment & Portfolio Strategy

Processes & Ways of Working

Competitive Pressure

Generating &
Actioning Shopper
Insights

Digital Logistics & Supply Chain

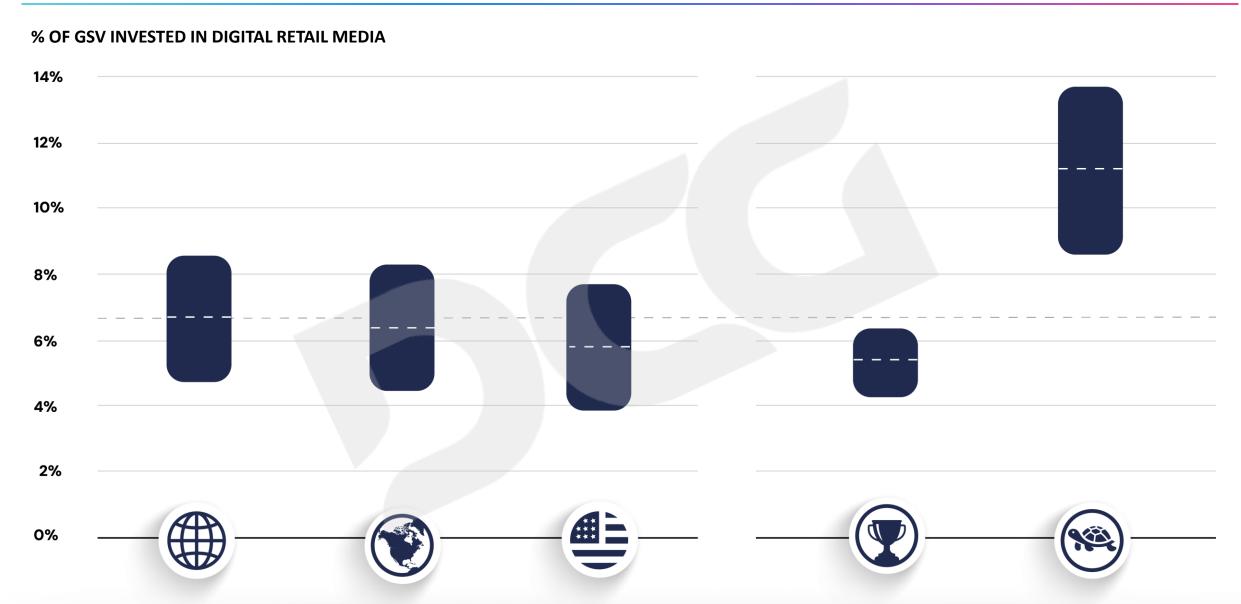
Retailer Chargebacks & Deductions

Sales Growth & Market Share

Data Sharing & Retailer Transparency

# **INVEST SMARTER, NOT MORE**





# **INVEST SMARTER, NOT MORE**



#### **DIGITAL COMMERCE LEADERS**

- 1 Invest significantly less than the average
- 2 Are growing faster than the average
- 3 Are more satisfied with their media ROI
- 4 Are more confident their media spend is sufficient

- Are less likely to be priced out of media activations by competitors
- Believe they have all the capabilities they need to succeed and deliver their media objectives
- 7 Invest more in people resources, upskilling and development
- 8 Review every media activation for future improvement

# PEOPLE & PARTNERS BEFORE PRICE & PROMOTIONS

# **CREATE FREEDOM WITH FOCUS**



#### **CENTRALISE FOR SCALE**

#### LOCALISE FOR ACTION

BRAND & CHANNEL VISIONS & STRATEGIES

DATA COLLECTION, MEASUREMENT & REPORTING

RETAILER VISIONS, STRATEGIES & OPTIMISATION RETAILER MEDIA BUYING & OPTIMISATION

EXECUTION TOOLKITS, GUIDELINES AND STANDARDS

ERGM GUARDRAILS AND EJBP GUIDANCE

CONTENT LOCALISATION, TRANSLATION AND 'RIGHT SIZING' PROCESSES, WAYS OF WORKING, ROLES & RESPONSIBILITIES

RETAIL MEDIA EXECUTION OBJECTIVES & FRAMEWORKS

TEST & LEARN STRATEGY, METHODOLOGY AND KNOWLEDGE SHARING

PRICING, PROMOTIONAL PLANS & RETAILER JBPS

RETAILER & BRAND SPECIFIC ACTIVATION & EXECUTION

GLOBAL RETAILER
PARTNERSHIPS &
DEVELOPMENT PLANS

DATA ACTIONABILITY SHOPPER INSIGHTS & JOURNEY ACTIVATION

AVAILABILITY, AUDITS, OUT OF STOCKS

SHOPPER JOURNEY UNDERSTANDING

GLOBAL AGENCY
PARTNERSHIPS, OBJECTIVES
& DELIVERABLES

**COMPETITOR STRATEGIES** 

ACTIVATION REVIEWS & CONTINUOUS IMPROVEMENT

# **CREATE FREEDOM WITH FOCUS**





### **Retailer and Manufacturer Role**





- Range
- Price
- Distribution to Store •
- Merchandising
- **Promotions**
- Marketing
- **Events**
- 2ndry Space
- Warehousing
- Display

- Media
- Calls to Action
- Incentives
- Loyalty
- Range Prioritisation
- Facings
- Space Planning
- **Customer Comms**
- Customer Engagement
- Feature



- Manufacturing
- Warehouse Delivery •
- Recommended Pricing
- **Brand Advertising**
- Trade Investment
- Retail Media Creation

# e-Retailer and Manufacturer Role





- Range
- Selling Price
- **Customer Distribution**
- Category Events
- Warehousing
- **Customer Returns**



- Manufacturing
- Warehouse Delivery
- Recommended Pricing
- **Brand Advertising**
- Trade Investment
- Retail Media Creation
- Visual Merchandising
- Promotions
- Marketing
- Targeting
- Availability
- Portfolio
- **Brand Events**

- Secondary Feature
- Media
- Calls to Action
- Loyalty Building
- Range Prioritisation
- **Customer Comms**
- **Customer Engagement**
- Profitability Mix
- Search & Content Optimisation
- **Product Discoverability**
- Display
- Retail Media Activation
- Seasonal Execution

# **LET'S SPEAK TO THE LEADERS**











**ANDREA STEELE** 

AVP ECOMMERCE & CUSTOMER MARKETING

**KRAFTHEINZ** 

**LESLIE LEE** 

**VP DIGITAL EXPERIENCES** 

**HORMEL FOODS** 

### **ARTHUR SYLVESTRE**

**VP DIGITAL COMMERCE** 

DANONE NORTH AMERICA

### **GREGOR MURRAY**

CHIEF 'SO-WHAT' OFFICER

DCG