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**POLITECNICO DI TORINO**

**Faculty of Engineering and Management**

**Department of Management Engineering and Production**

**MASTER'S DEGREE THESIS**

**THE DEVELOPMENT OF OMNICHANNEL: A  
ROAD MAP PROPOSAL FOR FASHION  
INDUSTRY COMPANIES**

**Academic supervisor: Prof. LUIGI BENFRATELLO**

**Candidate: CHIARA PANETTA**

**Student ID: 271767**

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*Alle straordinarie coincidenze, ai puntuali ritardi e alle  
magnifiche persone che mi hanno fatto arrivare fin qui.*

## **ABSTRACT**

The way we buy clothes has changed a lot over the years. If once the stores were the only places where we could go shopping, now there are multiple digital purchasing channels where we can buy apparel.

E-commerce platforms, online sites and social networks are some of the digital tools that support physical stores in offering the client the best customer experience.

The digital experience has become as important as the offline experience in store, sometimes blending together so as to offer the same efficient service on both sides.

Nowadays, the integration of the multiple selling channels that a fashion industry company owns and their synergical management is more than important.

The easier is for the customer to find the product on various channels, the easier is for themselves to make a purchase, and thus making the company's profits much higher than before.

This kind of strategy is known as omnichannel strategy.

The purpose of this dissertation is to analyze how omnichannel is spread inside fashion industry companies, and to provide them with a road map in order to embrace a customer-centric approach in their selling decisions and to develop their own omnichannel strategy.

As a case study, it will be examined how this kind of strategy is developed inside one of the best-known fashion brands in Italy and abroad, Save the Duck, studying the differences between the American STD, where omnichannel is a solid reality, and the Italian STD, where omnichannel is starting to be developed only recently.

To introduce the topic, it will be discussed how digitalization has changed our way of buying clothes.

Nowadays, a fashion industry company cannot think about its own business without taking into account the digital purchasing channels it also offers.

Customers have become accustomed to buy their clothes online, since the process of buying has become, over the years, easier to use, so as to induce them to repeat it.

Furthermore, the delivery time has reduced significantly, improving in this way the online customer experience.

Then, it will be discussed the point of view of customers on digitalization, focusing on what they currently prefer between the in-store experience and the online one, arriving at the conclusion that both channels are essential for the business' development of the company, since customers use both of them.

Customers, therefore, have been given a relevant role in the development of business' decisions, driving fashion industry companies to adopt a customer-centric approach. This kind of vision is well explained by the Flywheel model, which see customers as a driving force useful to grow your business, and not only as a number, as the Funnel used to do.

Then, in relation to the new important role customer currently covers, it will be analyzed how fashion industry companies are putting into place this customer centric strategy and the benefits they are receiving in adopting it.

However, in order to develop a successful customer-centric strategy, it is essential to manage relationships with customers in the most efficient way, using a CRM.

Its purpose is that of helping to collect important data about the customer experience of each client, both on digital and in-store channels.

The data collected about customers during their online and in-store experiences are essential, because they will be the data which will drive the decisions that the management will take regarding the business of the company.

Finally, it will be discussed the benefits of this new digital approach.

After having discussed the new importance of using a customer-centric approach, it will be analyzed the current status of fashion industry companies' business, while taking into account the competitive landscape that surrounds them.

Then, it will be discussed how it can be possible to connect the online and offline channels these companies have in order to offer the same brand experience and to start developing an omnichannel approach.

This integration among channels, making them work as a unique one and share the same information in real time, is the key to success of the omnichannel approach.

It will be analyzed the main channels used so far by fashion industries companies, and how they integrate them in order to create the best customer experience.

Furthermore, it will be discussed how data about customers coming from different channels can be collected using Customer Data Platforms.

The last chapter, finally, has as its objective the development of a road map that will help fashion companies to develop their own omnichannel strategy.

It will be taken into account the Save the Duck case study, in order to understand the process of developing this kind of strategy, analyzing the pros and cons of this method and which tools can be useful to reach this goal.

It will be analyzed how the American STD has successfully developed an omnichannel approach, starting from the beginning and analyzing the steps that allowed them to reach this goal.

Finally, it will be proposed a road map to help companies to arrive at a level of omnichannel development similar to the American STD, since omnichannel is not yet spread among all European fashion industry companies.

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# CHAPTER I

## **Digital sales: a new sales approach in a constantly evolving economic landscape**

### **1.1 Introduction**

Digitalization has become, over the years, an integral part of our everyday life.

Nowadays, most of the actions we make during our day is done with some digital devices connected to each other.

It is interesting to think about the way we used to buy clothes, for example, some years ago.

Physical stores represented the only places where customers could go shopping.

If a store was not present in their city, the only way to buy from that store was reaching it.

Now, thanks to digitalization, clients can make a purchase from almost every store in the world, comfortably from their house, using their laptop. And the online purchasing process has been developed in such a way to become easy to use, so as to encourage the customer to repeat that process in the future.

Within fashion industry companies, the online side of sales covers a large portion of their actual profits.

Zara, one the most spread fashion brands worldwide, has closed last year about 1200 physical stores to invest on the online sales.

The net sales coming from Zara's e-commerce have increased over the years, ascending from 808 million US dollars in 2014 to 10.034 million US dollars in 2022<sup>1</sup>, encouraging them to invest in their e-commerce rather than their physical stores.

Online clothing purchases are, nowadays, widespread around the world just as much as the in-store ones, thanks to the easiness of the buying procedure and the reduced time of shipping, from the warehouses to our homes.

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<sup>1</sup> Lukas Peters, zara.com: E-Commerce net sales from 2014 to 2022, 24<sup>th</sup> of September 2021, statista <https://www.statista.com/forecasts/1218316/zara-revenue-development-ecommercedb>



It can be said that digitalization has changed the way customers buy clothes, providing them with more channels from where they can make a purchase.

Digitalization represents also the starting point of the topic that will be discussed in this dissertation: omnichannel.

Without digitalization, it would be impossible to connect various channels and integrate the data coming from each of these channels, making possible, in this way, to develop an omnichannel strategy.

But first, before dealing with omnichannel in details, it will be discussed how this digital revolution has affected the central actor in the development of this strategy, the customer.

Customers cover a central point in this kind of approach. The entire decision-making process, related to the actions that the company should take in the future, both from a strategic and technological point of view, revolves around what the client does when they are online or inside the store.

Therefore, the decisions taken are data-driven, in this case using data about customers' activity.

First of all, it will be analyzed how they embraced this digital revolution.

## **1.2 The customer's point of view on digitalization of the fashion industry**

The purchasing experience, with the coming of the digital revolution, has changed in the way customers interact with the store.

If the client decides to do their shopping in a physical store, they will have the store personnel at their disposal, who can help them find what they are searching for, giving them advices on what it is currently present inside the store and on which clothes fit them better.

The in-store experience also allows clients to try on the clothes in the dressing rooms, in order to buy the right size for them.

So, the customer experience in the physical store is related to the human interaction between the customer and the personnel, which is the major lack of the online experience.

However, the digital platforms of fashion brands already equipped themselves in such a way that they are now able to compensate this lack.

For example, the e-commerce of Zara provides customers with a manual on how to find the right size: if the client enters their height and weight, an algorithm will calculate which size suits them better.

In this way, customers can buy the perfect size of the dress without trying it on and comfortably from their homes.

Moreover, the information about their size will be kept, so if in the future they make another purchase from the site, that information is already saved.

This would not happen in the physical store where, after the purchase, that information would be lost.

So, the digital experience is also about collecting data about customers and keeping this data saved, something it is harder to do during the in-store shopping.

However, it is possible to gather information about customers also in stores, for example using fidelity cards.

The purpose of fidelity cards is, indeed, building customer loyalty, by offering discounts and vouchers to the client, in this way encouraging them to buy again from the store.

Moreover, fidelity cards are useful to collect data about customers in order to personalize the offers that clients receive via emails, once they subscribe to the mailing list of the store/brand.

The software that manages fidelity cards is able, in addition to the task of loading and unloading the cards, of monitoring the customer's use of the card and to personalize, according to this data, the promotions that will be sent to them.

Of course, data collected through the digital experience are more precise and specific to the client's purchasing experience, since they can tell us what the customer has bought, which other clothes they have seen before the purchase and how much time they spent on each page of the site.

But a great percentage of fashion brands' clients still prefer making their purchases inside physical stores.

The 61% of customers, in fact, prefer buying inside the store rather than online, according to the last data collected by Google, since they can have the item immediately.

Nevertheless, the 78% of clients search online the clothes they are looking for, before going to the store.

They do this online research mainly for three reasons: they want to be sure that they are buying the right item at the right price, and that they are not spending more than what they can find online, they want to know where the store is located in order to organize the trip to it and they want to receive the right inspiration for their future purchase.

So, today it cannot be said that there is a clear distinction between customers that buy inside the store and customers that prefer shopping online.

It can be easily observed that the majority of clothing stores' customers use both the online channels and the offline ones.

It is important, nowadays, that these different channels work in the same way and, especially, that they are integrated with each other, to offer clients all the possible solutions in order to have a satisfying customer experience.

In-store and digital purchases are, therefore, two sides of the same coin.

### **1.2.1 Why is customer experience so important?**

It has been said that it is essential to integrate the digital channels brands have now at disposal, thanks to digitalization, to the offline channels they had before, in order to offer clients the best customer experience.

It will be now analyzed what customer experience is about, specifically.

According to the definition provided by HubSpot, "Customer experience is the impression your customers have of your brand as a whole throughout all aspects of the buyer's journey. It results in their view of your brand and impacts factors related to your bottom-line including revenue."<sup>2</sup>

From this definition, it can be easily understood that how the customer sees and relates to the brand is fundamental, since the power is now in the hands of customers, and no more in those of sellers.

This consumers' power comes from the multiple possibilities of purchasing that they have now.

So, since the client is so powerful, companies are trying very hard to improve the customer experience they are currently offering.

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<sup>2</sup> Jason Bordeaux, What Is Customer Experience? (And Why It's So Important), 2021, HubSpot <https://blog.hubspot.com/service/what-is-customer-experience>

It will be now discussed how customer experience is created.

Two important factors participate in creating it: products and people.

And by referring to these factors, you consider your customer experience as a satisfying one mainly for two reasons: if you are impressed by the performance of the product or if you receive attention by a customer support representative during your purchasing experience.

The better will be the customer experience with the brand, the higher the probability that the customer will buy again from that brand and that they will become loyal to that brand.

It will now be analyzed how actual fashion industry companies manage this, specifically discussing about Lululemon, the US/Canadian athletic brand.

Lululemon offers its customers a real community, that goes beyond the actual sale of clothes.

The brand provides clients with yoga classes and regular events: for example, every store organizes events around the neighborhood where it is located, in order to engage new clients and to keep in touch with the actual clients, in this way increasing the intensity of their link with the brand.

In this way, the store becomes an inspiring place, not only for the products it sells, but also for the idea of wellness it imparts to its customers.

Their community is so strong that customers help each other. If a client cannot buy, for example, from an outlet store the company usually ship, some fans of the brand, called “Lulu Angels”, would buy the product for them and then will send it to their home.

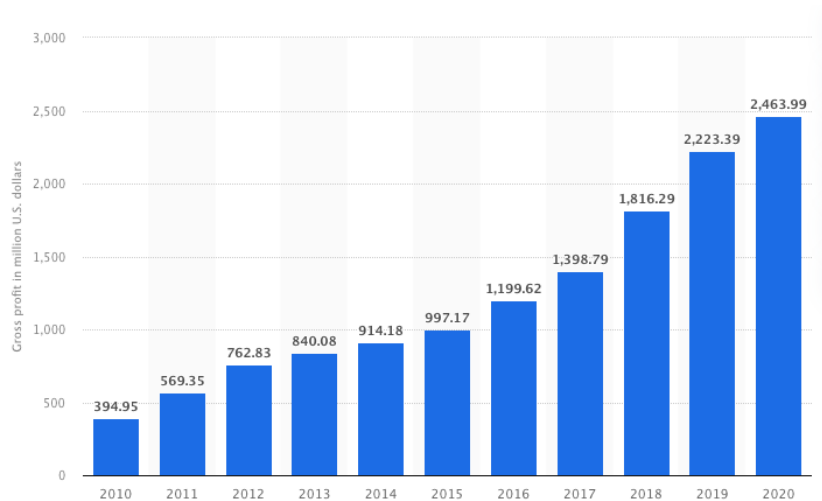
Cultivating the relationships with its own customers becomes, nowadays, an essential part of the business decisions of the company.

Purchases are no longer driven by necessity, the real reason that pushes a customer to buy from a specific brand stands behind the image that the brand provides, which can inspire clients not only with products but also with their personal vision, and the loyalty that customers feel towards the brand itself.

And this is the reason why customer experience is so important for fashion industry companies, and not only for them: they create a community of loyal customers that buy frequently from the store and, also, that worship the brand and help it to grow, by inviting other people to join the community.

The results of this approach can be seen in Lululemon's case: their retail sales are near \$2000 per square meter, competing at the level of Apple and Tiffany & Co.<sup>3</sup>

Finally, following this customer centric approach, their gross profit has been constantly increasing over the years, from 2010 to 2020<sup>4</sup>, as it can be seen in the graph below.



© Statista 2021

**Graph 1:** Gross profit in million US dollars of Lululemon from 2010 to 2020 (Source: <https://www.statista.com/statistics/564004/retail-revenue-forecast-of-lululemon/>)

### 1.2.2 Flywheel: integration of funnel marketing

It has been discussed, so far, how customer experience has become an important point for companies to focus and work on.

Customers have become the driving force of business.

But, before customers were given this importance, taking into account the actions they make during their purchasing experience in order to improve it, clients were merely seen as a number.

The most used marketing approach was the marketing Funnel.

This approach aims to engage the largest number of leads (future potential customers), through marketing campaigns and other marketing strategies, and then to do a skimming of these leads, passing through the different phases of the Funnel, and to have, in the end, the real customers that will make the purchase.

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3 Customer Experience Case Study: Lululemon, customerfaithful  
<https://www.customerfaithful.com/what-we-say/customer-experience-case-study-lululemon>

4 D. Tighe, Gross profit of lululemon worldwide 2010-2020, May 12, 2021, statista  
<https://www.statista.com/statistics/564004/retail-revenue-forecast-of-lululemon/>

So, customers are only seen as a number that, going down the funnel, becomes smaller, because not everybody will be interested in the purchase.

In the figure below, there are illustrated the three main phases of the Funnel.



**Figure 1:** The phases of Funnel marketing (Source: <https://www.italiaonline.it/risorse/marketing-funnel-cos-e-e-come-crearne-uno-efficace-503>)

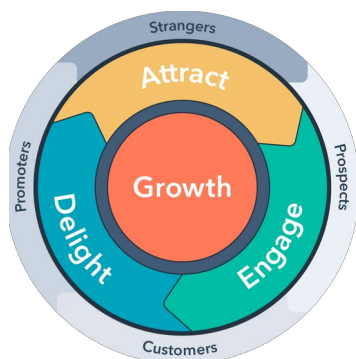
If, in the Funnel, customers are considered as a passive force, in the Flywheel model, developed by HubSpot, customers are a real driving force.

Using HubSpot definition, “with the flywheel, you use the momentum of your happy customers to drive referrals and repeat sales. Basically, your business keeps spinning.”<sup>5</sup>

Flywheel thinks about customers as a force to grow your business, not as an outcome, as the Funnel used to do.

And the energy necessary to spin the wheel is given by customers themselves, through their online reviews of their experience and their word-out-mouth.

The happier is the customer, the more inclined will be to leave good reviews on the product and their customer experience, inducing other customers to buy it.



**Figure 2:** The Flywheel model (Source: <https://www.hubspot.com/flywheel>)

<sup>5</sup> The Flywheel, HubSpot  
<https://www.hubspot.com/flywheel>

As it can be seen from Figure 2, the Flywheel has three main phases: attract, engage and delight.

All these phases work synergically around the customer, providing them the best customer experience and working on making them a loyal customer of the brand.

Also, the teams of marketing, sales and customer service do not work in separate silos anymore, which will create friction to the spinning of the wheel, but work together, all of them following the aim of attracting, engaging and delighting customers.

In conclusion, if Funnel was focused on the short-term and considered customers only as an outcome, the Flywheel model focuses on the long-term, gaining energy from customers, and using them as an active force that can help the company to grow its own business.

This vision of the customer, seen as a driving force, is at the base of the customer centric approach.

### **1.3 The customer-centric strategy and how companies are putting it into practice**

The Flywheel model, as it has already been seen, puts the customer and their needs at the center.

This is the kind of approach that a customer-centric strategy follows.

It can be said that "Customer centricity is the ability of people in an organization to understand customers' situations, perceptions, and expectations. Customer centricity demands that the customer is the focal point of all decisions related to delivering products, services and experiences to create customer satisfaction, loyalty and advocacy."<sup>6</sup>

To embrace this vision, though, it is necessary to change the way of thinking of the management, so far focalized more on the product rather than on customers.

Sometimes, the confirmation bias that the management has, due to the success their company still achieve in some of the sectors where they are active, using the actual type of business, induces them to be more reluctant in changing their business strategies, towards a more customer-centric view.

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<sup>6</sup> Gartner Glossary, Customer Centricity, gartner  
<https://www.gartner.com/en/marketing/glossary/customer-centricity>

So, the first step to do in order to be open and embrace this kind of approach, is to eliminate this bias from management and other company teams' minds.

It will be now analyzed how a worldwide known fashion brand, Adidas, is using customer centricity.

Adidas is one the biggest and spread shoemakers in the world, which offers to its clients also a wide selection of athletic sportswear and other fashion clothing.

As the VP of Digital Experience Design of Adidas, Jacqueline Smith-Dubendorfer, said, "This generation, they expect something now. They want instant gratification. They want to explore. They want to discover. [...] We need to lead and be able to respond to those consumer expectations immediately."<sup>7</sup>

And what better way to accelerate this response than using the digital channels they have now, to keep up with customers' expectations.

Adidas official website is developed in such a way to offer customers a personalized experience.

On their website, after having created a personal account, you can buy from a wide choice of shoes and clothes, and then, once you have made your purchase, you can check the status of your order.

You can also ask for an exchange, if your piece of clothing does not fit you, when you receive it.

They provide you with the best customer experience, following their clients through their whole purchase.

They also allow customers to customize their shoes, writing whatever they want on the shoe or choosing the color they prefer among twenty different colors.

This kind of customization pushes customers to leave good reviews about the brand, and also to share their purchase on social media, since customized products are always seen as peculiar and worth of sharing with others.

So, through its customers, the brand is able to reach a larger number of customers without spending money to do it.

As we have said before, since digitalization has become an important piece of our everyday life, Adidas found essential to improve the digital experience by investing in Salesforce products.

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<sup>7</sup> See how adidas stays a step ahead with Salesforce, salesforce  
<https://www.salesforce.com/customer-success-stories/adidas/>



Salesforce is, together with HubSpot, one the most used CRM in the world.

This investment in Salesforce products, such as Service Cloud, allows the brand to better understand its customers and to consider each customer individually.

The data collected through Salesforce, about individual customers, are then used to create products that satisfy the actual needs of clients, in this way making stronger the link between the brand and its customers, and improving overall profits, with happy customers who are given what they ask for.

As Smith-Dubendorfer said, “Those data points then enable us to adapt what we present, when we present it, and how we present it to ensure that we deliver as close to what that customer is looking for as we can.”<sup>8</sup>

So, it can be said that the first step to take, in order to start developing a customer-centric approach, is using a CRM to manage customers and collect data about them, that will be then analyzed and used to take decisions about the business of the brand.

It will be now discussed what a CRM is and how it works, specifically.

## **1.4 How to manage the relationships with customers using the CRM**

Customers’ needs and satisfaction are, actually, what a company must focus on in order to be competitive.

To manage relationships with customers, it has already been said that it is necessary to use a CRM.

A Customer Relationship Management (CRM) is “a piece of software companies use to manage interactions with customers, store information about them, and automate a number of processes connected with a customer’s journey through the marketing and sales funnels. A CRM system is an incredibly important tool for every company, helping to foster customer loyalty and forge it into healthy revenue.”<sup>9</sup>

So, a CRM helps a company to maintain long-term relationships with its clients, something it would not be possible to do today without the use of a digital tool, due to the large number of customers a fashion brand usually has.

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<sup>8</sup> See how adidas stays a step ahead with Salesforce, salesforce  
<https://www.salesforce.com/customer-success-stories/adidas/>

<sup>9</sup> Michal Wlosik, What Is a CRM and How Does It Work?, December 1<sup>st</sup> 2021, clearcode  
<https://clearcode.cc/blog/how-does-crm-work/>

The more you can track the activities of your customers, the more efficient will be the actions your company will make about marketing and sales, since with these data at disposal, the customer experience can be customized on each client.

Building customer loyalty through the use of this software is very important not only to induce customers to continue to buy from your brand, but also because gaining new customers is much more expensive than retaining them.

But a CRM is not only used inside the marketing and sales teams, but also inside other teams of the company, such as the supply chain or the customer service.

The supply chain team can monitor the relationships with its suppliers, through the use of a CRM, and identify the most efficient ones.

A customer service team, on the other hand, with this digital tool, will be able to know on which channels the customer has asked for help and will not miss any communication a client has tried to share with the brand.

In this way, they will be more efficient in resolving any problem, without disappointing, for example, important clients.

All the data collected by each of these channels can also be integrated and shared within all the company's teams.

And this is the key point of omnichannel, that is to integrate all the channels through which a company runs its own business, and thanks to this integration, to have a set of data always updated and available to everyone who needs to work on them, inside the company.

So, it can be said that, if a fashion industry company wants to start implementing an omnichannel approach, a CRM is a fundamental tool it needs to have.

One of the most famous and used CRMs around the world, and specifically implemented inside most fashion industry companies, is Salesforce.

### 1.4.1 Salesforce

With thousands of users around the world, Salesforce is the best choice for a company that wishes to better manage relationships with customers.

Salesforce is operating in various sectors, but especially inside the fashion industry, where it holds 25% of the business.<sup>10</sup>

Adidas, Ralph Lauren and the Italian Benetton, are only some of the fashion brands, known worldwide, that use this kind of service.

Through its use, fashion industry companies are able to personalize each customer's experience, by tracking their activities on the different channels of the brand, and by integrating this information to other channels.

For example, if a fashion brand notices, analyzing data about customers, that there is an increase in the use of mobile wallet, the company should take decisions on how to implement this option, working on the software that manages customers' payments.

So, an information that comes from the CRM, about a customer's purchase, is spread to the other channels, and used to implement the payment options.

Salesforce is able to discover trends and analyze them, in order to give the company an insight about its customers.

Another trend that has emerged, recently, is that people spend a lot of time on the phone using social networks and messaging apps.

This information pushes brands to create social communities that support the brand, as we have seen before, for Lululemon's case, so as to offer the brand free advertisement, since customers are driven by the sense of belonging to this community and the values they share with it, to talk to other people about the brand in a good way, and convince them to join the community.

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<sup>10</sup> Francesco Rigatelli, L'ad di Salesforce Commerce Cloud: «Digitalizziamo il made in Italy», 31<sup>st</sup> January 2018, ilsecoloxix  
<https://www.ilsecoloxix.it/high-tech/2018/01/31/news/l-ad-di-salesforce-commerce-cloud-digitalizziamo-il-made-in-italy-1.30371029>



*Figure 3: Salesforce logo (salesforce.com)*

In addition to giving insights about customers, in order to make the entire customer experience more efficient, Salesforce allows companies to maintain human relationships with its customers, even on the digital channels, that lack this aspect.

Brunello Cucinelli, the stylist of a luxurious Italian clothing brand, has chosen Salesforce for this reason, to give customers a purchasing experience similar to the in-store one.

“It was important for us to be able to give our customers the same experience that we give them in the physical world – a feeling of being looked after, without being pressured”, said Carolina Cucinelli, Communications & Digital Director.<sup>11</sup>

With Salesforce, Cucinelli has had the opportunity of offering clients the same luxury experience offered by its stores, but online.

And this unique customer experience, with the result of happy and satisfied customers, resulted in an increase in the brand’s profits, with ecommerce revenues four times higher than before.

So, it can be finally observed, with this example, that a special and satisfying customer experience, and an efficient management of clients, both lead to higher profits.

### **1.5 Analysis of the benefits of this digital approach**

It has been discussed, so far, how digitalization has changed our way of interacting with fashion brands, thanks to the advent of e-commerce, that has shifted the importance given to customer experience also on the online channels, in addition to the physical store’s one.

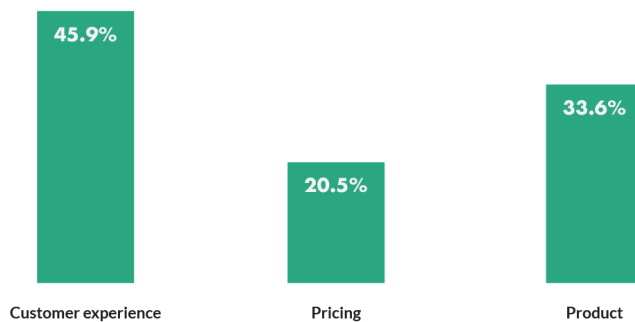
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<sup>11</sup> Brunello Cucinelli brings a personal touch to digital commerce, salesforce  
<https://www.salesforce.com/customer-success-stories/brunello/>

These new digital tools, such as social networks and websites, allowed companies to better track customers' activities, so as to better understand their needs, and the problems they encountered during their purchasing experience.

Customer experience has become the central point of every fashion industry company that wants to be successful in the next years.

### WHAT IS THE TOP PRIORITY FOR YOUR BUSINESS IN THE NEXT 5 YEARS?



**Figure 4:** Business professionals' top priority for the next 5 years. (Source: <https://www.superoffice.com/blog/customer-experience-statistics/>)

As it can be seen from the figure above, the improvement of customer experience is the number one top priority for 45,9% of the 1.920 business professionals interviewed.<sup>12</sup>

The reason behind this choice is that investing in customer experience can increase (Temkin Group) the earnings of a company that, for example, usually earn 1 billion dollars annually, to an additional 700 million dollars within 3 years of investing in it. This increase is possible due to the fact that it can be observed how 86% of customers is willing to pay more in order to receive a better customer experience.

“Customers are willing to pay a price premium of up to 13% (and as high as 18%) for luxury and indulgence services, simply by receiving a great customer experience.”<sup>13</sup>

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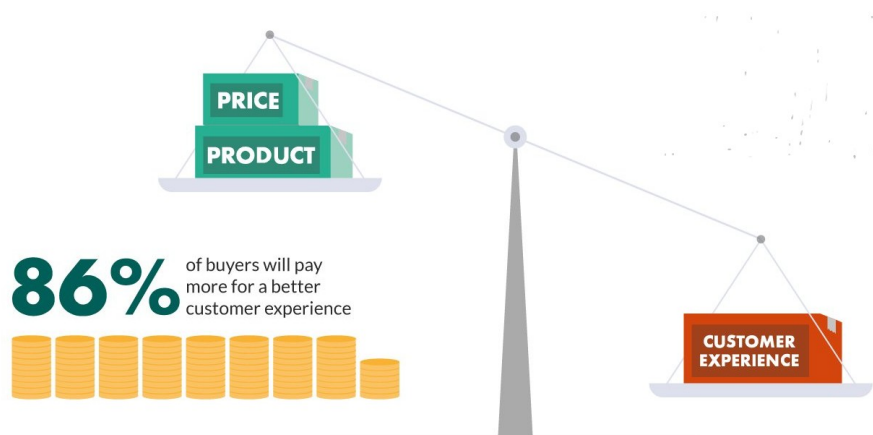
<sup>12</sup> Toma Kulbytė, 37 customer experience statistics you need to know for 2022, 24<sup>th</sup> June 2021, superoffice

<https://www.superoffice.com/blog/customer-experience-statistics/>

<sup>13</sup> Toma Kulbytė, 37 customer experience statistics you need to know for 2022, 24<sup>th</sup> June 2021, superoffice

<https://www.superoffice.com/blog/customer-experience-statistics/>

## SURVEY SAYS: CUSTOMERS HIGHLY VALUE GREAT CUSTOMER EXPERIENCES



*Figure 5: The importance of customer experience related to price and product. (Source: <https://www.superoffice.com/blog/customer-experience-statistics/>)*

So, one of the benefits that customer centricity can bring about, is that customers are going to pay more for the product.

It has also been discussed the importance of using a CRM, in order to manage relationships with customers and collect data about them.

After forming a partnership with Salesforce, Adidas has registered, around 2016, “a 59% increase in ecommerce globally, [...] which equated to nearly 1.1 billion dollars in online sales.”<sup>14</sup>

CRMs are a profitable tool, as it can be observed, and if they are managed in an efficient way, they can become the unique database of the company, around which all the company’s other decisions are made.

To reach this aim, it is also important how the data collected by the CRM are used and analyzed, in order to make targeted decisions about the business of the company.

Digitalization has given support to a customer-centric view also in this way, by offering the possibility of taking data-driven decisions, thanks to the huge amount of data companies can receive from their multiple channels.

Without digitalization, customer centricity would still be a chimera today.

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<sup>14</sup> See how adidas stays a step ahead with Salesforce, salesforce  
<https://www.salesforce.com/customer-success-stories/adidas/>

## **CHAPTER II**

### **The digital transformation of the fashion industry**

#### **2.1 Introduction**

It has been discussed, so far, how digitalization has changed the way fashion industry companies interact with customers during their purchasing experience, offering them multiple buying channels, and providing them with a customized customer experience, thanks to the huge amount of data provided by these digital channels.

But digitalization has changed, also, the way fashion brands relate to buyers and professionals around the world.

Currently, the most relevant occasion during which fashion brands can expose their latest collections to a wide audience of buyers and journalists coming from all over the world, and talk directly to them, is that offered by fashion weeks.

Fashion weeks have always been a major event in the life of clothing luxury brands, where a large audience of buyers would meet in the same place to see the collections, proposed by each brand, before they were distributed to public stores.

Due to the pandemic, however, the fashion week had to be translated into a digital experience, since it was not possible to gather all those people together in a closed place.

So, brands had to strengthen their digital channels, in order to maintain the already existing relationships with fashion industry insiders, and to attract brand new buyers from the outside.

The first step to take, in order to start an efficient digitalization of the most productive ways, used by the brand to interact with partners, is to centralize the virtual assets they have at disposal.

Centralization allows a better and more successful use of these assets, since data are available to everyone inside the company, and also are easily accessible to outsiders. Having data collected neatly in one place, and attainable to everyone, who wants to work on them and analyze them, is one of the fundamental requirements a fashion industry company should have in order to develop an omnichannel approach.

It can be easily observed how omnichannel becomes necessary to manage not only relationships with customers, as it has been discussed in the first chapter, but also to relate, in a fast and efficient way, to other industry professionals and insiders.

After having centralized all the digital tools useful to reach a larger audience, and to enrich the already established partnership with stakeholders, it is necessary to think about new and inspirational ways of delighting insiders and outsiders.

Among the most used digital solutions, nowadays, it can be found videos, which carry the purpose of telling a story, in which the most particular clothing items of the collection are the main characters, or mini-documentaries, which have the same goal as videos, so to tell a story, in order to better involve audience in the vision and mission of the brand, but with a longer duration.

Furthermore, to make buyers feel like they are participating in the physical store experience, also on the digital channels, it can be used some VR solutions.

A digital showroom is the best solution to offer an amazing brand digital experience, after having it connected with the physical stores' management tools, so as to give buyers, in real time, insights on the latest collection.

It can be observed how, also in the B2B transactions, integrating the online with the offline has become a necessary action to be taken, in order to keep the same pace with other clients.

Omnichannel, therefore, is becoming an increasingly solid reality in all the transactions a fashion industry company is facing every day.

This digitalization of the fashion industry, however, is not only limited to the sales channels of the company, both with customers and other companies, but involves also the supply chain.

For example, digitalization can improve the management of the logistical sector, or it can help having a more organized and easier to manage inventory.

Digitalizing also these sectors means having a more connected company's business, which integrates the sales and marketing channels with the logistics and the inventories, so as to collect and share data within all the company's teams, and in this way, to improve the efficiency of the decisions taken by the company.

Without sharing and collecting data from all company's sectors, it would not be possible to put omnichannel in place, since data cover a central role in its development.



However, omnichannel is not yet widely spread inside all fashion industry companies, indeed it can be said that nowadays only few brands are fully enjoying the benefits of omnichannel.

It will be now analyzed how the competitive landscape, in which omnichannel is spreading, is structured, first of all discussing about the current state of fashion industry companies' businesses, and then analyzing all the main actors which are currently part of this clothing sector.

## 2.2 Relevant trends in the current fashion industry

The ongoing pandemic, which has brought down the whole global economy, has affected the fashion industry sector too.

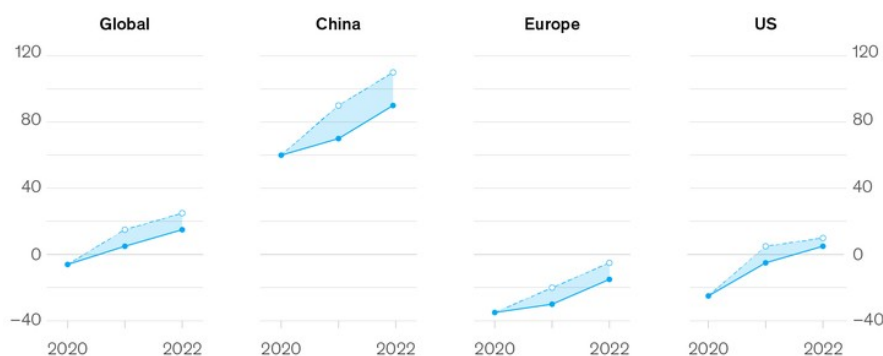
During the lockdown, all the clothing stores have been closed for a long period, during which the apparel industry has been converted to produce face masks and other items, necessary to contain the pandemic.

After two years of closures and partial relaunches, during which fashion industry companies have had heavy repercussions, now global fashion industry is finally recovering from this extraordinary situation, that has put a strain on its own business.

As it has been said, companies are now adapting their business decisions on consumers' priorities, and digitalization is particularly suitable for achieving this goal.

Change in fashion sales, McKinsey Fashion Scenarios,  
index (2019 = 0)

### Luxury



McKinsey  
& Company

**Figure 6:** Change in fashion sales, Luxury sector. (Source: <https://www.mckinsey.com/industries/retail/our-insights/state-of-fashion> )

As it can be seen from the figure above, regarding the luxury sector, countries are recovering at a different pace.

The three main actors, taken into account, are China, US and Europe.

China is recovering from the pandemic in a faster way rather than Europe and USA, and the reasons behind this phenomenon can be found in China's early exit from the pandemic, compared to other countries in the world, as it was the first to enter and, therefore, the first to return to a situation of almost normality.

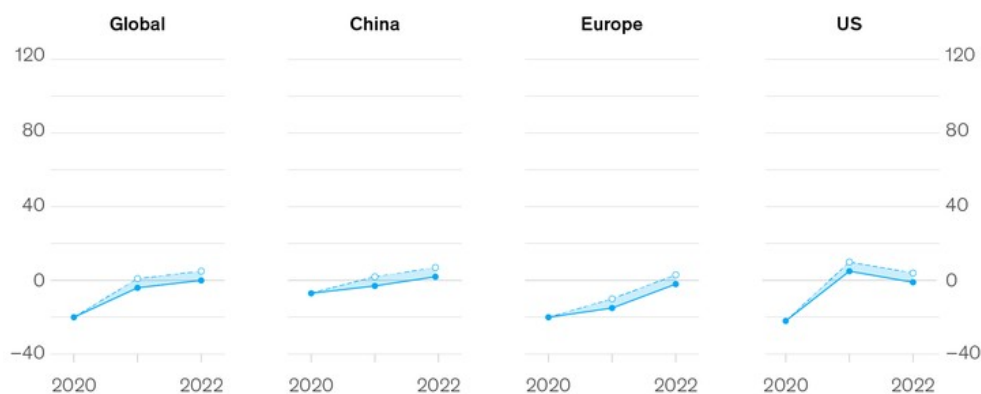
Also, the high rates of vaccination pushed China to reopen almost all businesses, including stores, inducing people to start buying again from physical stores.

The faster recovery of China's economy is also due to the travel restrictions that were put in place during the lockdown.

Chinese clients, who were used to buy their luxury clothes during their international trips, were forced to do their haute couture shopping inside local stores.

Change in fashion sales, McKinsey Fashion Scenarios,  
index (2019 = 0)

## Non-luxury



McKinsey  
& Company

**Figure 7:** Change in fashion sales, Non-luxury sector. (Source: <https://www.mckinsey.com/industries/retail/our-insights/state-of-fashion>)

A different situation, instead, can be observed in the non-luxury sector, where China is positioned quite at the same level as Europe and US, the latter having had a faster increase in sales during 2021, due to people's return to work and social life.

This difference between the luxury and non-luxury rate of recovery is due to the fact that wealthy customers had the opportunity to continue to buy luxury clothes and jewelry also during the pandemic, due to their different economic situation, compared to that of common workers, who faced difficulties and, in some cases, lost their jobs. So, the last two years have been tough for the global fashion industry business, characterized by sporadic improvements, mainly occurred during the partial slowdown of the pandemic curve.

But, since mid-2021, the situation has been getting better, both on the consumers and buyers' side, thanks to the changes adopted by the majority of fashion brands.

Some brands have already reached the pre-pandemic sales level, and in some cases overstepped it, whereas for some other fashion industry companies the lockdown has marked their failure, with no chance of recovery.

The different scenarios, in which fashion brands found themselves after the first pandemic wave, have been a direct consequence of the level of digitalization and development of analytics capabilities that had been reached, in the pre-pandemic period, by each company's management.

It has been discussed how, nowadays, it is fundamental to make data-driven decisions, and how, in order to meet this requirement, it is essential not only to collect data from all the company's channels, but also to make an accurate analysis of these data, which otherwise would be useless.

The fashion brands that already had this capability, of collecting and analyzing data, and worked on it in order to transform this capability into a real core competence, have been able to gain a competitive advantage over all the other companies, which did not develop this kind of competency.

So, companies that are leaders in this field, which includes "companies in which online sales account for 30 to 40 percent of total sales, parts of the value chain are significantly digitized, and online and offline channels are integrated to some degree"<sup>15</sup>, are the ones most likely to be successful in the following years, when the majority of clothing purchases will take place on digital channels.

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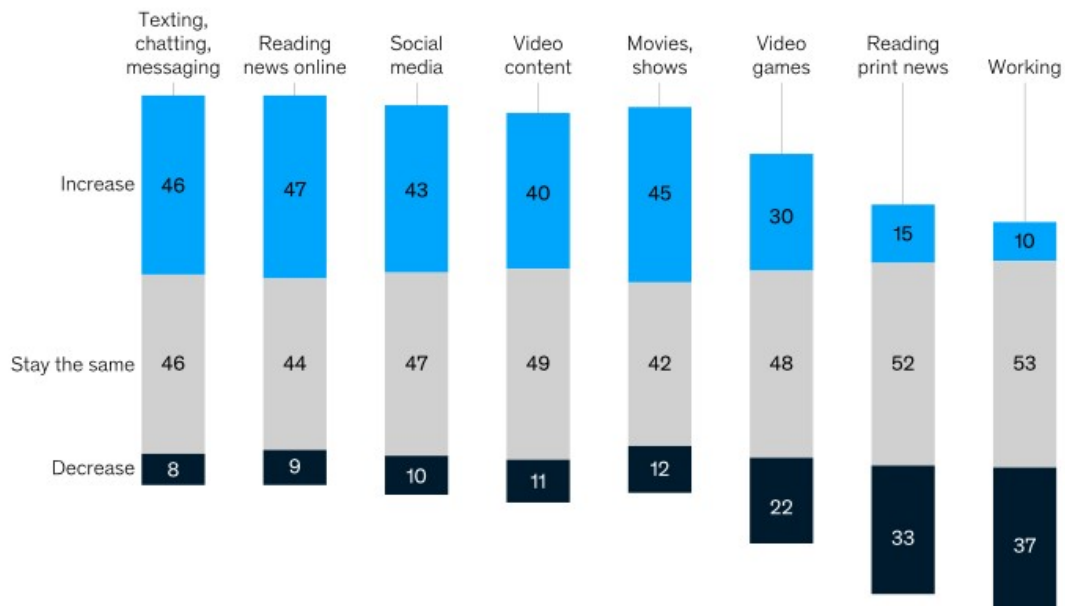
<sup>15</sup> Antonio Gonzalo, Holger Harreis, Carlos Sanchez Altable and Cyrielle Villepelet, Fashion's digital transformation: Now or never, May 6, 2020, mckinsey  
<https://www.mckinsey.com/industries/retail/our-insights/fashions-digital-transformation-now-or-never>

Therefore, brands that want to survive and become competitive in the future, must start a digitalization project of their assets, which will include not only the sales sector of the company, but all the areas, in the value chain, that may have a high impact on the brand's business.

And this shift from offline to online purchases has also been confirmed by the data collected during the lockdown period, which highlighted an increase in the time consumers usually spend using their phones and other digital devices.

### Consumers are spending more time online during the crisis.

Change in time spent on select activities,<sup>1</sup> % of respondents



**35%**

of consumers browse for fashion inspiration in online shops at least once per week

**22%**

of consumers state they will browse for inspiration online more often in the next 4 weeks

**10%**

of consumers think brands should not promote their own interests at this time of crisis

<sup>1</sup>Question: Over the next 2 weeks, how much time do you expect to spend on these activities compared to how much time you normally spend on them?  
Source: McKinsey COVID-19 Consumer Pulse Survey, Apr 1–Apr 6, 2020, n = >5,000; McKinsey COVID-19 Apparel & Fashion Survey, Mar 27–Mar 29, 2020, n = >6,000

**Figure 8:** Change in time spent on selected activities. (Source: <https://www.mckinsey.com/industries/retail/our-insights/fashions-digital-transformation-now-or-never>)

As it can be observed in the figure above, 35% of consumers search “for fashion inspiration in online shops at least once per week”<sup>16</sup>, thus making online stores the first starting point of their shopping experience with the brand.

For this reason, a fashion brand must offer clients a website that is always updated on the latest arrivals in stock, and designed in such a way as to whet the customer’s curiosity towards its clothing proposals.

The online customer experience, moreover, must be frictionless in every step of the customer journey, for example “by improving your website’s search function and expanding your online assortment”<sup>17</sup>.

Another step in the digitization of corporate assets is to allocate a larger part of the budget reserved for marketing to digital channels, and using this budget to implement communication with customers through emails and social networks, in order to send appropriate and customized contents.

Also, this entire process of digital transformation should receive the support of all the management, together with the CEO, and it should be organized following a road map that gives a clear idea of the actions to be taken, and the order in which they must be performed.

A road map, useful to start developing an omnichannel approach inside a fashion industry company, will be proposed later in this dissertation, as omnichannel is a direct consequence of this process of digitization.

A great level of digital conversion of a company’s assets is the best prerequisite that allows customers to carry out any omnichannel action.

An example, of using digital tools to implement an omnichannel approach, is making available to customers all stock present in both stores and warehouses, integrating the two principal channels for clothing procurement and thus increasing sales, since customers have the possibility of viewing the entire brand’s clothing offer, and thus having more chance to find what they are currently looking for, which could be, instead, unavailable on one of these channels.

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16 Antonio Gonzalo, Holger Harreis, Carlos Sanchez Altable and Cyrielle Villepelet, Fashion’s digital transformation: Now or never, May 6,2020, mckinsey

<https://www.mckinsey.com/industries/retail/our-insights/fashions-digital-transformation-now-or-never>

17 Antonio Gonzalo, Holger Harreis, Carlos Sanchez Altable and Cyrielle Villepelet, Fashion’s digital transformation: Now or never, May 6,2020, mckinsey

<https://www.mckinsey.com/industries/retail/our-insights/fashions-digital-transformation-now-or-never>

Omnichannel is a reality that has been developing only recently, but that is finding the right soil in which to grow.

And inside this fertile soil, it can be found another channel that caught the attention of big fashion brands, pushing them to want to digitize and integrate it to the existing ones. This channel is the second-hand market, which has flourished lately thanks to the development of some digital apps that support it.

### **2.3 The second-hand market and how it has become digital**

Nowadays, with the advent of fast fashion, the life of clothes is very short, as trends and fashions change very quickly.

Furthermore, the price of this fast fashion apparel is very affordable, allowing everyone to buy this type of clothing.

But it can be easily deduced how this continuous change of wardrobe represents an enormous waste at the environmental level, since it pushes fashion industry companies to have to satisfy a greater demand, and in this way, to increase the production volumes, which consequently has negative repercussions on the environment, since this increment in production requires huge amount of water and causes emissions of large quantities of  $CO_2$  into the atmosphere.

The second-hand market represents an efficient solution to this problem, since it encourages people to reuse garments previously worn by others, in order to lengthen the clothes' life cycle and to push fashion industry adopt a circular economy.

But it has only recently begun to flourish, thanks to the support it received on the digital channels that are being used on a daily basis by a lot of people, such as Instagram and other social networks, and also thanks to applications that allow customers to sell their clothes all by themselves, from the comfort of their homes and using their own mobile phones.

In the past years, instead, the second-hand was frowned upon by both luxury brands, that saw their uniqueness and exclusivity threatened by this new kind of market, and customers, who preferred to buy new and fashionable garments rather than already used clothes which belonged to old collections.

Recently, however, the second-hand market has been given new life by the so-called

Gen Z, that is people born between 1996 and 2010, who looks to vintage as a model from which to take inspiration for its own style.

Thanks to flea markets and digital platforms, from which it is possible to buy second-hand garments, Gen Z expresses its uniqueness through the creation of personalized looks, which reflect their lifestyle.

Furthermore, this generation is very committed to the protection of the environment, as evidenced by the numerous marches in favor of the environmental sustainability and all the policies that support the reduction of carbon emissions in the air, and therefore sees in the second-hand an excellent solution to carry the cause against the pollution produced by fast fashion industries and to make everyone better know what circular economy is and how it could be put in place.

So, nowadays especially young people join this kind of market, and the channels from which they can make their purchases are multiple, from physical markets to digital platforms, and also apps that allow users to sell directly to other people, not only clothes, but everything that they don't use anymore.

If on the one hand young people, today, make more and more use of second-hand clothes, on the other hand also luxury brands are entering this new opportunity.

In recent years, the luxury fashion world has also become advocate of sustainability and circular economy, and has found in the second-hand a useful way to implement this change.

The RealReal, the biggest American e-commerce of fashion re-sale, has as its partners important brands of the luxury sector, such as Gucci, Stella McCartney and Louis Vuitton.

Gucci is the most requested brand, and signed its collaboration with The RealReal in 2020, to promote circular economy in the fashion industry and social sustainability.

Through this partnership, the two brands are committed to extending the life cycle of Gucci clothing, and consequently reducing water consumption and carbon emissions related to the ex-novo production of items.

So far, this collaboration allowed a saving of “230 tons of carbon and over 10 million liters of water”<sup>18</sup>.

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18 M.C. Ostilio, Brand Second Hand: mai più attuali, 18 October 2020, sdabocconi <https://www.sdabocconi.it/it/sda-bocconi-insight/brand-second-hand-mai-piu-attuali>

For brands who, therefore, want to embrace circular economy and be environmentally friendly, TheRealReal represents a successful choice.

But its use is also convenient for those who decide to use the American e-commerce as an intermediary for their sales of used garments, as they receive 2/3 of the proceeds, and this percentage rises to 70% if they manage to make TheRealReal earn more than ten thousand dollars.

However, nowadays, there are applications that allow everybody, who has the need to put some kind of clothing up for sale, to sell it directly to the buyer, without going through third parties, and thus earn the entire proceeds.

The difference between these two ways of selling lies in the fact that reselling platforms, like TheRealReal, take responsibility for ensuring the authenticity and integrity of the garment, which is not always the case in direct transactions between seller and buyer.

Furthermore, in the interest of fashion industry companies, TheRealReal is able to elaborate statistics on the actual trends of the second-hand market, thus providing interesting feedback on buying and trading behaviors.

And these data could, in turn, be used to define a clearer picture of the fashion world's customer, and, in this way, making it possible to elaborate more targeted marketing strategies, or to improve the customer experience even more, by integrating the second-hand channel with the others and, in case of unavailability of a garment, redirect the customer to the second-hand market, providing them with a more complete overview of the brand's offer.

As it has been said, luxury brands are only recently joining the second-hand market, and in our country, the first luxury brand that is entering this market is Save the Duck.

### **2.3.1 Save the Duck**

After being the first Italian fashion company to receive the B Corp certification, which sees the company, that receives it, also engaged on a social and environmental level, Save the Duck has launched a new environment-friendly project by entering the second-hand market.



As the CEO Nicolas Bargi said, “I believe that practices such as resale and rental are by far the most sustainable ones, because they contribute to reducing production, impacting the environment only with shipping”.<sup>19</sup>

As regards their role inside the second-hand market, the CEO added: “We too have decided to launch our second hand. The idea behind the project is to create a community, connecting sellers and buyers. The users decide the price and shipping methods, while we have the role of "supervisors", primarily the authenticity of the garments. The purpose is above all "educational", to invite people to make garments last as long as possible”.<sup>20</sup>

So, the purpose of the company is to give longer life to their garments, making sure that they are reused, and thus putting in place the concept of circular economy.



*Figure 9: Save the Duck logo. Source: Save the Duck*

The company, although it does not derive any profit from this project, receives, as a benefit, the creation of a community around the brand, which supports its sustainable projects, by providing visibility to the brand, and increases the loyalty of its customers, who find themselves sharing the same vision of the brand and, in this way, feeling more connected to it.

So, the second-hand market is becoming a solid reality inside the fashion industry, encouraged by young people, through their use of social media and digital buying channels.

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19 Nicolas Bargi (Save the Duck): «Anche noi nell'arena del second hand», 13 October 2021, fashionmagazine, <https://www.fashionmagazine.it/business/un-nuovo-progetto-green-nicolas-bargi-save-the-duck-anche-noi-nellarena-del-second-hand-108292>

20 Nicolas Bargi (Save the Duck): «Anche noi nell'arena del second hand», 13 October 2021, fashionmagazine, <https://www.fashionmagazine.it/business/un-nuovo-progetto-green-nicolas-bargi-save-the-duck-anche-noi-nellarena-del-second-hand-108292>

It has been analyzed, so far, how digitalization has given a breakthrough to online sales; however, it is necessary to maintain this success in selling on the online channels, considering not only the innovation of the digital tools used, but also the traditional qualities they rely on.

## 2.4 Six vectors strategy

As it has been said, the pandemic gave a boost to online shopping, pushing fashion industry companies to complete in a few months a renewal process that, otherwise, would have taken years.

And in this spirit of digital innovation, the UK has stood out as the main character for this e-commerce's revolution of fashion brands.

During the pandemic, UK registered a boost in online purchases, with a percentage of 75% of English people using digital purchasing channels, that is supposed to grow by 10% in the next years.

**Online penetration for the UK apparel and fashion industry is high, and continued growth is expected.**

Current and projected share who shop online, %<sup>1</sup>



Share of spending, %<sup>1</sup>



<sup>1</sup>Figures are based on consumer data and may not match actual retail-sales records due to consumers' memories.  
Source: McKinsey and Dynata AF&L market research, Oct 2020, n = 2,642

McKinsey  
& Company

**Figure 10: Online penetration for the UK apparel.** Source: <https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/six-vectors-of-success-in-online-fashion>

As it can be seen in the figure above, online penetration for the UK apparel will grow, also, in 2022, thanks to the innovative selling channels fashion industry has now at disposal and, also, thanks to younger people who find it easier to shop online rather than

inside stores, even if the percentage of people who buy on digital channel is also high among the over-65.

Since the fashion industry has been able to reach this level of online penetration in such a short time, now it is necessary to maintain it.

But to keep this latest success on digital channels, the implementation of new features that favor the online customer experience, and the continuous improvement of web sites and digital platforms, are not enough to fuel and persist this online presence in the long term, a presence that is becoming more and more established.

It must be taken into account, also, the need to go back to the basic customers' requirements, such as buying high quality clothing at a fair price, which are capable of attracting the attention of the buyer and which have a good fit.

An efficient method to combine the digitization process with the satisfaction of basic customers' requests, is well explained by the "six vectors strategy"<sup>21</sup> shown below:

"Six vectors" strategy:

*1. Reinforce the value-for-money proposition.*

It is fundamental to focus on the quality that the brand is offering, because, since the supply of apparel is very wide, and the prices are easily comparable, what makes your brand unique, is the value you are giving to your customers.

*2. Curate intelligently.*

Always use data, collected about your customers, and advanced analytics to reach the right segment of customers for each proposal of your brand, and follow their evolving needs through the monitoring of their buying experience.

*3. Balance inventory and availability.*

Manage the inventory in such a way that, when a piece of clothing is not available in one channel, the customer is able to search for it in other channels where it is, instead, available. Use analytics to predict when the garment will be back in stock, and keep customers updated about this information.

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<sup>21</sup> Anita Balchandani, Benjamin Lau, Hai-Ly Nguyen and Bogdan Toma, Six vectors of success in online fashion, May 20,2021, mckinsey  
<https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/six-vectors-of-success-in-online-fashion>

4. *Stay connected.*

It is necessary to maintain strong relationships with the existing customers, through the multiple channels the brand offers, and, in this way, involving them more and more in the brand's vision.

5. *Design websites purposefully.*

Web sites must be always updated on the latest collections and news, and a greater importance must be given to the design of the site and to the photography.

6. *Get it right on the road.*

Logistics cover a fundamental role inside an e-commerce, deliveries must be on time and reliable.

So, for a fashion industry company that aims to be successful, nowadays, an integration among different channels, online and offline (like inventories and physical stores), must be done, in order to have a clear idea about all the sectors that constitute the brand's business.

## **2.5 Integration of online and offline channels**

It has been discussed how it is now essential to integrate all the channels a brand has at disposal, in order to make them work as a unique one, offering the client a fluid customer experience, and, also, allowing company to have a 360-degree view on its own business.

It has, also, been said how digitization covers a key role in fashion industry companies' current business, but how it is also fundamental to provide the basic requirements customers have always asked for during their purchasing experience.

An integration of digital channels, and the strategies behind their continuous improvement, with the offline ones, such as the physical stores, where collecting data about customers is not that easy as on the online channels, must be done, in order to implement an omnichannel vision.

Currently, decisions about the business of the brand are taken using data that are collected in separate silos. The aim of omnichannel is to eliminate this separation among the various business units and, instead, centralize all the data inside one database.

The benefits of a data's centralization are multiple, such as the possibility to have data always available, for every team inside the company, and to have these data always updated and never redundant.

But even though many brands are starting to implement this omnichannel strategy, they are still unable to fully benefit from it.

And the main cause, behind this situation, lies in the fact that many companies are not yet able to efficiently integrate and analyze the data they have at disposal.

The correct integration and analysis of data will be discussed in the next chapter.

Physical stores, however, still cover a central role in the customers' purchasing experience, so the best strategy to adopt, following an omnichannel approach, is that of allowing clients to switch from online to offline, maybe when the availability of the piece of clothing they are searching for, is only present inside the store and not online, without even noticing the difference between the two channels.

There are three main approaches that best describe the integration between online and offline channels in the fashion retail:<sup>22</sup>

1. *Click & collect.*

The client orders the piece of clothing online and then, they pick it up in the store.

2. *E-reserve in store.*

The client books clothes online with the possibility to try it on later inside the physical store.

3. *Order in store.*

The client buys the product inside the store but decide to have it delivered at home.

All these approaches fuse online and offline channels together, in such a way they are able to guarantee a complete shopping experience for the customer, and to offer them a wider choice of clothing, making both the online stock, and that present inside the store, visible and available to the client.

Furthermore, with the integration of online and offline channels, it is easier to track the customer's actions both inside and outside the store, and to collect data about the

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<sup>22</sup> Anna Minutillo, Omnichannel: strategie di integrazione tra fisico e virtuale, 2021, mmsadvice <https://www.mmsadvice.com/omnichannel-strategie-integrazione-fisico-virtuale/>

purchasing experience also inside the stores, where a CRM has been implemented as well as for the digital channels.

So, making all the brand's channels work as a unique entity is the basis of the implementation of an omnichannel strategy.

In the following chapter, it will be analyzed what omnichannel is, specifically, and how current fashion brands are putting it in place, joining the benefits that derive from its development.

## **CHAPTER III**

### **A new successful approach to sales in the fashion industry, following the digital transformation: the omnichannel strategy**

#### **3.1 Introduction**

The customer's purchasing experience, as it has been said, has taken, over the years, on an increasingly important role for companies.

The customer-centric approach is proving successful: according to a research carried out by Deloitte, the use of customer-centric strategies by companies, makes the latter about 60% more profitable than those which do not improve it.

Omnichannel can be considered a consequence of this new approach: the integration and synergistic management of the various channels available to a company, make the customer experience much more efficient, inducing the customer to repeat this purchasing process and allowing the company to achieve one of its main objectives, namely customer loyalty.

The channels through which brands can interact with possible future customers today, and thus start an engagement process, are many.

In addition to the physical store, also digital places, such as social networks, websites and e-commerce platforms, play a fundamental role in the customer experience.

However, in many cases, these channels are independent of each other, and each has a customer's datum that is different and not integrated with that of the other channels.

The repetition of the same data in different databases, which takes the name of data redundancy, does not allow to offer the customer a fluid and efficient experience, as would happen if these data were integrated with each other.

Their integration would provide a unique photograph of the customer, and this would allow them to be more involved when they want to buy something, receiving personalized proposals.

The answer, to an efficient customized purchasing experience of the client, lies in the development of an omnichannel strategy.

Omnichannel consists of a synergistic management of the various touchpoints (i.e., the contact points between the company and the consumer), with the aim of optimizing the customer experience.

But before the advent of this new strategy, the two approaches used by brands were mainly two:

- the multi-channel approach;
- cross-channel approach.

Multi-channel consists in offering the customer different touchpoints, which are however disconnected from each other, and developed in parallel.

This leads to different data on the various channels, perhaps concerning the same customer, but without the opportunity to combine them.

Cross-channel, on the other hand, offers a unique customer journey across all its channels, and it is concerned with integrating every new channel on the market.

Compared to omnichannel, however, it has a strong limitation: the underlying technology is neglected, causing a high integration cost and a slowdown in time to market.

Compared to these two approaches, however, omnichannel is able to quickly integrate each new touchpoint.

The customer no longer distinguishes the online from the offline, since they have the same brand experience on both.

In this way, its behavior is followed on each channel and communicated to the other touchpoints, thus placing the user at the center of everything, and adapting business strategies to their needs.

Furthermore, this new omnichannel approach allows to adapt the management software of the accounting administration, the ERP, with the Customer Relationship Management (CRM): the customer, for example, on an e-commerce site, as well as on all other touchpoints, is able to view both his personal profile, which is contained inside the CRM, and download invoices or consult the status of orders, information contained, instead, inside the ERP.

This integration allows them to have quick answers and not to repeat the same actions several times.



However, this integrated management of contact points, must also be combined with integrated data management.

The most efficient solution would be to collect the data from the various channels in a single database, so as to create a detailed image of the individual customer without losing any information about it.

To create this, however, it is necessary, for fashion industry companies, to carry out massive data collection, extracting them from the various third-party databases in which they are dispersed.

An efficient way to do this is by using Customer Data Platforms.

A CDP is defined as “A [...] packaged software that creates a persistent, unified customer database that is accessible to other systems”.

It is, therefore, able to collect the data, relating to a customer, present in the various channels and aggregate them into a single database.

This allows fashion brands to have a 360° view of the customer, and to use this information to develop efficient marketing strategies.

Furthermore, the centralization of the database allows to have a single and non-fragmented data collection, thus limiting redundancies, and to synchronize data in real time, so that all those who need to work on them always have them updated and available.

All these topics will be specifically analyzed in this chapter.

This introduction is taken from an article I wrote for the blog of the company with which I developed my thesis work, and it can be consulted at the following link:

<https://www.digital-sales.it/blog/omnicanalita-gestire-in-maniera-efficiente-i-dati-cliente-per-una-strategia-customer-centric>

### **3.2 The main well-known approaches used by fashion industry companies so far: multichannel and cross-channel**

Before omnichannel began to spread inside fashion industry business, the most known approaches, used by brands to manage their channels were, especially, multichannel and cross-channel.

The two approaches are different from each other regarding the integration of the many channels a fashion industry company owns.

According to the multichannel approach, each company's touchpoint, such as social networks, mobile apps, e-commerce and physical store, the customer gets in touch with, is implemented and improved individually, in parallel with the other channels.

Sometimes, also, the different touchpoints are developed with service providers outside the company, that do not provide the same information base as the ones implemented inside the firm.

So, each touchpoint is separate from the others, and in turn, also the data collected about the customer experience on each touchpoint are collected in separate silos, without the possibility to integrate them.



**Figure 11:** Multichannel approach. Source: <https://polus.media/blog/omnichannel-vs-multichannel/>

The multichannel approach, therefore, does not appear as the best alternative in order to offer a fluid shopping experience and, also, to allow the brand to have a unified view on all touchpoints.

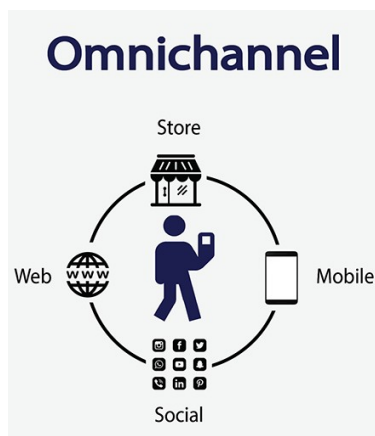
The evolution of the multichannel approach is represented by cross-channel.

This latest approach provides for the integration of two touchpoints, such as the e-commerce and the physical store, as it happens for the click & collect service, previously debated.

The integration of the channels is, however, limited to only two touchpoints, and so the data about the actions customers make on each touchpoint, cannot be collected and integrated entirely.

The last step of this evolution is the omnichannel. As it has been said before, with an omnichannel approach, all the company's touchpoints are connected to each other, and the client can, in this way, enjoy a fluid and efficient customer experience on each of these channels, without even noticing the boundaries that, previously, were present among them.

Also, following this kind of approach, it is finally possible to collect and integrate data from all channels, and in this way, being able to build a customized purchasing experience on each customer, by developing data-driven marketing strategies, that are able to keep up with the client's changing needs, and thus offer the most suitable purchasing proposal for them.



**Figure 12:** Omnichannel approach. Source: <https://polus.media/blog/omnichannel-vs-multichannel/>

Omnichannel allows, also, the customer to get in touch with other services that the company does not provide by itself, but relies on external service providers to offer them.

An example of this kind of omnichannel approach is given by Disney, that organized its own omnichannel strategy down to the last detail.

As reported by HubSpot, “once you've booked a trip, you can use the My Disney Experience tool to plan your entire trip, from where you'll dine to securing your Fast Pass. In the park, you can use your mobile app to locate the attractions you want to see, as well as view the estimated wait time for each of them”.<sup>23</sup>

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<sup>23</sup> Clint Fontanella, What is Omni-Channel? 20 Top Omni-Channel Experience Examples, 2022, HubSpot  
<https://blog.hubspot.com/service/omni-channel-experience>

So, Disney is able to connect all these services in just one tool, and also to share information among these channels, so as to give visitors updates about these services in real time, offering in this way the best customer experience.

Omnichannel, therefore, is about connecting different channels, so as to make the customer feel satisfied in every need, and also to facilitate them in finding the service or the product they are searching for.

Also, data collected in every touchpoint are available to all the other channels, and they can be collected and integrated so as to gain more specific information about the path followed by each client during their purchasing experience.

It will be now analyzed how omnichannel has been, currently, put in place by some fashion industry companies.

### **3.3 The development of the omnichannel approach inside fashion industry companies. Analysis of these companies**

Omnichannel, as it has been said, has begun to become established only recently, that is the reason why it has not been developed yet inside the management of most luxury brands, whereas some of the ones who started to embrace this strategy are not fully benefiting from it, since they are strengthening some aspects of the omnichannel approach and neglecting others.

However, there are some fashion industry companies that are implementing omnichannel in the right way and, for this reason, are taking full advantage of it.

For example, Oasis, an English fashion retailer, is managing to integrate their physical stores with the e-commerce and mobile app, in a full omnichannel vision.<sup>24</sup>

Inside their stores, the shop assistants are equipped with an iPad, which contains all the useful and updated information about the apparel stock present, at the moment, inside the shop, to give customers the necessary information that will allow them to enjoy a successful customer experience.

Furthermore, if the client does not find what they were searching for, because is no longer available inside the store, the sales assistants can also make an online order of the piece of clothing they wanted and, then, send it directly to their home.

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<sup>24</sup> Clint Fontanella, What is Omni-Channel? 20 Top Omni-Channel Experience Examples, 2022, HubSpot  
<https://blog.hubspot.com/service/omni-channel-experience>

In this case, it can be observed how Oasis has been able to fuse the online experience with the offline one, and how they managed to eliminate the boundaries between the two channels, making it possible to switch from one another in a very fast and easy way. Also, they make all the stock, present online and in loco, available to the customer, that is one of the most important requirements that is necessary to satisfy, in order to develop an efficient omnichannel approach.

Another example of a successful use of this kind of strategy is given by Timberland.<sup>25</sup> The American brand uses inside its stores the near-field communication technology, that allows mobile devices to wirelessly transfer data with a chip, against which they are tapped.

Once a client enters the shop, they are given a tablet, that has this kind of technology developed on it, so if the customer presses it against products, thanks to the chip present on the tags, information about that specific product is shown on the tablet.

Also, if they continue to tap the device against other products, the customization software, implemented on the tablet, will display the personalized suggestions about products, that have been developed according to the client's previous shopping.

So, in addition of having a digital device that interacts with products inside a physical store, it can be also easily noticed how data, about each customer experience, are collected inside the tablet and analyzed in such a way to give customized shopping advice, taking up the concept of how fundamental the data analytics is inside the development of an omnichannel approach.

Finally, another UK fashion brand, Topshop, is taking advantage of this new successful approach for its digital marketing campaign.<sup>26</sup>

On the occasion of the London Fashion Week, the brand placed a series of digital billboards across the United Kingdom, connected to the Twitter page of the company, so, every time a follower tweeted something about Topshop with the hashtag #LFW, the digital billboard displayed the tweet together with a piece of clothing from the brand's catalogue.

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25 Clint Fontanella, What is Omni-Channel? 20 Top Omni-Channel Experience Examples, 2022, HubSpot

<https://blog.hubspot.com/service/omni-channel-experience>

26 Clint Fontanella, What is Omni-Channel? 20 Top Omni-Channel Experience Examples, 2022, HubSpot

<https://blog.hubspot.com/service/omni-channel-experience>

So, people interested in the Fashion Week, by seeing this huge advertisement, were informed about the latest trends that were having success online, and could be inspired by these new trends to buy from Topshop.

For this reason, the multiple billboards were positioned near the physical Topshop's stores, so that the potential client would not have to walk too far to reach the store.

In this last example, it can be observed how omnichannel makes possible to integrate a social network, like Twitter, to an advertising billboard, filtering the relevant tweets and then showing them on the display, to give passers-by inspiration about what most people online are preferring, and inducing them to do the same purchase.

Therefore, although many fashion brands today have not developed yet a successful omnichannel strategy, since it is a process that requires time and money, to upgrade and digitize the actual channels the company owns, some fashion industry companies are already enjoying the benefits of omnichannel, as it has been previously analyzed, both in the marketing and sales sector and, also, in the logistics one.

So, the goal of omnichannel is to provide customers with the best purchasing experience, by customizing the shopping proposals they receive via mail or on social networks, and, after having caught their attention, by following the customer during the entire purchasing process, from the seeking of clothes, made it more efficient through the integration of all the stock the brand has available, to the actual sale, by offering multiple payment options, for example having the possibility to choose to pay with the app of the brand or with credit cards or, simply, with cash.

And after making the purchase, the customer is also followed during the shipping of the product, if they choose to have it delivered at home, giving insight about the state of the order and the date and time the piece of clothing will arrive at destination.

Omnichannel, therefore, puts the client at the center of every process, from marketing campaigns to logistics, and makes the management of the brand take business decisions according to the customers' behaviors and actions, information that the company is able to extract from the analytics of the huge amount of data it is able to collect, thanks to the integration of the different channels and the right tools to do this sort of analysis.

It has been previously analyzed how Timberland uses, inside its physical stores, some devices able to interact with products thanks to a chip present on them.

This kind of technology, present inside everyday things that we generally use, is called Internet of Things, and it is used in what is known as Smart Retail.

### **3.3.1 Smart retail: the advantages of applying IoT to retail**

Nowadays, fashion brands are using more and more digital devices, as it has been seen for the Timberland case, and other technologies in order to offer clients a unique experience, also inside the stores.

This integration of smart technologies to items which, usually, do not allow this kind of digital interactions, is known as Internet of Things, and it is an increasingly topical reality.

Smart retail uses the IoT and, also, Artificial Intelligence to engage clients in an intelligent way, also during their in-store experience, making the stores more attractive and the customer experience faster and wider.

The most used digital tools in smart retail are sensors, like the tags RFID (Radio Frequency Identification) and NFC (Near Field Communication), which contain every kind of information regarding the item of clothing in which the customer is paying interest at the moment, and that can be easily read using a digital mobile device, like a smartphone or a tablet.

Furthermore, smart retail allows to collect relevant data about customers' behaviors also inside the physical store, thanks to the tracking of the actions they took during their purchasing experience, through the use of these digital devices.

There are multiple examples of smart retail all around the world, and it will be now analyzed some of them.<sup>27</sup>

The DDB communication agency in Singapore has proposed, to some fashion brands' stores, the use of intelligent dressing rooms, which have inside their wall an integrated reader, that is able to read the smart tag of the garment to which is associated a particular song.

So, while the client is trying the item on, the song associated with that garment is played, making the customer experience more enjoyable and interesting.

Another example of smart retail is given by a beachwear brand that, in 2008, has solved the problem of trying on swimsuits, that could be an embarrassing experience for some

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<sup>27</sup> Laura Zanotti, Internet of Things: quali sono i vantaggi per il retail?, mcubeglobal  
<https://mcubeglobal.com/it/magazine/smart-retail-lingresso-della-internet-of-things-nella-distribuzione/>

clients inside the stores, by using an augmented reality that allows customers to virtually try on the garment from the comfort of their own home, simply through their webcam. And this solution could also be useful to fill one of the major deficiencies that characterize the digital buying channels, that is the impossibility of trying on the garment before buying it, something that was previously only possible by going to the physical store.

The last example is given by the Spanish chain Bananas Fly, which had the idea to integrate an RFID tag inside its shoes and a reader inside the floor, that could read the smart labels present inside the shoes and, in this way, was able to project the customer in an augmented reality dimension, in which they were shown images of some of the most famous cities in the world, such as Milan or Paris, into some magic mirrors, thus making the client live a unique experience and, also, having the opportunity of collecting data regarding the items they tried on, in order to develop increasingly specific purchase proposals for them.

It could be observed, therefore, how smart retail is able to improve and make more attractive and interesting every single customer experience, but it is also able to collect important data about customers' actions inside the store, that, before, it was not possible to collect.

It will be now analyzed the reason why the collection and analysis of data is essential in order to develop a successful omnichannel approach, and the steps that must be followed to develop an efficient data-driven strategy.

### **3.4 The importance of data about customers to take business decisions**

As it has been previously said, the entire omnichannel development has its roots in an accurate and efficient collection, and subsequent analysis, of the data about the customers' journey with the brand, collected from the different touchpoints of the company.

Without this huge availability of data, omnichannel could not have been implemented. Omnichannel strategy, therefore, is what it has been defined as a data-driven kind of strategy.

This means that data are the basis of every decision that results useful to improve, and make more efficient, the management of the brand's business.



Furthermore, this data-driven approach, applied to the implementation of omnichannel, brings with it multiple benefits, such as constructing a unique customer view for each client, thanks to the ability of mapping the entire customer experience, both on the digital and offline channels, and creating, in real time, a personalized purchasing experience on every touchpoint, thanks to the data collected during the client's journey inside the store, through the use of digital devices, like iPads, or on the brand's e-commerce.

So, the integration of the different touchpoints of the firm takes place by means of data sharing, among all of them, and the subsequent upgrade and implementation of these channels according to customer's needs expressed by these data, through their analysis. But this data-driven strategy must be organized in following a series of precise activities, in order to be useful in the implementation of an omnichannel approach. The three main steps that must be followed, sequentially, in order to put in place a successful data-driven strategy, are the following<sup>28</sup>:

#### *1. Data collection.*

As it has already been said, it is essential, with the aim of developing the best customer experience, from an omnichannel perspective, to collect all the data present in each touchpoint and then, to integrate them.

The touchpoints from which to take data are multiple, such as the website of the brand or its own e-commerce, but also the physical stores, where data can be collected through the use of fidelity cards, which are utilized by customers when paying, and which record the purchase history of the client, or through the implementation of IoT inside the store, as it has been previously analyzed.

Each brand's touchpoint receives these data through the use of tracking systems, such as Google Analytics or Hotjar, which is able to show all the actions a customer makes on a single page, like clicks and scrolls.<sup>29</sup>

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28 Redazione osservatori digital innovation, Cos'è il Data-Driven Marketing e perché abilita l'omnicanalità, 28 April 2020, [blog.osservatori](https://blog.osservatori.net/it_it/data-driven-marketing-significato)

[https://blog.osservatori.net/it\\_it/data-driven-marketing-significato](https://blog.osservatori.net/it_it/data-driven-marketing-significato)

29 Ilaria Petta, Omnichannel marketing, il futuro della trasformazione digitale, 10 June 2021, [fenicia.events](https://fenicia.events)

<https://fenicia.events/omnichannel-marketing/>

Data can also be collected from third parties, which is not always that easy to do, but a solution to this problem can be easily found using Customer Data Platforms, as it will be later discussed.

During this data collection process, it is however important, given the large amount of information available, to sort out the data that are really useful for the subsequent analysis, from those which do not describe customer attitudes or needs, and which do not represent the top-priority data.

## *2. Data analysis.*

Once all the useful data have been integrated, it is necessary to carry out an accurate analysis of them, in order to obtain insights about customers' experience with the brand, and to create a unique and more precise client view.

This analysis consists in the development of models or algorithms that allow to create clusters of customers, and in which each client has associated their own customer experience.

During this process of analysis, it is also possible to develop general behaviors' profiles, the so-called personas, to which the different customers can be associated, in order to understand their purchasing behavior.

However, it must be taken into account that customers' behaviors and preferences change over the time, so it is necessary to always update these profiles with real time information, and "using a system with automation and behind-the-scenes, AI-based suggestions can help your team identify new traits and opportunities".<sup>30</sup>

## *3. Data execution.*

After having collected and analyzed all the data at disposal, the latter are used for the execution of specific actions, which have the aim of more involving the customer in the purchasing process of brand's products, through personalized marketing proposals of their favorite garments, but also through the improvement of the customer journey, thanks to the implementation of new services, that has been driven by the feedback provided by clients themselves, useful to make customer experience more fluid.

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<sup>30</sup> How to use omnichannel data to build holistic customer profiles, optimizely  
<https://www.optimizely.com/insights/blog/how-to-use-omnichannel-data-to-build-holistic-customer-profiles/>

Some simple examples of data execution are “the sending of communications on the birthday, but also [...] the activation of a DEM (Direct Email Marketing) after a certain period of time from abandoning the cart on an e-commerce site.”<sup>31</sup>

So, data cover a central role in the development of omnichannel, making all the decisions made during its implementation, data-driven decisions.

But in addition to following the steps mentioned above, to implement an efficient data-driven strategy, it would also be useful to store all the data, coming from brand's touchpoints or from third parties, in a single and centralized database, in order to have them always updated and available in real time.

An efficient solution, advantageous to centralize all this information in one database, is represented by Customer Data Platforms.

### **3.5 Customer Data Platform: how to integrate data coming from different channels**

It has been discussed how omnichannel strategy is entirely based on a data-driven decision process, and how data must be collected, analyzed and executed in the right way and with the right tools, in order to improve the customer experience more and more, and be, in turn, successful in the omnichannel implementation.

It has also been said how it is important to organize all data about customers in a single database, rather than in multiple separate data silos, which cannot permit to integrate data and, also, could contain repeated data about the same client.

Customer Data Platforms (CDP) represent the best tool that is currently available in the field of data management and optimization.

A CDP is “a system capable of unifying the customer data collected by each company across various channels, not just from operations and marketing campaigns.”<sup>32</sup>

So, a CDP allows fashion brands to collect relevant data about clients not only from their own touchpoints, but also from external sources, and to store all this information inside a centralized database, in an orderly and clean way.

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31 Redazione osservatori digital innovation, Cos'è il Data-Driven Marketing e perché abilita l'omnicanalità, 28 April 2020, [blog.osservatori](https://blog.osservatori.net/it_it/data-driven-marketing-significato)

[https://blog.osservatori.net/it\\_it/data-driven-marketing-significato](https://blog.osservatori.net/it_it/data-driven-marketing-significato)

32 Marina Di Vincenzo, Cos'è una Customer Data Platform (CDP) e perché adottarla, 20 January, 2021, [advm medialab](https://blog.advm medialab.com/cos-e-customer-data-platform)

<https://blog.advm medialab.com/cos-e-customer-data-platform>

This kind of digital platforms are also able to collect huge amount of data, and of different types, such as data about the name and surname of the client, their careers and lifestyle, and, also, about their online activities, like the pages or products they visited or on which link they clicked.

However, previously in this dissertation, it has been observed how a Customer Relationship Management covers a fundamental position in the development of omnichannel, since it contains useful data about all clients who had interacted with the brand, and also about the ones that could buy from the brand in the future.

A CRM, though, is a tool that mainly supports the sales process, and that is not marketing oriented, as a CDP is.

Furthermore, CRMs are managed in such a way to store much less data than a Customer Data Platform can, and the information it contains come from internal touchpoints of the firm, like sales and marketing sector, but it cannot gather data from external channels and third parties, a potentiality a CDP, instead, has.

Another advantage of this platform is that it can make available the data it stores to everyone inside the company, and also all the firm's teams can collect data and share them with the CDP, allowing in this way to have a wider source of information about each client, and to be able to draw an increasingly accurate image of the customer.

So, CDPs are able to unify all data about the customer journey, even the ones coming from external sources, and to collect and organize them in such a way to offer a complete and efficient customer view.

Although the benefits of using a Customer Data Platform are greater than those offered by a CRM, it does not mean that the latter is worse, but that they have a different structure and aim, but both are useful, and should work together in order to improve the management of data and their analysis.

Finally, it can be said that "CDP are an efficient, reliable and secure method to collect, store, organize and manage huge volumes of information without losing any detail concerning them, in the short and long term".<sup>33</sup>

After having discussed about the advent of digitalization inside the fashion industry and the consequent need to place the customer at the center of everything that has, in turn,

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33 Marina Di Vincenzo, Cos'è una Customer Data Platform (CDP) e perché adottarla, 20 January, 2021, advmedialab  
<https://blog.advmedialab.com/cos-e-customer-data-platform>

paved the way for omnichannel, it will be now proposed a road map, useful for fashion industry companies in order to develop their own omnichannel strategy, following a customer-centric approach.

## **CHAPTER IV**

### **Omnichannel: how to create a road map for fashion industry companies in order to embrace a customer-centric approach**

#### **4.1 Introduction**

Omnichannel, as it has been previously discussed, can be seen as a direct consequence of the customer-centric approach, that is currently characterizing all fashion industry companies' business decisions.

Customer centricity, for its part, has also been the result of the spread of digitalization among fashion brands' touchpoints, which gave clients multiple purchasing possibilities to choose from, and thus passing the power from sellers to customers, that represent now the most important actor in all selling and marketing processes.

Also, the focus of customers is no more only on the product, but rather on their digital and in-store experience, which is what gives a brand its own uniqueness and makes it stand out from other fashion brands.

And omnichannel is the perfect strategy useful to personalize and make more interesting and engaging each customer experience, creating a stronger link with the customer and growing its brand loyalty.

But currently omnichannel is not equally spread inside the management of fashion brands, since it is a new kind of strategy, that is being developed recently, and which do not have precise rules to be followed in order to implement it in a fair and efficient way.

The purpose of this dissertation is to propose a road map which contains the most important steps that a fashion industry company should follow, in order to reach a successful level of development of omnichannel, and increase company's profits.

The steps, that will be proposed below, are the result of an analysis conducted by me both on the material that I also used to develop the previous work proposed in this dissertation, and on the information I received from the management of the Italian fashion brand Save the Duck during an interview I was able to do with them, about how they are currently developing omnichannel inside their company.

It will be now analyzed the most relevant information I was able to extract from this interview, and that has been useful in order to create the proposal of my road map.

## **4.2 Interview with Save the Duck management**

During my internship experience, I had the possibility to directly talk to Mauro Ballabio, a member of the management of Save the Duck, who is involved in the development of omnichannel inside the brand.

Save the Duck, as it has been previously said, is the first Italian fashion brand involved at an environmental and social level, and also the first able to obtain the B Corp certification.

During the interview, which is reported in full in Appendix A, I had the chance to ask Mauro some questions about how the business of STD is organized and about the actions they took in order to develop a successful omnichannel approach.

First of all, Save the Duck is strongly positioned on wholesale, but it has also opened some single-brand stores here in Italy, and it is planning to open some stores also in the United States, where it has a branch, inside which omnichannel is fully developed. And the reason why the American STD can already take advantage of the benefits of omnichannel is because, according to the interview I did, American clients present different requirements compared to the European ones, which pushed them to accelerate the development of omnichannel, in order to satisfy these needs.

Also, the maturity of these clients, both in the B2B and B2C markets, is higher in America rather than Europe and, moreover, the technological tools used in the US are different from the ones that are currently utilized in Europe, providing better performances in the implementation of omnichannel.

Regarding the steps they followed in order to develop this kind of strategy, their starting point can be found in the adoption of the HubSpot CRM, which was later integrated with their e-commerce, implemented using Shopify.

STD, therefore, has also an e-commerce digital platform, where it directly sells its products to clients.

Thanks to the integration of the e-commerce with the CRM, Save the Duck manages to concentrate all data collected about customers' purchasing experience in one centralized database, avoiding in this way any problem caused by data redundancy or by having

scattered and fragmented data in different separate silos, which would not permit to integrate them, in order to carry out a detailed analysis on them.

The Italian fashion brand also uses NuOrder as order management system with its B2B clients, which is one of the most well-known digital platforms used to encourage the wholesaling process.

Although STD has a strong presence in the wholesale, it is organizing to open more single-brand stores in Europe and to start opening stores also in the US, as it has been previously said.

Once reached this goal, they are planning to integrate the CRM inside the cashier systems of the stores, so as to track also customers' in-store experience.

If the client is already registered inside the CRM, because they had already bought from STD e-commerce before and have completed, in that occasion, the registration, it will be asked the customer to tell their own e-mail and, once it will be inserted into the cashier system, the CRM will display the personal account of the client and will update their customer experience with their latest purchase.

Quite the opposite, if the client is not yet registered inside the CRM, when it is the moment to pay at the cash register, it will be asked the customer their e-mail, so as to add it inside the CRM and, in this way, creating the client's personal account.

At the moment, without the presence of the CRM inside cashier systems, they are able to obtain information about where the customer has made their purchase through Certilogo, an online service offered by the brand to verify if the STD piece of clothing bought is authentic or not.

Once the client enters the Certilogo code, present on every STD piece of clothing, inside the dedicated page of their site, it will be asked the customer in which store they made the purchase and, then, it will be shown if the piece of clothing is authentic or if it is a fake.

In this way, by offering a useful service to clients, they are also able to gather information about the store where the client has made the purchase and about the piece of clothing they bought, an information that, otherwise, would have been lost.

And since omnichannel is fully based on a data-driven strategy, every information could be essential to depict a more accurate customer view, following a customer-centric perspective.



It can be easily deduced, from the analysis of STD case, how the use of CRM is essential in order to develop an omnichannel approach inside a fashion industry company, since customers, as it has been said before, are the central point to which every fashion brand refers to when making its business and marketing decisions, so as to increase customers' loyalty towards the brand and, in this way, increasing sales and, consequently, profits.

Furthermore, the integration of the offline channels, such as STD single-brand stores, with the online ones, such as the e-commerce, is another fundamental step to take, in order to embrace an omnichannel perspective, and it is also useful to integrate all the data collected by all the brand's touchpoints in one single database and, in this way, making possible to give customers a fluid purchasing experience, during which they do not notice the passage from online to offline, and vice versa, because both channels work as a single one.

But omnichannel is not an exact science and there are no precise rules to follow in order to develop it in the right way.

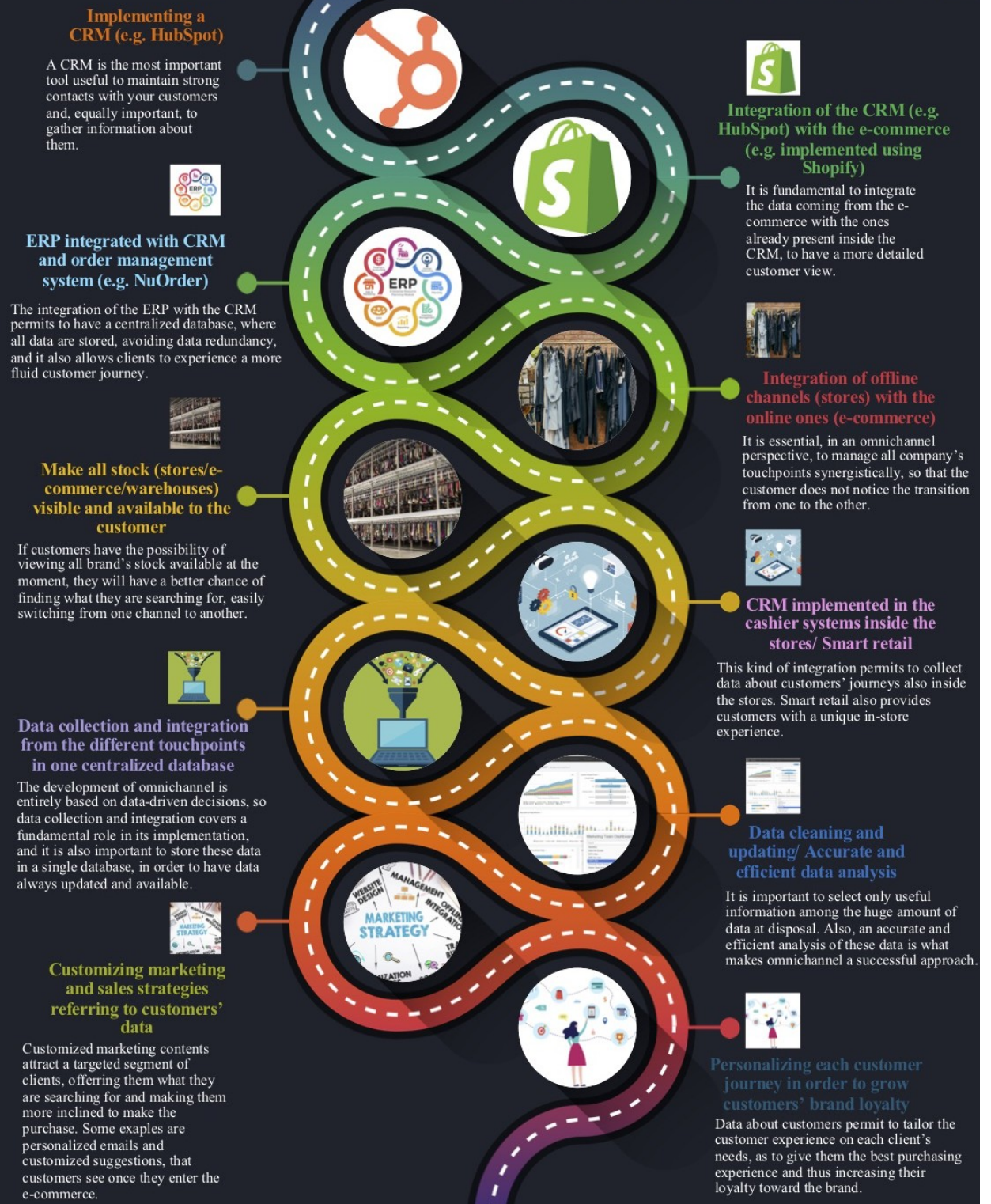
It will be proposed, below, a road map, which contains the main steps I personally consider essential to implement a successful omnichannel strategy within a fashion industry company.

### **4.3 The road map**

As it has been said so far, omnichannel looks like a successful strategy, capable of giving fashion industry companies a lot of benefits, both on the side of managing strong relationships with customers and, also, on the side regarding the profits of the company. A unique and interesting customer experience makes the client happy and more inclined to buy again from that specific brand.

However, currently, it cannot be found clear steps to follow in order to implement a successful and efficient omnichannel strategy, due to the fact that each fashion brand has its own way of developing it, due to their current structure and internal organization. It can be nevertheless proposed the principal steps a fashion industry company should follow, in order to reach this goal.

# OMNICHANNEL STRATEGY: A ROAD MAP PROPOSAL FOR FASHION INDUSTRY COMPANIES



I personally developed the road map above, whose aim is to provide a clear idea of the path that, if it is proceeded in the right way, can drive fashion firms to embrace a customer-centric view and, consequently, to implement omnichannel.

It will be now analyzed the main steps of this road map, the latter also reported in full in Appendix B.

#### 4.3.1 Step number 1: Implementing a CRM



The Customer Relationship Management can be considered the fundamental technological tool and, also, the starting point for the implementation of the omnichannel strategy.

Since this kind of approach is fully based on the centrality of customers in taking company's business decisions, and on how to give them the best customer experience on every brand's touchpoint, it is necessary to integrate these touchpoints in order to have a clearer view on what customers do and search for on each of them.

The CRM is the best tool that satisfies this need of integration, since it is able to integrate the online e-commerce with the in-store cashier systems, as it has been observed in the STD case, and it can also collect data coming from each touchpoint, so as to always have an updated view of the customer, and to put these data together, in order to conduct precise analysis on them and personalize, in this way, the marketing contents sent to customers and, especially, their purchasing experience.

This technological tool is also useful to engage new possible customers, or leads, that are clients who have not yet made a purchase from the brand, but who have shown some

interest toward the brand by filling out, for example, some online forms about the brand and, in that occasion, they have given their email or some information about their gender, occupation or age.

So, the CRM is the tool that allows fashion industry companies to create and maintain strong relationships with their customers, who are now the main actor in all brand's management decisions.

As it has been said, the CRM collects data from different touchpoints, and the online e-commerce represents one of the most important sources of data and transactions about customers' purchasing experience and, for this reason, it is important to have it immediately integrated with the CRM.

#### **4.3.2 Step number 2: Integration of the CRM with the e-commerce**



As it has been already discussed, the CRM is a powerful tool able to manage, in an excellent way, the relationships with the huge number of customers that fashion brands find themselves having nowadays.

But the CRM alone cannot be so efficient as it could be when it is integrated with the online selling channel of the company, the e-commerce.

Shopify is one of the most known and used digital platforms that allow brands, or even small retailers, to easily create their own e-commerce, in order to sell their pieces of clothing directly to the final consumer.



Save the Duck, as it has been previously pointed out, used Shopify to implement their own e-commerce, in this way strongly positioning their fashion brand also on the online selling channels aimed at customers.

The main clients of STD, however, are retailers, who sell the Italian brand's products inside their stores, but with the e-commerce they have successfully entered also the B2C market.

The integration between the e-commerce and the CRM allows fashion industry companies to gather also data coming from the online transactions carried out by customers, and to put together this information with the one already present inside the CRM, that comes from other brand's touchpoints or from some marketing campaigns. The more information can be collected about each customer experience, the more personalized will be the future marketing contents that will be sent to customers and, also, the more customized will be the next purchasing experience of the client with the brand.

However, to offer customers a more fluid experience, both on the online and offline buying channels, it is necessary to integrate the data contained inside the CRM, already integrated with the e-commerce, with the ones stored inside the Enterprise Resource Planning (ERP), so as to give clients information about, for example, the status of their order or the payment methods they can use in order to make the purchase.

#### **4.3.3 Step number 3: ERP integrated with CRM and order management system**



Through the integration of the ERP with the CRM, the brand can enjoy some benefits that will help the business of the company to be managed in a faster and more efficient way, in addition to the benefits that customers can be pleased with during their shopping experience, as discussed above.

The ERP, as the CRM, is a database, so their integration allows to gather all data in one centralized database that brings many advantages, as previously discussed, such as avoiding data redundancy and having data always available to all company's sectors, from sales and marketing to inventories and supply chain.

Also, this integration is fundamental to give customers, but also professional buyers, a complete and accurate vision of all the stock the brand has at disposal, thus avoiding placing orders that could not be fulfilled, due to lack of stock.

Furthermore, the ERP can also be integrated with the order management system, since it contains information about the shipping status of each purchase, allowing customers to track their orders, made on the order management system, and have information about the precise date and time at which the orders will be delivered at their homes, information that they can easily have by consulting their personal profile, contained inside the CRM.

STD uses NuOrder, a well-known order management system, with their B2B clients, since it is a platform that well supports the wholesale process, as it has been previously said.

So, after having implemented a CRM and having it integrated with the e-commerce and the central ERP, the next step in the development of omnichannel takes into consideration the offline channels of the brand, the stores, since it is essential to integrate all this digital information with the ones that can be collected also inside the in-store customer experience, thus to completely integrate the offline touchpoints with the online ones, so as the client will not notice anymore the passage from one to another.

#### 4.3.4 Step number 4: Integration of offline channels with the online ones



Before the advent of omnichannel, each company's touchpoint was managed and implemented separately from the other ones, without sharing any information among them and collecting the data coming from each channel in different silos, having no chance to integrate them.

Instead, omnichannel aims to run all brand's touchpoints synergistically, so as to offer the same services and brand experience on all of them, and to gather the data stored on each of them together in one centralized database, as discussed before.

If a customer comes to a store and they do not find the piece of clothing they were searching for, the store assistants should be able to search for that piece of apparel on the e-commerce directly from the store and in real time, by using some digital devices that can help the in-store experience to be more fluid for the customer.

Once they find the product online, the shop assistants can directly make the order and send it to customer's house, using the information provided by the client when they registered to the brand's CRM, or, if they prefer, they can return to the store to collect it.

In this way, the online e-commerce is merged with the offline physical store, sharing on both channels the information about that specific customer's purchase and, in turn, being able to offer the customer a more efficient and faster service.

Since it was not possible to collect data about clients' in-store experience before, with the integration of the CRM inside cashier systems and with the use of IoT inside the store, this is now possible and easy to do.

#### 4.3.5 Step number 5: Make all stock (stores/e-commerce/warehouses) visible and available to the customer



Thanks to the integration of the CRM with the ERP, the client is now capable of seeing all brand's stock currently present, both on the e-commerce and inside stores and warehouses, helping, in this way, customers to find what they were looking for and offering them a better customer experience, in turn increasing the probability of success of that possible purchase.

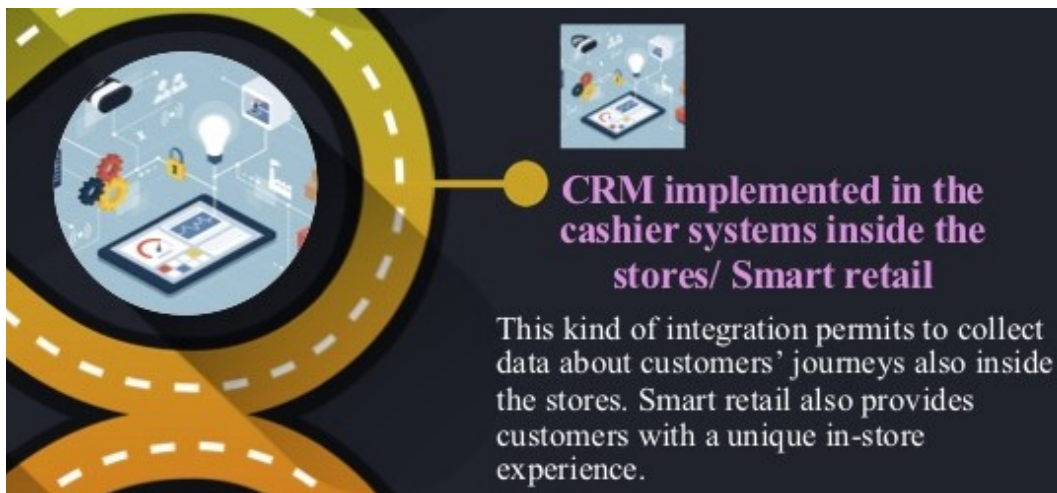
The management of stores and inventories' stock is run by the brand's ERP, giving updated and in real time information about the presence or not of a specific garment the client is asking for.

If the client has at disposal more channels from where making their purchase, they will have a wider choice of clothing and will be more inclined to make the purchase.

It will also be interesting to also integrate the second-hand channel, if the brand has one, to redirect the client on it if the piece of clothing they were searching for was not present inside the brand's official touchpoints, or was too expensive, in order to find it and, maybe, to buy it at a lower price.



#### 4.3.6 Step number 6: CRM implemented in the cashier systems inside stores/ Smart retail



The implementation of the CRM, and its subsequent integration with the e-commerce and the central ERP, brings many advantages, as it has been observed, in the improvement of customers' experience, since it makes their purchasing journey more fluid, faster and, also, allows to store and analyze important data about customers, that will be later utilized to personalize marketing and sales campaigns.

But it is also necessary to track the customer's actions that they usually take during their offline experience inside the store, to better understand their needs and behaviors.

Save the Duck, as it has been discussed, is planning to implement the CRM also inside the cashier systems of their future single-brand stores, in order to collect that information about customers' journey that would have, otherwise, been lost.

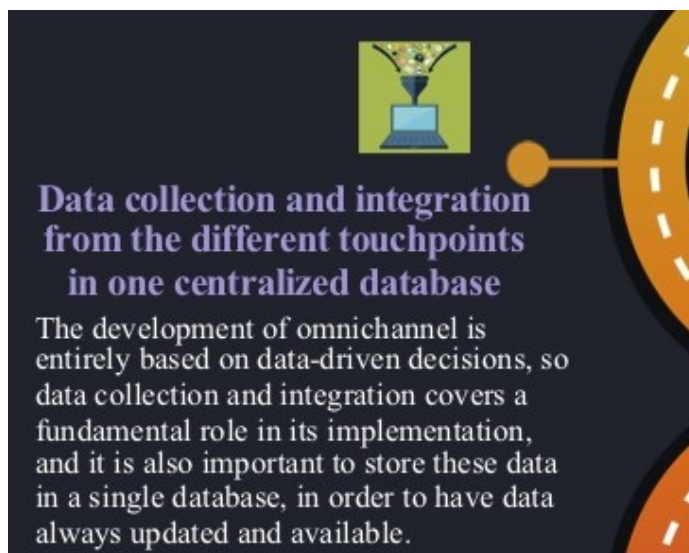
Through the use of fidelity cards, or by simply receiving the client's personal email, it is possible to upload on the CRM also the data about customers' purchases inside the store.

Another way to track customers' activity inside fashion stores is also represented by the adoption of Smart retail, which consists in utilizing some digital devices, like an iPad, that are able to read the information that is contained inside some sensors, positioned on the tag of each piece of clothing inside the store, and in this way giving both accurate information about every piece of garment and proposing clients personalized suggestions on what they should find attractive, basing these forecasts on the data

collected during the client's experience and stored inside the digital device they were using.

The use of these digital tools inside physical stores could be compared to the use of a tracker software during the online experience: as trackers do, also these devices are able to memorize the activity of the customer in every part of the store, knowing on which garments they have placed their attention on by asking for their information on the device, the same that also happens on the online e-commerce, where trackers are able to store information about the pages the client visited or the links they clicked on.

#### **4.3.7 Step number 7: Data collection and integration from the different touchpoints in one centralized database**



Once it has been made possible to gather useful data from each brand's touchpoint, also from the offline ones with the use of Smart retail or the implementation of the CRM inside cashier systems, as it has been discussed above, it is then necessary to collect all these data together in one centralized database, in order to analyze them.

Before the development of omnichannel, these data were stored inside separate silos that did not allow to integrate them.

Thanks to the integration of all brand's touchpoints, instead, it is now possible to integrate these data, so as to make a selection of the useful ones, while discarding the unnecessary ones, and having in this way an orderly collection of data, that will provide the basis for the subsequent analysis.

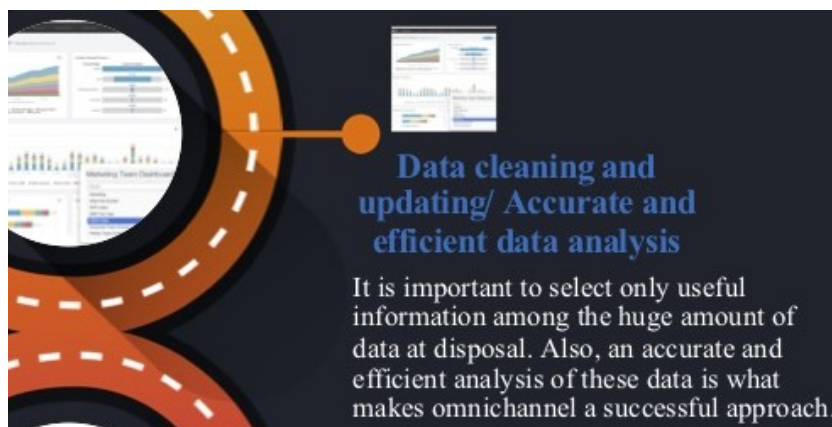
The centralization of these data will also allow every fashion company's sector, from marketing to logistics, to use these data and to update them, in order to always have a real-time customer view, and in this way following clients' changing purchasing behaviors.

Also, the centralization of the database makes the management of the brand's business faster and more efficient, since the reports already created by, for example, the financial sector could be used by the sales team, without losing time on doing something it has been already done.

Data collected in one centralized database are also easier to access, since the information is not fragmented in different silos, a fragmentation that would instead make their consultation harder.

Finally, since all information is stored inside one database, it is possible to avoid what is called data redundancy, that is the repetition of the same datum inside different databases, that would make it difficult to analyze them efficiently.

#### **4.3.8 Step number 8: Data cleaning and updating/ Accurate and efficient data analysis**



The tracking of customers' behaviors on every brand's touchpoint, in order to collect useful data from all of them, and their subsequent integration and centralization in a single database has as its final aim the analysis on these data, on whose results will be taken the decisions about the company's business, that will involve every sector inside the firm.

This analysis can be based on the huge amount of data accurately collected and selected from all brand's channels.

Save the Duck practices constant updating and cleaning of the data at their disposal, in order to conduct a more accurate analysis about their customers' needs and behaviors on all the brand's touchpoints.

So, before starting to analyze all the information stored inside the centralized database, it is necessary to make a selection of the data that would be actually used for the next analysis.

Once data have been cleaned and updated, the analysis is carried out using the analytical tools that are currently available.

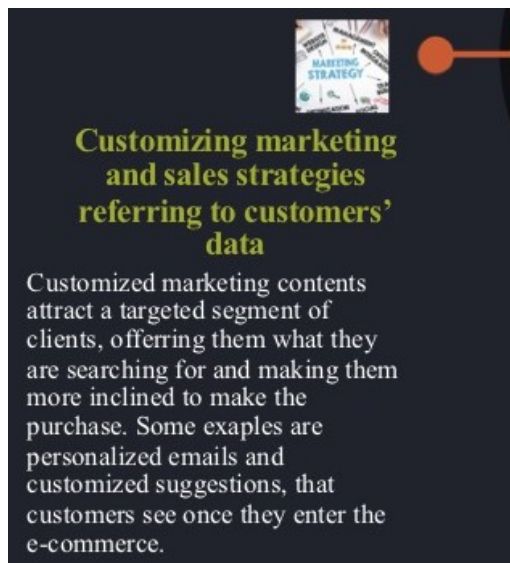
HubSpot provides analytical tools as a feature already implemented inside the CRM, called HubSpot Analytics, which provides reports and dashboards that give an insight on customers' behaviors that emerges from their tracked actions on the brand's touchpoints.

Customers who present similar behaviors, or similar personal characteristics, such as gender, age or occupation, are then grouped together in clusters, and each cluster will represent a particular type of client, called persona, useful to conduct a successful customer segmentation, in order to send to each cluster of clients the right marketing contents and to personalize their customer experience once they interact again with the brand, by predicting their future behaviors and needs.

An efficient customer segmentation, obtained by making an accurate analysis of the data about clients that brands have at disposal, is the prerequisite for a successful customer-centric strategy, on which omnichannel is based, since the satisfaction of customers' needs is the main factor on which fashion brand's, that want to be successful in the long term, should focus on.

Furthermore, this clustering of customers will facilitate the customization of marketing and sales campaigns, and will allow the forecasting of their future interactions with the brand, as it has been previously said.

#### 4.3.9 Step number 9: Customizing marketing and sales strategies referring to customers' data



After having managed to trace customers' behaviors on all brand's touchpoints, using trackers on the digital channels (e-commerce, social networks and websites) and digital devices, connected to garments through the use of sensors, inside the physical stores, the huge amount of data collected from each touchpoint is stored inside a centralized database, that could be the CRM itself, and after a careful cleaning and selection work, finally these data are analyzed in order to create clusters of clients, who share similar behaviors or demographic information, in order to better segment the audience of customers of the brand.

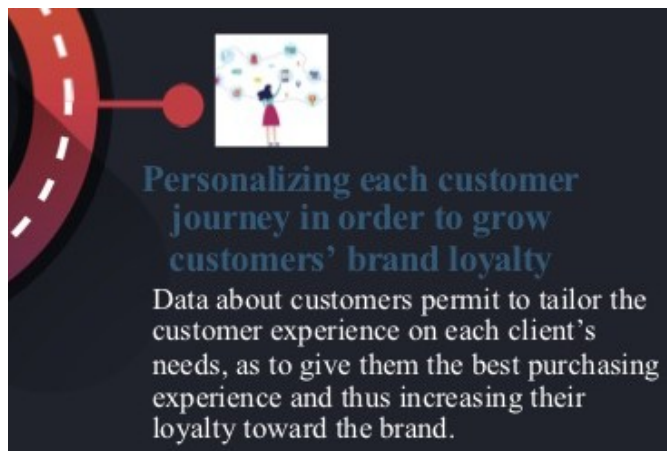
Then, each cluster of clients is analyzed, so as to understand the requirements and the purchases that type of client, which is represented by a specific persona, usually makes, so as to offer them, once they interact with the brand, customized suggestions, for example proposing a specific type of clothing, or a garment that could complete the outfit they are currently buying, basing these proposals on the previous purchase the customer has made and that have been stored, in the form of data, inside the centralized database.

Another example of using information about clients, also the demographic ones, is to send to the customer, on their birthday date, an email that wishes them happy birthday and offers them a special discount on all clothing items, valid only on that specific day,

encouraging the client to buy from the brand and, also, making them feel special on that occasion, thus increasing their brand loyalty.

The more personalized will be the marketing contents sent to the customer, the happier they will be, since they will feel embraced and understood by the brand, increasing the chances of them buying again from that brand and, especially, of becoming loyal to it.

#### **4.3.10 Step number 10: Personalizing each customer journey in order to grow customers' brand loyalty**



Customer's loyalty towards the brand and their personal satisfaction are the main objectives pursued by every fashion brand nowadays.

Since there are multiple alternatives from which to buy, and some of them share very similar pieces of clothing, as it can be easily observed for fast fashion brands, what makes a fashion industry company gain a competitive advantage on all the others is the level of customer satisfaction they can reach, by offering the best clients' experience on all brand's touchpoints, and to reach this goal is essential for every fashion brand to completely switch their focus from product to client, and to invest in software and technological tools, such as the CRMs and the ERPs, necessary to store and integrate data, but also in analytical tools, that allow to carry out accurate analysis on these data, and to use this stack (ERP, CRM, Data Analytics Tools) to drive an efficient data-driven strategy, that only the employment of these tools can make the latter efficient, and in this way implementing a successful omnichannel approach.

## CONCLUSIONS

The advent of digitalization inside the fashion industry world has brought about several changes in the way brands approach customers.

If once the selling process happened only in presence, inside the physical store, now clients can interact with fashion brands through multiple ways, both digital and offline. Over the last few years, characterized by long periods of lockdowns due to the spread of the pandemic, the sales channel most used by customers was the digital one, as it was not possible to go to the stores.

So, fashion brands had to enhance their digital channels in order to satisfy ever-increasing online orders and to also continue communicating with their customers.

The pandemic, therefore, has accelerated a digitization process that would, otherwise, have taken years to complete.

Nowadays, every successful brand has its own e-commerce and website, that the client can consult both for making a direct purchase or for simply finding some inspiration before buying something.

And the presence of this multitude of online apparel buying channels allowed customers to be able to choose from a wider audience of brands, in a faster way and from the comfort of their home, thus obtaining a higher bargaining power.

It can be easily deduced, for this reason, that power is no more in the hands of sellers, but in those of buyers.

And since customers has gained this new strength in fashion industry companies' business, the satisfaction and loyalty of clients have become the main goals to be reached in order to obtain a competitive advantage over other brands.

Customer centricity, which means placing the client at the center of every business decision taken by the company, has therefore become the most used and known strategy inside the world of fashion.

Through the implementation of this approach, the client is seen as a real driving force that can help the company grow its business, thanks to the information and feedbacks that the customer provides during their purchasing experience.

Furthermore, the interaction of the customer with the brand has to be fluid, interesting and fast, by offering them multiple channels from where to make the purchase, and to easily switch from one to another.

This customer-centric approach, therefore, made it necessary to integrate the various touchpoints owned by the brand, in this way developing what is called omnichannel strategy.

The integration and synergistic management of all the brand's online and offline channels allow to offer clients a more fluid and efficient customer experience, by providing on every touchpoint the same services and brand contents, and also, thanks to their fusion, to personalize every customer interaction with the brand, by analyzing the huge amount of data collected and integrated from all channels, something that before was not possible since each channel had its own separate silos of data that could not be combined with the others.

So, omnichannel is the final step of this process of digitization, that has first given importance to the role of customer within the company management, laying the foundation for the birth of the customer-centric approach, which later has made it necessary to develop omnichannel, in order to better understand the behaviors and needs of customers during their experience with the brand, through the collection of data from the different touchpoints, and to make accurate analysis on these data so as to have a better client view and, in this way, to personalize their purchasing experience with the brand, thus increasing their loyalty.

Without digitization, therefore, it would not have been possible to develop omnichannel, since it is an approach entirely based on a data-driven strategy, that uses data collected about customers, both online, with the use of trackers, and offline, through fidelity cards and digital devices present inside the stores, to depict the most accurate image of each client.

But omnichannel is not being implemented in the same way by every fashion industry company, due to the fact that it is not a perfect science and that each brand has a different business structure from where to start to develop it.

So, to help fashion brands to put omnichannel in place in a right and successful way, a road map has been proposed, that contains, in my opinion, the fundamental steps to



follow and the digital tools to utilize in order to obtain great benefits from its development.

The steps proposed derive from an analysis conducted on the different ways omnichannel is being currently implemented by some fashion industry companies, and from the subsequent highlighting of the main actions and decisions these brands shared during its development.

The use of a CRM (Customer Relationship Management) is one of the basic requirements to satisfy in order to start embracing this customer-centric strategy, since it is a powerful tool capable of storing all the relevant data about the history of sales of each client, but also about the interactions that the customer has had with the brand, even if they did not make any purchase, by visiting, for example, the brand website or social networks.

Another fundamental step is represented by the integration of online and offline channels, so as not to let the customer notice the switch from one to another, finding in this way easier to buy from the brand and feeling satisfied about their purchasing experience, thus inducing them to buy again from the brand.

This integration, however, is made possible through the utilization of digital tools, as the CRM, but also Customer Data Platforms that, for example, are able to store greater amount of data than CRMs, being both useful to create a connection between the digital and the offline touchpoints, in order to create a unique database that is able to store and centralize all data about customers' experience with the brand and, also, to make it easier to work on them and to analyze them accurately.

So, another fundamental step is the centralization of data, as it has been also underlined during the interview with STD, that allows to avoid the repetition of the same data about customers and to always have updated and reliable information at any time, and also accessible to all the company departments, so as to avoid the waste of time that would be incurred if these data were to be extracted each time from the various databases in which they are fragmented and, subsequently, to be selected in order to analyze only the data that are actually relevant and necessary to the team that is working on them.

In conclusion, an efficient use of the CRM, that in turn allows to integrate and connect all the brand's touchpoints, both digital and physical, in this way permitting to collect

data that once were not possible to gather due to their fragmentation in different databases, and to do accurate analysis on them, in order to create clusters of clients and in this way obtaining a more precise customer segmentation, are the main points on which a fashion industry company should focus on to implement omnichannel in a successful and profitable way, as STD is currently doing in the US, following exactly this path, so as to offer unique purchasing experiences to their clients and, in this way, making them feel more connected to the brand, which consequently pushes customers to become more loyal to it and, also, to induce other people to join the brand's community, thanks to their positive word-of-mouth and the good reviews they leave once the shopping experience is over, both online and in-store.

## APPENDIX A

Full interview with Mauro Ballabio, who is currently working at Save the Duck.

The questions asked were written by me and were sent to him via email. He answered to them and sent to me the following document, which contains also his answers.

**- Is American STD using different/more selling channels compared to the European one?**

STD is strongly positioned on WHOLESALE and ramping up on direct e-commerce, while we don't have any direct presence yet in retail; however, the structure of the American market is different and requires responding to different requirements from clients: for instance, key clients are using NuOrder order management and Dropship kind of delivery, hence we need to be ready for them.

**- What are the main factors that allowed you to develop omnichannel in America and not yet in Europe?**

**What are the main differences between the American and the European approach?**

Essentially the way customers are organized, their requirements and "power" but also the fact that their requirements are clearly oriented to a frictionless efficiency.

**- What was the main reason why you started to develop an omnichannel approach? What was your starting point in the development of such a strategy?**

STD is developing a direct presence in USA after leveraging a long-term partnership with a distributor: hence, we want to accelerate our growth and respond in a more robust way to key clients' needs.

**- Did you had any difficulties in implementing omnichannel? If yes, what were your difficulties?**

We are still in the middle of our journey – setting up the IT structure and honeying processes is a never-ending journey.

**- Which changes/actions did you make to start developing this approach? Both in the management organization and in the technological area.**

As mentioned, direct presence and organization; extension of our central ERP system and integration with e-commerce and order management system (NuOrder) that are peculiar to the US market (vs. Europe).

**- How are you managing omnichannel currently? Does it often need updates or not? Are your profits greater than before?**

Clearly the growth of direct e-commerce is aimed to establish the brand and internalize profits; but the general efficiency required to run a more “omnichannel oriented” business is beneficial for the profits.

**- What are the pros and the cons of omnichannel in your company?**

We have limited cons, since we have a very agile structure that can only benefit; the challenges are that we want to keep being agile while growing fast.

**- Is omnichannel currently working well or did you notice some differences in its performance throughout the years?**

Moving towards it, we can just see an acceleration in everything.

**- Did you manage to integrate the in-store purchases of customers with the digital channels?**

**Do you use tablets or other devices during the in-store customer’s experience? Do you have a CRM also in the cash registers inside the stores?**

We don’t have direct retail shops open in US but openings are planned in 2022 and they will be integrated with CRM features in Cashier system.

**- Do you think some other choices would have made the development of omnichannel easier?**

Not really, we are enjoying limited constraints from the existing structure.

**- What other software/ digital tools are you currently using in addition to CRM?**

Our CRM is integrated in the e-commerce (Shopify) and will be linked to cashiers’ systems.

**- How did you implement your current CRM?**

Simply enabling Hubspot with Shopify (native integrated environment) and fast forwarding specific Hubspot features.

**- How do you collect data from different channels? Is it easy for you to avoid data redundancy?**

We are currently running a specific project to allow a seamless integration of data; with the right tools this is essentially a lean exercise.

**- Do you have one central database to collect data or more databases?**

We have a unique CRM system that allows us to manage multiple regions client data respecting data privacy.

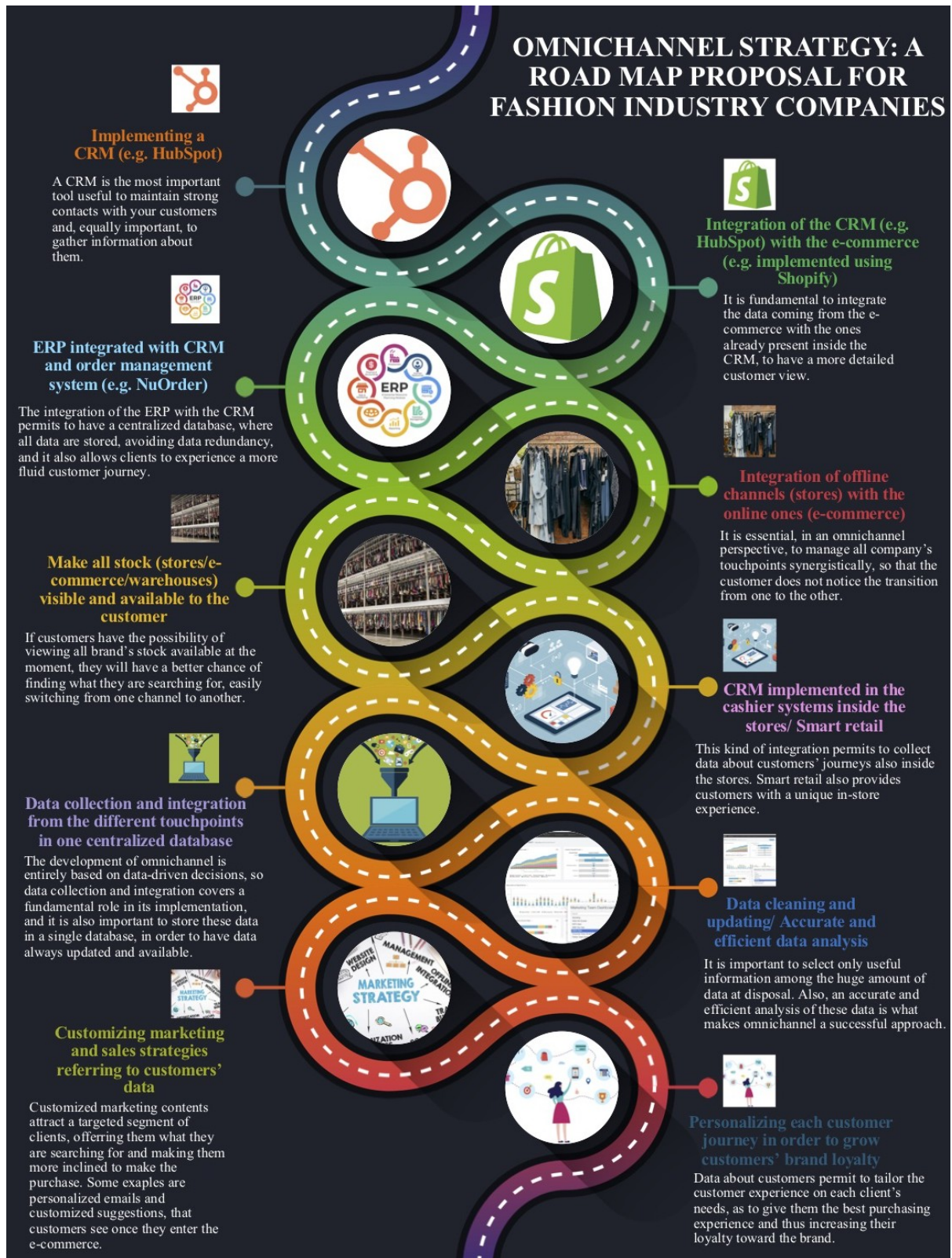
**- What are the steps you are currently following to reach the level at which omnichannel has been developed in America?**

We are adjusting our pace to clients' requirements; we are planning to develop a multichannel presence starting from a different set up (in Europe we already have retail shops) hence the trajectory is different.

**- Are you having difficulties in implementing it or not? Do you notice differences in the way of implementing omnichannel between Europe and America? And if yes, what are these differences?**

Extremely different: maturity is different in B2B and B2C clients; as well as tools are not yet established and are different from US. The maturity level is probably at 7 compared to a 9 in USA.

## APPENDIX B



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**Sitography of the images present inside the road map:**

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