

# **SO DIGITAL**

**Global Brand Excellence Solutions**

**DIFFERENTIATE TO WIN IN  
MATURE E-COMMERCE MARKETS**



**WHILE DOMESTIC ONLINE SALES IN THE UNITED STATES AND THE EUROPEAN UNION WILL CONTINUE TO INCREASE — TAKING SALES AWAY FROM BRICK-AND-MORTAR STORES — GROWTH RATES WILL FLATTEN OUT OVER THE NEXT 10 YEARS. RESEARCH FIRM FORRESTER FORESEES CROSS-BORDER E-COMMERCE OUTPACING DOMESTIC GROWTH, WITH A COMPOUND ANNUAL GROWTH RATE OF 17 PERCENT BETWEEN 2017 AND 2022, COMPARED WITH 12 PERCENT FOR OVERALL B2C E-COMMERCE.**

**WHILE THE EXPLOSIVE GROWTH IN EMERGING MARKETS IS GOOD NEWS FOR THE OVERALL E-COMMERCE INDUSTRY AND ESPECIALLY THOSE WHO TAKE ADVANTAGE OF THESE TRENDS, LOCAL MARKET REACHING SATURATION LEVELS IN NEAR FUTURE SHOULD BE WORRYING TO MANY AND WILL POINT TO NEW DEVELOPMENTS AND BEHAVIOUR OF KEY PLAYERS.**



**AS LONG AS THE TOTAL MARKET IS EXPANDING THERE IS ENOUGH GROWTH FOR EVERYBODY AS A "RISING TIDE LIFTS ALL BOATS". HOWEVER, ONCE THE MARKET GROWTH FLATTENS OUTS, INCREASING MARKET SHARE LOCALLY WON'T COME FROM THE GROWING TOTAL MARKET AND AT THE EXPENSE OF THE TRADITIONAL BRICK-AND-MORTAR RETAILERS AND CUSTOMERS SWITCHING ONLINE BUT FROM TAKING AWAY MARKET SHARE FROM OTHER E-COMMERCE PLAYERS.**

**THIS MARKET SHARE GROWTH STRUCTURE CHANGE WILL REQUIRE CHANGE IN E-COMMERCE GROWTH STRATEGY FORMULATION & EXECUTION FROM MARKET EXPANSION & MARKET DEVELOPMENT TO GROWTH THROUGH DIFFERENTIATION.**

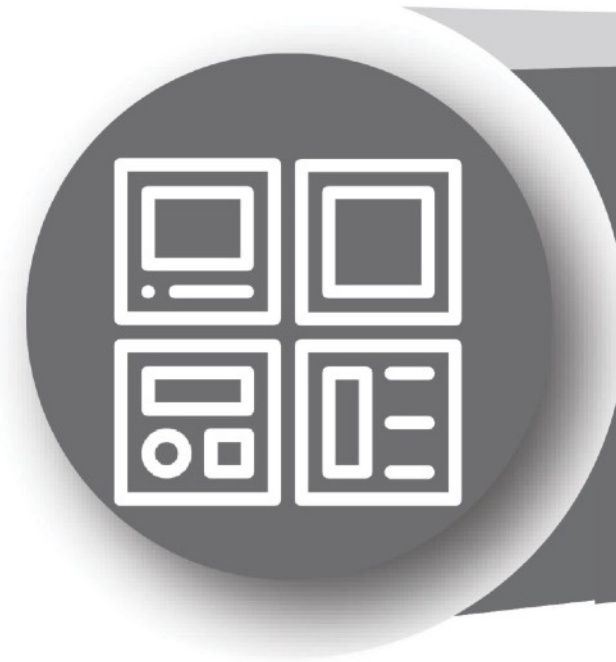


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**IN A DIFFERENTIATION STRATEGY A FIRM SEEKS TO BE UNIQUE IN ITS INDUSTRY ALONG SOME DIMENSIONS THAT ARE WIDELY VALUED BY BUYERS. IT SELECTS ONE OR MORE ATTRIBUTES THAT MANY BUYERS IN AN INDUSTRY PERCEIVE AS IMPORTANT, AND UNIQUELY POSITIONS ITSELF TO MEET THOSE NEEDS. IT IS REWARDED FOR ITS UNIQUENESS WITH A PREMIUM PRICE.**



**E-COMMERCE WEBSITES TEND TO BE STANDARDIZED, AS IF SOMEONE CREATED A COUPLE OF STANDARD TEMPLATES, AND EVERYBODY CHOSE THE ONE THEY LIKED. SURE THERE ARE CUSTOM GRAPHICS AND COLORS, BUT THE OVERALL EXPERIENCE ON MOST ECOMMERCE WEBSITES IS IDENTICAL. MOREOVER, EVEN THOUGH RETAILERS FACE A LOT OF COMPETITION, BOTH ONLINE AND OFFLINE, IN MANY CASES THE PRODUCTS THEY SELL ARE VERY SIMILAR.**



**WITHIN A CONTEXT OF COMMODITISED E-COMMERCE TECHNOLOGIES WHICH SHAPE AN UNDIFFERENTIATED PRE-PURCHASE AND PURCHASE EXPERIENCES, ONLY WAY TO DRIVE GROWTH DOMESTICALLY IS BY BUILDING CUSTOMER LOYALTY THROUGH DIFFERENTIATION - FOCUSING ON COUNTRY DISTINCT (POST) PURCHASE CUSTOMER EXPECTATIONS AND EXPERIENCE**





**THE CUSTOMER LOYALTY SEEMS TO BE LARGELY ESTABLISHED AT THE STAGE OF POST-PURCHASE.**



**ACCORDING TO THE U.S. CONSUMER SURVEY DONE BY IBV (INSTITUTE FOR BUSINESS VALUE) IN 2011, OUT OF 3 PHASES OF BRAND EXPERIENCE (PRE-PURCHASE, PURCHASE AND POST-PURCHASE) RESPONDENTS CLEARLY MARKED THE POST-PURCHASE PHASE AS THE MOST INFLUENTIAL OVER THEIR RETAIL BRAND RELATIONSHIPS AND THEIR WILLINGNESS TO PROMOTE A GIVEN RETAILER TO OTHER CONSUMERS.**



**STUDIES BY RAMANATHAN (2011), AS OTIM AND GROVER (2006) HAVE SHOWN THAT SEVERAL POST-PURCHASE FACTORS, SUCH AS CONVENIENCE OF TRACKING ORDER, ON-TIME DELIVERY AND EASE OF CUSTOMER SERVICE, PLAY VITAL ROLES IN INFLUENCING CUSTOMER LOYALTY. REPEAT PURCHASES BUILT ON THE FOUNDATION OF CUSTOMER LOYALTY CAN RANGE UP TO 40% OF THE TOTAL REVENUE.**



**SO, IF YOU'RE IGNORING YOUR ECOMMERCE POST-PURCHASE EXPERIENCE, WHETHER IT CREATES UNIQUE VALUABLE DIFFERENTIATORS, RELATIVE TO OTHER AND BEST PERFORMING RETAILERS, YOU'RE IGNORING THE MOST INFLUENTIAL PREREQUISITE OF FOR REVENUE GROWTH.**

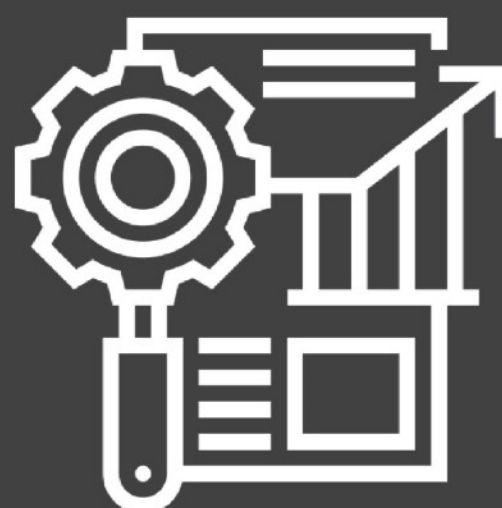


**THE POST-PURCHASE IS AN ESSENTIAL, YET OFTEN OVERLOOKED, STAGE OF THE ECOMMERCE CUSTOMER JOURNEY. START BRANDING THE POST-PURCHASE EXPERIENCE AND DIFFERENTIATE TO WIN**



**THE LENGTH OF DELIVERY TIME, VARIETY OF DELIVERY OPTIONS, TRACKING VISIBILITY AND COMMUNICATIONS, HOW YOUR PRODUCT IS PACKAGED, THE EASE OF EXCHANGES AND RETURNS—IT ALL CONTRIBUTES TO YOUR BRAND PERCEPTION (PROMISES YOU MAKE) AS A WHOLE. MEETING THEM OR FAILING THEM HAS A SIGNIFICANT IMPACT ON YOUR TOP LINE REVENUE.**

**THE IMPORTANCE OF THE POST-PURCHASE BRAND EXPERIENCE IN DEEPENING OR UNDERMINING THE BRAND RELATIONSHIP THAT A CONSUMER HAS WITH A RETAILER IS UNQUESTIONABLE. IT'S INFLUENCE ON THE GROWTH OR DECLINE OF REPEAT CUSTOMERS SEGMENT AS WELL.**



**SO HOW DO YOU TURN THINGS AROUND AND START FOCUSING ON YOUR ECOMMERCE POST-PURCHASE EXPERIENCE TO DRIVE GROWTH?**

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**TO DIFFERENTIATE ONE NEEDS TO KNOW AGAINST WHAT EXACTLY IS ONE DIFFERENTIATING FROM - OR BETTER SAID WHAT ARE THE MARKET AVERAGES ALONG DIMENSIONS OF DIFFERENTIATION. BUT MORE IMPORTANTLY, WHAT ARE THE MARKET IMPLICIT AVERAGE CUSTOMER EXPECTATIONS FROM POST-PURCHASE EXPERIENCE WHICH YOU HAVE TO MEET, JUST TO BE ELIGIBLE TO COMPETE.**

**THE "BASIS OF COMPETITION" IS FORMED BY ALL PRODUCT /SERVICE BENEFITS THAT CUSTOMERS VALUE AND WHERE THEY PERCEIVE A DIFFERENCE BETWEEN COMPETITORS. ON THESE FACTORS, THE BETTER YOU PERFORM, THE HIGHER PREMIUM YOU GET.**



**SO DIGITAL GLOBAL E-COMMERCE BRAND EXCELLENCE PLATFORM ENABLES BRAND & E-COMMERCE PROFESSIONALS TO DEFINE AND IMPLEMENT GROWTH-THROUGH-DIFFERENTIATION STRATEGIES BY IDENTIFYING THE BASIS & DYNAMICS OF COMPETITION WITHIN A MARKET**

**OUR PLATFORM ENABLES COMPETITIVE CROSS INDUSTRY PERFORMANCE BENCHMARKING OF BEST PERFORMING E-RETAILERS ACROSS DIMENSIONS OF ONLINE (POST)PURCHASE EXPERIENCE, INCLUDING BUT NOT LIMITED TO, PHASES OF DELIVERY, TRACKING, PACKAGING - OUT OF BOX EXPERIENCE, AND RETURN & REFUNDS**



**TO START DRIVING YOUR ECOMMERCE GROWTH BY CREATING UNIQUE DIFFERENTIATORS OF POST-PURCHASE EXPERIENCE AS A BUILDING BLOCK OF CUSTOMER LOYALTY CONTACT US TODAY FOR A FREE NO-COMMITMENT ONE-ON-ONE WALK THROUGH OF THE SOLUTION & SERVICE AND USE CLIENT CASE OF NIKE (EMEA).**

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# METHODOLOGY

## PREPARATION

## EXECUTION

## REPORTING

Country Sample  
Selection

Product Ordering  
& Returning

Data Controlling

Representative Retailers  
Sample Selection

Scorecard Answering

Final Data Input

Scorecard Question  
Selection

Input Controlling

Platform Publishing

Researchers Selection  
Onboarding

Researcher  
Controlling

# POST-PURCHASE EVALUATION ELEMENTS

## BEFORE THE "BUY" BUTTON

BEFORE THE ACTUAL CLICK ON "BUY" BUTTON, RESEARCHERS LOOK UP ALL "PROMISED EXPERIENCE" PRODUCT-RELATED INFORMATION ON THE WEBSITE - SUCH AS ESTIMATED LEAD TIME ON CHECK-OUT, POSSIBLE DELIVERY DAYS, PLACE AND AVAILABILITY CHOICE, AND ALSO TRY OUT CROSS-CHANNEL FUNCTIONALITY. AVAILABLE SERVICES LIKE CASH & TRY ON DELIVERY, CANCELLATION WINDOW, SUSTAINABILITY PROMOTION AND PAYMENT OPTIONS ARE CHECKED AND RECORDED. ORDERING PROCESS BEGINS.

## DELIVERY PHASE

ACTUAL DELIVERY TIME AND POSSIBLE ORDER ISSUES ARE TRACKED. COMPARISON TO A "PROMISED" EXPERIENCE BEGINS.

## TRACKING

CONVENIENCE AND VISIBILITY OF TRACKING ORDERS ARE CHECKED. RELIABILITY OF ESTIMATED DELIVERY DATE AND ITS DISPLAY AT CHECKOUT AND IN TRACKING EMAILS ARE COMPARED, AND COMMUNICATIONS ANALYSED - SUCH AS ORDER CONFIRMATION, SHIPMENT AND DELIVERY CONFIRMATION.

## PACKAGING - OUT OF BOX

OUT OF BOX EXPERIENCE, PACKAGING, BRANDING, PRODUCT PRESENTATION, AS WELL AS GIFT WRAPPING AND MESSAGING EXPERIENCES ARE TRACKED ALONGSIDE WITH PHOTOS. SPECIAL PACKAGING, PROMOTIONS AND PERSONALISATION ARE ALL LOOKED INTO.

## RETURNS

EASE OF RETURNS LIKE AVAILABILITY OF DROP OFF POINTS, COLLECT AT HOME OPTION AND EXCHANGE POSSIBILITY, RETURN POLICY, PROCESS AND ITS SIMPLICITY, SEAMLESS RETURNS AS WELL AS RETURN FEES ARE TESTED.

## REFUNDS

REFUND LEAD TIME, AVAILABILITY OF INSTANT REFUNDING AS WELL AS REFUND TRACKING COMMUNICATION ARE RECORDED AND ANALYSED.



**"Buy" Button**



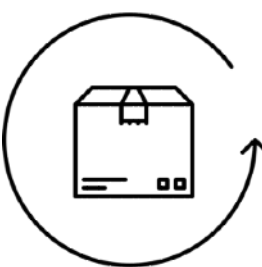
**Delivery**



**Tracking**



**Packaging  
Out of box**



**Returns**



**Refunds**





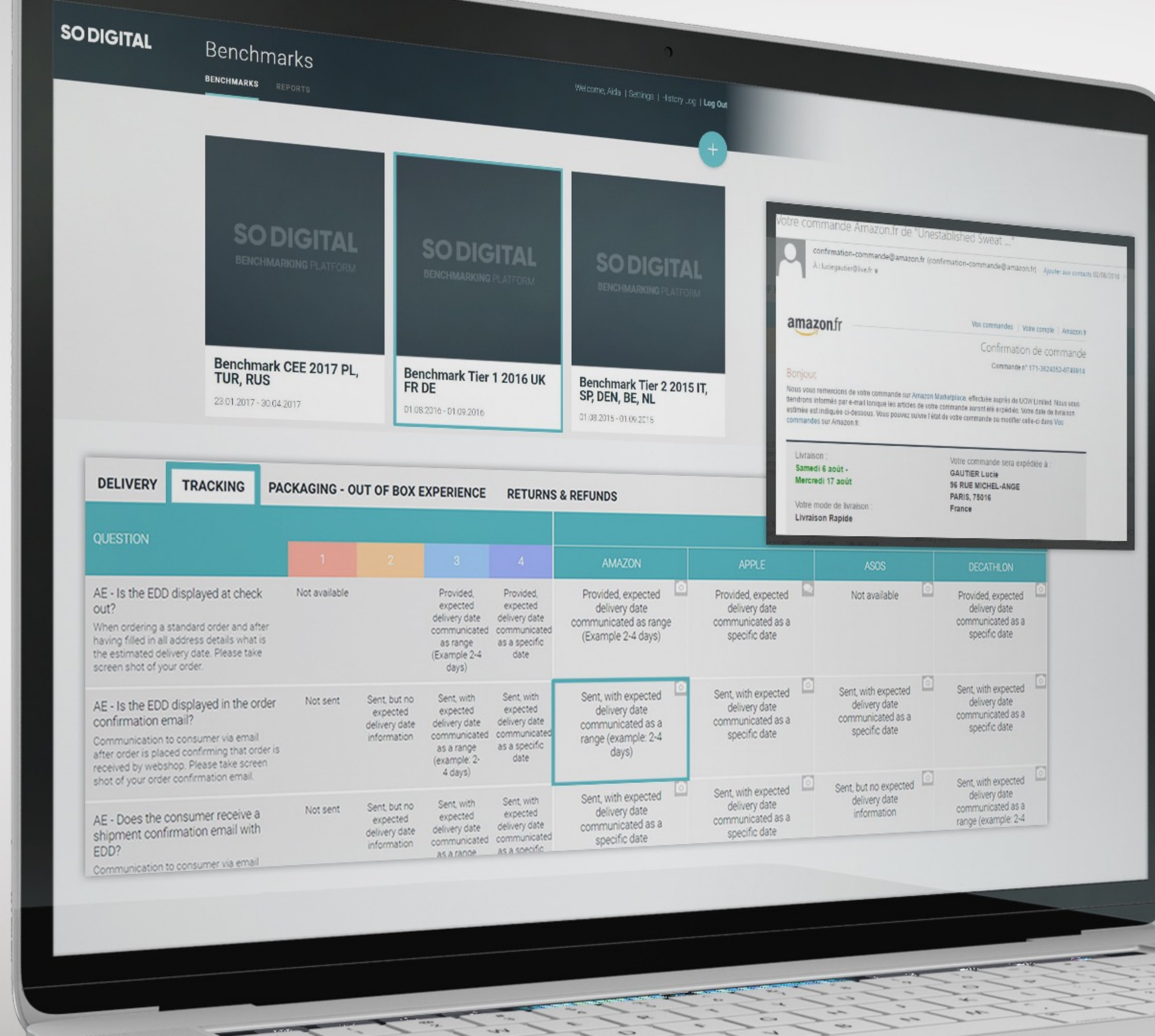


# SCORECARD

PROOFS PROVIDED INCLUDE PHOTOS AND SCREEN SHOTS. PHOTOGRAPHS ARE TAKEN IN THE MOST IMPORTANT ACTUAL EXPERIENCE PHASE - PACKAGING & OUT OF BOX EXPERIENCE PHASE.

IN THIS WAY, CLIENT CAN SEE WHAT THE FIRST PHYSICAL ENCOUNTER OF THE CUSTOMER WITH THEIR PRODUCT LOOKS LIKE - FROM PACKAGING, ACTUAL PRODUCT, TO GIFT WRAP AND MESSAGING.

IN OTHER PHASES, SCREEN SHOTS ARE TAKEN - OF CHECKOUT PAGE, AS WELL AS TRACKING, REFUND AND RETURN COMMUNICATION (EMAILS).





NAME	OWNER	CREATED	LAST UPDATE	ACTIONS
<a href="#">Out of Box Experience - Inner Box Design</a> Benchmark CEE 2017 PL, TUR, RUS	Aida Wolf	20.08.2018 at 18:46	20.08.2018 at 18:46	
<a href="#">Out of Box Experience Germany</a> Benchmark Tier 1 2016 UK, FR, DE	Aida Wolf	15.02.2018 at 19:17	15.02.2018 at 19:17	
<a href="#">Tracking performance in France 2016</a> Benchmark Tier 1 2016 UK, FR, DE	Aida Wolf	15.02.2018 at 19:10	15.02.2018 at 19:10	
<a href="#">Footlocker vs Zalando in Germany</a> Benchmark Tier 1 2016 UK, FR, DE	Aida Wolf	01.02.2018 at 01:43	01.02.2018 at 01:43	
<a href="#">New Report 23.01.2018</a> Benchmark Tier 2 2015 IT, SP, DEN, BE, NL	Aida Wolf	23.01.2018 at 21:39	23.01.2018 at 21:39	
<a href="#">Bol.com</a> Benchmark Tier 2 2015 IT, SP, DEN, BE, NL	Aida Wolf	12.01.2018 at 00:43	12.01.2018 at 00:43	

OUT OF BOX EXPERIENCE GERMANY

**OUTER CARTON/PACKAGING EXPERIENCE**  
What did the outer packaging look like when the order was received? Please photograph.

TOTAL    DETAILS    **PHOTOS**

Germany / Adidas / Undamaged / standard carton

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# REPORTS

PLATFORM USERS ARE ABLE TO INSPECT INDIVIDUAL QUESTIONS AND THEIR PERFORMANCE VIA THE SCORECARD, WHILE MARKET PERFORMANCE INSIGHTS ARE DERIVED FROM THE REPORTS MODULE.

USER CAN CREATE REPORTS ON INDIVIDUAL PHASES OF THE POST-PURCHASE, ACROSS MARKETS, WITHIN INDIVIDUAL MARKETS, AS WELL AS ON THE LEVEL OF INDIVIDUAL RETAILERS.

IN THIS WAY IT'S POSSIBLE TO INSPECT / COMPARE RETAILERS PERFORMANCE ACROSS MARKETS AS WELL AS MARKET'S AVERAGE PERFORMANCES TO DEDUCE RELEVANT INSIGHTS.



# PRICING MODEL

SUBSCRIPTION PACKAGES	BASIC	MEDIUM	PREMIUM	INTERNATIONAL
PLATFORM ACCESS / USERS	2 x	5 x	10 x	15 x
NUMBER OF COUNTRIES	1 x	3 x	5 x	7 x
DATABASE REFRESH PER YEAR	1 x	1 x	2 x	2 x YEAR
TAILORED QUESTIONS (SCORECARD)	X	+ 2000 E PER COUNTRY	+ 1700 E PER COUNTRY	+ 1500 E PER COUNTRY
TAILORED SAMPLE (RETAILERS SELECTION)	X	X	+ 3000 E PER COUNTRY	+ 2500 E PER COUNTRY
PRICE / YEAR	5.000 E	10.000 E	15.000 E	20.000 E

Research solely and exclusively focuses on the **POST-PURCHASE** phase of **E-COMMERCE** shopping/ buying journey. This in effect means we research, measure and provide data points according to the **SCORECARD** about following elements and their characteristics and performance : **Tracking** (options, mechanism) , **Delivery** (policies, options, mechanism), **Packaging and Out of Box Experience** (characteristics of the package, opening experience & presentation, photos included), **Returns & Refunds** (policies and mechanism).

All prices are excluding VAT. Denominated & payable in EUR.  
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 By accepting the offer you accept to abide by them.



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**THANK YOU**