GLOBAL RETAILING IN THE DIGITAL AGE

JEMUEL RIPLEY, ZACHARY PARADIS, HILDING ANDERSON & NATHAN CHMIELEWSKI
The third annual study of retailers’ use of mobile, e-commerce, and in-store experiences

Current state

The retail industry remains poised on a knife’s edge. Dropping foot traffic, new online-only competitors, and profound changes in customer preferences have buffeted the industry for a decade or more. Yet the same technology disrupting retail may also be its salvation. Click and collect in-store. Mobile apps. E-commerce. Instagram. Beacons.

In this, our third annual retail study, we’ve tried to take a fairly comprehensive look at how retailers are responding to this new environment. How effectively are retailers weaving together mobile apps, e-commerce platforms, and in-store innovations? What does the current state of retailing tell us about the future?

Retail stores are seeing roughly half of the foot traffic they saw 6 years ago.\(^1\)

\(^1\) SapientNitro estimates based on data reported by the Wall Street Journal, RetailNext.net, and Shoppertrax.com.

Key findings\(^3\)

- **Four leaders:** This year, we selected four retailers as our leaders, based on the strength and quality of their customer experience. Apple, Sephora, Argos, and Home Depot earned their spots by integrating digital and rethinking their store environments more significantly than any others in our study.

- **Stores are increasingly focused on the entire customer journey,** with new innovations in the pre-visit and post-visit stages. Starbucks' pre-purchase, Walmart's Savings Catcher, and John Lewis' click and collect were notable.

- **Mobile payments continued to be a hot topic** this year, with widespread use in the UK and slower adoption in the U.S.\(^4\) Just three retailers in our study enabled sales associates to check out customers remotely, however.

- **Reimagining the store:** We’re still early in the reinvention of the store. Argos, Sephora, and Apple were among the notables that have truly rethought the store.

Future opportunities

This crucible of consumer change and technology transformation must be met with a similar transformation amongst retailers. For most retailers, the easy steps of pilots, testing, and point solutions are largely done. What is left is more fundamental – retailers must reimagine their business in the age of the customer (see Figure 1).

These steps include rethinking the role of the store, IT operations, merchandising, and even the supply chain. The fundamentals of competition are changing.

For marketers and retailers, this is no longer the challenge of digitalizing retailing. It is the challenge of retailing in a digital age.

---

\(^3\)For full details, see “About our research” at the end of this article.

OUR RESEARCH
Introduction to the research

To assess retailing in the digital age, we studied retailers with physical stores to see how the use of mobile, e-commerce, and in-store technology has evolved (see Figure 2). Our hypothesis was that retailers were already adapting to this changing environment. We wanted to understand how they were adapting and explore how sub-segments (luxury, apparel, mass merchandisers, etc.) have developed and were competing.

We covered four major global cities during the research: New York, Chicago, Toronto, and London (see “About the research” for details).

In reviewing ninety-nine retailers, we, of course, discovered major variances in competitive intent, degree of vision, and quality of execution. There is no one-size-fits-all here, and not every innovation is appropriate for every business. Each marketer has to evaluate the fit to their specific business — to learn from the best and decide what makes the most sense for their needs.

In fact, our big realization is that retailing in the digital age doesn’t mean introducing “digital” (e.g., kiosks or tablets) to the physical space. Instead, it means redefining your entire business around operating in a digital world.

Brands must follow the customer’s journey across touchpoints — only some of which will include digital tools at all. A touchpoint might be defined by a smile or the feel of a linen shirt. A mirror image of you dressed in the new style of the iconic Burberry trench coat. The smell of a store as you enter. Operating in a digital world requires integrating the physical and digital, hand in hand.

Our big realization is that retailing in the digital age doesn’t mean introducing “digital” to the physical space. Instead, it means redefining your entire business around operating in a digital world.

FIGURE 02

We evaluated three categories of retail experiences: mobile, e-commerce, and in-store.

Source: SapientNitro, 2016.
Rules for creating retail experiences

How do you go about defining the best combination of physical and digital for your brand? Our research uncovered five overarching rules to keep in mind when designing the future of your retail experience.

1. Retailers must become more flexible, immersive, and fit for purpose

Digital extensions – a great interactive kiosk, mobile app, or sales associate tool – are no longer enough. Retail brands must reimagine their business in the age of the customer.

Digital transformation is on the agenda of retailers and their boardrooms. According to a 2015 International Data Corporation (IDC) study, nearly two-thirds (64 percent) of Western European retailers are currently undertaking a formal digital transformation program, while a further 21 percent were expected to have started one by the end of 2015. They note that a “race to digitize [is] taking place among the largest retailers in Europe.”

Our research shows that more transformation is sorely needed. If there is one overarching finding from our study it is this: The examples that we saw in market do not go far enough toward rethinking the retail business for the digital age.

Based on our research, we see the top reimagining priorities to be centered around three main questions:

---

1IDC. "64% of Western European Retailers Currently Undergoing Formal Digital Transformation Effort, While Further 21% About to Start by End of the Year, Says IDC." https://www.idc.com/getdoc.jsp?containerId=prUK25829515.
1 HOW CAN YOU IMPROVE FLEXIBILITY?

Retailing in the digital age should be more flexible than in the past. This means omnichannel and visibility; click and collect; mobile ordering; ship-to-home; and all the permutations. Our leaders — Apple, Argos, and Sephora — have all made significant progress in this area (see Figure 3). In the UK, specifically in the cities, click and collect/reserve has been credited with stalling the decline in footfall. In fact, at one leading UK retailer, it accounts for the majority of orders via online platforms.

2 HOW CAN YOU MAKE THE EXPERIENCE MORE IMMERSIVE?

On the less frequent occasions that customers do go to the store, they need to be greeted by great experiences. Museum quality if you’re selling tech hardware. Dynamic changing rooms and great customer service if you’re in apparel. Smaller spaces. Better tools. Faster service.

3 HOW CAN YOU MAKE YOUR RETAILING PROPERTIES FIT FOR PURPOSE?

Retailing properties (mobile, e-commerce, and physical) should be fit for purpose. Retailers in the digital age need inventory, but they don’t need as much inventory. Endless aisle tools, smartphones, visibility of inventory, and sales associates (You do have visibility, right?) all mean more flexibility. Reduce square footage, invest in community events, and make the store and brand be more connected to humans. Look to recent trends in bookstores and banks — fewer, smaller, and more beautiful examples with higher sales per square foot.

FIGURE 03

Sephora’s ColorIQ measures skin color, sets up follow-up purchases of various foundations, and also offers a hands-on experience in the store.

You’ve been matched: the output of the ColorIQ process
Think experience-led and mobile first: Mobile as the gateway to the brand

If experience is the combination of interactions (the tools that you use) and perceptions (how you feel about the brand), then the leaders in our study thought more deeply about both.

We observed multiple techniques to enhance the experiences of guests, as each retailer made choices for their discrete target audience.

Mobile as the gateway to the brand

For most retailers, smartphones are now the gateway to the brand. Mobile is how they start and sustain customer relationships.

Forty-four percent of smartphone-owning U.S. online adults (ages 18+) have used their phone to research products online while shopping in a physical store in the past three months. The most common, reported activities include comparing prices (48 percent), looking up product information (41 percent), and searching for coupons (37 percent).6

It is how people find their local store, explore the inventory, reserve the product that they want (30 percent of Sams Club’s e-commerce sales in 2015 involved in-store pickup), and, increasingly, pay for their products.7 Mobile is now a primary touchpoint for retailers.

In our study, we commonly noted barcode scanners (to pull up reviews/ratings and place orders), store locators, the ability to shop (m-commerce), and wish list/save-for-later features (see Figure 4). Top-scoring retailers are pushing the boundaries even further with voice capabilities, image search, live chat, and mobile in-store maps.

FIGURE 04

With a buy button on more digital platforms, m-commerce is more widespread than ever.

---

Among grocers, Walmart packs an industry-leading mobile app with notable tools including the Savings Catcher, items’ aisle locations, pharmacies, registries, wish lists, weekly ads and rollbacks, m-commerce with click and collect, and Apple Watch support for grocery lists. Waitrose has taken a contrasting approach to Walmart with a single-task mobile app. The “Pick Your Own Offers” mobile app puts the customer in control of couponing: Customers choose ten items to link to their myWaitrose card and automatically save 20 percent every time they buy them, both in-store and online.

In North America, features like Macy’s image search, Home Depot’s voice-based search, and Apple’s EasyPay make the phone a more powerful tool in the store, and reduce the workload in-store (see Figure 5).

In the UK, we found fewer smartphone innovations. Waitrose and John Lewis impressed with their mobile payment app and “price match claim request,” respectively, discussed elsewhere. Waitrose, Marks & Spencer, and Boots all supported Apple Pay.

---

**FIGURE 05**

Mobile is becoming an essential channel in the store, with image search, wayfinding, mobile payments, and voice-based search being offered. As we’ll see in later sections, it is also a key channel pre- and post-visit.
Mobile payments

Both retailers and mobile providers are entering the mobile payment space. We noted a few stores which offer their own payment technologies — Neiman Marcus, Apple, and Starbucks, for example. In the UK, the touch-to-pay function (NFC) for small purchases under thirty pounds was nearly ubiquitous in London.

And mobile payments are growing more widespread. By 2018, IDC predicts that 60 percent of omnichannel retailers will have launched customer mobile payment initiatives.9

According to NFC World, over 10 percent of UK card payments are contactless, up over 300 percent from the previous year.10 Grocery in the UK leads the way, with 30 percent of all transactions paid through some form of contactless payment.11 According to research from Barclaycard, one in three merchants in the UK accepts contactless payments.

Contactless payment options in the U.S. are just being introduced by the likes of Apple Pay and Samsung Pay, but banks and retailers have yet to buy in – only 23 percent of big box retailers offer Apple Pay in-store.12

---

10Ibid.
Walmart recently introduced “Walmart Pay,” a new feature on their existing app that lets shoppers pay in-store using their smartphones – replacing a traditional credit card swipe or writing a check.13 Joining Apple, Samsung, PayPal, and Google, Walmart is positioning itself for a stake in the growing U.S. mobile payment market, which, according to Forrester Research, is anticipated to handle $142 billion in transactions by 2019.14

We also saw some new innovations in payments. Neiman Marcus’s app offers a QR code feature, linked to an existing card or account, which allows you to use your smartphone to check out (see Figure 6). And effective use of mobile payments by Apple and Sephora helped bolster their scores.

Sales-associate-based mobile check-out in the U.S. was also noted, but only at Apple, Sephora, and Neiman Marcus (see Figure 7).

In the UK, the story is more compelling. Self-checkout is now common across all supermarkets in the UK and also in home improvement stores, large news agents, and chemists/pharmacies. Leaders in our study include Tesco, Argos, John Lewis, and Waitrose (see Figure 8).

Sephora offers a clienteling app, allowing sales associates to check out customers in the aisle.

Argos – a UK variety store – replaced their traditional catalogs with tablets and enabled mobile-based payments for click-and-collect.

---

Experience-led, community-oriented, and subtly enhanced by digital

In our study, it was clear that the store has become, in turns, a distribution hub, customer service zone, training area, and community spot. Stores are being reconceptualized. For example, Waitrose is the click and collect leader in the UK. Microsoft and Samsung stores offer training areas and customer service (as well as a bar, in Samsung’s case). Under Armour has a treadmill and jump zone to let you try out their shoes and outfits on the move. H&M even has a virtual runway that lets you strut in front of cameras and a green screen, and then lets you post the finished product online. Increasingly, new experience-led versions of stores are being built within the context of the digital age.

Community orientation was also evident. Samsung, in its store in New York’s Village, has a “kids section” with a low table, comfortable seats, and apps preloaded on their devices (see Figure 9).

Digital should be a subtle experience enhancer, rather than “in your face” screens and kiosks. For example, Sephora’s use of beacons — one of the few in our study — is done well. Warby Parker’s only digital solution — their photobooth — provides entertainment, drives mobile activity, and adds to the try-on and store experience.

In the end, retailers are growing wiser in their investments into the customer experience. Gone are the “Me-Ality” full-body scanners that occupied valuable floor space.

Retail should be the center of your customers’ passion points (see Figure 10). Provide the customers more reasons to increase their dwell time.

Samsung/Best Buy virtual reality promotion

For example, in our testing, Best Buy’s Gear VR demo (left image) was unavailable in our first three visits to stores. And, when we did ultimately sit down with the headset, several elements were missing: no secondary screen (for friends to watch the headset video), a non-swiveling chair, and a lack of separation from the noisy environment. The Samsung store (right image) had all of these elements, which resulted in a better experience.
Focus on the full customer journey

By broadening the aperture of experience beyond its traditional focus in retail – the store – leading brands are creating a new competitive battleground and winning sales before someone even arrives at a physical property (see Figure 11).

According to Forrester, 41 percent of U.S. online adults (ages 18+) discovered a retail product that they recently purchased through an online source. And 68 percent of online adults who did research prior to a recent purchase used two or more sources of information in the process.15

And these customers are more valuable. According to a study by IDC, omni-channel shoppers have a 30 percent higher lifetime value than those who shop using only one channel.16

Pre-visit

Starbucks was a highlight of capturing pre-visit sales. Pre-orders (with their “Mobile Order and Pay” app) account for 10 percent of all U.S. store transactions, jumping to 20 percent of transactions during peak hours.17 Twenty-four percent of all transactions are paid using Starbucks’ mobile app.16 This presents multiple benefits: reduced wait time for the customer, higher throughput, and improved working capital for the store. It also buttresses their loyalty program.

Starbucks is not alone in this, however. About one-third of U.S. retailers covered in the study have click and collect (BOPIS/ROPIS), while about three-quarters of the UK retailers that we reviewed had click and collect (see Figure 12). Click and collect is practically ubiquitous in UK, with retailers investing in operations for next-day pickup (e.g., at TopShop, order in-store by 5 PM and pick up from 12 PM the next day; or at John Lewis, order by 8 PM and collect after 2 PM the next day).

Pre-visit

Starbucks was a highlight of capturing pre-visit sales. Pre-orders (with their “Mobile Order and Pay” app) account for 10 percent of all U.S. store transactions, jumping to 20 percent of transactions during peak hours.17 Twenty-four percent of all transactions are paid using Starbucks’ mobile app.16 This presents multiple benefits: reduced wait time for the customer, higher throughput, and improved working capital for the store. It also buttresses their loyalty program.

Starbucks is not alone in this, however. About one-third of U.S. retailers covered in the study have click and collect (BOPIS/ROPIS), while about three-quarters of the UK retailers that we reviewed had click and collect (see Figure 12). Click and collect is practically ubiquitous in UK, with retailers investing in operations for next-day pickup (e.g., at TopShop, order in-store by 5 PM and pick up from 12 PM the next day; or at John Lewis, order by 8 PM and collect after 2 PM the next day).

As we noted earlier, click and collect has been credited with forestalling a decline in footfall in major UK cities. Click and collect accounts for a majority of orders placed via online platforms at one large retail store, as well as helps drive revenue growth, according to Matt Bradbeer, UK Retail Executive.

Over the past two years, there have been signs of similar levels of investment by U.S. retailers. In 2015, Target invested $1 billion in strengthening its e-commerce offerings, which include everything from grocery delivery, to ship from store, and click and collect.20 Home Depot claims that over 40 percent of online sales involves physical stores.21 Walmart’s click and collect was used the most during the holiday period in the U.S., followed by Best Buy, Target, Kmart, and Macy’s.22

Yet, by some measures, North American stores underperformed with their pre-purchase experiences during the latest holiday season (2015-2016). One study found that 50 percent of those who opted to buy online and pick up in store encountered problems in 2015.23 Throughout our study, we witnessed this first-hand. Missing signage, poorly organized, poorly located, and too-small pickup rooms were common – at least in some stores. Click and collect only works if stores are ready for it (see Figure 13).

---

Try-on and tryout option innovation

Another pre-visit aspect is try-on. Innovative examples include Warby Parker’s Home Try-on program – which is also one of the best advertising platforms for the brand. It lets customers try on five pairs of eyeglasses at home, and encourages them to post images of their experiences on social networks. Trunk Club enables an in-person meeting with your personal stylist, but also has a video conferencing option. BMW’s i3 Extended Test Drive extends the period you can try your new car on the roads you know best, thereby matching Tesla’s offer.

Post-visit innovation

But even more important, in our opinion, is post-visit activity. This is important because it drives repeat visits from someone who is a known purchaser, and adds value for both the customer and the store.

Post-visit, we saw innovation in our study from three companies in particular – the UK’s John Lewis price match claim in their mobile app, Target with their Cartwheel App, and Walmart with the Savings Catcher (see Figure 14).

The Savings Catcher app lets you scan your receipt with your mobile phone camera, and Walmart will automatically send you a gift card (that can only be used at Walmart) with the difference in price between what you paid and any lower price offered by competitors in the area. It has generated over $2M in customer savings and also collected a wealth of customer data. This supports the retailer’s low price positioning and drives increased store foot traffic.

Neiman Marcus also impressed in the post-visit phase with its mobile app. The app identifies sales associates with FaceTime, email, text, and voice options for immediate contact (see Figure 15). Again, making it easy for someone to restart the purchase process.

Designing for the post-visit stage of the journey – whether with follow-up emails, texts, savings catchers, or other communications – is a significant opportunity missed, or poorly executed, by many retailers in our study. And since it requires close coordination across all three of the core channels – mobile, e-commerce, and in-store – it is an excellent measure of whether a firm has embraced digital-at-the-core in its operations.

FIGURE 14

John Lewis’ “Never Knowingly Undersold” promise extends to their mobile app with a feature that allows customers to submit a request for matching another retailer’s price for an item. The competing retailer must have a high-street shop, and cannot be online only (no price-matching Amazon).

FIGURE 15

Neiman Marcus’ mobile app provides visibility into employees at your local store. You can FaceTime, text, email, or call them during their working hours.

---

Move from data and reports to intelligence about performance and your customers

A fourth area of innovation is the growth of new instrumented sensors. These sensors are used to optimize endcap performance and overall traffic flow throughout the store (typically monitored via infrared) (see Figure 16).

In fact, a March 2016 Forrester Report noted that in-store analytics “are gaining a foothold.” Indeed, technology firm Brickstream noted that 71 percent of retailers said that they use or plan to use people-counting technology in their stores, while 68 percent said that they are looking to introduce in-store Wi-Fi and loyalty systems.

---


Facial recognition (which can reliably identify gender and age) carts with GPS trackers, and smartphone monitoring systems are additional inputs into a network of measurement and analytics (see Figure 17).

In our study, the only obvious examples of data and analytical awareness occurred during our visits to Apple and Sephora – both welcomed the visitor to the store on their mobile phones and prompted the use of the beacon technology. We saw no examples in the UK.

All told, these sensors can generate huge quantities of performance and analytics data. For example, the evaluation of these data can lead to major revisions in an understanding of customer behavior. Executives might find that store dwell time was significantly different than they thought, or that smartphone usage was primarily for entertainment, not “showrooming,” or that it was used primarily as a communication tool.

These and other insights can lead brands to increase (or decrease) investment into mobile apps, as well as in-store use of digital endcaps (see Figure 18).

Retail in the digital age requires optimization of store environments.

SapientNitro’s IONOS solution combines in-venue wayfinding with real-time analytics, facial recognition, and touch-screen functionality.

Optimization of store layouts and flow using real-time analytics is now possible and affordable. In one study, an innovative endcap received fewer visits, but had 10 times the total dwell time than the adjacent, unlit endcap.
Keep in mind that stores are far from irrelevant

Our study confirmed that the role of the store is changing. And you can’t contemplate the changing retail environment without noting Amazon and its recent opening of digitally-enhanced bookstores.

Innovations in store format

One of the big surprises from brands in our study was that online pure-play leaders – Bonobos, Warby Parker, and Trunk Club – didn’t weave together their physical and digital experiences. For example, none offer click and collect functions or in-store inventory visibility.

In the UK, we saw in-store innovations from mass merchandiser Argos, which is in the process of revitalizing its 700+ stores with tablets replacing traditional print catalogs, LED screens placed on the walls for dynamic signage, and dedicated counters for fast click and collect service. Argos delivers larger “hub” store stock to nearby smaller stores, enabling customer access to the full range of stock in a few hours or overnight.

A second example in the UK was Made.com, a furniture showroom, which includes Instagram-ready markers on the floor, self-service tablets with scanners for in-store shopping, and the collection of emails through the tablet tool (see Figure 19).
In addition, projectors are used for in-store signage, the store has a startup feel (with glass walls to peer behind the scenes at Made.com employees), and private consulting rooms are available.

The Samsung pop-up shop in the UK's Westfield Mall ably showcases future technology with hands-on demonstrations of mobile, virtual reality (VR), and wearables. They offer Gear VR roller coaster, ski jump, and surfing sections. A premium experience with white-gloved employees allows try-on of wearables and experimentation with mobile devices (see Figure 20).

Bonobos' mobile experience, on the other hand, is a responsive website, not an app, preventing any in-store functions. In addition, the Bonobos store checkout was handled through their consumer e-commerce site on a standard Apple laptop placed on a table.

Is this due to a belief that those experiences aren't relevant? Or reflective of the difficulty in getting them right? Or maybe they’re more in tune with the needs of the Millennial shopper. (If this is the case, it suggests a bleak world indeed for stores with large physical locations.)

On balance, we believe the cause to be that retailers have only just started to develop their in-store channels. The value of the store experience – tactile engagement, a full 360-degree experience, and of course a sales force – makes it a difficult channel to replace or shut off. In fact, retailers in our study are seeing more uses in more ways than ever before: human interaction, tactile engagement, entertainment, and fulfillment flexibility (see Figure 21). Stores remain just a part of the total retail experience. Great companies are broadening the aperture of experience.
Conclusion

Retailers are on the verge. Too few retailers successfully blend the three main channels — mobile, e-commerce, and stores — together in a way that is optimized for customer experience.

Instead, like many legacy organizations, retailers have focused on point solutions and worked within channel silos.

The time for this type of thinking has passed. Retailers must now consider a wholesale reimagining of their business. To succeed over the next decade, retailers must fundamentally transform themselves, touching every area from organizational structure to the products and services that they offer.

Our research reveals five main points: The need for a vision of a future retailer; the importance of mobile; the opportunities in the pre- and post-visit phases of the purchase cycle; the importance of analytics and optimization; and, finally, the continued, central role of the physical store.

The brands that succeed in this environment will be the ones that transition and evolve quickly enough to get ahead of the changes in their core business.

About the research

The intent of this survey was to evaluate the full retail experience created by major U.S., Canadian, and UK retailers. To what extent were they offering an effective and intertwined customer platform for business in the digital age?

To that end, we conducted unannounced visits to online, mobile, and in-store properties of ninety-nine U.S., UK, and Canadian retailers. We audited English-language mobile apps and websites, stores in at least one location, and primarily flagship stores in London, New York City, Chicago, and Toronto. The research was conducted over a full year, starting in the second half of 2015 and concluding in the first half of 2016.

We evaluated three main areas: mobile app effectiveness overall and in-store (25 percent of the weighting), the store experience (55 percent), and e-commerce effectiveness (including click and collect, and ratings and reviews) (20 percent) to determine our top performing brands overall.

We also compared our results to our previous evaluations conducted in 2012 and 2013.
Jemuel Ripley  
Vice President, Global Retail Lead, SapientNitro New York  
jem@apient.com  
Jem is responsible for driving key sector initiatives that include retail innovation, original research, talent development, and strategies that guide retailers as they navigate uncertainty, compete globally, and connect always-on consumers to their brands.

Zachary Jean Paradis  
Vice President Retail Strategy, SapientNitro Chicago  
zparadis@apient.com  
Zachary is a strategist, professor, and writer obsessed with transforming lives through customer experience. He acts as co-lead for the firm’s Experience Strategy domain, supports the company’s innovation efforts, and teaches at the IIT Institute of Design.

Hilding Anderson  
Director Research & Insights, SapientNitro Washington, D.C.  
handerson@apient.com  
Hilding is the Editor-in-Chief of Insights, and a Director of Research and Insights at SapientNitro. He helps set the thought leadership agenda across the agency, and advises global clients on emerging trends.

Nathan Chmielewski  
Senior Associate, Research and Insights, SapientNitro Chicago  
nchmielewski@apient.com  
Nate is a researcher focused on customers’ interactions with brands across all touchpoints. He connects experience, secondary research, and social insights to understand consumer behavior and brand positioning, and identify opportunities to improve the customer experience.

INSIGHTS ON THE GO

For additional interactive and related content download the SapientNitro Insights App. It features all the same provocative thinking from thought leaders – and more – to your on-the-go fingertips.

SapientNitro®, an active element of Publicis.Sapient, is a trusted advisor to clients looking to imagine new business models, new services and new possibilities for the age of the customer – driven by the power of technology. Our capabilities across brand and marketing; sales and service; technology and operations and deep industry expertise allows us to drive drive measurable business impact for today’s leading brands by putting customer experience at the heart of their organization. For more information, visit www.sapientnitro.com.

SapientNitro and Storyscaping are registered service marks of Sapient Corporation.