

# SHEARED



**Counting Sheep for  
Omnichannel Accountability**



**This is  
book #3?**

**Three's  
a crowd...**

A large crowd of white cartoon sheep with fluffy wool and simple faces, standing on a green field. A speech bubble is positioned in the upper center of the image.

**We're way past  
a crowd... more  
like a herd!**

**Dedicated to the ones  
who got away...**

**and GO FURTH,➤R**



# By now, no one can ignore eCommerce or its influence on sales and share growth...

That's old news...

Accounting for

**63%**

of chain retail growth

**39%**

of chain retail sales

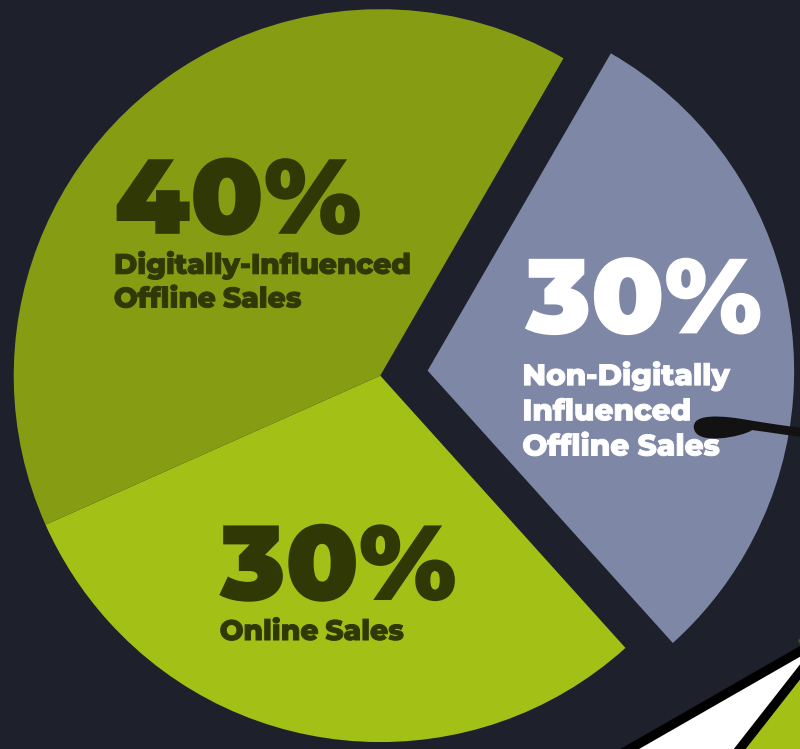
by 2026





# 70%

of sales will be digitally influenced by 2027.



I'd argue closer to 100% because retail merchants are starting to build in-store planograms based on online sales velocity.



**Yet, despite that winning  
in eCommerce is becoming  
a leading indicator of  
winning in Commerce,  
some leaders were not  
taking action,  
behaving more like  
**SHEEP...****



**And that was baaa-d...**

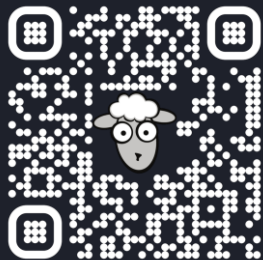


And so, about two years ago, we starting publishing our SHEARED eBook trilogy calling “a sheep a sheep” and spotlighting:

- ▶ The “baaa-d” behaviors holding us back from digital transformation
- ▶ The true root causes for these sheep-like behaviors “fencing” us in
- ▶ The 8 factors for effective change to help our organizations “hop the fence” of change for long-term growth



As featured in **Forbes**



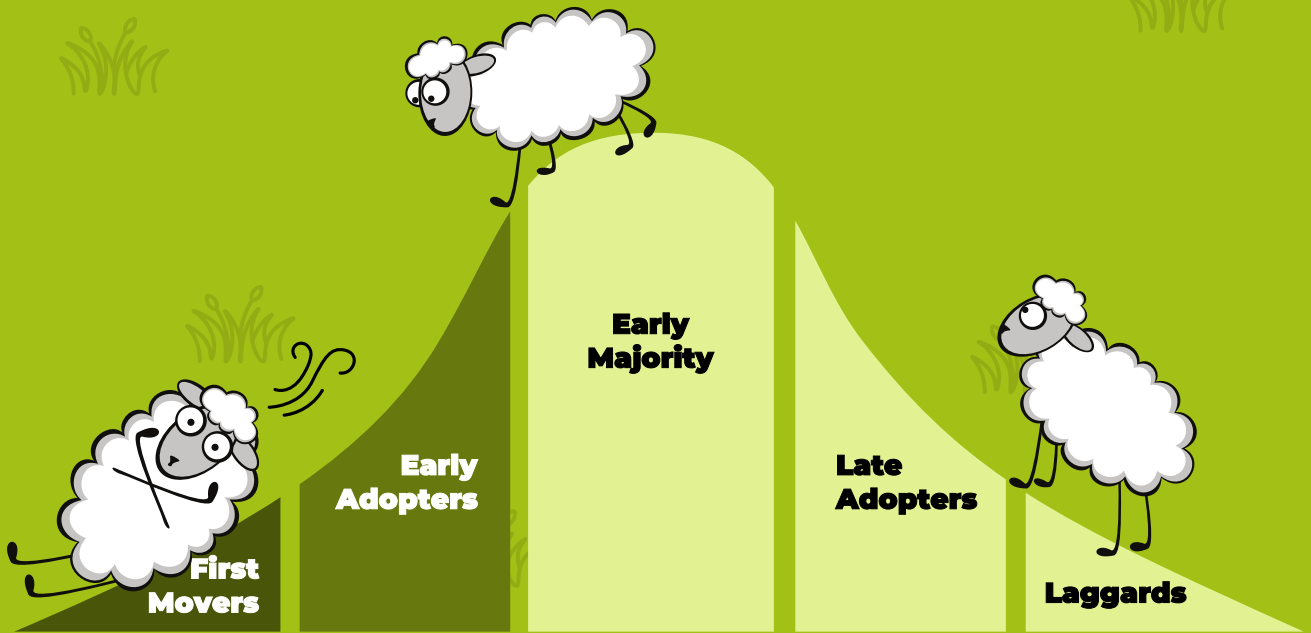
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**We've seen a lot of progress over two years.**

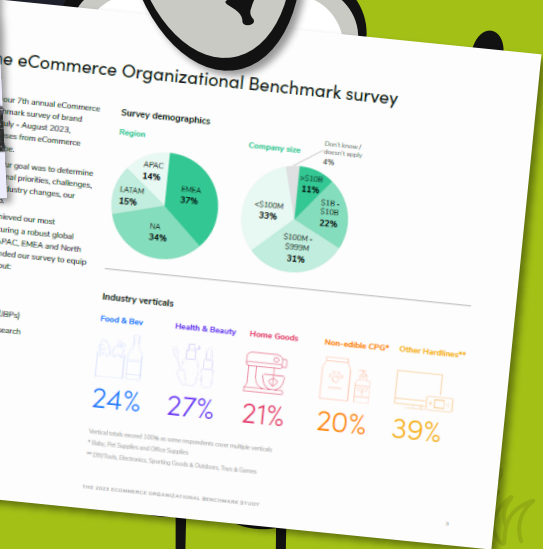


**More leaders and organizations have been “jumping the fence” of omni transformation.**



In fact, for the 7th consecutive year,  Profitero published the results of its **eCommerce Organizational Benchmark Study** to learn where companies are advancing in eCommerce vs. falling short of the mark.

**\*SPOILER\***  
The “e” in eCommerce is becoming silent...



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**Many first movers are  
“shedding their coats” of  
corporate conformity...**

**...going – dare  
we say it –  
Corporate  
Commando...**

Sir, yes sir!





However, there's still a lot  
more progress to make...

Some orgs  
need to do **more**  
In new areas

Some orgs need  
to do **better** in  
current areas

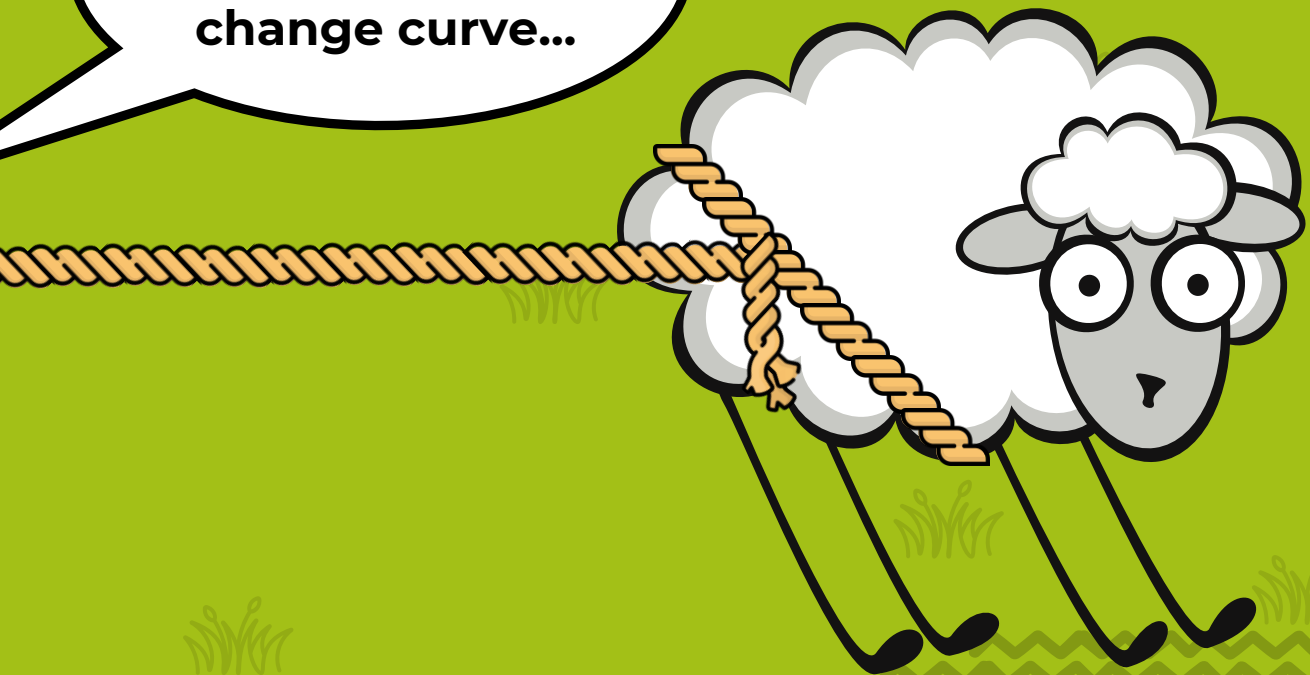
Some orgs just  
need to **start** in  
any area...





**We're not satisfied  
until everyone breaks  
free from the herd.**

Sorry, no leader  
left behind the  
change curve...





**And now because  
eCommerce has  
started to mature...**



**Mature? What ever  
do you mean?**

**...we can't just  
keep doing  
what we've  
been doing.**

**We need to  
change what  
we do.**



**If we want to change  
what we do and how  
we're performing,**

**we must change what  
and how we measure.**

**We must start  
counting  
sheep...**

**Count?!!  
I don't even  
have fingers!**





Before we start counting sheep...  
**what is still holding  
us baaa-ck?**







1

**Measurement**  
(Accountability)

2

**Me-asurement**  
(Professional Vanity)

# 1

## Measurement

# “You are what you measure.”

By focusing on shorter-term metrics, many CPGs have enabled the “baaa-d behaviors” we discussed in our first eBook.

- **Silos**
- **Shortsightedness**
- **Risk Aversion**
- **Bureaucracy**

**And less accountability.**

A cartoon illustration of a sheep with a large, white, fluffy body and a grey face. The sheep has large, wide eyes and a small black nose. It is holding a black pointer stick in its right hand. A speech bubble originates from the sheep's mouth, containing the text: "It's 'Ewe'.. You might want to Spell Check." The background is a dark blue-grey color with a jagged, torn-paper-like edge on the right side, revealing a bright green background behind it. In the top right corner of the green background, there are two white arrows pointing to the right.

It's “**Ewe**”..  
You might want  
to Spell Check.

# 2

## Me-asurement



**“Ewe aren’t the only *what* you should measure.”**

**In our bureaucratic workplaces with limited measurement and accountability, some “old” leaders focused on measuring themselves and succeeded due to efficiency and relationships VS. true effectiveness, foresight and merit.**



**Now, *ewe*’re getting it!**

**These leaders can pose great risk to an organization when navigating through tough times as they *aren’t practiced.***

# 2 Me-asurement



**“Ewe aren’t the only *what* you should measure.”**

But eCommerce leaders aren’t only focused on themselves, right?

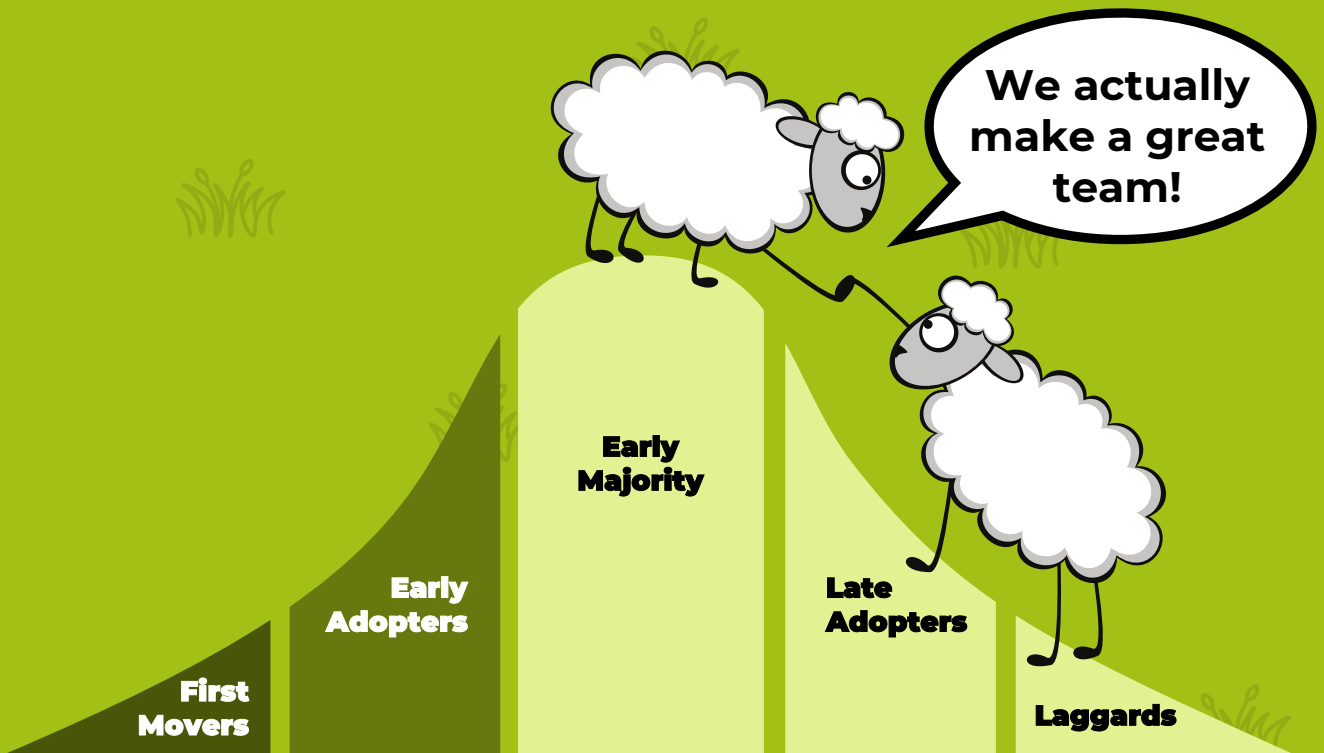
**There are always some egos, but it’s more that most “new” eCommerce leaders are skilled at managing commercial ambiguity as consultative thought leaders, but aren’t all prepared to manage maturity.**

**These leaders can also pose great risk when asked to lead an organization through tough times as they too aren’t practiced.**





**What we need now are the  
“old” and “new” leaders  
to integrate and align our metrics  
so that we can manage maturity  
and lead omni change together...**



# Successful omni change starts by counting ~~sheep~~ 8 factors

*Expanded and Updated*



**Executive  
Commitment**



**Focused  
Leadership**



**Ambitious  
Vision**



**SMARTER  
Strategy + Goals**



**Resources  
+ Investment**



**Communication  
+ Assessment**



**Education, Skills  
+ Capabilities**



**Organizational  
Enablement**





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**Change must start at the top with eCommerce not just stated but **actioned** as a top priority publicly and internally.**

I plan to the say the word "omni" at least 10 times at CAGNY...

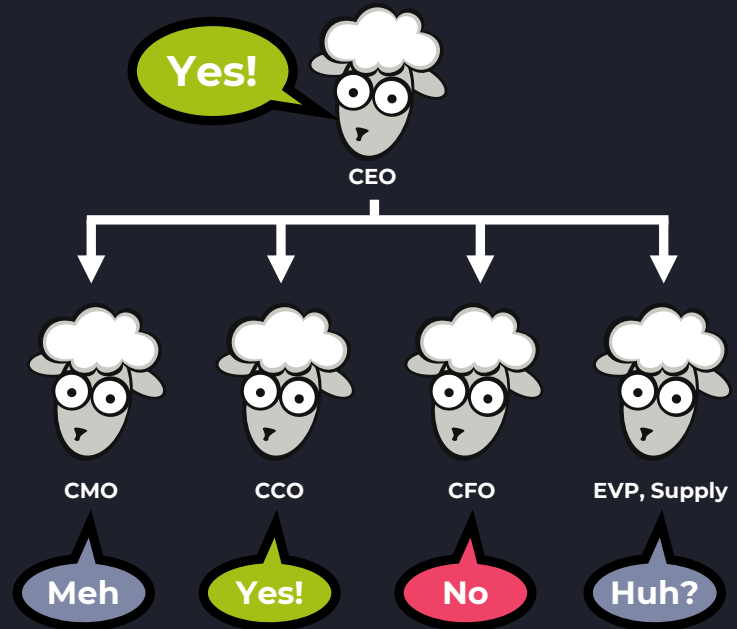


You going to do "omni," too?





**But this MUST extend to and from ALL executive leaders, NOT just the CEO!**



**\*Especially if they own the P&L's.**

**Executive Commitment**

Focused Leadership

Ambitious Vision

SMARTER Strategy + Goals

Resources + Investment

Communication + Assessment

Education, Skills + Capabilities

Organizational Enablement





**Focused leadership and talent assigned to new and evolving strategies will always be the next step to success.**



**43%**

**of orgs reported assigning dedicated Category Managers.**



**41%**

**of orgs reported assigning dedicated Strategy Managers.**



**39%**

**of orgs reported assigning dedicated Omni Sales Managers.**



**Executive Commitment**



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**Education, Skills + Capabilities**



**Organizational Enablement**





# Team structures are evolving, too...

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Leadership and talent focused on key eCommerce functions are critical, but how you structure matters, too!

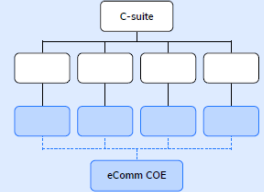


Q: Which best describes the structure of your eCommerce team?

Source: Profitero 2023 eCommerce Benchmark Survey

### Democratized team

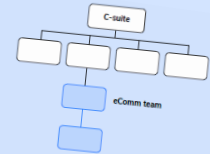
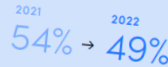
eComm roles are dispersed across the organization, often supported by an eComm Center of Excellence (COE).



## VS.

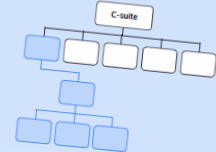
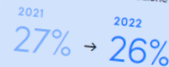
### The embedded team

Relatively small team, reporting up through a single function, likely Sales or Marketing.



### The sidecar

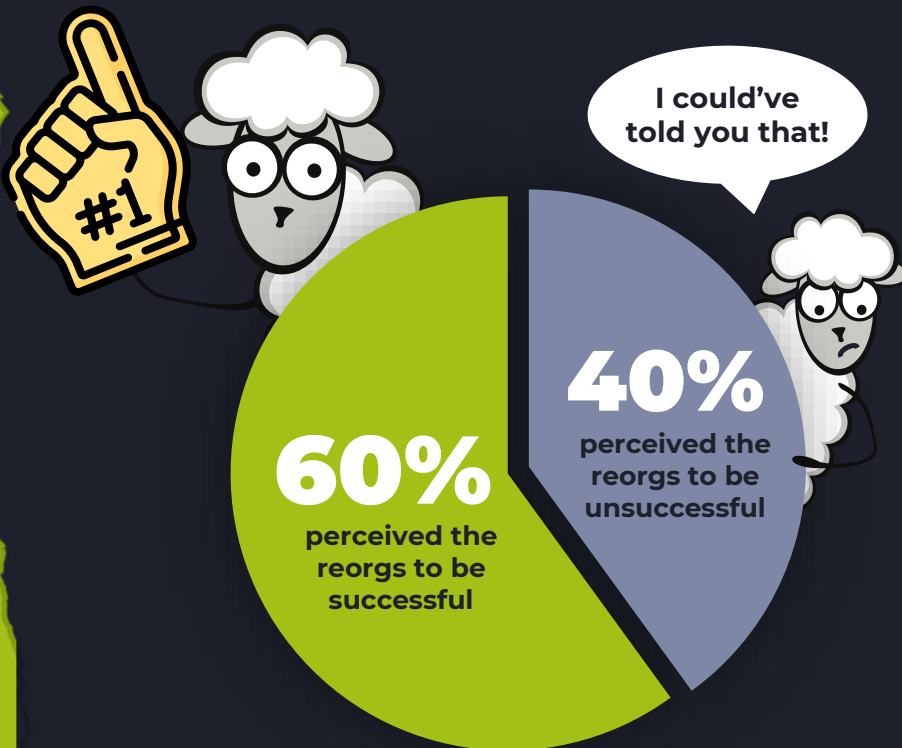
Team made up of multiple functions (i.e. Sales, Marketing, Supply Chain, etc.) operating as a standalone unit.





# 63%

reported 1-2 company reorgs related to eCommerce in the past two years



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**Most execs tops-down the vision goal and don't ensure the building blocks to achieve.**

**Them: "We are transforming into a digital-first organization."**

**Us: "Great...how?"**

**Them: "We will achieve \$4B in eCommerce net sales by 2026."**

**Us: "Cool...is that good?"**

**How about?**

**Them: "We would like to be within arms distance of desire by 2030. Based on trends and dynamics, for that to be true, we must achieve \$XB in incremental growth via a) eCategory management, b) exclusive online only portfolio development across our top 5 retailers, c) innovation in sustainability, d) social commerce integration and e) Y% increase in retail media iROAS YoY."**

**Us: "You had us at incremental..."**



# Growth is NOT a strategy. Growth is the goal based on a strategy enabled by capabilities.

Likely as a result, only

# 15%

of orgs feel their  
strategy has pulled  
them ahead of the  
curve vs. competition  
**-2% over last 2 years**

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It's *actually* pronounced  
**STRATEGY...**

And requires not just the  
levers (a.k.a. "how"), but  
also the intentional  
incremental growth goal  
(a.k.a. "why")





**Brands must establish goals leveraging their capabilities behind SMARTER Growth Strategies and their bottoms-up building blocks.**

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Those NEW Category Managers could really help here! And so can **firstmovr**



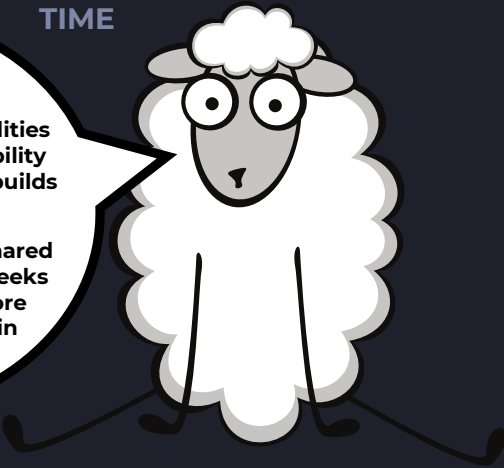


# eCommerce success requires a **Pull Strategy** with new complexities.



Brands must invest upfront in media and capabilities to drive conversion and visibility online. Over time, inventory builds as demand pulls.

But NOW with more store-shared inventory and lower retail weeks on hand, we need even more resources and supply chain capabilities!



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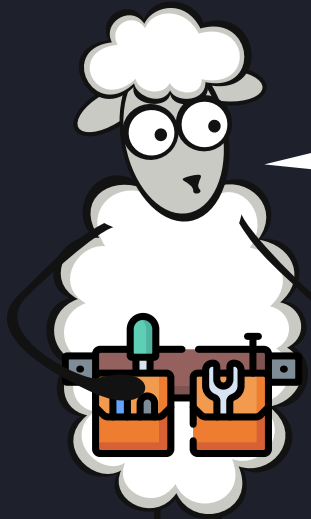


**Unsurprisingly with the increased prioritization around eCommerce, Brands are substantially increasing investment in 3<sup>rd</sup> party solutions, data and services to support their growth.**

To which of the following is your company allocating budget to support eCommerce?



■ Data ■ Tools ■ Agencies



**Despite all the HGTV I watch, it's often wise to hire a professional...**





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**We are what we measure,  
and leading brands are  
maturing their measurement  
of all eCommerce levers:**

**>50%**



**of brands are actively tracking  
the digital shelf and have resources  
and processes to rapidly optimize  
and tie to outcomes.**

**>30%**



**of brands are tracking and  
optimizing retail search on daily  
or weekly basis.**



But there is still

**30%**

**of brands who have articulated eCommerce as a strategic priority but do not have measurable goals in place to track or communicate to the organization**



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Strategy + Goals



Resources  
+ Investment



**Communication  
+ Assessment**



Education, Skills  
+ Capabilities

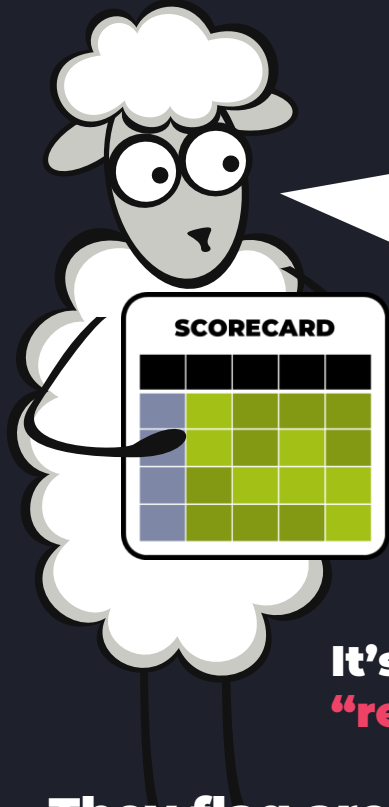


Organizational  
Enablement





**And as we communicate, we must make sure we don't become a "Good News Only" Company.**



Our digital shelf scores are amazing!  
Why are still we losing share?

It's okay to have some "reds" and "yellows"...

**They flag areas of opportunity, prompt investment and focus, AND show that we've set our benchmarks high enough.**

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# We must be leading the “eCommerce agenda” with our JBPs...

## ...OR we soon won't be on their agenda.



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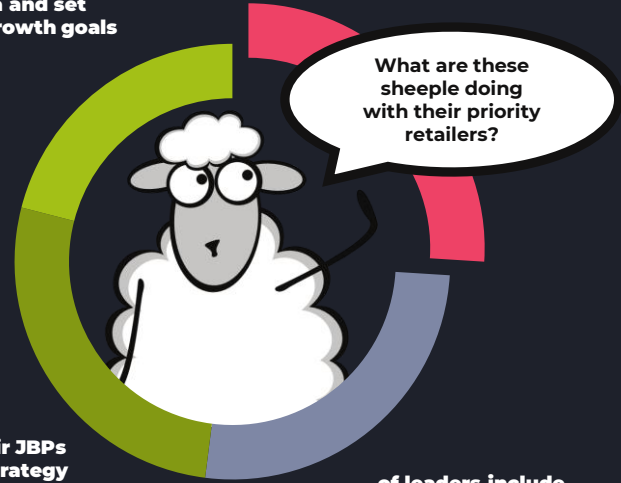
### 21%

of leaders include eCommerce in their JBPs as an integrated strategy, share data and set specific growth goals

### 26%

?????

What are these sheeple doing with their priority retailers?



### 27%

of leaders include eCommerce in their JBPs as an integrated strategy and share data and insights

### 26%

of leaders include eCommerce in their JBPs but only sparingly and not as integrated strategy



I know how to prep the teams for the future!  
**Let's offer 4 voluntary 60-minute webinars.**

**While quantity is not quality, orgs will need robust training and certification programs to accelerate omnichannel knowledge.**



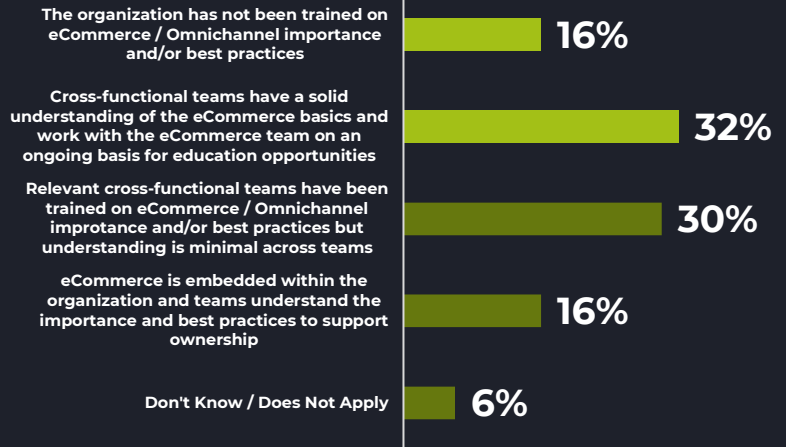
 **firstmovr**  
can help most places,  
*BUT definitely here.*

- Executive Commitment
- Focused Leadership
- Ambitious Vision
- SMARTER Strategy + Goals
- Resources + Investment
- Communication + Assessment
- Education, Skills + Capabilities**
- Organization Enablement



# Some organizations have launched upskilling efforts, but it's not "one and done" and requires embedding this knowledge more frequently and deeply across teams and workflows.

In the area of eCommerce & Omnichannel Education, how would you describe your organization's eCommerce capabilities / approach?



Mom? Dad?  
I think I'm gonna need that 5<sup>th</sup> year at college...



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# “You are what you measure.”

Going back to the first of the biggest barriers ahead of us,

## 1 Measurement (Accountability)

the way to enable your organization for eCommerce (or any change for that matter) is to hold everyone (*NOT just the eComm Team*) accountable to the “change” metrics that matter.



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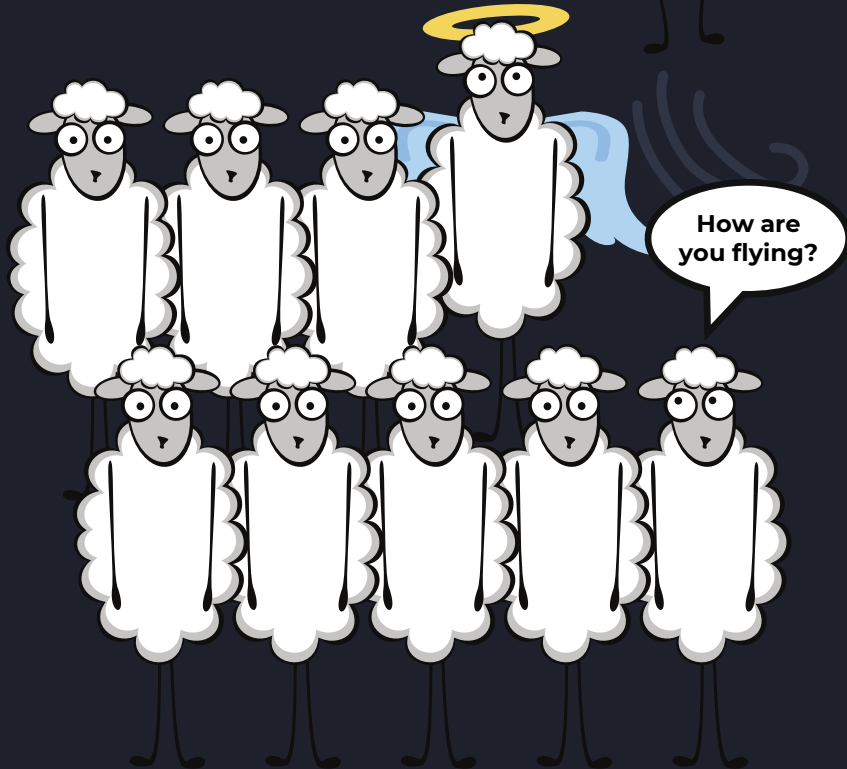
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# 15%

of orgs have embedded eCommerce goals and KPIs more broadly into personal objectives and bonus plans.



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**By embedding those metrics broadly across the organization, there will be a natural need for**

- **New Education & Upskilling**
- **New Capabilities**
- **More Resources & Investment**
- **Enhanced Strategies**
- **Evolved Org Structures**
- **Improved Workflows**
- **And more...**

**Further fueling the 8 factors of successful eCommerce change!**

**#mindblown**



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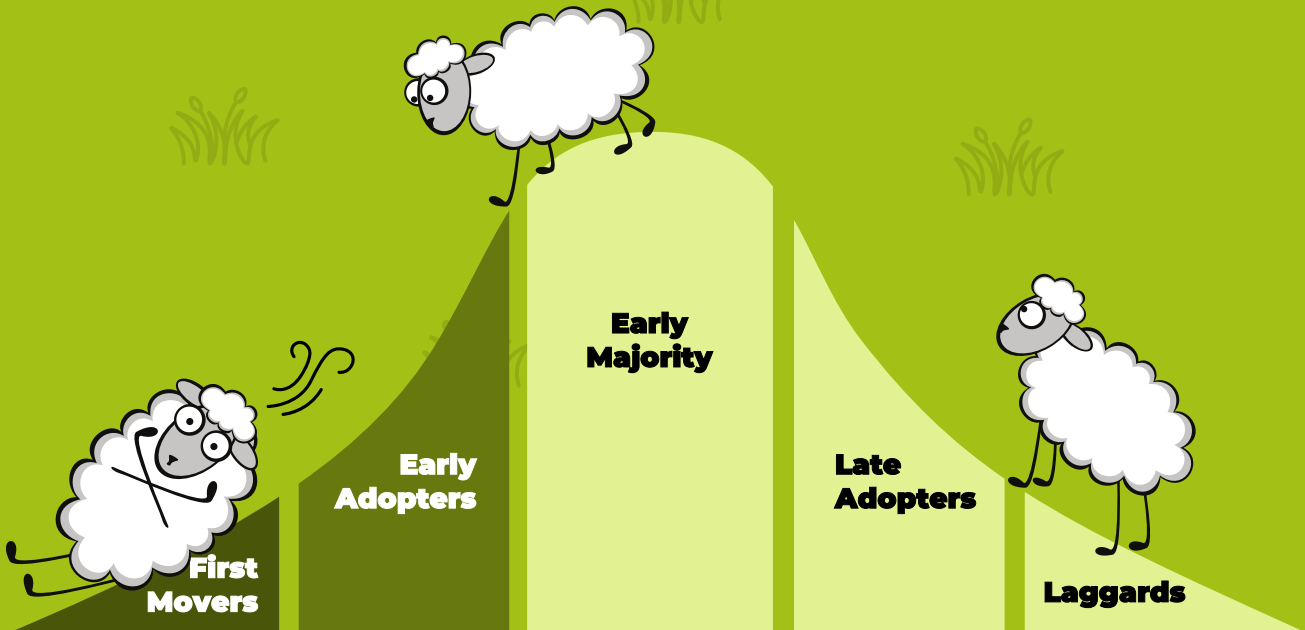
Communication + Assessment

Education, Skills + Capabilities

Organizational Enablement



**Counting sheep**  
**(i.e. measuring these 8 factors)**  
**will help all of us hop that**  
**fence of change...**





**Other leaders are  
counting sheep  
and seeing the  
results.**

**You can, too.**

**Counting isn't easy,  
but at least you get  
paid to do it!**





**And remember  
you're never alone.**

**We've always got your**

**baaa-ck!**



**YOUR PARTNER FOR  
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**Learn how to  
count sheep:  
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# TOGETHER, WE GO FURTH R



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Our Open Commerce Ecosystem makes it possible for retailers, agencies and tech providers to combine digital shelf data insights with their own solutions, eliminating data gaps and unlocking incremental value for brands.

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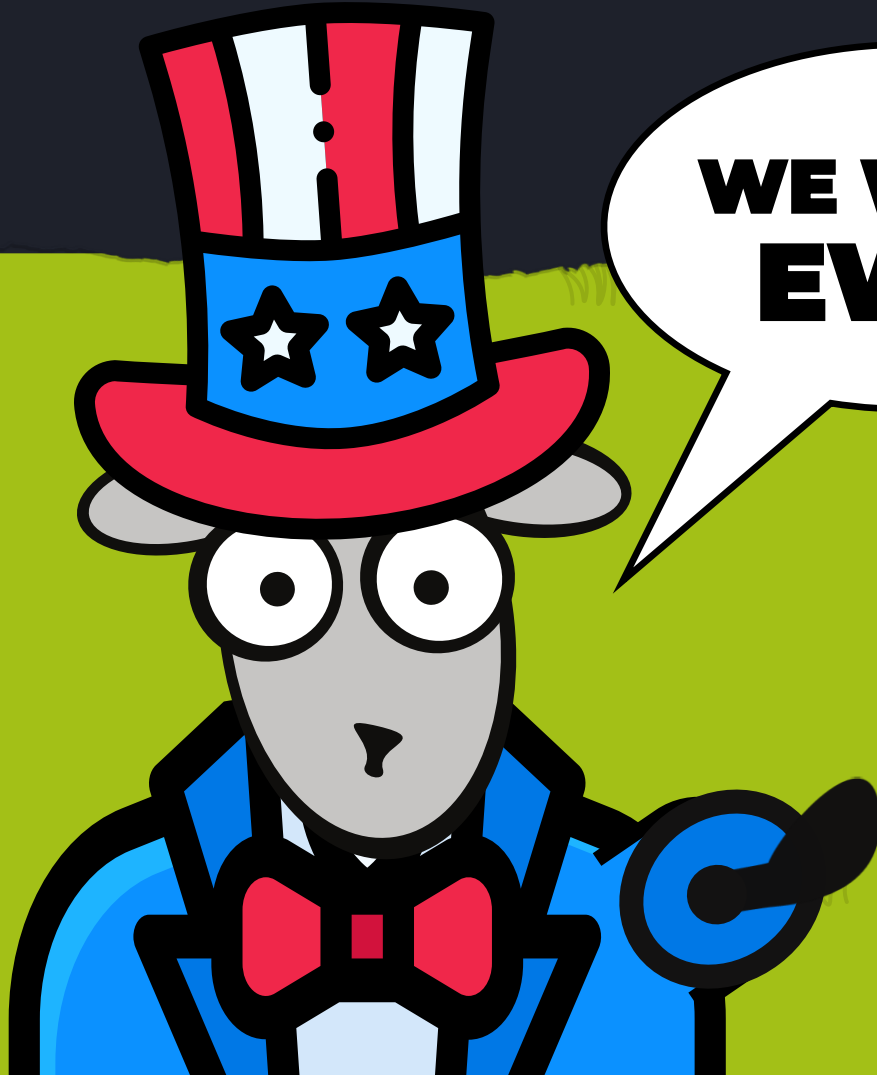
of our 2023 eCommerce  
Organizational Benchmark Study





**#NOTASHEEP**

**#CORPORATECOMMANDO**



**WE WANT  
EWE!**



A large flock of cartoon sheep with white wool and black outlines, standing in a green field. The sheep are arranged in a dense, somewhat circular pattern, filling most of the frame. Two speech bubbles are overlaid on the scene, one in the upper middle and one in the lower middle.

**What do you call a  
sheep who only shops  
the lowest prices?**

**A sheepsbate...**



Hey, where are you going?

All your jokes are **baaa-d...**

But remember?  
We don't have to be sheep anymore.

NO CARTOON SHEEP WERE HARMED  
IN THE MAKING OF THIS EBOOK.