THE DynamicAction Way

DYNAMIC
ACTION

To drive ongoing profitable retail practices and address the complexities of modern retail, **a new point of view** that places focus on **customer profitability**, **surgical decision agility** and **actionable metrics** is necessary.

But too often, retailers default to the same metrics, reports, discussions, and blunt actions (such as promotional discounts) taken the year before. Why? *Without a workable plan, change is too difficult and thinking differently too ambiguous.*

However, select retailers are systematically developing new operating muscle leading to successful change and more profit with *The DynamicAction Way.*

The DynamicAction Way is a success program that guides retailers through the change to a new operating mindset.

Below, find the workstreams and their components positioned on *The DynamicAction Way* roadmap.

The DynamicAction Way Workstreams

EXECUTIVE WORKSTREAM
Arm executives with the insights that drive the new questions and right discussions which cultivate a new organization-wide operating mindset

TEAMS WORKSTREAM
Insert value into teams' metrics, meetings and actions, automate the repetitive and make existing processes more efficient

DATA WORKSTREAM
Empower retail organizations with a validated, well-connected, trusted data set that will spur new discussion, new exploration, new actions and new found speed

The DynamicAction Way Roadmap

STRATEGIC INSIGHTS

DATA ENRICHMENT ROADMAP

EXECUTIVE DASHBOARD

ACTION ASSESSMENT

CEO PLAYBOOK

DISCOVERY   *IMPLEMENTATION*   Platform Launch   *TRAINING*   *SPRINT DRIVEN OBJECTIVES* >>

DATA SOURCE MAP

KPI ASSESSMENT

MEETING ASSESSMENT

SYNDICATION REVIEW
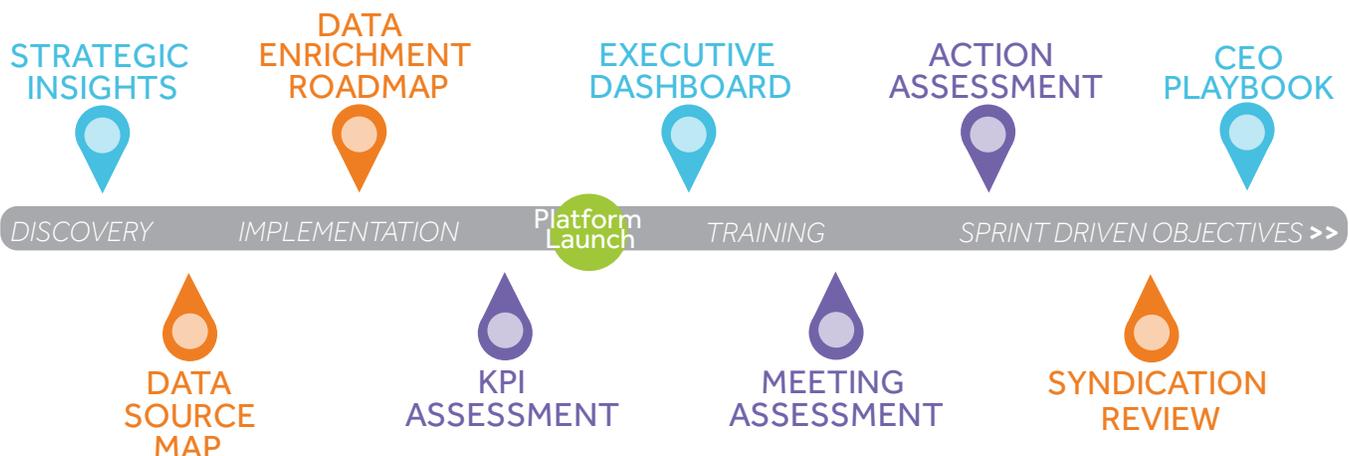
EXECUTIVE WORKSTREAM

①STRATEGIC INSIGHTS ②EXECUTIVE DASHBOARD ③CEO PLAYBOOK

STRATEGIC INSIGHTS ①

Foundational baseline from which to direct tactical, in-season adjustments from this deep diagnostic of lifetime customer behavior

- Allocate attention to stores, products, categories and brands that drive high lifetime profit customers

- Course correct new vs. existing customer budget allocation

- Drive/edit customer acquisition winback, nudge, migration and VIP programs

- Reduce unprofitable activity

- Invest in marketing highly addictive products and high lifetime buying value

EXECUTIVE DASHBOARD ②

Daily read on the business from a curated dashboard of outcome, de-averaged outcome, causal and failure state metrics

- Comprehensive understanding of Finance, Merchandise, Customer, Marketing Operations and Content KPIs

- Key profit signals, efficiency indicators and failure states that direct next level nvestigation

- Signal areas where there are high-value opportunities to course correct

- Alert to immediate opportunities to address immediate opportunities or hygiene issues
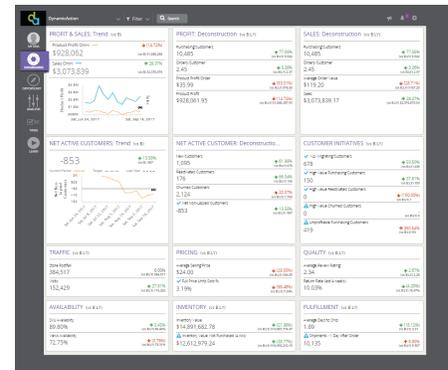
CEO PLAYBOOK ③

Series of best practices gleaned from thousands of hours of studying, observing and testing operating principles in retail

- Organization set up for appropriate profitability trade-offs and increased speed from insight to action

- Ensure collection of the data needed to drive the next wave of insights, decisions and actions

- The questions to ask that reinforce the use of action driving metrics

- Cultural shift to allowing data to tell the story and not burying the ugly

- Changing teams' approach to be more customer and profit centric

- Team alignment across silos with staying power

TEAMS WORKSTREAM

KPI ASSESSMENT ① *Identify metric gaps and recommendations that will help spur timely course correction and action*

- Metric diagnostic best practices and clarity on metric ownership

- Understand metric consistency (or lack thereof) across business units

- Move beyond basic outcome metrics to the causal and failure state metrics that fuel course correction

- Deaverage metrics to focus on the needle moving edges of the distribution

NEW CUSTOMER PROFIT ▼**5**%

RETURNS from LOW LTV CUSTOMERS ▲**4**%

VIEWS AVAILABILITY ▲**2**%

MEETING ASSESSMENT ② *Increase meeting productivity with a review of recurring meeting preparation, execution, follow-up and recommendations*

- Get strategic about meeting preparation, execution, follow-up, and driving action

- Diagnose action candidates and what worked

- Analysis methods to move from meeting guessing to data driven insights

- Drive best practice meeting behaviors such as letting the data speak and a willingness to surface the ugly

ACTION ASSESSMENT ② *Take action more efficiently with a review of process (action owners, decision rights, decision processes, automation and consistency) and recommendations*

- Get to action more quickly and develop the processes to act on a more regular cadence

- See which action processes need improvement and which would benefit from automated, metric driven rules

- Understand where other groups are required to get involved

- Reduce the number of blunt, calendar driven actions and steer toward more surgical, data driven actions

- Determine how to monitor in place AI and automation

DATA WORKSTREAM

① SOURCE MAP ② ENHANCEMENT ROADMAP ③ SYNDICATION REVIEW

Retail practices fueled by analytics typically lose steam without a foundational trust in the data. Get a validated, well-connected, trusted data set that will spur new discussion, new exploration, new actions and new found speed.

DATA SOURCE MAP ①

Detailed account of the data sources (retailer and 3rdparty sourced) flowing into DynamicAction

- See how each data source flows into the DynamicAction platform including those sourced from 3rd party vendors and how they're connected

- Understand core assumptions and custom business logic applied to work around missing or malformed data

- Receive a detailed account of receipt timing associated with each data feed

OVER 1,500 PROPRIETARY ALGORITHMS SPECIFICALLY FOR TODAY'S RETAIL ENVIORNMENT

DATA CONNECTED AND TRANSFORMED USING DYNAMICACTION PROPRIATARY DATA MODEL

DATA

PRODUCT CUSTOMER
ANALYTICS FINANCE INVENTORY
OPERATIONS MARKETING
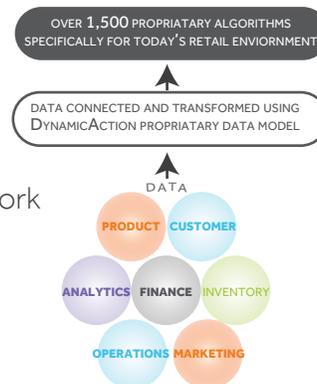
DATA ENRICHMENT ROADMAP ②

Audit of data model gaps and joins to produce a prioritization of potential field, attribute and logic enhancements

- Know all data source gaps

- A prioritized plan to improve data quality

- A understanding of unlocked value as new data sets are provided

Enhancement	Rationale	Priority
Common CustomerIDs	Web, Store, Web Analytics common CustomerIDs	🟢
Additional Store Attributes	Analysis metadata for relative store performance	🟢
BazaarVoice Integration	Review Rating analysis in the context of sales + conversion	🟡
Product Image URLs	Visual product analysis	🟡
Competitive Price File	Price pressure analysis in the context of sales + conversion	🔴
New Affiliate Integration	Integration post switch to new vendor	🔴

DATA SYNDICATION REVIEW ③

Leverage DynamicAction data to fuel automation rules in last mile systems

- Recommended DynamicAction calculated metrics that could serve to improve rules in Exposure, Pricing and Stock automation systems

- How to use DynamicAction customer data to fuel automated campaign generation

- Clean, validated, connected data in DynamicAction serve to accelerate internal AI or data science projects

- A review of Export API capabilities and opportunities