

First class delivery

TALES OF UNDELIVERED goods during last Christmas are now history. But to jog the memory and ensure we don't all become complacent, a recent report by Shelley Taylor Associates referred to a few notable *faux pas*. A bottle of wine ordered from Chateauonline.com was delivered by hand in a cardboard box with no name on it and without a delivery note or receipt. A card within the box simply said, 'Enjoy with our compliments.' The bottle was delivered to an office and, because there was no name on it, someone – not the purchaser – took it home assuming it to be a gift to the office.

Similarly, in attempting to order on the Foodferry.com site, the research company had to wait to receive a username and password by email. It arrived three days later, by which time we can assume they were no longer hungry.

It's six months since horror stories like these

began to emerge, spoiling many festive celebrations. Since then we've seen the demise of Boo and a number of other high-profile e-tailers screaming for cash to support their marketing activities. Coupled with predictions that 95-98% of dotcoms will fail within the next two years, it's perhaps not surprising that some researchers are claiming the death knell is sounding for online retail.

Whether that's true or not, the vast majority of dotcoms have, in the meantime, put the setbacks behind them and are juggling the current hot potato in e-commerce: fulfilment.

The e-commerce explosion

Forrester Research claims that by 2004 e-commerce revenues in the US alone will reach > \$7 trillion. But according to the Boston Consulting Group, at least four out of five online

For e-tailers, the best way to impress and keep your customers is to deliver them the right product on time. That's not as simple as it may sound, though. Neil Bromage looks at the issues involved in successful fulfilment, now that the customer's in charge.



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E-business fulfilment developers like TechnoPhobia are much in demand.

buyers have experienced one failed purchase, and 28% of all online purchases fail completely.

Failed purchases are proven to deter shoppers, with 28% of those who were frustrated in a purchase saying they wouldn't shop online again, 23% refusing to buy from that company's particular site anymore, and 6% deciding not to shop at the company's bricks-and-mortar

stores either. With statistics like these, it's little wonder that dotcoms are facing up to the fulfilment problem and the need to invest in end-to-end infrastructures.

Unfortunately, there seems to be a lack of consensus in the dotcom world as to where the real problems lie. In current research, around 150 companies, representing e-tailers, Web designers, logistics and delivery firms, were questioned on fulfilment issues. The answers are interesting, drawing parallels with the Garden of Eden story: when asked why he ate the forbidden fruit, Adam blamed Eve, who blamed the snake, who didn't have a leg to stand on.

According to a Verdict report in May 2000, "most online retailers are failing to satisfy consumers and are (still) providing a poor service." The report highlights the changing face of consumer demand. The rise of the time-poor/asset-rich consumer, a growing number of single-person households, wider access to the Internet, and a desire for better service on customers' terms are all placing a complicated new set of demands on retailers.

More than mere delivery

On the face of it, fulfilment seems like a straightforward issue: a customer clicks on a site, places an order, which is sent to a warehouse, then put into a white van and delivered within a



According to TehnoPhobia's Pip Thorne, many e-tailers are "not looking seriously at what the site is actually there to do".

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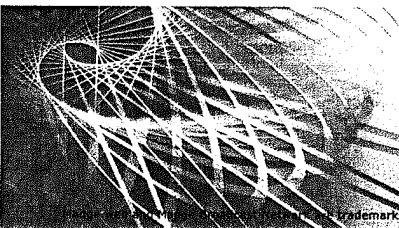
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In60 has brought a rapid fulfilment service to the Glasgow area.



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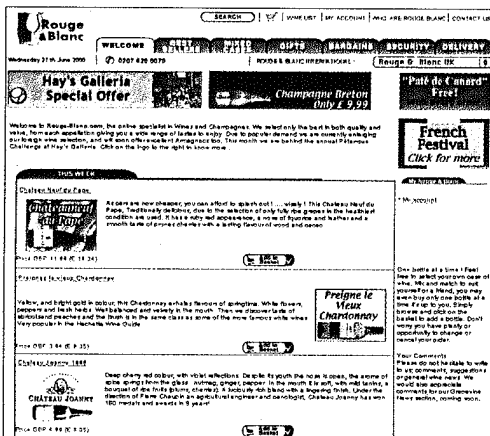
CASE STUDY: ROUGE & BLANC

Rouge & Blanc offers more than 200 different wines, champagnes and spirits throughout Europe and the UK. From its beginnings in 1997, it has adopted an unusual, if not unique, market position in the electronic wine-retailing sector, by investing equally in France, Germany and now the UK. In each country it has set up permanent wine stocks of at least 30,000 bottles, a Web site in the local language and national directors.

With distribution centres in Bordeaux, Stuttgart and Burton-on-Trent, single bottles, larger quantities or any combination can be delivered locally at competitive prices. Rouge & Blanc guarantees to deliver to the door within three days throughout Europe and the UK.

Since it was set up, over 600,000 wine lovers have visited the site and over 100,000 bottles have been sold. By the end of last year, the site was receiving more than 100 orders a day, reaching a peak of 400. The average spend is around £80 and repeat orders are running at one-third of total sales.

At the beginning of 2000, it posted record results showing a rise in turnover of 500% in 1999, reaching £1m. In June 1999, Rouge & Blanc raised £1m of investment capital, in which investors took 49.9% of the company shares (BNP Private Equity 29.45%, Bianca Finance 8.4%, Sthorefi 11.5% and Filtarn 5%). In May 2000 it announced its intention to raise



a further £8m to fund further growth.

Rouge & Blanc's success is due largely to Xavier Boyreau. The son of a vigneron who grew up in the Graves wine region near Bordeaux, he spent nine months perfecting the business model prior to launch, in order to create an efficient distribution system that could deliver one bottle or several cases equally fast in either France, Germany or the UK.

The company's expansion has focused on three things: geographic growth, marketing and communication, and development of Web information systems and WAP technology. It's also recently announced a "new logistic breakthrough": a sophisticated, personalised picking service, which enables shoppers to order as little or as much wine as they want without incurring any minimum order or additional packaging costs.

The Rouge & Blanc site ensures maximum payment security during transmission through the SSL protocol certified by Thawte/Verisign, and adds a further 50-60 security codes in order to safeguard payment. Additionally, no credit or charge card numbers are retained either on the Web or in the company's offices. These systems were set up by Pierre Yves Bonnetain, one of the founders who's now an recognised authority on Internet security.

www.rouge-blanc.com

week or so. So what's the problem?

If recent research has clarified anything, it's that fulfilment is about much more than simply dropping off a parcel. According to one industry specialist, fulfilment is "the chain of events leading up to and following the placing of an order, which results in the physical movement of goods from factory to consumer".

Pip Thorne is a director at Sheffield-based TechnoPhobia (www.technophobia.com), which developed the Smile.co.uk site. He says, "One of the problems is that many sites are set up for high-volume/burst mode, whereas generally the Internet brings in low-volume continuous orders." In testing for clients, TechnoPhobia

"The last 12 months have seen the rise of a new breed of online customer – one who isn't prepared to accept second best"

has shown that where fast response/delivery to a customer can be achieved, the take-up rate of orders will rise as customers become more and more impressed with the service offered.

Sadly, he continues, the problems are being exacerbated by the fact that, particularly in the UK, expectations of online fulfilment are rising in tandem with their more widespread use.

One of the most obvious reasons (and the one being addressed by most dotcoms) is a lack of integration with other systems. In spite of the lessons learned by more traditional marketing disciplines, many companies demonstrate a clear lack of commitment to backing up an online presence with solid logistics and processes. According to Thorne, "This is, in part, due to piling their budgets into the front-end look and feel without looking seriously at what the site is actually there to do."

The faster the better

While Amazon is still clearly ahead of most of its rivals for fulfilment, one interesting fact is that of those companies that are currently get-

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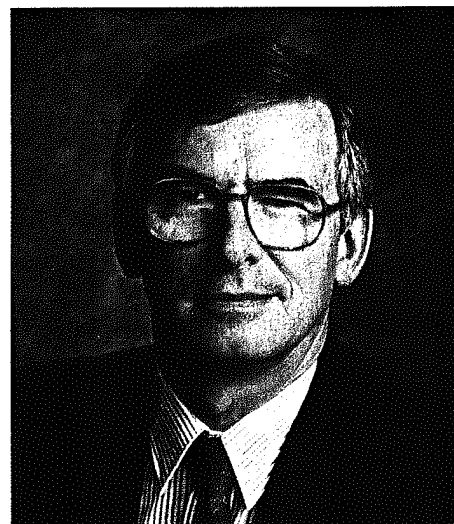
ting it right, it's often the new launches offering rapid (one-hour or two-hour) delivery that are actually succeeding.

In60.com recently launched in Scotland, initially to service the Glasgow area before being rolled out nationwide. It provides a range of products, such as rental videos, DVDs, confectionery, toiletries, books and computer games, guaranteeing delivery within an hour using a fleet of 'In60.commando' couriers. In60 has also developed a system for returning rental products into specially designed 'drop boxes' located throughout the city in shops, bars and cafes.

It's described as the first free fully integrated, one-hour Internet-to-door delivery service of home entertainment and convenience goods in Europe. Ian MacCallum, one of its directors, says, "Gone are the days of just renting a video. In60 delivers the whole package, from food and drink to a full range of entertainment and convenience items, directly to homes and offices. And we'll continue to utilise the latest technology to offer more for our customers."

In60 may well find its expansion south of the border more difficult than it expects, as recent weeks have seen the London launch of the already successful Urban Fetch (www.urbanfetch.co.uk). Having already cracked the New York market, Urban Fetch has introduced its 'free delivery within an hour' model to the UK capital. With a range of books, videos, music, food and gifts being delivered "when it's convenient" for shoppers, it looks likely to score heavily with Londoners.

But Urban Fetch isn't the only new player to enter the market recently, as a new breed of B2B and B2C companies gear up to stake their claims. M-Box has announced its entry, claiming that it'll revolutionise the UK delivery industry through a series of strategic partnerships that will include cornershops and milkmen, a motorbike courier, a call centre provider, parcel delivery and an IT company. Founder Geoff Web says, "It currently costs around £20 per product for a retailer to handle fulfilment itself. We can do it for £5-£9." ➤



Bob Bischof of McIntyre & King: "Mail order companies will be the big winners when they diversify properly into e-tailing."

The screenshot shows the Urban Fetch website for London. At the top, it says "What can we fetch for you?™ Free delivery in an hour." Navigation tabs include WELCOME, BOOKS, MUSIC, MOVIES, ELECTRONICS, FOOD, and GIFTS. Below these are sub-tabs for ABOUT URBANFETCH, DELIVERY AREAS, FREE DELIVERY, HELP, and HOW TO REGISTER. A shopping basket is empty. Promotional banners offer "2 CDs for only £20" and "free video or DVD rental with every order". A welcome message states: "Welcome To The London Launch Of Urbanfetch & A Whole New Shopping Experience! Following our success in New York, we are delighted to bring London the ultimate in convenience—free one-hour delivery of books, music, movies, electronics, food and gifts, with more to come!" It also mentions a special offer of 2 CDs for £20 and a free movie rental. A "LONDON DELIVERY MAP" is provided to ensure users are within the delivery area. Two product spotlights are featured: a Picnic Rucksack - Green for £70.00 and a Palm V Connected Organiser for £250.00.

An e-commerce business with a proven track record in its Manhattan birthplace, Urban Fetch is now set to take central London by storm.

The advertisement for COMXO features a central logo and several icons representing different services: Call Centre, Desktop TELEPHONY, Interactive TELEVISION, Virtually ANYTHING, Audio CONFERENCE, and Virtual SWITCHBOARD. The text on the left reads "COMXO Call2 MultiVoice" and "www.comXo.com". On the right, it says "Web-based audio conference puts you in control with technology that's light as a feather, and works any time, anywhere. Ideal for conversations, negotiations and explorations, but best of all, special announcements so that everyone is first to hear. Call now +44(0)1753 710430 or email sales@comxo.com".



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In contrast to the leisure-oriented goods of many fulfilment businesses, M-Box is hoping to corner the market in shopping for practical everyday necessities.

During testing and launch, In60 has established success rates of around 96%. Similarly, at European wine e-tailer Rouge & Blanc (see boxout on page 42), 98% of customers' orders are successful, according to company director Gwenaelle Reid. Their successes, however, are due to different factors. At In60, MacCallum says that the use of its own delivery staff is imperative, while at Rouge & Blanc great

emphasis is placed on having its own stocks of at least 30,000 bottles available at any one time.

If Internet consultancies like TechnoPhobia are in demand at the moment, then companies that provide outsourced fulfilment, warehousing, order processing and so on are struggling to fill the enormous gaps that are becoming evident in this sector of the dotcom market. The growth and opportunity being experienced is huge, but only for those companies that can demonstrate a real ability to deliver.

Experience counts

One such company is the Liverpool-based McIntyre & King (www.mcintyre-king.com), which is an established direct marketing and fulfilment supplier.

McIntyre & King chairman Bob Bischof believes that many dotcoms will fail if they think that e-commerce is the only way to market. "There will be consolidation among dotcoms and traditional retailers. Mail order companies will be the big winners when they diversify properly into e-tailing, because they have a fundamental understanding of distance shopping as well as superior buying power."

Bischof also feels that the real hot-spot in fulfilment is international home delivery. His company has just announced a strategic alliance with a European partner to capture what it sees as a lucrative market. "We realised that an early presence in Europe would provide McIntyre & King's clients with an immediate competitive advantage. We've finalised a deal that provides a base from which we can service Europe using

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normal mail and parcel services.”

The issue of whether or not dotcoms should manage their own fulfilment or outsource it is one on which Charlie Gilreath, CEO of Global-fulfilment.com, has strong views. “There’s no way companies can sustain building international infrastructure and compete with those outsourcing fulfilment – it’s too expensive and the advantage switches to local players of size in each market. You can’t take on leading brand names that are highly profitable and entrenched with infrastructure. You need a ‘virtual’ advantage: capturing sales without the cost of fixed infrastructure, reducing operating costs and providing inexpensive scalability.”

Globalfulfilment works with clients like EMI, Blockbuster and Bigbag, and offers a solution comprised of three principal components: a proprietary database, integrated secure transaction systems and Smart Hub technology. This enables it to operate in any supplier’s warehouse and distribute products from its worldwide distribution centres.

An old hand at delivery

However good any of the various infrastructures are, the final question that everyone seems to get around to is whether the delivery companies offer services that provide a consumer-focused proposition. Fortunately, there are some good news stories about delivery companies. Surprisingly perhaps by far the oldest – the Royal Mail (www.royalmail.co.uk) seems to be one of the best. It’s also the reason why dotcoms find it easier and cheaper to


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McIntyre and King is just one of the e-tailers relying on an early fulfilment presence in Europe for its commercial future.

operate in the UK, where a generally reliable service operates into every address in the country, and often for just 26p.

In the UK, Amazon says it’s currently happy with the services provided by the Royal Mail, although pressure is mounting on Parcelforce to introduce a timed delivery service.

The Royal Mail also numbers successful e-tailers like Blackstar, Lakeland and the ➤

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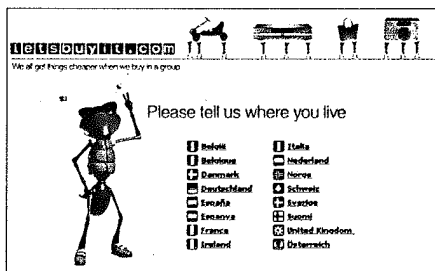
CASE STUDY: LETSBUYIT.COM

Letsbuyit.com defined a new category for e-commerce with its aggregated buying model. The concept has created an environment where shoppers group together for the best possible prices on branded goods and services through collective buying power. This adds value to both the consumer and participating businesses.

Incorporated just 18 months ago, in January 1999, its idea of building the strongest Web-based purchasing power in the world has proved extremely popular, with 5,000 members registering every day. The site now has over 700,000 members across 14 countries.

Along with other dotcoms, Letsbuyit had fulfilment difficulties over the Christmas 1999 period. Going live in November, it was still new to the UK scene and had problems with supply and delivery. MD for UK and Ireland Peter Jaco says, "When you're new people don't know who you are and the commercial relationships are not properly founded. As a result we've had to cancel some and move on up the ladder."

Letsbuyit operates through direct contact with manufacturers and large distributors, avoiding unnecessary costs associated with traditional retail distribution, which are usually



passed onto consumers. It's a method that, the company claims, opens up a new, sophisticated sales channel for manufacturers, offering scope for direct feedback from members.

Letsbuyit is still experiencing some difficulties as it continues to work on enabling all its systems to become fully integrated. Jaco says that this is never going to be perfect and that the US is much more advanced than European and UK markets, which aren't set up in terms of a home-based customer experience.

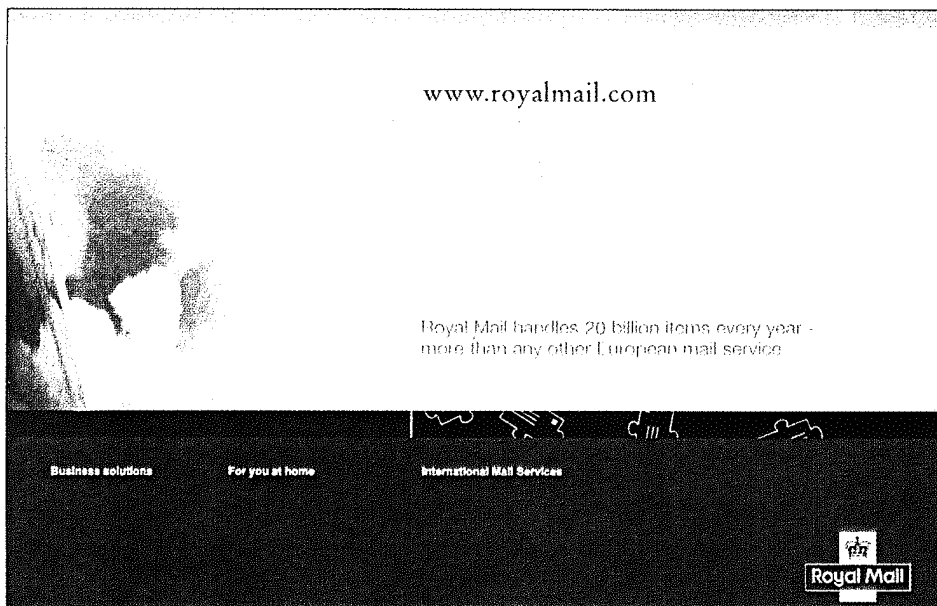
He is, however, "reasonably confident" about how its systems are working. Together with its fulfilment company, Sykes, it's turning orders around in 24 hours to enable a chosen

carrier (generally Parcelforce) to make delivery. But Jaco's keen to see more flexibility offered to his customers on how and when delivery is effected. "It's how you handle customers that's important." As a result, Letsbuyit is now training all staff in customer management methods.

In April 2000 Letsbuyit announced its intention to launch an IPO, but subsequently, in May, postponed these plans, saying that in the current market it didn't believe it would be valued fairly. However, on 20 June the management announced that the IPO would launch on 12 July, initially trading on the Neuer Markt. Martin Coles said, "We've had strong support from our institutional investor base, and as retail rebounds we're convinced our listing will be a huge success done now."

Trading in May increased by 80% over April to around €4.3m, representing a total of approximately 30,000 orders in May.

In June, Letsbuyit was named Best European retail site, scooping the NMA Effectiveness Awards 2000 Grand Prix for creating an entirely new model that will no doubt have long-term repercussions, and demonstrating the power and effectiveness of digital media.



With a headstart of centuries over most competitors, the Royal Mail has proven itself a leader in the choice of fulfilment and delivery companies.

Book People in its client list. Interestingly, when asked where it feels the real hot-spots lie in the fulfilment chain, Nigel Moore, head of the Royal Mail's home shopping strategy, places delivery as second only to inventory management.

There are, however, complaints from dotcoms, including Amazon, that many other UK-based delivery services are still not providing the necessary electronic links to enable online deliveries to be tracked. Other concerns relate to whether traditional delivery companies are geared up to manage the obvious peak-time trading, particularly around Christmas. Having learned their lessons last year, e-tailers don't want to lose custom again because of the failings of delivery companies.

Coping with errors

If there's one issue that dominates the current delivery discussion, it's that of returns. When Chateauonline's bottle went astray, it was just one instance of some early teething problems. Its senior VP of operations has since given careful consideration to the delivery process. In particular, he suggests the adoption of the follow-

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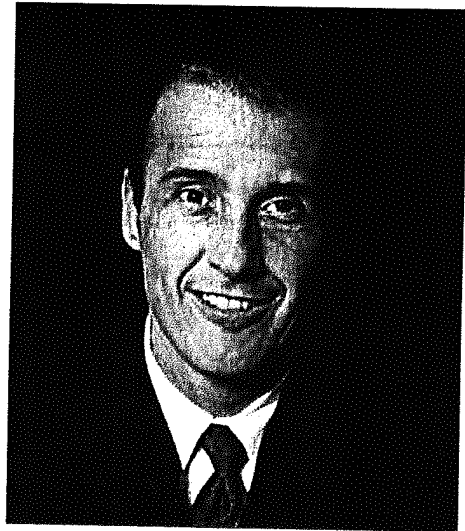
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Globalfulfilment.com's Charlie Gilreath:
"There's no way companies can sustain building international infrastructure and compete with those outsourcing fulfilment."

Having been voted best fulfilment e-tailer in the US, Amazon is also able to hold a dominant position in the UK market as one of the few widely trusted dotcom brands.

ing seven-point plan for dealing with returns:

- Lower the return rate. Send messages by email and mobile (SMS) indicating exactly when you're planning to make a delivery. Make arrangements for an alternative delivery point (even at that late time in the process). Capture all important delivery data. Provide automatic validation of address consistency;
- Increase the success of the second and third delivery attempts. Don't return on the day after at the same hour, but contact the client first. Allow for alternative delivery points or fixed-time delivery;
- Increase non-working-hour delivery options, allowing for evenings and weekends;
- Create partnerships with third-party drop-off point providers;
- Automate the tracing and tracking of returns handling using the same shipment/order number. Standardise retention times in case of three consecutive delivery failures, and don't return the goods until receiving an okay from the client;
- Measure the statistics together, including delays and incidents. Plan for evaluation meetings once a month;

- Allow for multiple delivery options (including third parties), capturing orders and delivery choices from the e-tailer and passing them on to multiple transportation providers that best suit the customer's wishes.

It's clear that the issues now being addressed are being driven not by the dotcoms, nor their fulfilment or delivery companies, but by the consumer. However it's happened, the last 12 months or so have seen the rise of a new breed of customer - one who's not dazzled by the relative ease of e-commerce, and who isn't prepared to accept second best. If a company can't deliver at a convenient time, then the customer will simply go elsewhere. Loyalty is no longer a fashionable shopper's accessory.

We need only look at the mortgage market where, at one time not so long ago, the thought of switching to another lender was almost unheard of. Now we're being actively encouraged to do just that. If borrowers have no loyalty to their mortgage provider, then they're scarcely likely to have any with a shop, whether it's online or in the high street. It's just possible that modern technology is recreating that long-lost ideal: that once again the customer is always right.

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