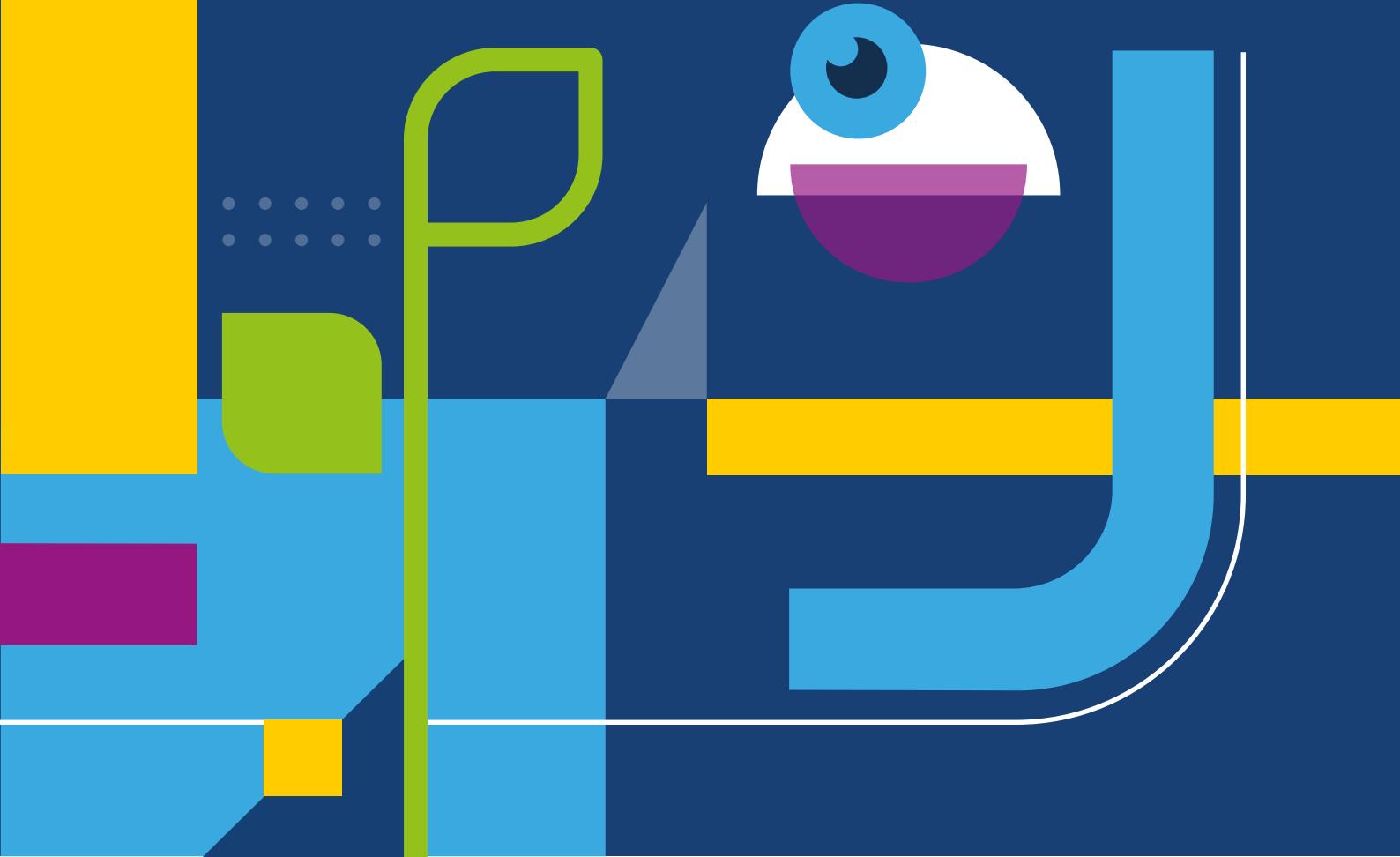


# HANDELSKRAFT 2022

DIGITAL CHAMPIONS





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DIGITAL CHAMPIONS

# DIGITAL CHAMPIONS

»Trends, Strategien und Potenziale im Everywhere-Commerce« (»Trends, Strategies and Potential in Everywhere Commerce«) is the title of the first trend book Handelskraft 2013. Almost a decade and nine editions later, a lot has happened – in digital business, at our clients and partners, at our agency and, last but not least, at the trend compass for industry and trade. Former trends are now standards, new trends are emerging. Strategies have been tested and further developed. »Everywhere commerce« still offers a lot of potential – and even more so in 2022.

E-commerce has become data-driven e-business. Digital has become the new normal, part of interpersonal relationships – in both private and professional life. Not just for a small group of digitally savvy experts, but for everyone – from primary school children being home-schooled to grandmothers with smartphone skills, from local retailers with a modular website to B2B platform players with a multi-client strategy. Digital is no longer questioned; it is

not an extra, not something that should be postponed, but an accepted and used everyday and business essential.

## **Digitalisation makes the world a better place.**

That is what we believe in. The past two years in particular have given companies a tremendous boost on their journey to digital excellence, in developing digital DNA, in building digital intelligence and in the pursuit of digital freedom.

We support companies in translating this momentum into business success in the long term. We are convinced that every company can become a digital pioneer – whether it is a major international corporation, a local medium-sized enterprise or a young start-up. 16 years of experience in digital business with our clients and their customers, with our partners, with the participants of Digital Business School, the Handelskraft Conference and the B2B Digital Masters Convention have shown what it takes

to become a digital champion. In the tenth trend book »Handelskraft 2022«, at the Handelskraft Conference and day by day on our Handelskraft blog, we share this knowledge.

We show that every company can become a digital champion through an innovative spirit, the right strategy and corporate culture.



*Christian Malik*

**Christian  
Malik**

*C.O. Grötsch*

**Christian Otto  
Grötsch**

**Frank  
Ertel**

Managing Directors, dotSource

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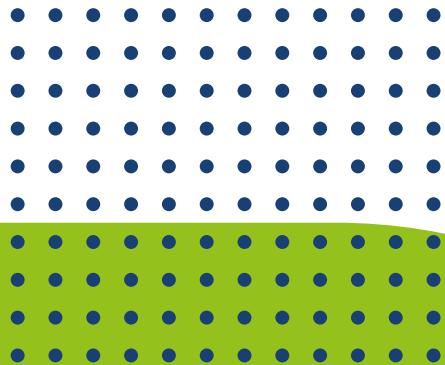
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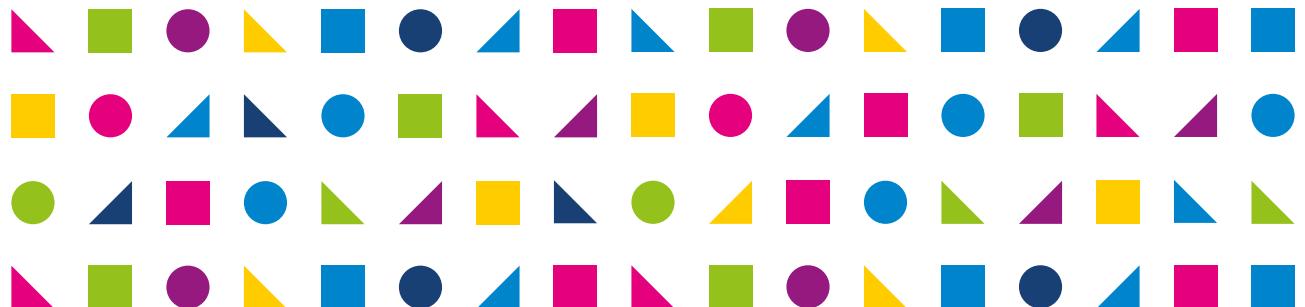


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Successful companies have digital leaders who promote team spirit, increase motivation and embrace transparency.

# DIGITAL CHAMPIONS ARE TEAM PLAYERS



In 1998, Otto Rehhagel achieved something with 1. FC Kaiserslautern that no one had ever done before: He led a football team from the 2. Bundesliga to the Bundesliga and promptly won the German championship. He brought new ideas to the team, pulled off some sensational transfers and, through often unconventional methods, managed to bring back creativity to a team that was thought to be out of reach.

A look at the history of the sport shows: becoming a champion requires courage, the right personnel, a vision – and constant competition monitoring.

Those who recognise potential at an early stage, are courageous and turn it into innovations, who have the right equipment and a motivated team gain a competitive advantage with the prospect of entering the digital Champions League. The tool manufacturer WIESEMANN 1893 shows how it is done: with the 3D printing of tool holders, the company from North Rhine-Westphalia is revolutionising a traditional industry. It is not only the innovative product itself, which has never existed before, that contributes to this, but also the way towards it: WIESEMANN 1893 took customer feedback into account along the entire value chain – from product

development and marketing to sales and service. This led to the creation of a community that ensures unique experiences and made the company one of the twelve most successful direct-to-consumer (D2C) brands in 2021 alongside digital champions such as adidas.<sup>1</sup>

**Success stories like these show: companies that want to become digital champions can only do so with the right team and a user-centric strategy.**

Instead of approaching new and existing customers with outdated e-commerce strategies and annoying them with shotgun marketing campaigns, companies need to ensure that their customers become fans and thus part of their community – a community that celebrates successes with the management team at the end of the season and embarks on the journey to the digital Champions League together.

# MARKETING MIX OF THE FUTURE



Companies must no longer think:

»***How do I generate a sale?***«

Instead, they need to ask themselves:

»***How do I create my customer?***«<sup>2</sup>



Industry and trade need more than just market-oriented sales strategies to remain successful. Clear marketing goals that take into account ever-changing customer needs, buying habits and digital practices are a prerequisite for change and growth. Digital champions focus on traditional virtues and keep a close eye on their further development.

The marketing mix known in operational marketing is one of these virtues. It summarises all measures designed to achieve marketing goals.<sup>3</sup> It originally consisted of four pillars, which have been relevant since 1960: product, price, place, promotion.<sup>4</sup>

However, since this concept can only be inadequately applied to the services sector, it has been further developed over the years and

three pillars have been added: people, process and physical evidence.<sup>5</sup> It is now time to think more broadly about these concepts and apply them to an increasingly digital business world.

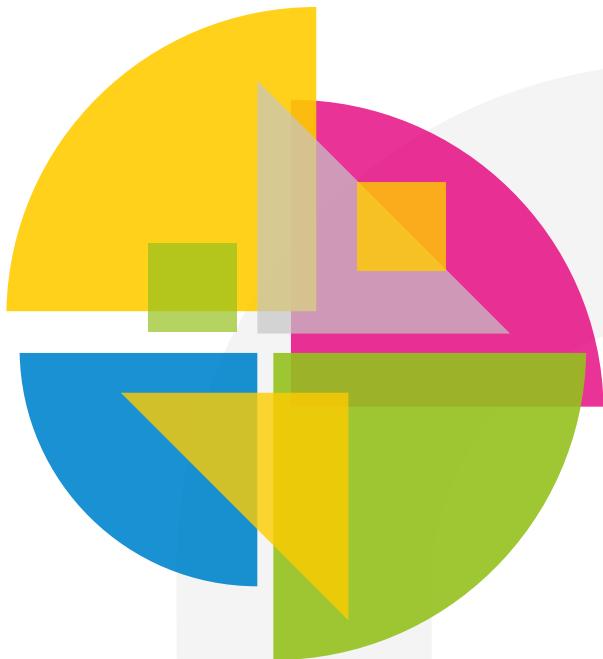
Companies must become experts at serving their customers and establish themselves as the number one point of contact. Only then can the seven pillars of marketing contribute to customer acquisition and not just to the promotion of products.

So how can the long-established marketing mix and its 7 Ps be applied to future business strategies? And how can companies sell added value instead of products in the long term?

**Intelligent advertising can never make up for poor performance: customer behaviour makes brands strong – and not vice versa.<sup>6</sup>**

# PRODUCT – DEFINED BY THE BUSINESS MODEL

IN THE RECENT PAST, IT HAS BEEN COMPANIES' BUSINESS MODELS THAT HAVE CHANGED RATHER THAN THE PRODUCTS THEMSELVES.



## EXPERIENCE BEATS PRODUCT

Product policy in the marketing mix describes which products and services a company wants to offer and how they appear on the market. However, customers no longer just buy products. They buy experiences – and emotions.

Companies that understand this can tailor their product and service offerings to their customers' needs – thanks to digital tools and platforms, this is now easier than ever before.

A prominent example of this is the subscription economy. It reflects how consumer needs and behaviours have changed. The shift from product-centric approaches to customer-centric approaches is crucial in the subscription economy. Only 25 per cent of all subscribers choose their subscription based on price,

while more than 50 per cent of users prefer subscriptions that give them more freedom and a wide variety of options, for example subscription upgrades or convenient billing.<sup>7</sup>

Amazon, Spotify and Netflix are prime examples of a successful subscription economy. Thanks to cloud computing, this business model is booming – clouds are becoming increasingly efficient and visibly more attractive for small and medium-sized enterprises as well. Between 2007 and 2012, Adobe saw its sales plummet because it sold its software on CD. Since switching to a digital subscription model, however, the company has been doing better than ever – and not only that: Adobe is even considered one of the pioneers of the subscription economy in the software industry.<sup>8</sup>

## FENDER'S VIDEO SUBSCRIPTION SERVICE

The legendary guitar company Fender recently had the problem that up to 90 per cent of new customers lost interest in playing the guitar within the first year and returned their instrument. To counteract this, Fender began offering a video subscription service that featured lessons for aspiring guitarists. Not only did this improve the experience with the instrument, but it also strengthened loyalty

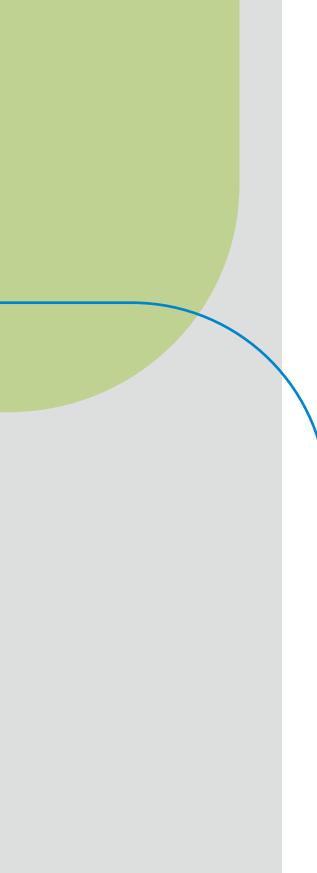
to the brand. This allowed Fender to reach its customers on the level of emotion as well as expertise. The number of returns decreased.<sup>9</sup>

## CATERPILLAR'S PREDICTIVE SERVICE

A similar development can be observed in B2B. The construction equipment manufacturer Caterpillar is a prominent example here. In the past, the company often had problems with managing the maintenance of its customers' machines.

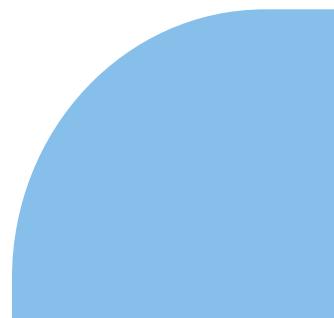
# ADVANTAGES of Subscription Models<sup>11</sup>:

1. Generating regular recurring income
2. Being able to flexibly respond to changes in customer behaviour
3. Increasing resilience and competitiveness in the long term



That is why it created an analytics service called Cat Connect Solutions, which acts as a monitoring system that analyses usage patterns and provides timely information on when maintenance needs to be carried out.

Since then, the company has seen itself not only as an equipment manufacturer, but also as an equipment manager that supports customers over an agreed period of time and retains them even more effectively.<sup>10</sup>



## FACTS about Subscription Models:

**60%** of customers with subscriptions regularly adjust their subscriptions.<sup>7</sup>

In 2020, the subscription economy's revenue grew by **12%**.<sup>10</sup>

# PRICE – MORE THAN JUST COST RECOVERY

IT IS IMPORTANT TO TRUST CUSTOMERS.  
NOTHING IS WORSE THAN A CHAINED BALLPOINT PEN AT A BANK COUNTER.<sup>12</sup>

## SERVICE BEATS PRICE

Pricing traditionally looks at how the price of a product should be determined in order for it to be accepted by customers. This includes, for example, discounts as well as payment and credit terms.<sup>13</sup>

However, a positive customer experience is at least as relevant as price for today's consumers when making purchasing decisions. Customer experience is influenced by numerous surrounding circumstances that come with the actual product, for example the corporate image.<sup>14</sup>

Due to ongoing price wars on countless portals, global shopping events such as Black Friday and Cyber Monday as well as dynamic pricing, the data-driven changing of prices, the pricing policy of retailers and manufacturers is much more dynamic today than it was a few years ago.

Prices have become transparent and customers know that. Hidden bargains are rare. Setting up customer-specific prices by connecting ERP and commerce systems makes it possible, for example, to offer many customers a special price.

## DYNAMIC PRICING AT IBM

With its cloud tool IBM Dynamic Pricing, IBM analyses various environment variables, for example, and takes the corresponding customer behaviour into account: Data on Internet search behaviour and shopping cart abandonment is combined with sales and price sensitivity. The retailer's relevant inventory data is monitored so that market developments can be responded to in real time and price changes can be suggested.<sup>15</sup>

For customers, however, prices are also determined by factors such as fair pricing, transparent supply chains and sustainability. Moreover, service quality is important for long-term brand loyalty<sup>15</sup>:

**94%** of consumers make their purchasing decision based on the quality of customer service.<sup>12</sup>

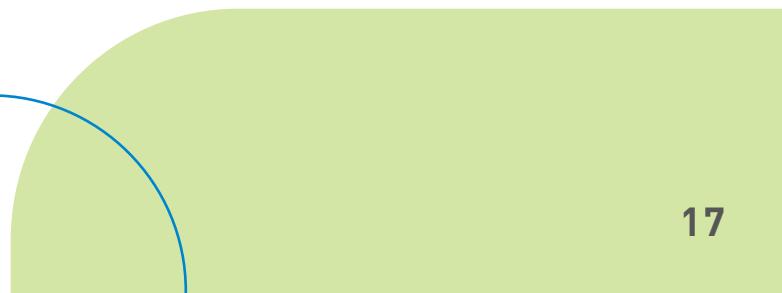
**14%** expect a live chat feature.<sup>16</sup>

For **82%** of consumers, chatbots are part of good service.<sup>17</sup>

**68%** of all customers contact customer service by e-mail.<sup>17</sup>

Contrary to pricing as a traditional pillar of marketing, it will no longer be the best price that generates the highest possible profit in the future, but the relevance of customer service.<sup>18</sup> For companies, whether B2B or B2C, it is therefore advisable to create awareness among their customers that high-quality service pays off and that it is not just the product that is purchased, but also the corresponding support. In this context, chatbots are a great way for websites to provide customers with quick solutions to questions and problems 24/7.

Especially in B2B, products are purchased not only for one customer, but often for entire departments. In addition, they are often more complex in nature than in B2C. In the event of malfunctions, customers have to invest more in fixing them than in the product itself. This makes it all the more important to offer competent customer service with a focus on **quality and exclusivity.**<sup>19</sup>



**PLACE – COMMERCE IS**

**EVERWHERE**



WHERE ARE PRODUCTS BOUGHT THESE DAYS?  
THE ANSWER IS AS SHORT AS IT IS SIMPLE:

***EVERYWHERE.***

## **Customers want, no, they even expect a cross-channel experience.**

Commerce takes place everywhere these days – whether it is on social media channels, via live streams, directly with the retailer via D2C or in hybrid retail. Companies and retailers need to be aware that their customers can no longer be reached on just one channel. Customers must be engaged at all interconnected customer journey touchpoints, including omnichannel solutions such as<sup>20</sup>:

### **IN-STORE RETURN**

Products purchased online can be returned at retail stores. Customers can save any return shipping costs and look for alternative products right away.

### **IN-STORE ORDER**

Customers receive advice and support from sales staff in store, who accompany them with a tablet, for example. The shopping experience is improved and customers can have the products delivered either to their home or to the store.

### **CLICK & COLLECT**

Customers can pick up and pay for products ordered online at brick-and-mortar stores. This reduces any mistrust of digital payment methods and can make it possible to provide an additional consulting service.

### **ONLINE AVAILABILITY DISPLAY**

Customers check the availability of a retailer's products online and get reliable information on whether it is worth going to the store. There, customers can then be inspired by other products.

**This shows that location-based digital tools that bridge the gap between the offline and online world are becoming increasingly important.**

The US-American department store Target, for example, offers an app that notifies customers when they are near a store and then displays location-based special offers. Since the 2018 Christmas season, Target has also offered a checkout service called »Skip the Line«, which allows customers at the department store to check out with various store employees without having to wait in line.<sup>21</sup>

## **COMMERCE IS EVERYWHERE.**

To say that selling products and services is different today than it was in the days of the traditional pillars of marketing is a major understatement.

B2B companies, for example, are under constant pressure due to increasing digitalisation, having to rethink their multi-channel sales strategies and reach »hybrid customers« across all channels.<sup>22</sup>

In the case of multi-channel retailers, the integration of all channels to provide customers with a seamless experience takes place across all front- and back-end processes. However, this approach should always focus on customers and it should be evaluated in a data-driven manner which channels they use in parallel and where their pre-purchase and post-purchase stage takes place. The reason for this is that these processes differ from customer to customer.<sup>23</sup>

**CUSTOMERS DO NOT IDENTIFY WITH SHOPPING CHANNELS,  
BUT WITH THE BRANDS THEY TRUST.<sup>24</sup>**



»**Everywhere commerce**« no longer distinguishes between mobile commerce, e-commerce and brick-and-mortar retailers. Customers do their research, buy products and return them,

**WHENEVER AND WHEREVER THEY WANT!**<sup>25</sup>



**72%** of customers expect consistent interaction across all departments.<sup>26</sup>



**8 out of 10** B2B executives say that omnichannel is more effective than traditional methods.<sup>26</sup>

# PROMOTION – AUTHENTICITY PAYS OFF

WORD-OF-MOUTH MARKETING PLAYS AN  
EXTREMELY IMPORTANT ROLE IN THE DIGITAL WORLD.





The traditional interpretation of the term »promotion« encompasses all tools that serve to disseminate information about products and build customer loyalty, such as advertising and public relations.<sup>27</sup>

**However, the times of the shotgun approach in marketing are long gone.**

Thanks to digital analytics tools and clustering methods, companies and brands know their target audience very well and can engage it with tailored ads – anytime and anywhere. However, 85 per cent of Internet users perceive this type of advertising as annoying. Advertising is only perceived as more annoying on television.<sup>28</sup> In addition, one out of three people in Germany uses an ad blocker.<sup>29</sup>

Non-transparent data collections by big players like Google and Facebook lead to overly personalised ads being perceived as creepy.<sup>30</sup>

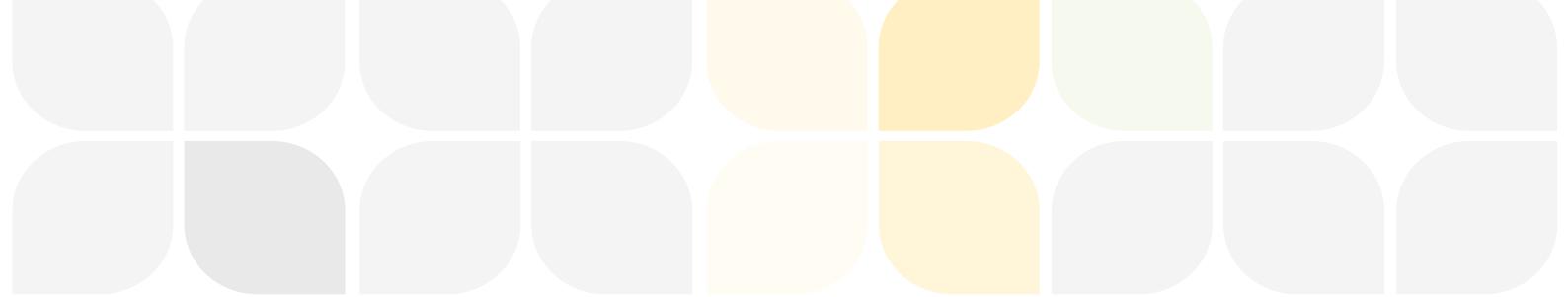
**SO HOW CAN COMPANIES GENERATE ATTENTION FOR THEIR PRODUCTS AND SERVICES WHEN PROMOTION TAKES PLACE EVERYWHERE?**

**HOW CAN CONSUMERS BE CONVINCED TO MAKE A PURCHASE WHEN INFORMATION IS UNIVERSALLY ACCESSIBLE?**

The solution is

**AUTHENTICITY.**

In order to authentically advertise products and services, satisfied customers, users, fans and friends will remain the key to success in the future. Gathering community opinion is easier than ever these days.



## REVIEW PORTALS

Almost **90%** of online shoppers inform themselves on a review portal before buying a product.<sup>31</sup>

Customers are more likely to rate a product if they were satisfied with it. About one out of four customers changes their negative review to a positive one when the company responds.<sup>31</sup> Companies should therefore definitely enter into dialogue with dissatisfied customers, get certified seals of quality and rely on their customers as a decision-making aid for potential new customers.

Combining sweepstakes and product reviews as well as charming reminders in newsletters can encourage more customers to write reviews. Professional quality and complaint management can also help companies stand out from the competition and strengthen customer loyalty.<sup>32</sup>

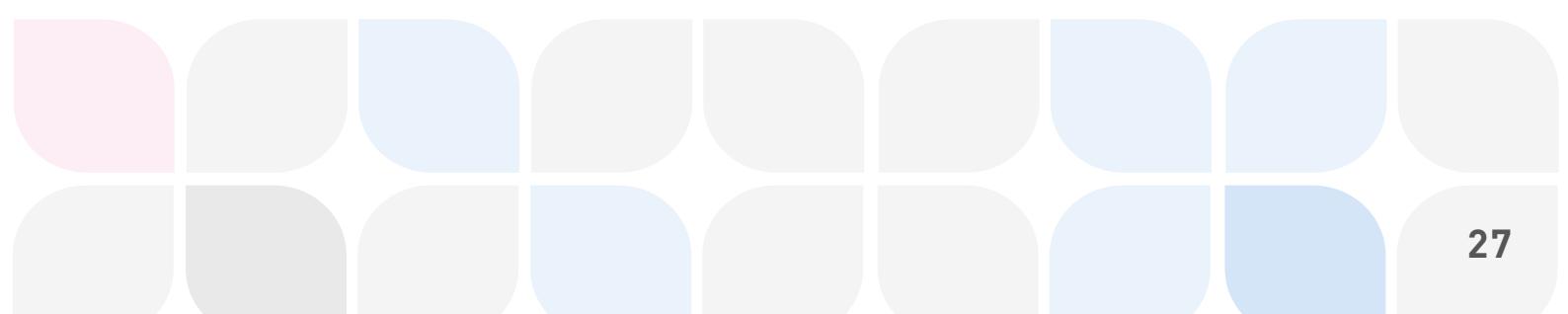


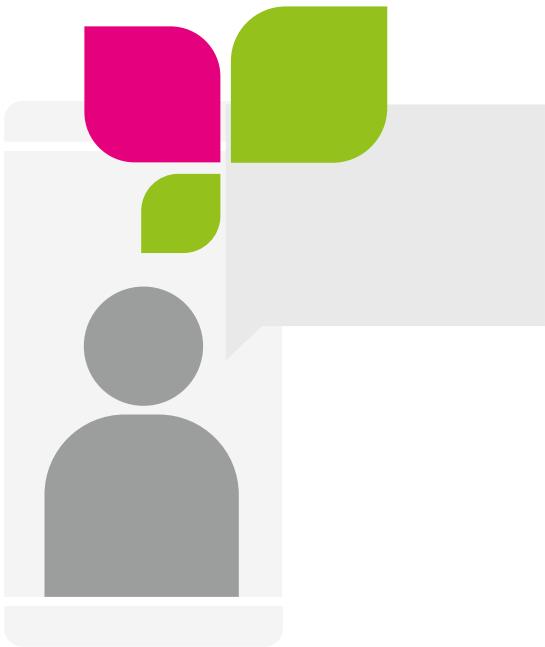
## USER-GENERATED CONTENT

User are 2.4 times more likely to **trust** the authenticity of statements made by other users than content from the brand itself.<sup>33</sup>

And digitalisation makes it possible. The psychological phenomenon of »social proof«, where people tend to rely on other people's opinions, is an important factor for companies in a digitalised world.<sup>34</sup> The construction equipment manufacturer Liebherr shows that user-generated content also works in B2B: The company started a community for crane operators and fans.

Users could upload, comment on and share photos of cranes on »Tower Crane World«. The posts featured on a map, creating an overview of the world of cranes from above. Liebherr was able to engage directly with fans, providing them with product information and creating a large community of technicians, crane operators and manufacturers. 1,000 different locations and 50,000 website visitors later, the company received the »Deutscher Preis für Onlinekommunikation« (German Award for Online Communication) for this project.<sup>35</sup>





## INFLUENCERS

### COMPANIES NOW EARN 5.20 US DOLLARS FOR EVERY US DOLLAR THEY SPEND ON INFLUENCER MARKETING.<sup>36</sup>

Influencers are people who use their popularity and reach, especially on social media channels, to enter into paid partnerships with brands and companies. In return for contractually agreed payments, they promote a company's products and provide relevant information in their videos and posts.<sup>37</sup> B2C influencers have long been in vogue. However, they can also be effective in B2B. Here, purchasing decisions are influenced less by emotionality and more by rationality.<sup>38</sup>

Professional content, areas of expertise and the reputation of B2B influencers are also more important than their reach – industry experts instead of celebrities.<sup>39</sup> However, there are a number of things that B2B companies need to keep in mind if they want to be successful with influencer marketing on XING, LinkedIn and Twitter.

## **1. Choosing influencers wisely**

Inappropriate influencers can damage the credibility of a company. That is why it is important to invest enough time in selecting a suitable influencer.

## **2. Identifying corporate influencers**

Corporate influencers are authentic and credible alternatives to external influencers, speakers and business partners.

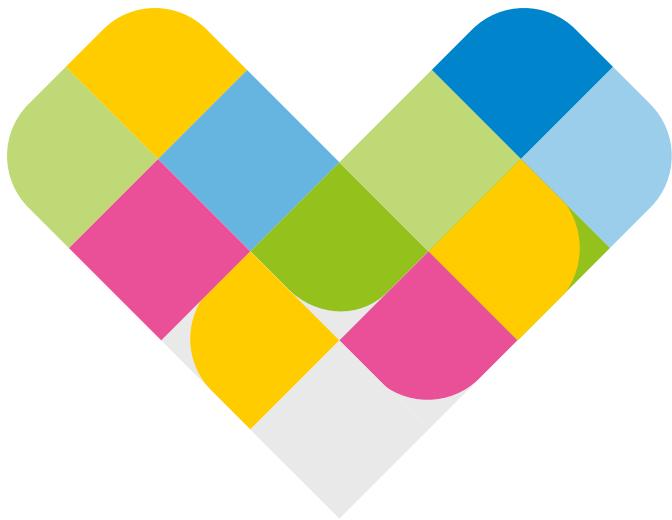
## **3. Serving niches**

Especially in B2B, niche experts are listened to. If companies cannot find a suitable influencer for their niche, they have the opportunity to position someone in the segment themselves.<sup>38</sup>

# PEOPLE

**EMPLOYEES ARE  
THE BEST BRAND  
AMBASSADORS.**

When customers use a product or service, they inevitably interact with the contacts – the employees – of the respective company. Whether consciously or unconsciously, this contact is always seen as a yardstick for the quality level of an organisation. Even when using seemingly impersonal streaming services or ordering meal kits, the quality of customer service via messenger, e-mail or phone can be a significant competitive advantage.<sup>40</sup>



That is why companies need employees who take care of customers, embody the company's vision and can identify with the product – and ideally even see themselves as brand ambassadors.

There are three main aspects that organisations need to keep in mind in order to create a positive image, both internally among employees and externally, and thus retain customers in the long term:

## 1. RECRUITING THE RIGHT EMPLOYEES

Qualified employees are not that easy to find – and if they are, they are in high demand on the job market. For this reason, companies should develop a clear strategy for recruiting employees – especially for digital business. Specialists can be approached directly and digital experts as well as university graduates can be recruited by means of recruitment marketing.<sup>41</sup>

This requires companies to keep up with digitalisation and provide career opportunities that did not exist just a few years ago. Whether data scientist, instructional designer or cloud architect: The skillsets of potential new recruits are becoming more digital, more specific and more varied. Companies can only remain competitive if they offer appropriate jobs or learn to reposition themselves.

## 2. CONTINUOUSLY IMPROVING EMPLOYEE SKILLS

Recruitment strategies, however, are only part of the measures to become or remain successful. Training strategies are almost more important. In order to continuously train employees, employers must be able to recognise the potential of their employees and support them in developing their skills. 98 per cent of companies would welcome training for existing employees.<sup>42</sup>

They state that practical relevance, concise and efficient knowledge transfer as well as scientifically sound content in particular should be part of training.<sup>42</sup>

It is a fact that the expectations of customers can only be met or even exceeded once the skills of employees have been ideally adapted to the challenges of the digital age.

### 3. INCREASING EMPLOYEE SATISFACTION

Employees should always feel ideally supported. HR strategies must be employee-centric and geared to individual needs – Generations Y and Z in particular see employment relationships as a constant give and take. By involving employees in decision-making processes, learning culture, innovative strength and acceptance of change are improved in the long term.<sup>43</sup>

Inflexible working hours, rigid hierarchies and strict division of labour only hinder the development of a company's internal knowledge and innovation management.

Executives bear responsibility and must increasingly see themselves as facilitators. Dictating tasks to others is a thing of the past. Instead, project managers must let their teams figure out to-dos and due dates on their own, act as a point of contact and allow momentum to build through enthusiasm and motivation.

This means that processes must appear as **simple** as possible to customers.

In the background, however, they must be interconnected as efficiently as possible.

**57%** of customers consider good service to be the most important aspect for them to feel connected to a brand.<sup>44</sup>

**41%** of HR professionals see corporate culture as the main obstacle to digitalisation, as it is still not focused on that issue.<sup>45</sup>

# PROCESS – OPTIMISATION THROUGH ORCHESTRATION

## MODERN, DIGITAL PROCESSES ARE ALWAYS USER-CENTRIC.

In the digital age, the implementation of digital solutions alone does not lead to improved or new processes and thus to success. For companies to really make the most of the potential of innovative technologies, they need a change of perspective, a failure-tolerant corporate culture as well as employees who are willing to learn new methods and develop their skills.<sup>46</sup>

On their way to the digital Olympus, companies must therefore pay attention to a user-centric orchestration of their system and process landscape in order to offer customers, partners, suppliers and employees the most convenient shopping, service and collaboration experiences possible.

**Disney is a good example of the digital renaissance of the »Process« marketing pillar.**

When Disney customers book their theme park trip via app or on the website, they can use the »My Disney Experience« tool as an app to plan the details of their trip – from choosing restaurants to securing a FastPass. In the park, they use the app to find attractions and view estimated wait times. The app is also connected to the admission wristband, which acts as a key to the hotel, saves photos and processes food orders financially.<sup>47</sup>

## **Customer expectations are high.**

To live up to these expectations, companies need intelligent customer management – and that is only possible with a modern CRM system,<sup>48</sup> not least so that marketing, sales and service can work together optimally and provide customers with the most pleasant customer journey. It is important for companies to digitalise many different departments in parallel in order to accelerate processes, make full use of the potential of the implemented tools and ensure maximum interconnection.

## **ORCHESTRATION**

in this context means

**THE COMBINATION OF SEVERAL INDIVIDUAL SERVICES INTO ONE OVERALL SERVICE. IT ASSIGNS SPECIFIC FUNCTIONS TO DIFFERENT SERVICES, PROCESSES, APPLICATIONS AND WORKLOADS AND MANAGES INTERDEPENDENCIES.<sup>49</sup>**

# PHYSICAL EVIDENCE

PEOPLE NO LONGER BUY PRODUCTS,  
THEY BUY EXPERIENCES.



## **EMOTIONS INFLUENCE WHAT WE BUY**

The subjective perception of a product or service by customers contributes significantly to a positive brand experience – then as now. A holistic, cross-channel brand experience is the royal road to success, especially nowadays when the audience's attention is the most precious asset.<sup>50</sup>

## **APPLE SELLS SIMPLICITY.**

## **HARLEY-DAVIDSON SELLS FREEDOM.**

## **NIKE SELLS MOTIVATION.**

These brands are successful because they appeal to human emotions. Consumers remember them for longer – not only because they are present on all channels, but also because of their coherence.<sup>51</sup>

At Starbucks, customers not only buy their coffee, but they also enjoy a living room atmosphere, free Wi-Fi and their personalised coffee cup. Convenience, cosiness and connection. The company wants to establish Starbucks as the »third place« for every customer besides their home and office<sup>52</sup> – not because the coffee is the best, but because the experience should be special.



- BUT HOW CAN PHYSICAL EXPERIENCE WORLDS BE TRANSFERRED TO THE DIGITAL REALM?**
- HOW CAN ONLINE SHOPS STICK IN PEOPLE'S MINDS?**
- AND HOW CAN BRANDS PREVAIL AGAINST THEIR COMPETITORS IN THE DIGITAL WORLD?**

## A PERSONALISED APPROACH IS THE STARBUCKS CUP OF THE INTERNET

For companies and brands to build recognition online, customers need to get a feel for who and what is behind a website. On first contact, this is often achieved through visual stimuli, colours and consistent typographies.<sup>53</sup>

Unlike the original marketing theory that did not take the digital realm into account, quick page load times, conversion-optimised designs and fast product findability are the interior design of the digital age. A smart SEO strategy is the billboard of the modern era, a personalised approach the Starbucks cup of the Internet.

In order to create a compelling brand experience, silo thinking in companies must be broken down. In this case, brand managers still operate separately from customer service, product management and marketing. In the worst-case scenario, a company may have a visual language that is appropriate for the target audience, have one-click buy features on its website and have integrated a modern chatbot, but then does not provide booked services for weeks and leaves customers with queries waiting in a queue.

Brand experience must therefore be consistent in every contact with customers and involve all departments.<sup>54</sup> Then customers will come back.

## TRADITIONAL MARKETING MIX

Product

Price

Place

Promotion

People

Process

Physical Evidence

## EXTENDED MARKETING MIX

Business Model

Digital Services

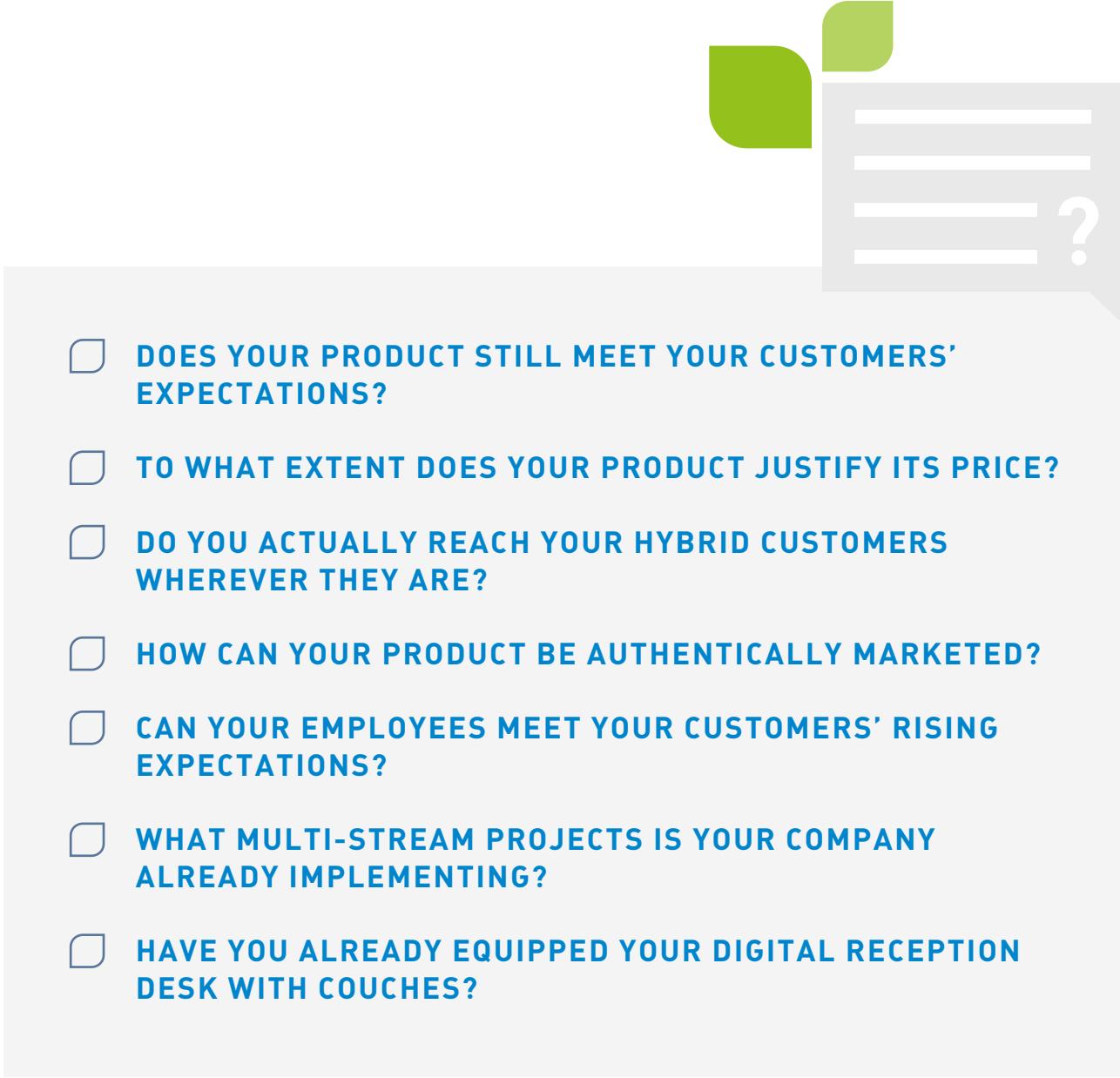
Omnichannel

Authenticity

Brand Ambassadors

Team and System Orchestration

Brand Experience



- DOES YOUR PRODUCT STILL MEET YOUR CUSTOMERS' EXPECTATIONS?**
- TO WHAT EXTENT DOES YOUR PRODUCT JUSTIFY ITS PRICE?**
- DO YOU ACTUALLY REACH YOUR HYBRID CUSTOMERS WHEREVER THEY ARE?**
- HOW CAN YOUR PRODUCT BE AUTHENTICALLY MARKETED?**
- CAN YOUR EMPLOYEES MEET YOUR CUSTOMERS' RISING EXPECTATIONS?**
- WHAT MULTI-STREAM PROJECTS IS YOUR COMPANY ALREADY IMPLEMENTING?**
- HAVE YOU ALREADY EQUIPPED YOUR DIGITAL RECEPTION DESK WITH COUCHES?**

# TRANSFORMATION STARTS IN YOUR MIND

In order to hold their own in digital business and remain successful in the long term, companies need professionals and executives who are able to think digitally, act in a future-oriented manner and bring change into the company. In the training courses at Digital Business School, we demand and promote this potential and train the digital experts of tomorrow.



## LOOKING FOR DIGITAL EXPERTS?

» Thanks to the »E-Commerce Manager« certification course, I obtained a 360-degree view of digital business. The modules really cover everything – from strategy to logistics. The contents of the seminar series are very practical, which means that they can easily be put into practice within companies as well. The knowledge I acquired also allowed me to develop new ideas that take our company forward. To sum things up: this is exactly the right training course to understand e-commerce in its entirety!

– Nicole Schipper, Head of Marketing, Schecker GmbH



»E-COMMERCE  
MANAGER«  
CERTIFICATION  
COURSE



## WE TRAIN YOUR PROFESSIONALS AND EXECUTIVES!

» Thanks to the »E-Commerce Manager« certification course, I was able to get exactly the overview and professional input that I need on a daily basis – both in the exchange with developers and with customers. The »Digital Transformation Architect« certification course then helped me to overcome internal challenges. The keywords here are further strategic development of the shop, leadership and project management.

– Gina Heiden, Head of E-Commerce, Delmes Heitmann GmbH & Co. KG



Digital  
Business  
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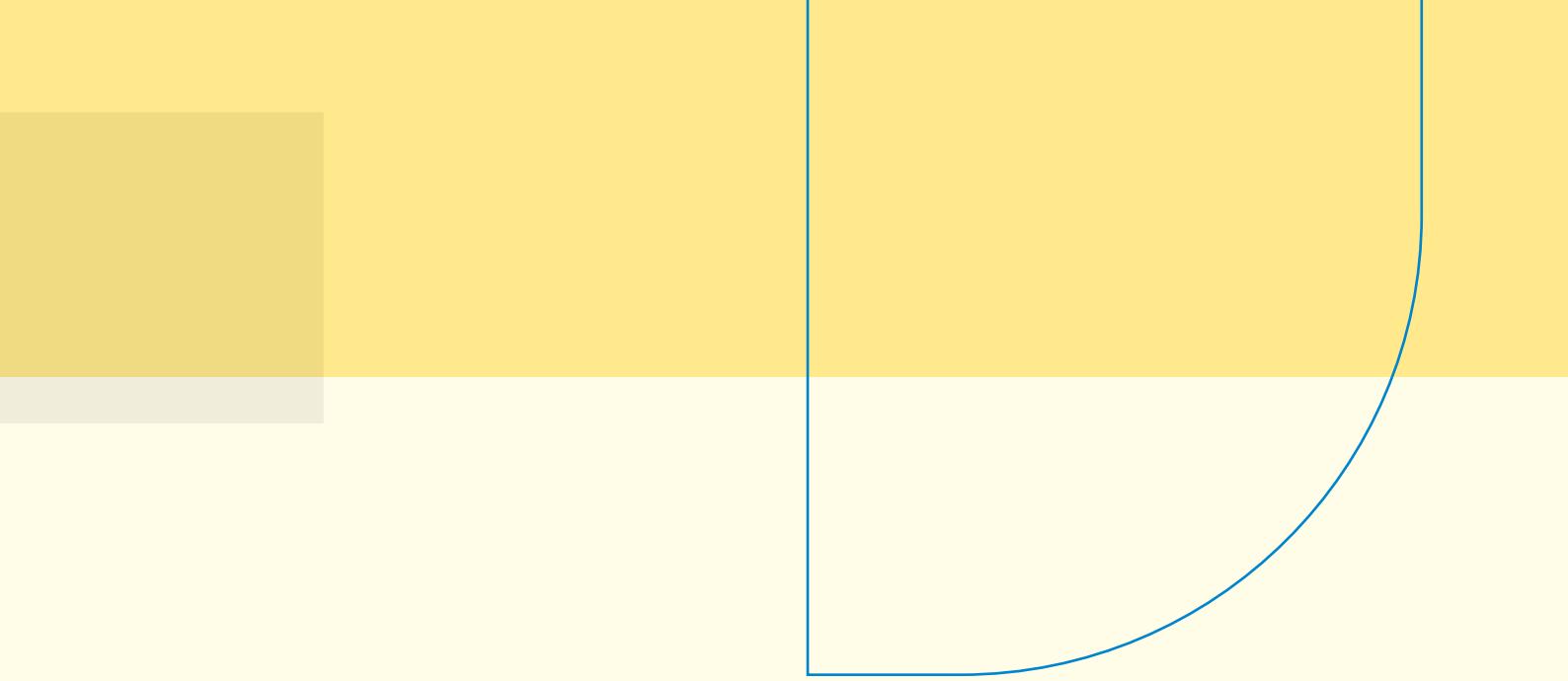
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# BECOMING A LOVE BRAND



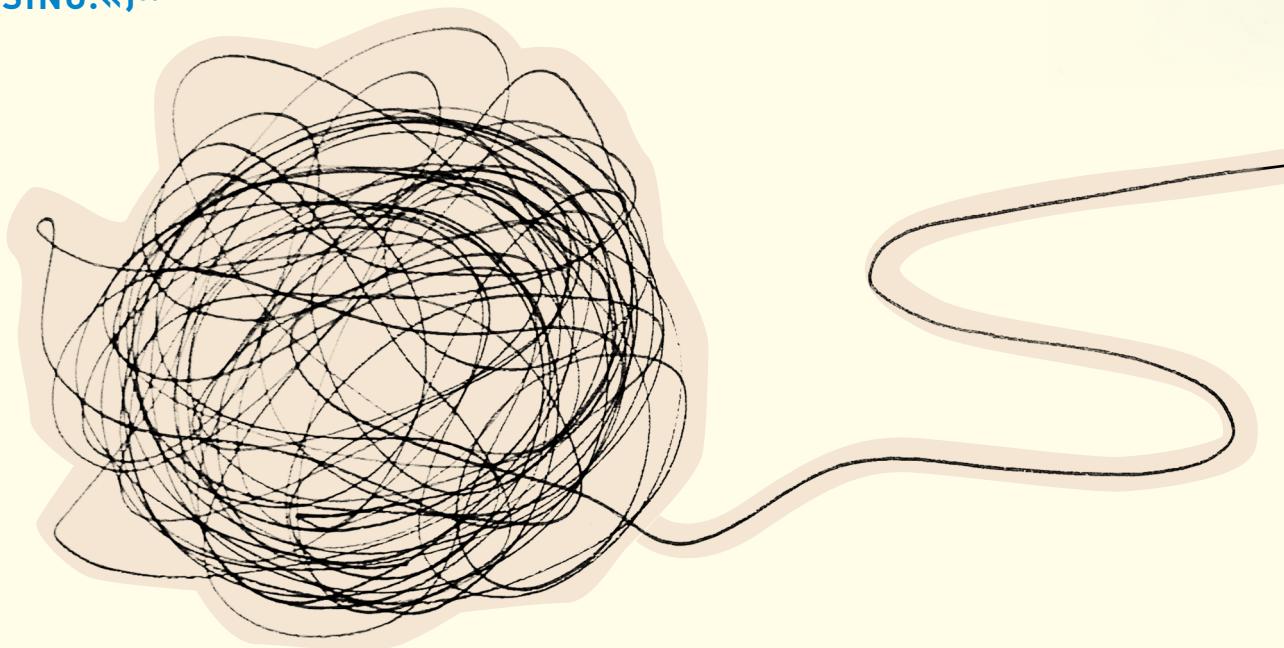
## NOWADAYS, A BRAND IS ONLY SUCCESSFUL IF IT HAS FANS INSTEAD OF CUSTOMERS.

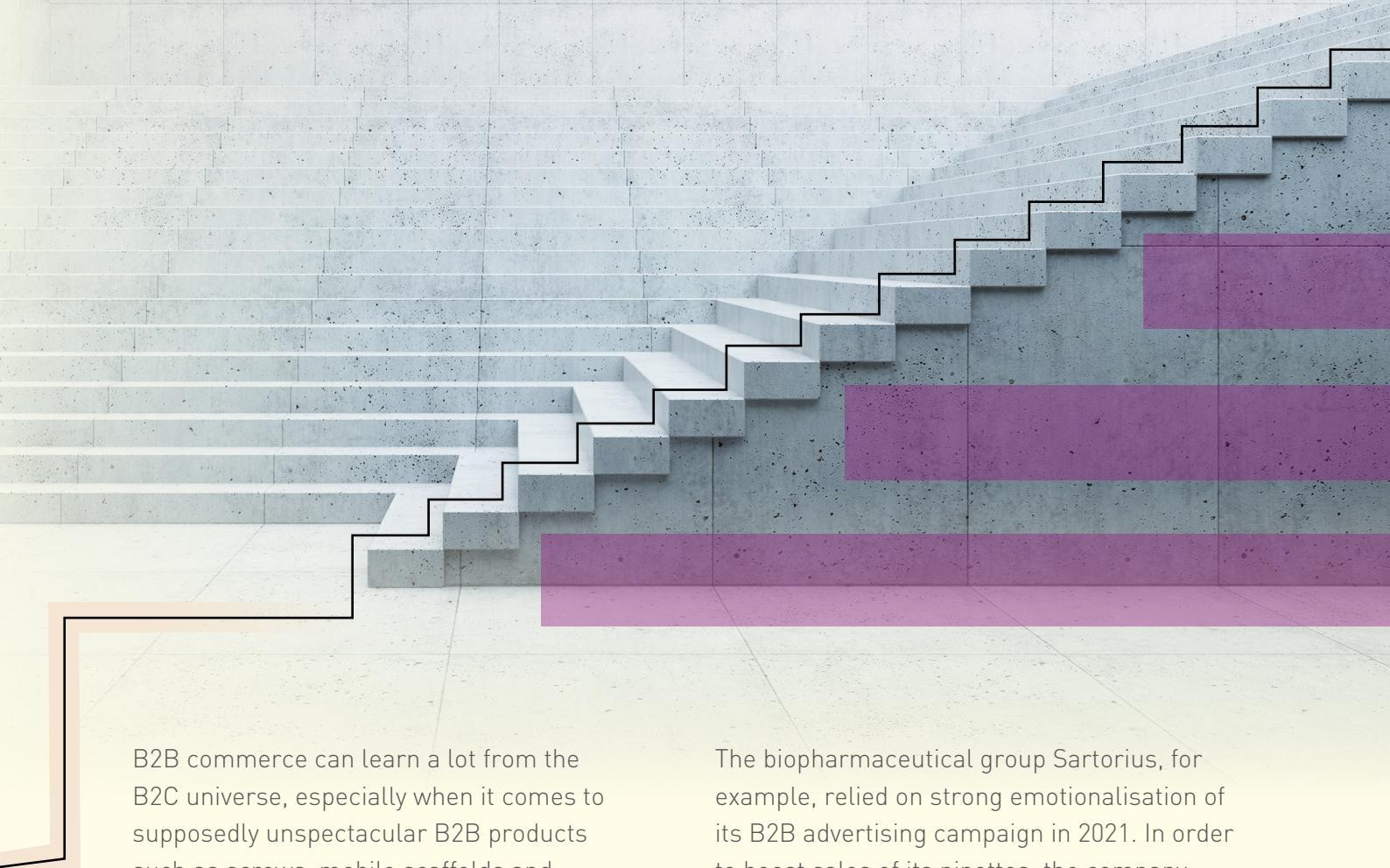
Brand loyalty is no longer a question of business model. **B2B companies benefit from taking inspiration from B2C strategies and channels.** Bold companies are once again turning to tried and tested means such as **audio branding** and **print marketing** to get

closer to their fans, cleverly linking them to **voice commerce** and **live stream events**. With such a variety of options, the challenge is not to overwhelm users. Successful brands are brands that can be experienced – with all senses.

# WHAT B2B CAN LEARN FROM B2C

»SCHWACHE MARKEN MACHEN KUNDENWERBUNG.  
FÜR STARKE MARKEN MACHEN KUNDEN WERBUNG.«  
(»WEAK BRANDS ADVERTISE TO CUSTOMERS. FOR STRONG  
BRANDS, HOWEVER, IT IS CUSTOMERS WHO DO THE  
ADVERTISING.«)<sup>55</sup>





B2B commerce can learn a lot from the B2C universe, especially when it comes to supposedly unspectacular B2B products such as screws, mobile scaffolds and production equipment. The keyword here is emotionalisation – both in the analogue and the digital world. Especially in the digital realm, the same rules apply to all companies. Here, they all have to submit to the relevant algorithms while at the same time generating traffic to their online shops.

The biopharmaceutical group Sartorius, for example, relied on strong emotionalisation of its B2B advertising campaign in 2021. In order to boost sales of its pipettes, the company used an unusual key visual: a cramped hand. The accompanying text: »Ergonomic pipettes. Listen to your hand.« The corresponding call to action: »Request a free trial now.« This tonality, completely focused on users' needs, led to greater brand awareness and ultimately stronger sales growth.<sup>56</sup>

Overall, there are several digital strategies that are less established in B2B than in B2C. Three particularly effective ones are mentioned here:

### 1. DIGITAL PERSONALISATION

Companies must understand their customers. For this reason, it makes sense to carry out a customer analysis before developing an effective marketing strategy. In B2C, personas are standard for many companies. They are developed with regard to the needs and mentalities of customers. When B2B companies know the people behind business customer accounts, they too can make use of personalised offers in the form of advertising

and sales campaigns. Only then do B2B companies reach the right people with their marketing efforts.<sup>57</sup> The purchasing decision process often involves employees in different roles, for example purchasing agents, technicians, lawyers and CEOs.<sup>58</sup> The question is always: Who is the contact person and what information do they need? Service content or plain display of prices?

**B2B**

**Digital Masters**  
Convention



Strategy



Best Practice



Masterclasses

## 2. DIGITAL VISIBILITY

Both B2C and B2B companies rely on online customer acquisition, for example through a search engine optimised website with background information and integrated contact function. Unlike in B2C commerce, however, digital marketing in B2B requires companies to invest more time in grouping search terms

for Google Ads, as the search queries are usually more specific. In addition, keywords with a lower search volume must also be taken into account in B2B because otherwise medium-sized companies in particular rarely get past the big players in the industry.<sup>56</sup> The mechanisms behind this are the same as in B2C.

09–10 November 2022

# B2B from Professionals for Professionals

At relevant industry events, those responsible for digital B2B business often do not even get the chance to ask their specific questions. The B2B Digital Masters Convention changes that. After all, B2B is not just one industry among many, but a multi-layered business with complex products and demanding customers.

Join us now!

[b2b-dmc.de](http://b2b-dmc.de)



### 3. DIGITAL INFRASTRUCTURE

B2B companies not only need to further automate their e-commerce processes, they should also build a good infrastructure on social networks. An authentic presence, community management and thought leadership on B2B channels such as LinkedIn or XING can make a big difference. This is exactly where the right companies and contacts can be reached with ads and appealing posts.

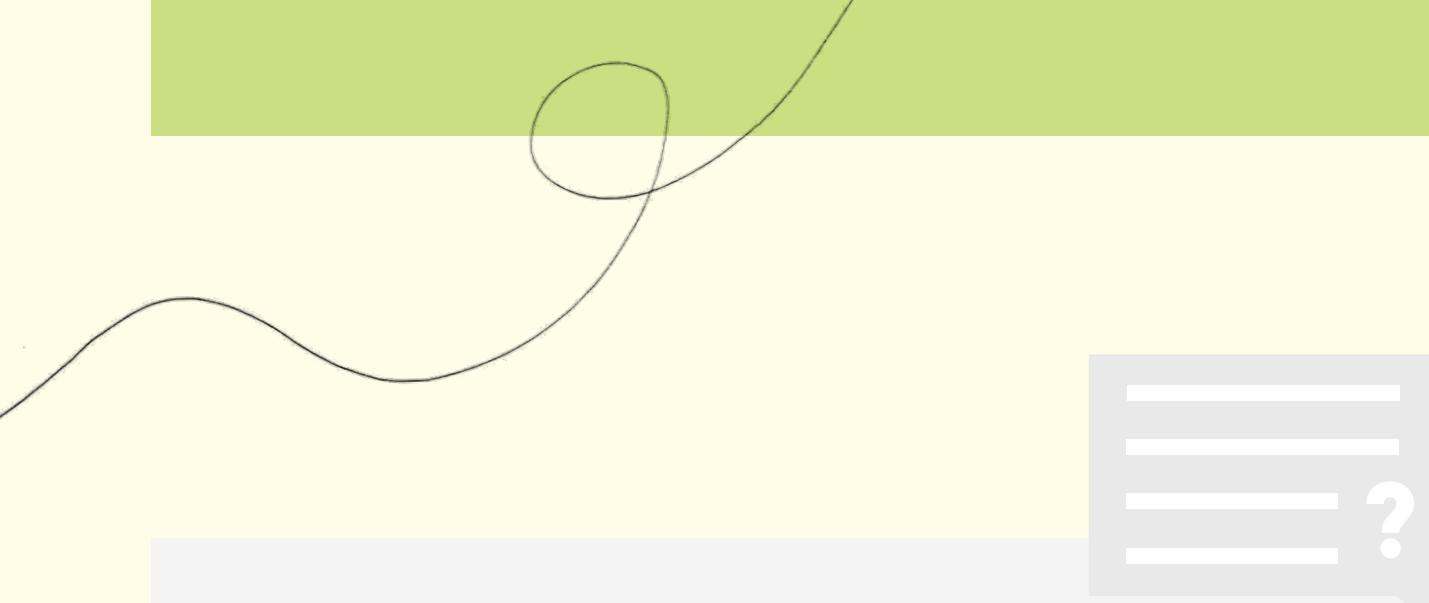
It is important that products and services are presented in an equally emotional and inspiring way – just like people are used to in B2C. This makes companies more approachable and transparent.

## »FANS INSTEAD OF CUSTOMERS«

is the motto when it comes to building a community online – especially in B2B.

The construction equipment manufacturer Caterpillar/CAT, which was already mentioned for its innovative machine maintenance strategy, generates a significant portion of its revenue these days by selling merchandise such as keychains and toy excavators. The community pays on its own initiative to represent the brand. CAT has climbed the Olympus of B2B community management – construction machines turn into products that evoke emotions.<sup>59</sup>

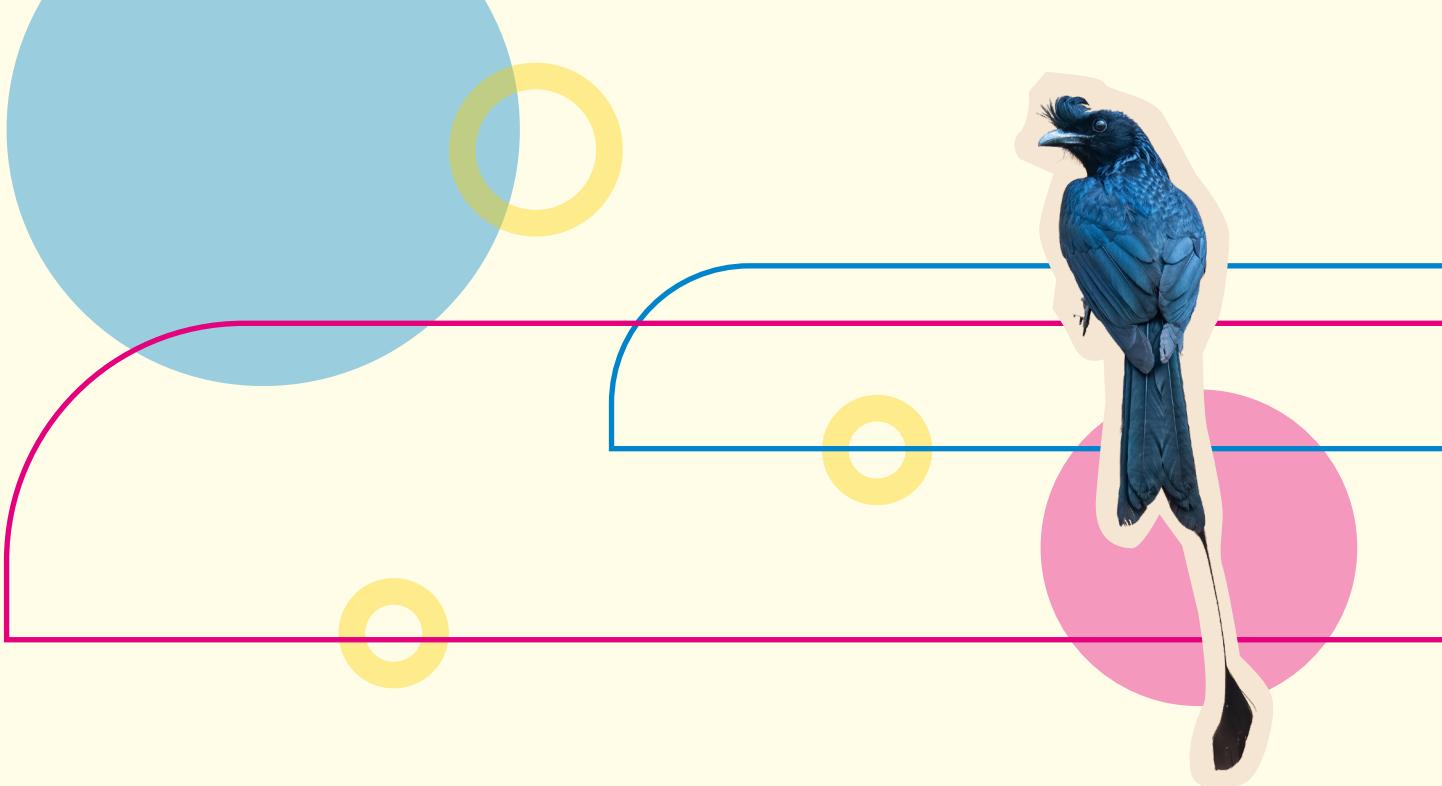
Companies need to ask themselves how they can translate inspiration from B2C campaigns into their own business. The most important prerequisite for this is that they know their target audience or invest in getting to know them.



- DO YOU KNOW WHICH STAKEHOLDERS YOU NEED TO CONVINCE WITH WHICH INFORMATION?**
- CAN YOUR CUSTOMERS FIND YOUR PRODUCTS ONLINE?**
- DOES YOUR BRAND ALREADY BENEFIT FROM AN EFFECTIVE SOCIAL MEDIA STRATEGY?**
- DO YOU APPEAL TO THE EMOTIONS OF YOUR CUSTOMERS?**
- HOW CLEAN ARE YOUR USER INTERFACES?**

# SONIC BRANDING

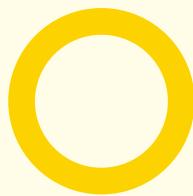
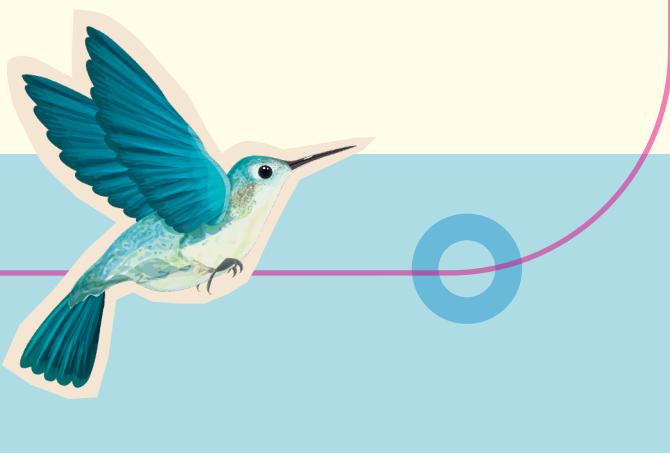




Music and sounds have a strong emotional impact, which also affects the trust of and closeness to users and potential customers. Especially in times characterised by sensory overload, it is important to shape one's own brand management.<sup>60</sup> Jingles, sound and melodies with recognition value are marketing classics.

### **But why is music so important these days?**

Sonic branding is the opportunity for brands to add an acoustic element to their identity. Whether it is pouring an ice-cold Coke into a glass full of ice cubes or crunching on potato crisps: audio content evokes emotions, increases brand awareness and establishes communication between brands and consumers.<sup>61</sup>



**Representing brand identity acoustically has become just as important as visual identity – provided it also fits the corporate DNA and strategy.<sup>64</sup>**

Nowadays, you see people wearing headphones or EarPods everywhere – on pavements, on buses, while doing sports. »Generation Headphones« makes it clear that the desire for a personal audio sphere is omnipresent.<sup>62</sup>

The mobility and individuality provided by smartphones offers more audio touchpoints along the customer journey than ever before. Acoustic stimuli are also playing an increasingly important role when it comes to user experience, for example in the form of app feedback or notification sounds.<sup>63</sup>

Everyone remembers the roar of the MGM lion, McDonald's »I'm lovin' it« jingle or the UEFA Champions League intro. Thanks to the catchy jingle, the first thing anyone noticing a stone chip in their windscreen on the motorway does is call Autoglass.

Brands must be made audible in 2022. Through sound logos and brand voices, brands must be recognisable on all auditory channels – from podcasts, sound assistants, hotline queues and radio ads to background sound on a website.<sup>65</sup> This is the only way for companies to gain a competitive advantage in the long term.

**101**

minutes a day, 14- to 69-year-olds in Germany listen to the radio –  
84 minutes via broadcast platforms and 17 minutes via the Internet.<sup>66</sup>

**33%**

listen to podcasts at least occasionally.<sup>67</sup>

**40%**

of people over the age of 14  
use audio streaming services.<sup>68</sup>



**WHICH INTUITIVE TIMBRES ARE SUITABLE  
FOR YOUR BRAND?**

# DIGITAL CHAMPIONS SHARE THEIR KNOWLEDGE WITH ALL SENSES



## Digital. Business. Talk.

For the »Digital. Business. Talk.«, Handelskraft Digital Evangelist Oliver Kling and Digital Business Analyst Franziska Kunz invite experts from the digital industry to discuss current issues. The focus is always on the latest developments in the industry, including trends and analyses – everything straight forward.



## dotCast

Digital expertise to go – in the car, on the train or on the couch. »dotCast«, the digital tech podcast, turns dotSource webinars into audible content. Whether it is digital trends, industry knowledge or technology insights: with »dotCast«, you always stay up to date.



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On our YouTube channel, you can get insights into dotSource projects and events. In addition, our digital experts at »dotSource Research« explain the basics of digital customer relationships in easy-to-understand videos.





## Webinars

Whether it is digital strategies, New Work or system selection: our webinars offer the opportunity to get information on digital trends, build up industry knowledge and gain insights into current software solutions.



## Handelskraft Blog

Handelskraft.de is one of the leading German e-commerce and digital marketing blogs. Since 2007, we have been reporting on trends and developments in digital business on a daily basis. We already share our insights and ideas with over 6,900 feed readers.



## Research

Clear. Easy to understand. Practical. Our publications such as trend books, white papers and success stories as well as our »Best Practices« format provide insights into the most important digital topics, analyse trends and share knowledge about successful digital projects that we have carried out with our clients.



# VOICE COMMERCE



»ALEXA, ORDER DETERGENT!«,  
»SIRI, WHAT'S THE WEATHER GOING TO BE LIKE TODAY?«,  
»OK GOOGLE, SHOW ME SPORTS SHOPS NEARBY!«

This is pretty much how many dialogues in German households go. Voice assistants have been in vogue for quite some time and will play an even greater role in the future.

One out of four Germans already owns at least one smart speaker; among those interested in technology, this figure is as high as 75 per cent.<sup>69</sup>

Voice commerce goes beyond the use of smart speakers and encompasses not only completed shopping cart transactions, but also price enquiries, product advice and regular information about bargains and offers.

**Users are getting older, lazier and want their information more quickly.**

These alone are **THREE** reasons for the success of voice assistants.

## HOW DO VOICE ASSISTANTS WORK, FOR EXAMPLE WHEN BUYING RECORDS?

- The user asks the voice assistant:  
»Where can I find David Bowie records?«
- The question is sent to the voice assistant's provider as an audio file.
- Automatic speech recognition is used to convert the audio file into a character string.
- Natural language processing (NLP) splits the character string into components to determine the intention of the query.
- The intention is then forwarded to Google, for example.
- Google processes the query, returns the result and the voice assistant sends it to the text-to-speech engine.
- The user receives an answer in spoken form. Record dealers nearby or online shops offering David Bowie records are suggested to the user.<sup>70</sup>

When dealing with the topic of voice commerce, companies should ask themselves how they can establish their brand via voice. This works, for example, with a memorable sound logo, catchy tunes or creative catchphrases. It is also important whether and how voice can relieve the burden on customer service and generate repeat customers.<sup>71</sup>

When designing a well-functioning voice feature, it is important to ensure that users do not end up in a dead-end situation. Instead, emphasis should be placed on a circular conversational design – a modern roundabout that does not have any exits and allows companies to reach users with questions over and over again.<sup>70</sup> However, the prerequisite is that the content of the website is suitable for this in the first place.

### **Circular conversational design is becoming indispensable in voice commerce.<sup>70</sup>**

Voice still benefits from the entertainment factor and rarely generates shopping cart transactions over 75 euros, but this is just the right opportunity for companies that want to be first movers. They can use gamification triggers to set up the channel, benefit from community effects and ultimately be so entertaining that customers keep coming back.

An alternative to voice responses is the use of visual feedback features. Users can receive feedback via VUIs, for example. VUI means voice user interface and acts as a voice-controlled user interface that lets users experience what they have just said – in the form of visual feedback.<sup>72</sup>

## THREE KEY FACTS ABOUT SMART SPEAKERS<sup>73</sup>:

THOSE WHO OWN A SMART SPEAKER ALSO USE IT.

SMART SPEAKER USERS SEE GREATER POTENTIAL IN THEM THAN HAS BEEN TAPPED TO DATE.

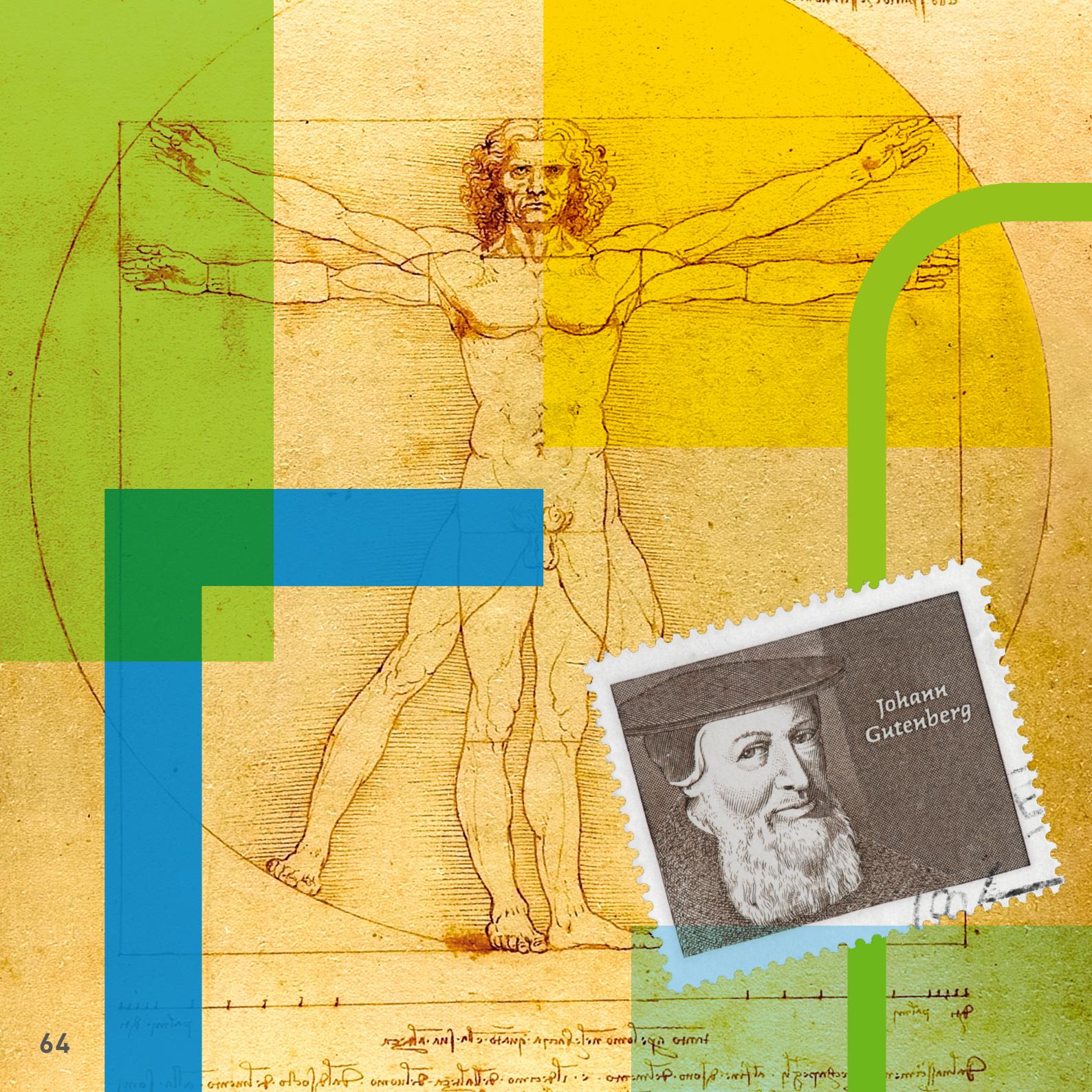
THEY ARE PRIMARILY USED FOR STREAMING SERVICES AND SMART HOME APPS.

Voice-controlled input devices benefit from the processing by our brain. It can process spoken language three times faster than text.<sup>74</sup>



WHAT PRODUCTS OR SERVICES CAN YOU OFFER VIA VOICE?





# THE PRINT RENAISSANCE

Not so long ago, people were happy when they received an e-mail and did not have their letterbox full all the time. Today, it is the other way around.

## **Print is back.**

Print mailings are a creative way to reach customers who use a spam filter.<sup>75</sup> After all, 57 per cent of all e-mails worldwide are spam. However, companies have to come up with something special so that their print mailings do not go straight from the letterbox to the bin. Personalisation and individualisation are the keys to success here. Personalised offers can only be sent to customers if target groups have been created beforehand – just like in online marketing. The only difference lies in the sales channel.

The trend is clearly moving towards trigger-based advertising mail. When existing customers visit an online shop, they can be sent special offers related to their desired products the following week, provided they have given their consent in compliance with the GDPR and the relevant processes in the background are automated<sup>76</sup> – automated in such a way that creatives can fully concentrate on the design of print products. The fully or partially automated processes are carried out by corresponding CRM, DAM or PIM systems. The integration of such systems pays off because they increase the efficiency and quality of the processes.<sup>77</sup>

PIM systems, for example, can usually be connected to various layout tools such as InDesign. This type of system manages projects and makes it possible to plan budgets and use resources efficiently. Product data is automatically and, depending on the campaign, specifically transferred to the layout tool, where clothing sizes, item numbers and personal salutations automatically appear in the template and do not hinder the creative process of designers<sup>76</sup> – completely to the benefit of customers. They then receive an individual, printed QR code or a personal URL (PURL) by postal mail, inviting them to return to the online shop or shopping cart.<sup>78</sup>

### **Trust in print is high!**

In December 2020, the children's rights organisation Save the Children showed how creative dialogue marketing works by sending an empty paper plate to 700,000 Swiss households. Even without explicit images of suffering children, it was clear that the plate was a metaphor for hunger – and the call to action was straightforward: »Helfen Sie mit, Teller zu füllen« (»Help us provide meals«). The campaign brought in thousands of new donors and helped numerous children by doing so.<sup>79</sup>

In order to make mailings more sustainable, messages can be printed on glassine or cornflour – or paper from sustainable forestry can be used.<sup>77</sup>



The options are endless. Offline advertising materials are a welcome change for existing and new customers and can sometimes achieve higher conversion rates than online ads through organised data management.

## PRINT MAILINGS<sup>77</sup>:

GIVE RECIPIENTS A FEELING OF SECURITY

DO NOT REQUIRE ANY FORM OF DATA PROTECTION CONSENT

DELIVER TAILORED, HAPTIC MESSAGES THAT ARE  
TRUSTWORTHY

70% of Germans prefer to receive news regarding personal matters  
by **POSTAL MAIL** rather than by e-mail.<sup>80</sup>



WILL YOU ALSO BECOME A PRINTFLUENCER SOON?



# WHITE PAPERS FOR DIGITAL CHAMPIONS

We present digital topics concisely and in step with actual practice. Our white papers combine trends, analyses and system comparisons with the experience of our clients and our expertise from 16 years of digital business.

## DEVELOPING STRATEGIES



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»SEO IN THE MOBILE ERA«



»CONTENT COMMERCE«



»E-COMMERCE POTENTIAL IN B2B«



»CUSTOMER ENGAGEMENT«

# SELECTING SYSTEMS



»E-COMMERCE SOFTWARE«



»REMOTE BUSINESS«



»DATA-DRIVEN MARKETING«



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# LIVE STREAM SHOPPING

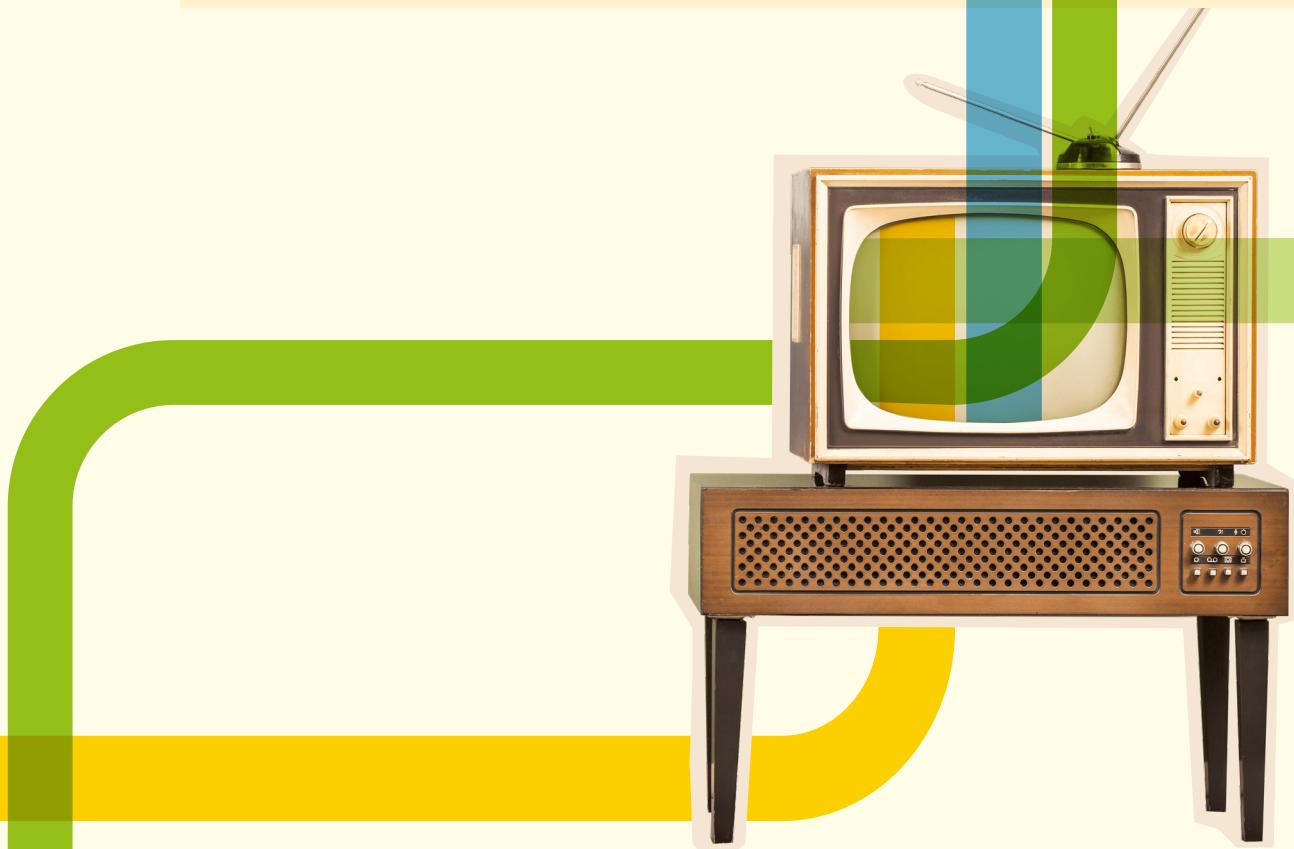
Live streams are increasingly used on social media and websites to present products, conduct Q&A sessions and generate sales. What enjoyed great popularity on home shopping channels such as QVC and HSE24 back then is reinterpreted in this way. Unlike back then, however, live shopping allows fans and followers to exchange information and experiences with each other. Interested people get tips from users who are also interested in superfoods. Or vintage sweatshirts. Or dog toys. It is just like in a store, provided you are in the same place at the same time and have the confidence to talk to strangers.

In China, live streaming e-commerce has long been a profitable business: sales in 2020 are estimated to be around 157.5 billion US dollars – an increase of 210 per cent compared to the previous year.<sup>81</sup> The market is also booming in the USA. Companies rely heavily on key opinion leaders there. Li Jiaqi, a live stream salesman in the service of cosmetics manufacturer L'Oréal, for example, sold 15,000 lipsticks on Taobao on Singles' Day – within a few minutes.<sup>82</sup> On this platform, Viya, a Chinese live stream host based in the USA, has more viewers on average than the Oscars ceremony or the season finale of Game of Thrones.<sup>83</sup>

**THERE ARE TWO TYPES OF  
LIVE STREAM SHOPPING<sup>84</sup>:**

In-store live streams broadcast on the sales pages of brands and companies

Live streams of influencers hired by brands to use their influence on social platforms to sell products





Service providers such as the American start-ups Popshop Live and Glamhive have recognised this trend and enable sellers to create live stream channels on their platforms, including gamification features and real-time performance statistics.<sup>83</sup>

Exclusive products, discounts and limited drops encourage customers to participate in live stream events.

In order to reach a certain number of customers, however, companies should first build a community. This can be achieved, for example, by creating a brand image with recognition value through extraordinary campaigns and by hiring target-group-relevant, high-reach influencers to give products an identity.

Big players from the fashion industry like Louis Vuitton also rely on live streams. In August 2020, a menswear show was live-streamed on various platforms and attracted a large audience<sup>85</sup>:

**68** mil. on Weibo

**18** mil. on Douyin

**8** mil. on Tencent

**1** mil. on OOH

**3.3** mil. on Instagram

**1.6** mil. on Twitter

**335** k on Facebook

**84** k on [louisvuitton.com](http://louisvuitton.com)

After the show, Louis Vuitton stores in Taiwan, China and South Korea had the biggest sales weekend in their history.

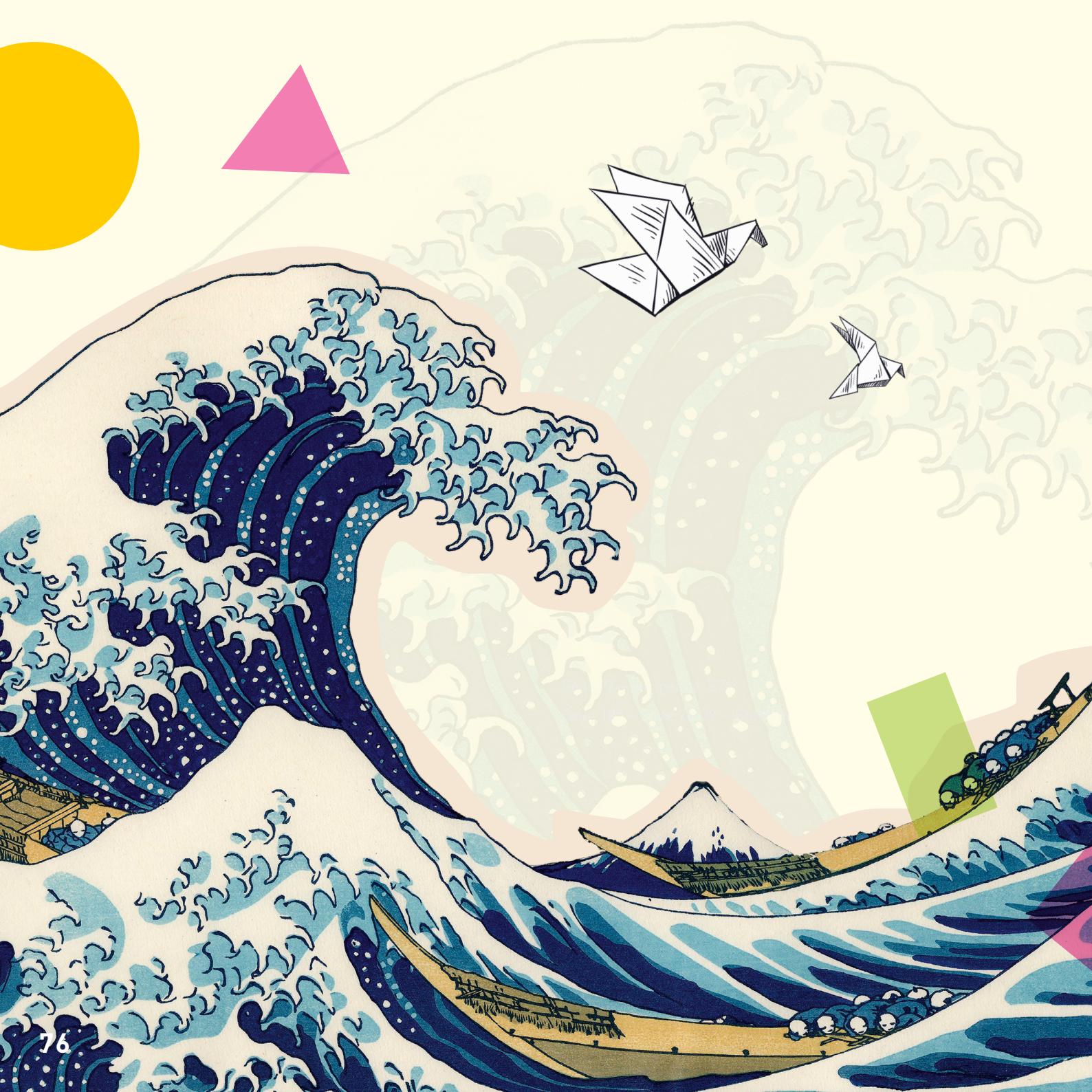
Germany is still somewhat reluctant to embrace live stream shopping. However, the tools are there – and so is the general willingness. What is important now is to be a first mover and to bring closeness to customers into the virtual space – just as ESPRIT and Tamaris are already doing in the fashion industry.



**Companies must first determine whether the right conditions for live shopping are in place and ask themselves:**

- HOW RECEPTIVE IS THEIR TARGET AUDIENCE TO LIVE STREAMS?**
- DO THEY HAVE THE NECESSARY REACH TO GET THROUGH TO POTENTIAL CUSTOMERS?**
- IS THEIR PRODUCT PORTFOLIO SUITABLE FOR BEING PRESENTED IN A LIVE STREAM?**





# REDUCING COGNITIVE LOAD

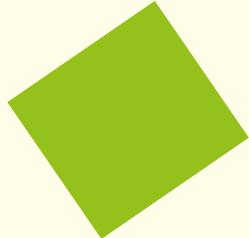
The »back« button is the most frequently used feature of Internet browsers.<sup>86</sup> If users are dissatisfied with a website because they cannot find the desired information right away or are overwhelmed by the website's design, they use this button. It is a disaster for brands and companies because they have to convince with intuitive usability and clean user interfaces these days. If they do not, users will bounce.

Apple has been leading the way for years and speaks of »human interface design« in this context.<sup>87</sup>

Many users are already used to it and see it as a benchmark, which is why they have developed certain expectations when it comes to online brand presences, whether consciously or unconsciously. Expectations that demand maximum information intake while requiring minimum interaction.

**In order to become a love brand, brands must avoid cognitive overload of their customers.**

The average smartphone owner uses 30 apps a month and nine apps a day. If apps and websites are to be used more frequently, it is important that users can quickly understand how to use them. Minimalism is the keyword here – more white space, very limited colour palettes and consistent typography.<sup>88</sup>



#### **FLAT DESIGN:**

Two-dimensional visual details  
Minimalist illustrations

**Added Value:** Shorter load times and simple navigation<sup>89</sup>

#### **LIMITED CHOICES:**

Functionality and simplicity  
Focus on essential content

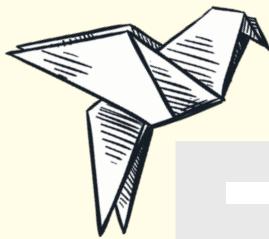
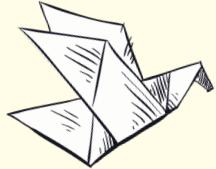
**Added Value:** Increased user attention and quicker page navigation<sup>90</sup>

#### **WHITE SPACE:**

Generous use of white space between content elements

**Added Value:** Interface appears more elegant and uncluttered, improved readability and more positive perception<sup>91</sup>

Only with a high-quality CI can brands avoid cognitive overload of their customers, leave a positive impression, keep users on their website for longer and generate more conversions.<sup>90</sup>



- IS THE VISUAL PRESENTATION CLUTTERED AND THE COLOUR PALETTE CONFUSING?**
- DO YOU OVERWHELM YOUR CUSTOMERS WITH POOR TYPOGRAPHY?**
- ARE THERE TOO MANY LINKS AND FORMS?**
- DO YOUR USERS HAVE TO READ AND SCROLL TOO MUCH TO FIND WHAT THEY WANT?**

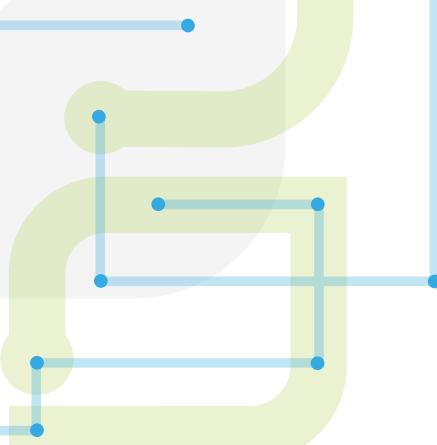
# DATA IS OUR FRIEND

Successful digital business also involves data-driven work. However, before companies can use new technologies and approaches such as data fabrics, natural language processing, customer and data management platforms and business intelligence, they must lay a crucial

foundation: a data culture. After all, only those who are not afraid of data want to work with it. Working together in a data-driven way is what makes data-driven business successful.

**Companies that rely on data-driven insights grow by 30% per year on average.<sup>94</sup>**

**Companies that use data-driven marketing strategies can save up to 30% of costs while increasing revenue by as much as 20%.<sup>95</sup>**



Everything that is free these days is paid for with data. People have come to accept that. Data is the wind in the sails of the digital world.<sup>92</sup> Data is our friend. It means progress and holds huge potential for all companies. They just have to recognise it and derive appropriate measures.

No matter what data is collected, the highest priority should always be:

**Data collection must always serve a purpose and not be the purpose itself.<sup>93</sup>**

In other words: There is no point in hoarding data and hoping that the rest will take care of itself. Companies must learn to deal with data and identify concrete measures that need to be taken. That is why it is essential to accept data as the central starting point for all corporate decisions.

Data must be shared with others so that people can learn from it together. Then it will also make people happy. Then it can be both the result and starting point for all decisions – and only then does it also serve a purpose.

**Data-driven companies are 140% more likely to gain a competitive advantage than companies without data-driven insights.<sup>94</sup>**

# ROOTEDNESS IN CORPORATE CULTURE



## DEMYSTIFYING DATA

Ideally, all employees in a data-driven company are able to actively use collected data, integrate it into their daily work and extract information from it. The problem is that generating data is daunting and intimidating for many people. This needs to be demystified and transformed into professional structures.

To achieve this, companies must create an appropriate corporate culture framework that takes all data into account when making decisions.

## **Data instead of gut feelings.**

Nothing new per se, but the rootedness in corporate culture is. For companies, it is still an enormous challenge to achieve data maturity – throughout the entire company, but also among external stakeholders.

It is not for nothing that the topic has always been among the top data trends in the last three years.<sup>97</sup> Appropriately trained CTOs (chief technical officers) and CIOs (chief information officers) can act as facilitators for data culture in companies and help employees understand

data-based visions, for example through visually appealing dashboards. This enables teams to build relevant data expertise.

### ESTABLISHING A DATA CULTURE

This is the only way to make information accessible to employees who have had little contact with it so far. A transparent approach to data knowledge in a company can manifest itself, for example, by employees presenting figures from their departments in meetings and putting them into context to promote an understanding of data among all employees. An example of this would be the average time users spend in an online shop or the revenue generated per minute.

In the long term, this kind of transparency helps everyone in a company better understand processes and optimise them continuously.

The exchange of figures across teams can also be seen as a modern feedback culture: A marketing team that sends the latest download figures to a sales team every week, for example, can have a motivational effect. Work that is valued. In figures. In black and white.

**Data culture promotes collaboration between different teams within an organisation and drives data democratisation by eliminating gatekeepers.**

It also significantly helps develop new offerings and tailor them to the needs of customers and employees alike.<sup>98</sup> Data is always a glimpse into the future and the past at the same time.

**83%** of CEOs state that they want a data-driven organisation.<sup>99</sup>

**74%** of data-driven companies rely solely on data for decision-making.<sup>99</sup>

For **85%** of German companies, the use of data plays a very important role.<sup>100</sup>

## HOW CAN COMPANIES ESTABLISH A DATA-DRIVEN CULTURE?<sup>101</sup>

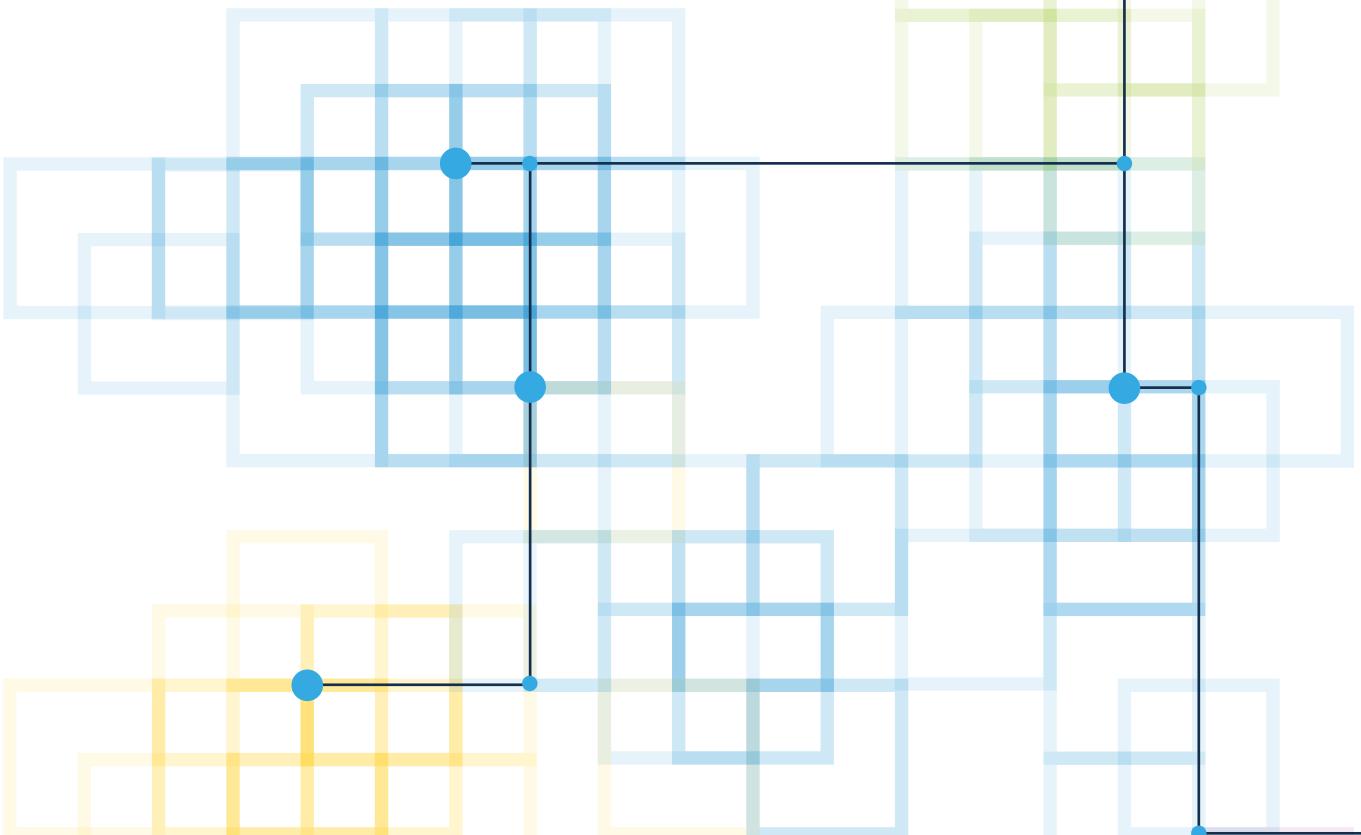
BY USING VISUALLY APPEALING DASHBOARDS, CTOS AND CIOS CAN HELP SHAPE DATA CULTURE IN A USER-FRIENDLY WAY.

BUILDING EMPLOYEE KNOWLEDGE IS MORE IMPORTANT THAN INTEGRATING TOOLS.

COMMUNICATION ACROSS TEAMS AND DATA TRANSPARENCY ARE KEYS TO SUCCESS.

DATA IS THE RESULT OF DECISIONS AND AT THE SAME TIME THEIR STARTING POINT.

# CONSISTENT DATA MANAGEMENT WITH A DATA FABRIC



## BLESS THE CLOUD

The business world is modernising and accelerating. In order to remain competitive and be able to grow, more and more data is required, which can be provided and retrieved more and more quickly nowadays. Bless the cloud. However, effective data management also poses challenges.

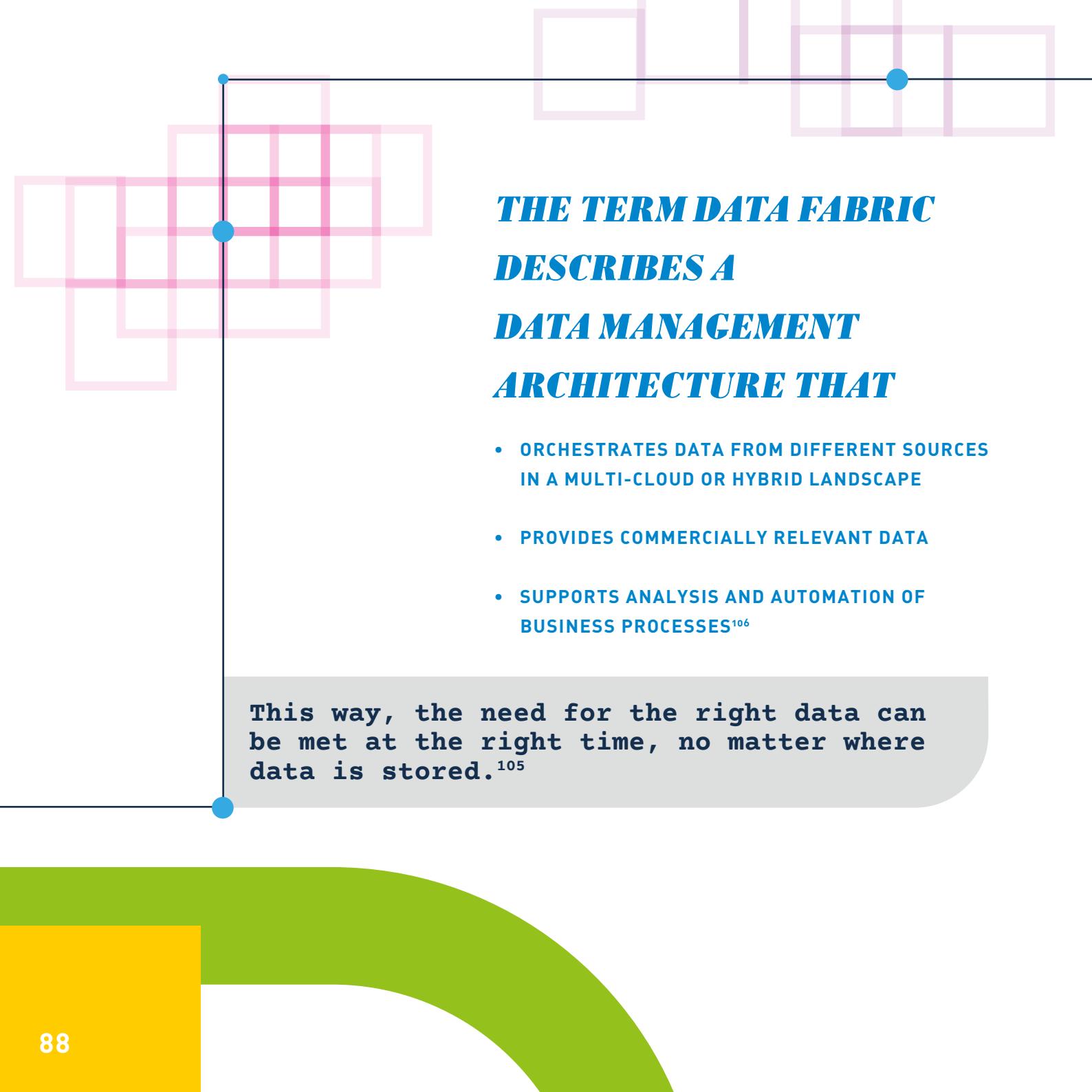
This is where **data fabrics** come into play – a data management architecture that has repeatedly been ranked among the top 3 »Data and Analytics Technology« trends.<sup>102</sup> Rightly so. The term encompasses a portfolio of different data services that connect different endpoints in cloud and on-premise solutions.<sup>103</sup>

The core element of a data fabric is a data orchestrator, which acts as an intermediary between users and user applications and provides a specific virtual perspective for each

department to enable simplified and intuitive access. It automates data-driven processes from end to end and spans across different systems, departments and types of data.<sup>104</sup>

A data fabric not only accelerates digital transformation in a company. It

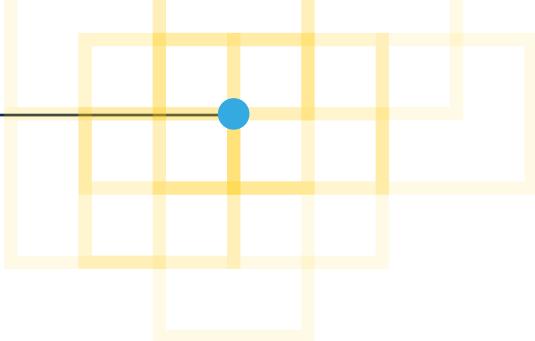
- **PRIMARILY CONNECTS DIFFERENT LOCATIONS AND TYPES OF DATA SO THAT THEY CAN THEN BE USED MORE EFFECTIVELY**
- **MANAGES DIFFERENT ENVIRONMENTS SUCH AS ON-PREMISE AND MULTI-CLOUD**
- **OFFERS INTEGRATED FEATURES FOR DATA GOVERNANCE<sup>105</sup>**



## **THE TERM *DATA FABRIC* DESCRIBES A DATA MANAGEMENT ARCHITECTURE THAT**

- ORCHESTRATES DATA FROM DIFFERENT SOURCES IN A MULTI-CLOUD OR HYBRID LANDSCAPE
- PROVIDES COMMERCIALY RELEVANT DATA
- SUPPORTS ANALYSIS AND AUTOMATION OF BUSINESS PROCESSES<sup>106</sup>

This way, the need for the right data can be met at the right time, no matter where data is stored.<sup>105</sup>



Another reason why the data fabric approach is so interesting is that it enables companies to continue using existing technologies. At the same time, it ensures that all important corporate data can be brought together and analysed in one central place.

A concrete example confirms the practicability of a functioning data fabric: Due to rejected services that a hospital billed to health insurance companies, the operator incurred costs of about 12 million euros per year. In a project using the Talend platform and a statistics tool from IBM, patterns as to when hospital services were rejected were identified in the data set of the last five years.

This led to the development of an early warning system that informs the hospital ahead of time how likely billing rejections are, for example in the case of incomplete surgical reports.<sup>107</sup>

In order for companies to work in a resource-efficient way and for data experts to be able to focus on analysing the data that is relevant to them, it is worth taking a look at the data fabric architecture – perhaps precisely because new data connections can be integrated without interrupting existing ones. A real opportunity for companies with complex data silos.

**Data fabrics reduce the time required for integration and provision of data by up to 30% and the time required for maintenance by 70%.**<sup>108</sup>

# THEY CAN UNDERSTAND US

## NATURAL LANGUAGE PROCESSING (NLP)

is one of the most exciting fields of artificial intelligence and has already given rise to technologies such as chatbots, voice assistants and translators as well as many other tools that companies and customers use every day. The technology is based on deep learning. This makes human language accessible to

machines. They can hear us and they can understand us. They can capture much larger amounts of data than a human ever could – in less time.<sup>109</sup>

And not without reason: NLP applications facilitate, accelerate and automate data analysis and processing for companies at record speed.

They offer the opportunity to visualise data in a meaningful way without employees having to know the data structure. Many BI providers have already integrated such features, for example Tableau with Askdata. This feature allows employees to ask questions about revenue or profitability and receive an audio-based answer. BI providers such as Microsoft Power BI also already offer voice integration.<sup>110</sup> They have Narrative Science extensions that supplement charts and graphs in dashboards with a natural language narrative.<sup>111</sup>

Data queries in natural language are generally less precise than the static structure of most computer input. Speech input is more complicated as well because ambiguous terms are often used. The software that processes such complex language queries, however, should not be static, but should learn as it goes along – just like artificial intelligence.<sup>112</sup>

Therefore, the following applies to NLP applications in BI software:

**Employees do not have to learn how to work with software – software has to learn how people think.**<sup>110</sup>

In **recruiting**, NLP applications can also contribute to more efficient data processing by scanning CVs as fast as lightning and creating objective candidate profiles. When it comes to employee engagement, NLP can be helpful as well. AI-powered engagement solutions like Glint can analyse comments from employees, identify frequently used keywords and phrases and provide vital employee feedback.<sup>113</sup>

**Natural language processing** is no longer in its infancy and will be used even more precisely, even more resource-efficiently in practice in the future.

The market volume for NLP applications will grow from **11.6** billion US dollars (2020) to **35.1** billion US dollars (2026).<sup>114</sup>

**53%** of technical leaders state that their budget for NLP applications was at least **10%** higher than in 2019.<sup>115</sup>

NLP applications must provide **answers** instead of search results.<sup>116</sup>

# WHAT REMAINS OF DATA

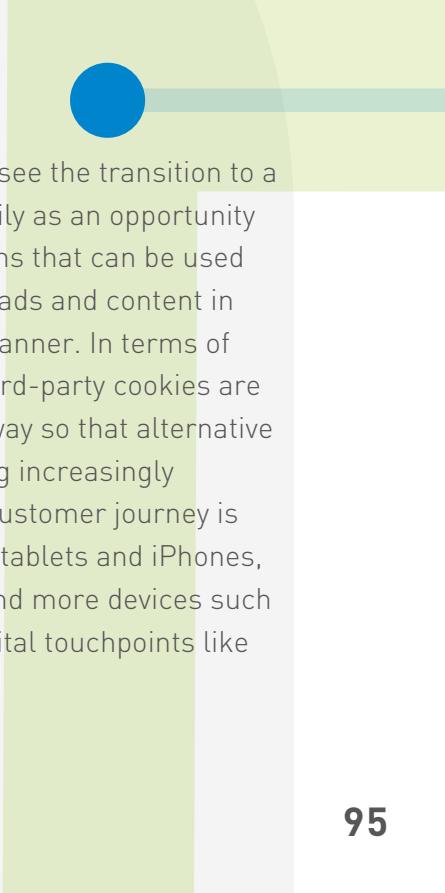
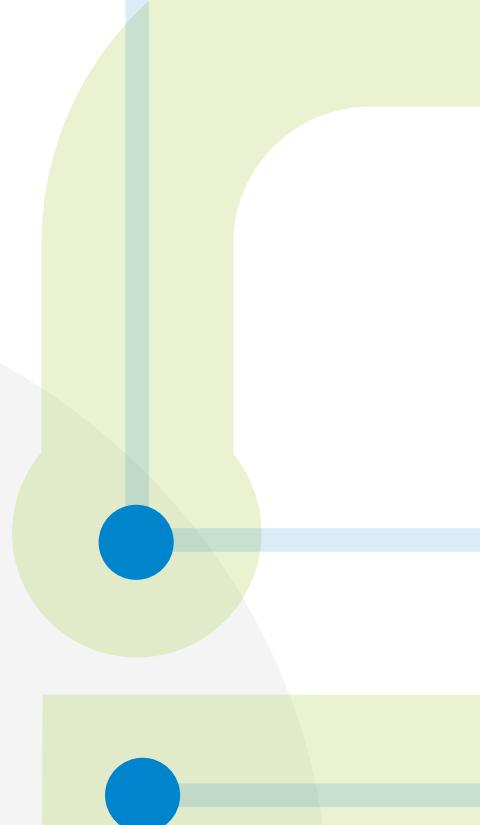
It remains complicated to create a high-quality, central data foundation that encompasses data from different sources. It is at least as complicated to handle this data pool professionally and to really benefit from its analysis. The majority of marketers are aware of this problem. This led to the emergence of platforms that tackle the problem by centralising all marketing data and thus providing a 360-degree view of the user: CDPs (customer data platforms, which primarily collect first-party data) and DMPs (data management platforms).

Companies that use DMPs obtain second- and third-party data from website trackers in order to use it for targeted ad placements. However, the Google Chrome browser, among others, will stop supporting these cookies from 2022 onwards because they are very unpopular with users. This requires a realignment of data management platforms.

## FIRST PARTY, FIRST SERVE

With the help of software such as Adobe Experience Cloud, it is possible to create relevant customer experiences, even with first-party data: All data from different channels is brought together there and user IDs are coupled with the corresponding user authorisations. This way, data can be coordinated across all company sources and much more precise and richer customer profiles can ultimately be created.<sup>117</sup>

However, even without specific software, marketers can make more valuable use of first-party data, for example by applying the touchpoint model: If a website manages to get at least 30 per cent of its users to sign up, for example through newsletters or sweepstakes, this first-party data in combination with ID solutions that comply with data protection regulations can allow for valuable targeting.<sup>118</sup> The remaining 70 per cent can be targeted via contextual segmentation. What makes this so difficult, however, is a lack of scalability across publishers and countries.<sup>118</sup>



Marketers can and must see the transition to a cookie-free world primarily as an opportunity to find alternative solutions that can be used to distribute and analyse ads and content in an even more targeted manner. In terms of cross-device tracking, third-party cookies are no longer up to date anyway so that alternative ID solutions are becoming increasingly important. After all, the customer journey is no longer limited to PCs, tablets and iPhones, but also includes more and more devices such as smartwatches and digital touchpoints like signage.<sup>119</sup>

## IMPACTS OF A COOKIE-FREE WORLD

»COMPANIES WILL  
NEED TO REVISE  
THEIR **MARKETING  
STRATEGIES**,  
CUSTOMER DATA  
ACTIVATION AND  
**ACQUISITIONS**.«

»MARKETERS  
WILL HAVE TO  
MAKE BETTER  
USE OF THE  
POTENTIAL OF  
**FIRST-PARTY  
COOKIES**.«

»COMPANIES WILL  
NEED TO ADAPT  
TO **ADTECH** AND  
**MARTECH**  
**CONCEPTS**.«<sup>117</sup>



- DOES YOUR COMPANY ALREADY BENEFIT FROM A DATA-DRIVEN CULTURE?**
- HOW CONSISTENT AND INTUITIVE IS YOUR DATA MANAGEMENT?**
- DOES YOUR COMPANY ALREADY USE NLP SOLUTIONS FOR DATA PROCESSING AND ANALYSIS?**
- ARE YOU READY FOR COOKIE-FREE TARGETING?**

# BI UNDERGOING A REALITY CHECK

The term business intelligence has been around since the early 1990s. With the increasing digitalisation of companies, it is constantly being redefined and adapted to the current digital environment. However,

## BUSINESS INTELLIGENCE

always describes a technology-driven process for analysing data and presenting useful information that makes it easier for all employees of a company to generate insights and make well-founded decisions based on them.<sup>120</sup>

Good BI platforms mainly stand out because of their user-friendly platform integration, intuitive data analysis and straightforward dashboard creation. This makes it easier and faster to access, analyse and manage data.

**BI is booming.**

The market volume is expected to grow to **28.2** billion euros by 2025.<sup>121</sup>

Revenue in the BI software segment is expected to increase by **8%** annually.<sup>121</sup>

## EFFICIENCY THROUGH BI

The American restaurant chain Chipotle was able to replace its previous BI solution with a modern self-service BI platform, giving its teams a better overview and access to data from all 2,400 restaurants. This measure reduced the time required for different strategic projects by two thirds and saved 10,000 hours of work per month.<sup>122</sup> Monitoring of the entire operational restaurant business was now possible.

## MORE PRECISE MARKETING THROUGH BI

The software company Ellie Mae has a market share of about 35 per cent of all US mortgage applications, so it has a large amount of relevant customer data. By integrating a business intelligence tool, it was possible to remove duplicate records, inactive records and misinformation from the software giant's database in order to conduct an improved sales and financial analysis and identify better cross-sales opportunities through appropriate clustering.<sup>123</sup>

## COMPETITIVE ADVANTAGES THROUGH BI

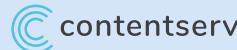
Lotte.com is the leading online shopping centre in South Korea with 13 million customers. With one million website visitors daily, the company wanted to find out why shopping cart abandonments occur. For this purpose, South Korea's first online behavioural analysis system was implemented. The BI solution identified unexpected delivery times and a long checkout process as reasons for shopping cart abandonment on the website. The adjustments made based on this information increased customer loyalty and led to an increase of 10 million US dollars in sales.<sup>124</sup>



**WHICH BUSINESS INTELLIGENCE SOLUTIONS DO YOU USE TO OPTIMISE YOUR BUSINESS PROCESSES?**

# DIGITAL CHAMPIONS HAVE STRONG PARTNERS

## TECHNOLOGY PARTNERS



## NETWORKS & ASSOCIATIONS



## EDUCATION PARTNERS





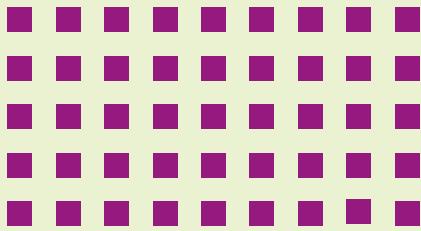
DO NOT MISS  
OUT ON ANY  
TRENDS:



# HYBRID RETAIL



Customers are channel hoppers. This makes it all the more important for brands, retailers and manufacturers to finally act in an omnichannel way. Concepts such as **local inventory ads** and **ship from store** bring the benefits of online shopping to brick-and-mortar retail. **Showrooming** and **window shopping 2.0** decouple retail stores from actual transactions. The e in e-commerce is also becoming redundant, making way for **re-commerce** and success in niche markets with **specialist marketplaces**.



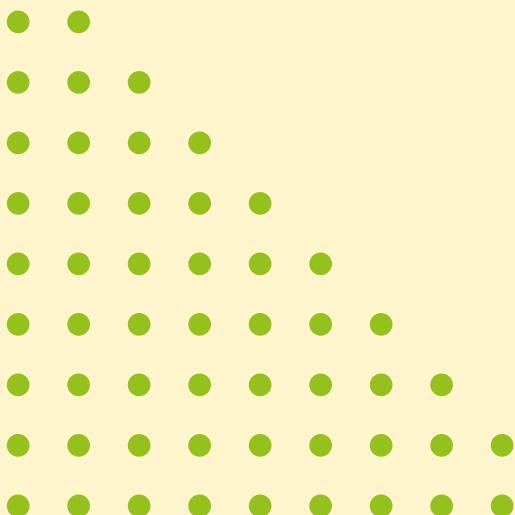
»YOU CAN ONLY GET REALLY GOOD SERVICE IN RETAIL STORES.«



»PRODUCTS ARE ONLY SENT TO YOUR HOME IF YOU BUY THEM ONLINE.«



»ONLY GEEKS MAKE CONTACTLESS PAYMENTS WITH THEIR SMARTPHONE.«



- All that used to be true, but not anymore.<sup>125</sup>
- The digitalisation of the stationary point of sale (POS) on the one hand and the transfer of analogue virtues to online retail on the other hand are simply expected by customers these days. However, there is more to convenience, availability and service – the must-haves for successful retail – than mobile payment in retail stores or digital shopping assistants online.



The digitalisation of retail stores does not mean that everyone has to offer digital fitting rooms and virtual mirrors. Inspiration online does not mean that every brand has to rely on influencer marketing. What has to be done both online and offline, however, is to carefully examine customer behaviour because it has changed drastically<sup>126</sup> – especially in the last two years.

### **Customers no longer play by the rules of traditional brick-and-mortar retail – they make up their own.<sup>127</sup>**

It is becoming increasingly rare for their customer journey to begin with them opening a shop door – and this journey does not necessarily end where it began.

Instead of asking themselves where the widely discussed POS of the future is, retailers should start shifting their mindset and focus their strategy on the MOI, the moments of in-between, because that is where customers are and where they buy products – whether offline or online.

### **Customers are channel hoppers.**

Reaching them at the proverbial right moment is an art. This art is mastered by retailers who take advantage of the cost-effective and customer-friendly synergy between offline and online, who no longer stoically differentiate between channels and who no longer ask the

following question on the Internet: »Online shop or marketplace?« The right question to ask would be: »Online shop and which marketplaces?«<sup>128</sup>

## ***The point of sale is not a one-way street.***

Regardless of whether customers first search online and then make a purchase offline or whether they first test products in retail stores and then place an order online – retailers should be prepared for every scenario of what is known as the »ROPO effect« (»research online, purchase offline« and vice versa), all the more so because a third ROPO dimension has manifested itself in shopping behaviour as a result of the increased number of mobile purchases: Customers use online and offline channels simultaneously. While they look for the right product in retail stores, they use their smartphone to compare prices and availability offered by marketplaces and online shops as well as other brick-and-mortar stores.

Innovative concepts, especially for **»in-between business«**, will be crucial to success in retail in 2022. Synergistic instead of indiscriminate digitalisation is not the only challenge for brick-and-mortar retailers.<sup>129</sup> They must rethink their range of products,

offer variety and make going to the store more enticing with creative offers, especially for walk-in customers.<sup>130</sup> Trends and concepts such as **content commerce**, **data-driven business** and **retail as a service** that make online retail successful are arriving in brick-and-mortar stores. Digital tools that support brick-and-mortar retailers and best practices they can learn from already exist.

Those who use them and integrate digitalisation into their retail strategy not only for the sake of digitalisation act in the interest of customers, making their business future-proof by doing so.<sup>131</sup>

## WHAT ONLINE AND OFFLINE CAN LEARN FROM EACH OTHER

Commerce is the purchase of a good and selling it at a higher price. This may describe the traditional concept behind commerce and may also be the economic goal in the end, but retailers who think exclusively like this in 2022 will have a hard time actually selling products.

**Retailers are well advised to take advantage of the benefits of all channels.**



# BENEFITS OF

## Online shopping<sup>132</sup>:

1. Independence from opening hours
2. Personalisation
3. Wider range of products
4. Shopping as an experience

## Shopping in store<sup>132</sup>:

1. Immediate availability
2. Possibility to try on and try out products
3. Personal advice
4. Proximity to experts



# WINDOW SHOPPING 2.0

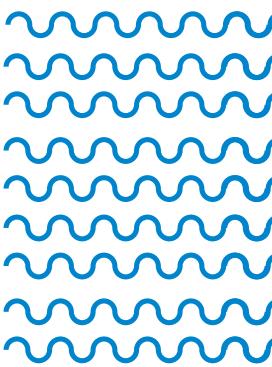
## INDEPENDENCE FROM OPENING HOURS

During the lockdowns in 2020 and 2021, retailers got creative. Although stores were closed, customers were able to purchase products via window shopping. Ideas ranged from product numbers on printed signs and presentations on Instagram to QR codes.

In many stores, even an A4 piece of paper with a phone number and contact details provided access – to customers and to products for customers.

Retailers in Burghausen turned this lockdown service into a new business model with the »Wir haben geöffnet« (We are open) campaign.<sup>133</sup> Creative solutions like this show that it is possible to bring the benefit that was once reserved for online retail to brick-and-mortar stores as well.

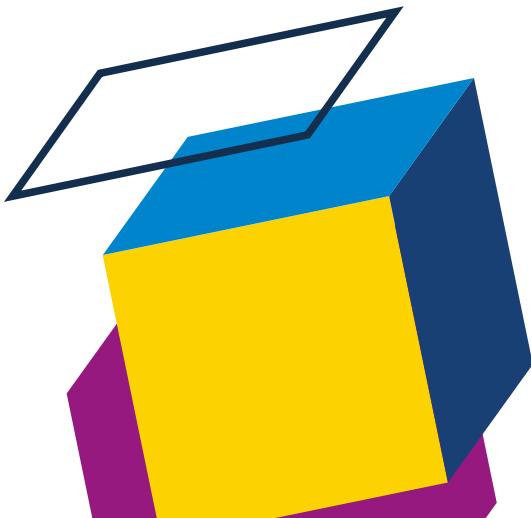
# FROM SCREEN TO STORE

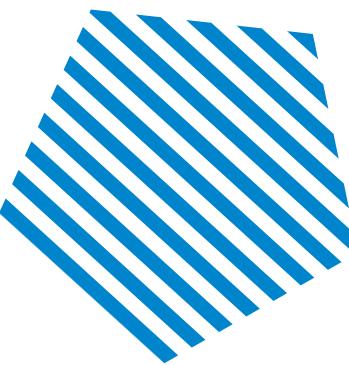


## PERSONALISATION

Data-driven marketing has long become a must-have for success in online retail. Data-driven marketing also offers enormous potential in brick-and-mortar retail. A concept that ALDI successfully used to analyse the effectiveness of a campaign for vegan food as well as to boost visits to ALDI stores is the combination of DOOH and footfall measurement. DOOH stands for »digital out of home« – digital outdoor advertising in public spaces.<sup>134</sup> ALDI booked these screens to display its content at different locations.

Footfall measurement is a technology that uses mobility and GPS data to track whether a person passes a digital screen. Together with the MarTech start-up ScreenOnDemand and the IT company Adsquare, ALDI identified all relevant locations where digital billboards as well as eco-conscious stores can be found – and where their target groups move. ALDI then linked content on the urban screens that was related to its »Veganfreundlichster Supermarkt 2020« (Most vegan-friendly supermarket 2020) advertising campaign to the footfall analysis.<sup>135</sup>





This way, the food retailer not only managed to determine the immediate effect of each DOOH screen on the sales of vegan products in its stores, but it also became possible to optimise the campaign in real time.<sup>136</sup> When the vegan campaign drew particularly large numbers of customers to ALDI stores at certain locations and times of day, the outdoor advertising was automatically intensified. Screens that did not attract visitors to the stores dropped out of the campaign. New investments were made in billboards that performed very well.<sup>135</sup> The data-driven marketing paid off for the discounter: The return on advertising spend was more than 210 per cent. At the same time, interest in vegan food increased by 154 per cent.<sup>134</sup>

Digital screens in combination with real-time analysis of geodata make it possible to quickly and effectively respond to customer behaviour. Even changes to content to be displayed every minute can be implemented.<sup>135</sup> In view of the constant shift in customer behaviour and expectations, this can make all the difference – even the best campaign will not be successful in the long term if it is based on results from two months ago. Customers will already be somewhere completely different after such a long period of time.

**Real-time optimisation is becoming a crucial competitive advantage for retailers.**

# LOCAL INVENTORY ADS

## WIDER RANGE OF PRODUCTS

Instead of trying to compete with the variety offered by online retailers, brick-and-mortar retailers should focus on highlighting their role as curators with a targeted range of products.<sup>137</sup> Especially with regard to product information, there is enormous potential to use a crucial offline advantage even more efficiently: immediate availability.

**Those who master the difficult challenge of making the inventory and range of products in their stores transparent online can boost in-store visits and purchases.**

This does not necessarily require retailers to have their own online shop. A Google presence to get started or the integration of new technologies such as local inventory ads are approaches that are definitely worthwhile since customers have become more aware of shopping locally. The majority of Google searches via smartphone have local relevance. Despite the pandemic, the number of searches for »available near me« worldwide doubled in 2021 compared to the previous year; searches for »in stock« even increased by 700 per cent.<sup>138</sup> The electrical retailer expert also uses local inventory ads online to make its inventory visible.

THE RESULTS THAT EXPERT ACHIEVED WITH THE INTEGRATION OF THESE LOCAL ADS SPEAK FOR THEMSELVES<sup>138</sup>:

In the 2019 pre-Christmas season, there were **180** mil. searches for locally available products.

One out of **SEVEN** clicks on local inventory ads led to an in-store visit.

**150,000** in-store visits and 2,300 online orders.

A **50%** increase in digital reach.

Revenue was more than **27** times the advertising spend.

# INSPIRE INSTEAD OF SUPPLY

## SHOPPING AS AN EXPERIENCE

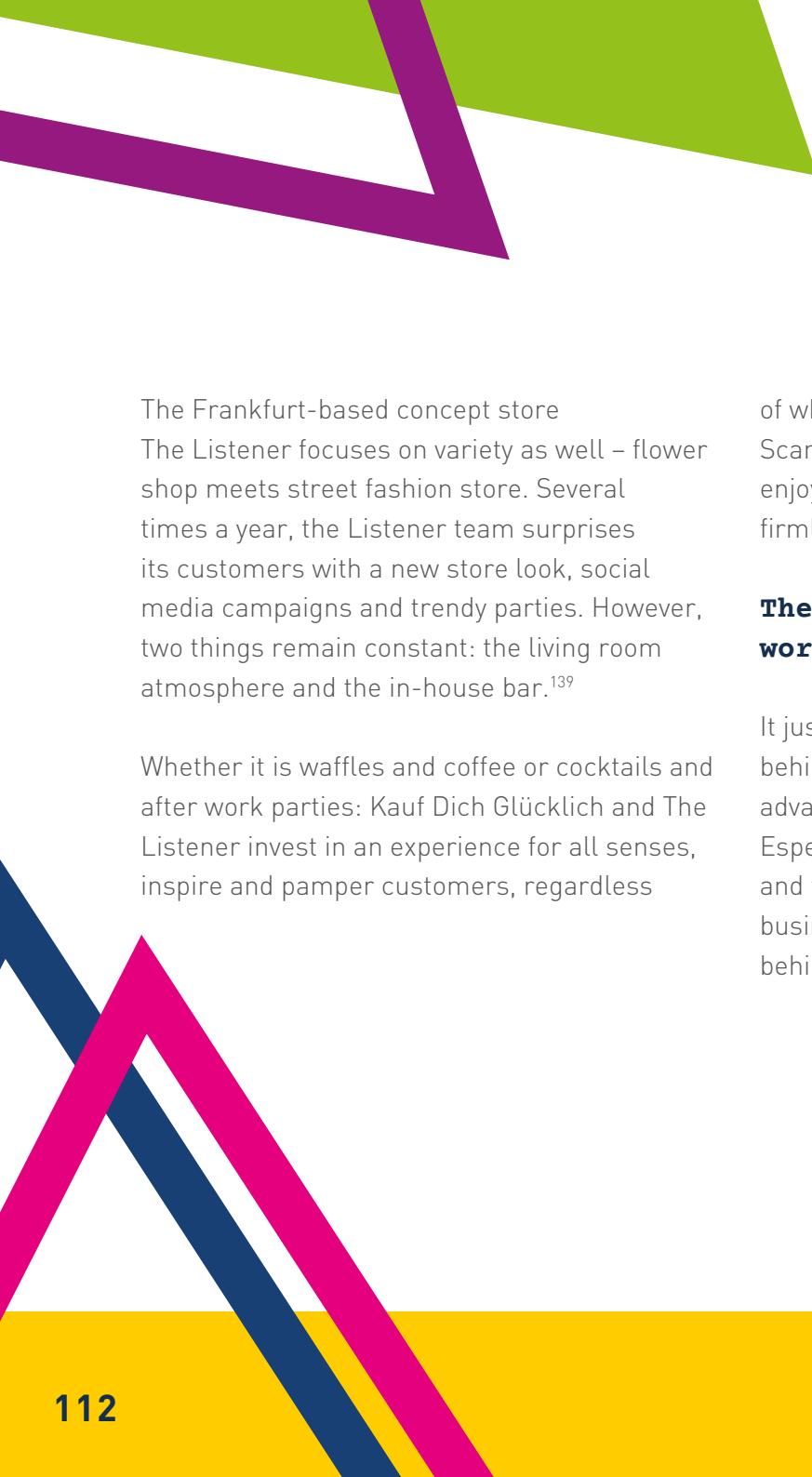
### **Content defines commerce success.**

Not just online, but also in brick-and-mortar retail. Customers do not look exclusively for products, but for inspiration, tips and advice – both online and offline. After many months of even greater online consumption due to the pandemic, consumers are used to being spoiled with creative content related to a product and brand instead of just being provided with it. It is precisely at this point that brick-and-mortar retailers need to reinvent themselves and transfer the potential of content commerce from the digital to the analogue world. No one has to visit retail stores to go shopping.

### **So how can retailers make going to the store more enticing?**

More variety is a starting point for bringing a breath of fresh air and customers into retail stores – be it in terms of assortment breadth or store look.<sup>137</sup>

Successful **concept stores** such as Kauf Dich Glücklich have been leading the way for years. Visitors to the Berlin-based store not only find a wide range of products from Scandinavian furniture, fashion and decoration items to stationery, but can also enjoy home-made waffles and coffee in the integrated café. Via its online shop and Instagram channel, the Kauf Dich Glücklich team has also implemented its successful concept digitally, shares recipes, informs about brands that are coming on board or its own Kauf Dich Glücklich collection.<sup>139</sup> A visit to the concept store is an experience in itself – and always different when people come back.



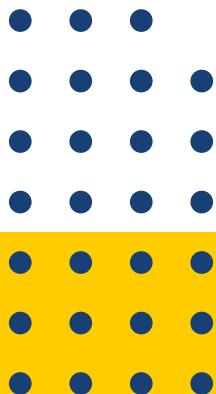
The Frankfurt-based concept store The Listener focuses on variety as well – flower shop meets street fashion store. Several times a year, the Listener team surprises its customers with a new store look, social media campaigns and trendy parties. However, two things remain constant: the living room atmosphere and the in-house bar.<sup>139</sup>

Whether it is waffles and coffee or cocktails and after work parties: Kauf Dich Glücklich and The Listener invest in an experience for all senses, inspire and pamper customers, regardless

of whether they end up buying a piece of Scandinavian furniture or just comfortably enjoying a drink. Aesthetics and variety are firmly anchored in this retail concept.

**The connection to the digital world is a natural part of it.**

It just fits in with the community. The idea behind concept stores has another key advantage: the unusual attracts attention. Especially with regard to walk-in customers and the more and more popular »in-between business«, retailers can learn from the concept behind concept stores.



# SHIP FROM STORE

## IMMEDIATE AVAILABILITY

The perfumery chain Douglas has implemented a new delivery concept: ship from store. Products ordered online are shipped to customers from one of the stores and not from a central warehouse. Since the logistics chain of Douglas is completely digitalised, the inventory in stores can be accessed at any time. An AI decides on the best way to ship orders to customers.

While online retail has already succeeded in bringing the benefits of brick-and-mortar retail online, there is still a lot of room for improvement in the reverse case. Home delivery, which used to be a unique selling point and is still one of the main reasons for online purchases nowadays, is already offered

in stores by progressive retailers such as sports discounter DECATHLON and men's outfitter engbers. On the one hand, brands and retailers that integrate such services into their business concept set themselves apart from the competition that does not offer customers this option; on the other hand, they automatically generate valuable customer data in stores that they can also use for their digital channels and campaigns.

This is a crucial aspect because the question of linking offline and online data continues to be one of the major challenges for successful retail and long-term customer relationships.

**Ship from store is considered one of the biggest growth levers for multi-channel retailers.<sup>140</sup>**

# RETAIL AS A SERVICE

## PROXIMITY TO EXPERTS

Car dealerships do it and so do fashion designers: They present their products and new collections in showrooms. There, visitors can check out the cars or the new fashion collections, touch them and get advice on them. This principle is now becoming the new store concept for many other industries: retail as a service.<sup>141</sup> This means that manufacturers book retail space to display their products, provide advice to their customers and collect customer data.

**It is not primarily about selling products, but about visibility and a new way to reach customers.**

urbanbird is a pioneer in this field. The Munich-based company is the first to bring retail as a service to German shopping centres. In its showrooms, urbanbird presents innovative and unique technology and lifestyle products from various manufacturers. Especially for complex products that require explanation and for online pure players, this option offers enormous potential to attract attention to their range of products offline and to reach new customers.<sup>142</sup>

# DEEP COMMERCE

## PERSONAL ADVICE

Offline commerce is a social experience.<sup>143</sup> People meet people. There are conversations between store visitors and store employees – whether it is a product consultation or small talk about the weather or family. Contact between salespeople and customers is a given, simply because of the physical presence. In customers' favourite stores and with the direct salesperson they trust, this relationship can also be closer.

For online retailers, building and maintaining strong customer relationships digitally is just as much of a must-have for brand success as a powerful online shop.

### **Close customer relationships do not just happen on their own.**

However, brands have been showing for years that it is possible to create them online. Deep commerce brings this key aspect of successful commerce into even sharper focus.

Successful direct-to-consumer (D2C) companies such as the DIY brand MissPompadour are as closely connected to their customers as corner shopkeepers once were to their regular customers. Whether it is an Instagram live stream, WhatsApp message or e-mail: MissPompadour has personal »in-between conversations«, which do not come with the purchase of wall paint, with the members of its community via digital channels.<sup>144</sup> Founder and CEO Astrid Reintjes still takes care of this herself – as often as she can. Direct exchange with her as well as within the community is a crucial aspect that turns customers into fans and wall paint into an e-commerce success.

## D2C BRANDS CAN<sup>145</sup>:

- DIRECTLY INFLUENCE CUSTOMER INTERACTIONS
- OPERATE INDEPENDENTLY OF MARKETPLACES AND INTERMEDIARIES
- HIGHLIGHT THEIR IMAGE MORE STRONGLY IN COMMUNICATION
- CENTRALLY ACCESS CUSTOMER DATA
- REDUCE RESOURCE USE AND COSTS BECAUSE PROCESSES DO NOT NEED TO BE OUTSOURCED
- ANALYSE AND REDESIGN PROCESSES MORE EASILY

In 2019, D2C e-commerce sales in the USA amounted to **14** billion US dollars.

In 2020, this figure was already **17.75** billion US dollars.

For 2021, more than **21** billion US dollars in sales were forecast.<sup>146</sup>



- WHAT ARE THE ADVANTAGES OF YOUR CHANNEL STRATEGY?**
- CAN YOUR CUSTOMERS REACH YOU 24/7?**
- HOW FLEXIBLY CAN YOU OPTIMISE ADVERTISING SPACE?**
- HOW DO YOU MAKE YOUR IN-STORE PRODUCTS VISIBLE ONLINE?**
- HOW WELL CURATED IS YOUR RANGE OF PRODUCTS?**
- HOW SMART IS YOUR DELIVERY CONCEPT?**
- HOW DO YOU DRAW ATTENTION TO YOUR PRODUCTS?**
- HOW CLOSE ARE YOU TO YOUR CUSTOMERS?**





# RE-COMMERCE & SPECIALIST MARKETPLACES

Brands, retailers and manufacturers that

**FOCUS ON CUSTOMERS AND THEIR NEEDS,**

**MAKE SHOPPING EXPERIENCES AS CONVENIENT AND PERSONALISED AS POSSIBLE, FROM SEARCH TO AFTER-SALES SUPPORT,**

**ENABLE CUSTOMERS TO PROVIDE FEEDBACK, FOR EXAMPLE VIA SOCIAL MEDIA,**

**USE CUSTOMER FEEDBACK TO OPTIMISE THEIR OWN PROCESSES,**

**AND PROVIDE CUSTOMERS WITH ADDED VALUE THAT THEY DO NOT HAVE WITH THE COMPETITION,**

will be successful in the long term, regardless of the channel.<sup>147</sup> However, there are trends, new business models and ways to reach customers that underpin how vital customer

focus, convenience, feedback and service are to successful retail – and there are also good reasons to make use of **re-commerce** and **specialist marketplaces**.

## **SECOND-HAND FASHION IS BECOMING THE FIRST CHOICE.<sup>148</sup>**

The lockdown phases in 2020 increased second-hand fashion sales by **50%**.

In the next ten years, second-hand fashion is expected to claim a **20%** share of the market.

By **2028**, second-hand fashion will be more important than fast fashion:

- The second-hand fashion market had a value of 9.7 billion euros 10 years ago
- This figure was 21 billion euros in 2019
- It is forecast to reach 56.5 billion euros by 2028
- The fast fashion market is forecast to reach a value of 40 billion euros by 2028



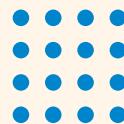
# RE-COMMERCE

Consumer-to-consumer platforms (C2C) and specialist marketplaces both in B2C and B2B also provide opportunities for brands, retailers and manufacturers to create strong customer relationships through community building. Second-hand fashion is becoming the first choice for more and more consumers. One third of German consumers already buy second-hand fashion online – and this percentage is rising.<sup>149</sup>

The C2C »flea market shops« Vinted and momox as well as the online shop NA-KD successfully responded to this consumer awareness years ago – consumers want to know not only where products come from, but also what happens to them after use. More and

more large platforms, including Zalando and ABOUT YOU, have now also established the sale of second-hand clothing as a profitable business segment.<sup>150</sup>

**Resale as a service** is another successful business model that traditional retailers use to respond to consumer behaviour and establish themselves in the second-hand market. Companies like Gap and Dickies, but also luxury brands such as Stella McCartney are partnering with second-hand companies and schemes that take care of remaining products from clearance sales and sell second-hand clothing from retailers, giving customers the opportunity to easily resell their clothes.<sup>150</sup>



The buy-and-sell principle also has potential in B2B. **Maschinensucher.de**, the leading **B2B** marketplace for used machinery, has more than seven million users and an annual enquiry volume of 50 billion euros. Whether it is a printing press or a concrete mixing plant: Trade in used machinery is cost effective and gives dealers access to international markets, new business partners and customers. Manufacturers also benefit from the B2B second-hand model because the value of new machines increases with an ever-growing secondary market.<sup>151</sup>

In addition to cost savings and sustainability, second-hand marketplaces such as **Maschinensucher.de** in B2B and **momox** in B2C offer members the opportunity to engage in very close exchange with each other.

# SPECIALIST MARKETPLACES

Community building within platforms promotes a sense of belonging to the platform and thus to the brand itself. Specialist marketplaces also take advantage of this outside the second-hand sector. Besides a company's own online shop, they are a promising option to increase brand awareness and reach. There, manufacturers do not have to gain visibility amidst an oversupply of brands and products.

On specialist marketplaces, the chance of reaching the right target group more quickly is inherently higher than on top dog Amazon. Another advantage is that brands and manufacturers can carry out more extensive branding activities on these marketplaces – something that is severely limited or involves further costs on Amazon.<sup>152</sup>

**Online marketplaces in Germany generated almost 41 billion euros in revenue in 2020.**

That is

- over 20% more than in 2019
- almost 50% of the total e-commerce revenue in Germany<sup>153</sup>

## GOOD REASONS FOR GETTING INVOLVED IN SPECIALIST MARKETPLACES FROM A MANUFACTURER'S POINT OF VIEW<sup>154</sup>:

- LOWER COSTS FOR A HOLISTIC MARKETPLACE PRESENCE
- NO DIRECT COMPETITION WITH AMAZON AND ITS OWN BRANDS
- FOCUS ON A SPECIFIC INDUSTRY AND MORE FREQUENT/ DIRECT CONTACT WITH CUSTOMERS IS POSSIBLE
- SALES CAN BE MANAGED INDEPENDENTLY AND MORE EASILY
- ADDITIONAL SERVICES WITHOUT THIRD-PARTY COSTS
- BETTER BRAND PROTECTION
- FEWER COUNTERFEIT PRODUCTS
- TARGETED INCREASE IN REACH
- CONCEPTS RELATED TO BRAND IMAGE CAN BE IMPLEMENTED MORE EASILY
- HIGH-QUALITY MANUFACTURER COMMUNITY
- GREATER SYNERGY EFFECTS AND POTENTIAL FOR FURTHER DEVELOPMENT

# BALANCING ON ONE LEG IS HARD

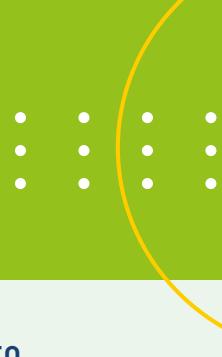
## THE INTERNET IS HUGE – EVEN FOR THE MOST NICHE LONG-TAIL USE CASE, THERE IS A TARGET GROUP

Although the willingness of consumers to buy directly from manufacturers is continuously growing, brands should not rest on their laurels and take measures to also convince those consumers who have so far only made online purchases on marketplaces.<sup>155</sup>

For brands and manufacturers, being active on both channels also means double the opportunity for visibility, access to customers and sales growth. Marketplaces often act as search engines that guide consumers to online shops of brands and manufacturers.<sup>156</sup>

Leaving a marketplace community and thus exchanging security and convenience for yet another online account is a hurdle that consumers are only willing to overcome if the decision for a brand shop is worth it. That is why brands should always go the extra mile when doing business via their online shop in order to turn marketplace customers into loyal shop customers.

## IDEAS TO TURN MARKETPLACE CUSTOMERS INTO SHOP CUSTOMERS<sup>156</sup>:



### OFFER A WIDER RANGE OF PRODUCTS AND SERVICES THAN ON MARKETPLACES

- Exclusive products
- Specific packaging sizes
- Full service
- 24/7 customer support
- Offer better availability and/or lower prices

### OFFER ADDITIONAL SERVICES TO CUSTOMERS WHO CREATE A SHOP ACCOUNT

- Cashback promotions after purchase on marketplace and for signing up
- Discount for new customers
- Extended warranty services
- Product-specific services

### ADAPT SEO AND SEA MEASURES TO GOOGLE SEARCHES

- Draw attention to lower prices, a wider range of products and faster delivery
- Use customers' product wording, for example from reviews, for ads
- Include long-tail use cases

### USE CONTENT COMMERCE TO BUILD BRAND AWARENESS

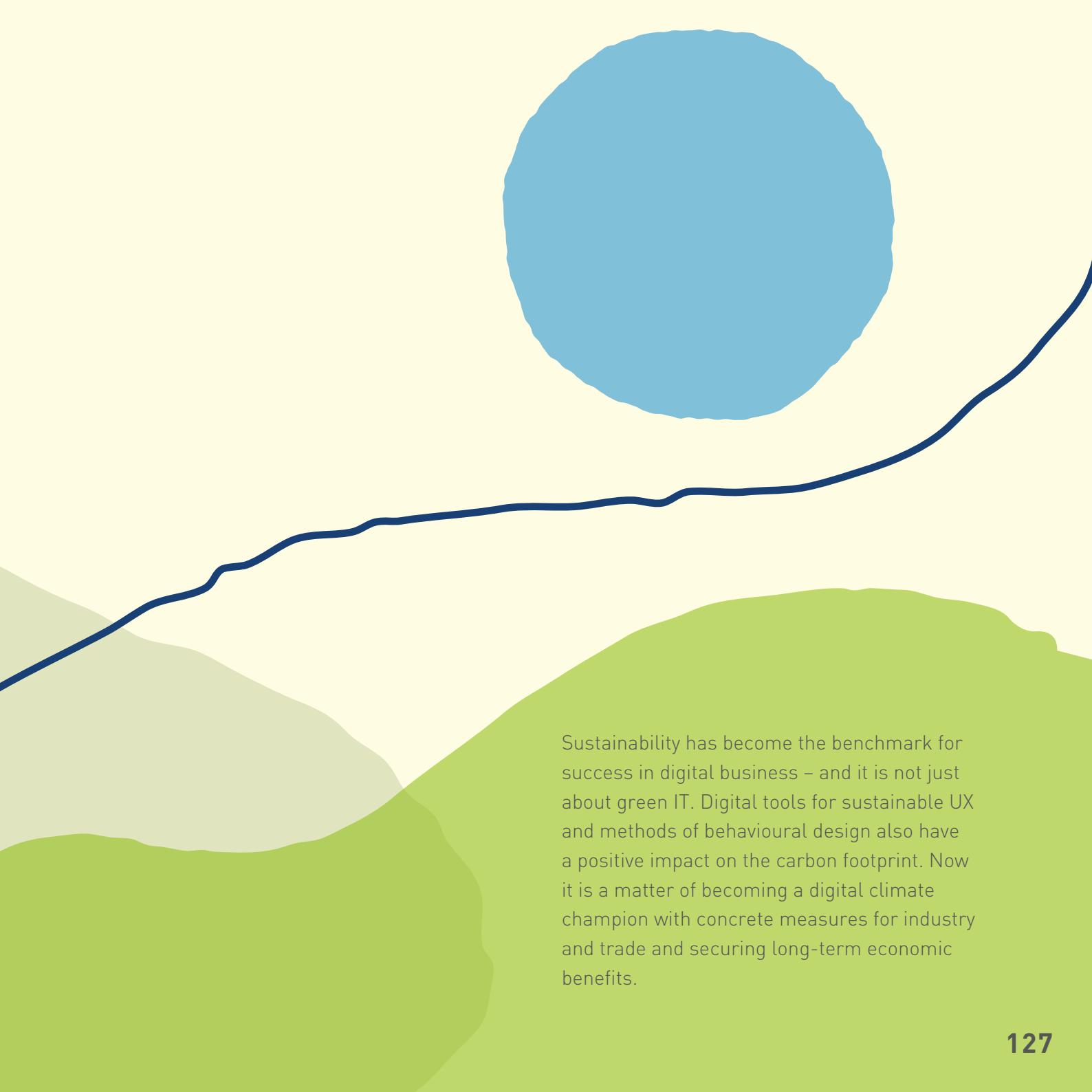
- Integrate user-generated content
- Encourage users to give feedback and participate in the community
- Let users participate in product design
- Create inspiring product stories



WHAT ADDED VALUE CAN CUSTOMERS FIND IN YOUR SHOP?



# **SUSTAINABLE BUSINESS MODELS**



Sustainability has become the benchmark for success in digital business – and it is not just about green IT. Digital tools for sustainable UX and methods of behavioural design also have a positive impact on the carbon footprint. Now it is a matter of becoming a digital climate champion with concrete measures for industry and trade and securing long-term economic benefits.

## SUSTAINABLE BUSINESS IS DIGITAL BUSINESS

»Dafür stehe ich mit meinem Namen« (»I stake my reputation on the quality of our products«) – with this well-known advertising slogan, Claus and Stefan Hipp have become the personal brand of their company. While originally referring to the quality of the baby food, the slogan was expanded to include sustainability: HiPP has been climate neutral since 2011.<sup>157</sup> As the world's first baby food manufacturer, HiPP has even offered climate-positive products in the form of its famous jars since May 2021.

About one out of every two companies in Germany wants to get to the point where HiPP was eleven years ago.

**Sustainability has become a top business priority across all industries.**

Whether on their own initiative, as is the case with almost half of German companies, or due to political requirements. The current shift in consumer awareness is putting additional pressure on brands, retailers and manufacturers in B2C and B2B:

**Sustainability has become a purchasing criterion for 80% of consumers worldwide.**

Almost **HALF** of consumers

have an emotional tie to products and trust brands that are sustainable

consciously choose less well-known, but more sustainable brands<sup>158</sup>

Public rankings such as that of the non-profit organisation Carbon Disclosure Project also contribute to companies positioning themselves even more sustainably. More than 300 companies from B2C and B2B made it onto the environmental organisation's »A List« in 2020.<sup>159</sup> Being featured in the »A List« – A stands for very good – today has a similar media impact as the 30-year-old HiPP guarantee.

For all these reasons, companies must holistically integrate sustainability into their business strategy, their organisation and their corporate culture – for the sake of the environment and their business.

**After all, sustainability is not just a moral end in itself, but also a driver of long-term economic benefits.<sup>160</sup>**

A holistic sustainable business strategy – building a conscious business – ranges from the conscious use of resources, green IT, sustainable UX and usability design, climate-neutral production, packaging and logistics to social commitment. The opportunities are there, the expectations of consumers, stakeholders, partners and investors are great – especially towards digital companies.

However, examples like HiPP show that role models for reducing the carbon footprint can also be found in traditional industries.

**COMPANIES SIMPLY CAN NO LONGER AFFORD NOT TO MAKE A CONTRIBUTION.**

Almost **90%** of German companies attribute a pioneering role to the digital economy.<sup>160</sup>

## A HOLISTIC SUSTAINABLE BUSINESS STRATEGY GIVES YOU LONG-TERM COMPETITIVE ADVANTAGES! THOSE WHO ARE COMMITTED TO SUSTAINABILITY CAN

- expect higher margins
- gain further market share and open up new markets
- acquire new customers
- strengthen brand loyalty
- increase sales
- retain customers more effectively
- build and maintain a positive brand image<sup>160</sup>

## ARE YOU ALREADY PART OF THE

**86%** of technology companies in Germany that see sustainability as an essential part of their business activities?<sup>160</sup>

**64%** of companies in Germany that consider sustainability to be part of their business strategy?<sup>160</sup>

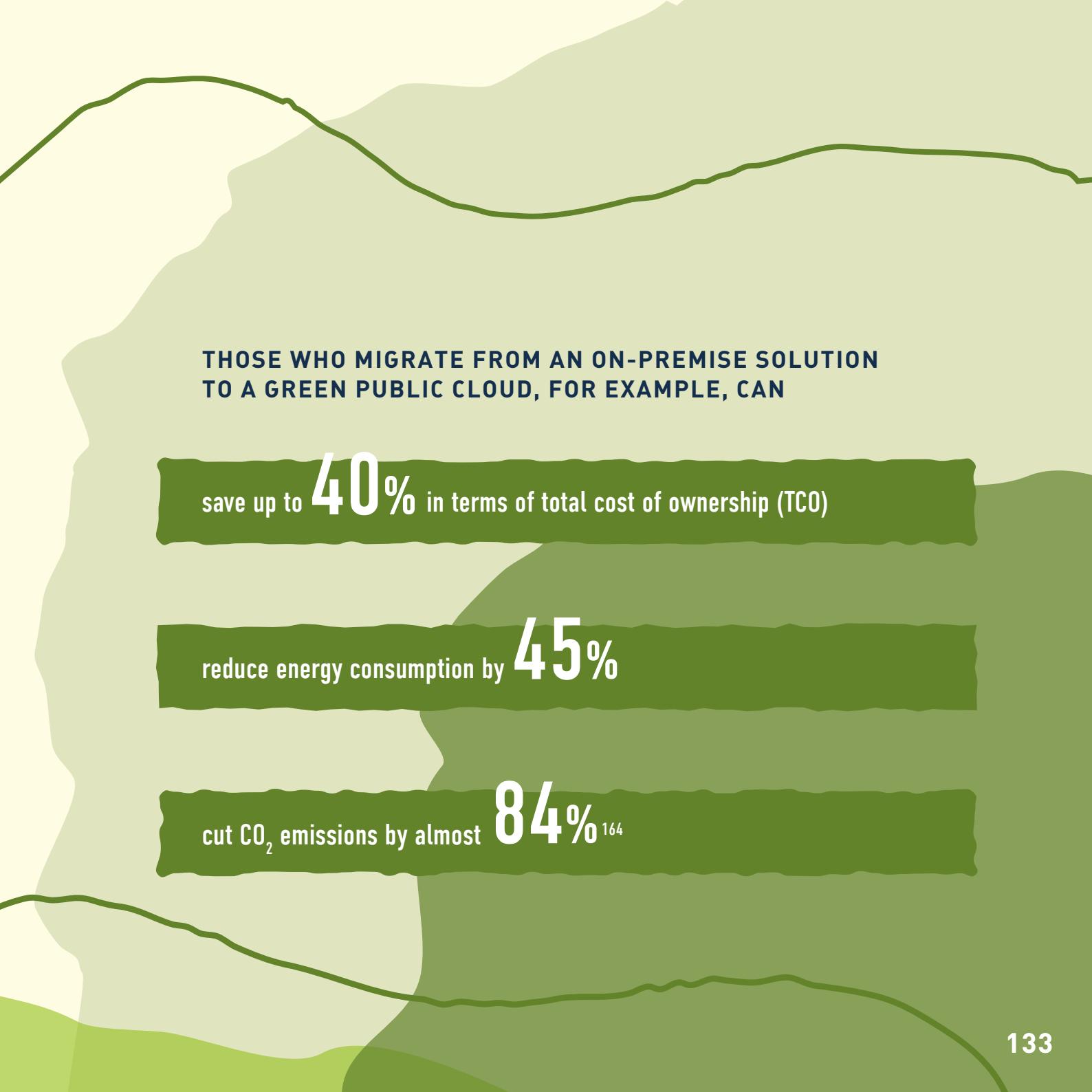
**84%** of companies in Germany where sustainability activities achieve positive effects within the company itself?<sup>160</sup>

**80%** of companies in Germany that have publicly committed to sustainability?<sup>160</sup>

**77%** of companies worldwide where sustainability leads to increased customer loyalty?<sup>158</sup>

**63%** of companies worldwide that increase their brand sales thanks to the integration of sustainability?<sup>158</sup>





THOSE WHO MIGRATE FROM AN ON-PREMISE SOLUTION  
TO A GREEN PUBLIC CLOUD, FOR EXAMPLE, CAN

save up to **40%** in terms of total cost of ownership (TCO)

reduce energy consumption by **45%**

cut CO<sub>2</sub> emissions by almost **84%**<sup>164</sup>

**Climate-neutral hosting** – whether it is switching to green hosting providers such as greensta and STRATO, which source green electricity from renewable energy sources, or trying to save CO<sub>2</sub> emissions elsewhere – is another green IT measure that more and more companies are opting for.<sup>165</sup>

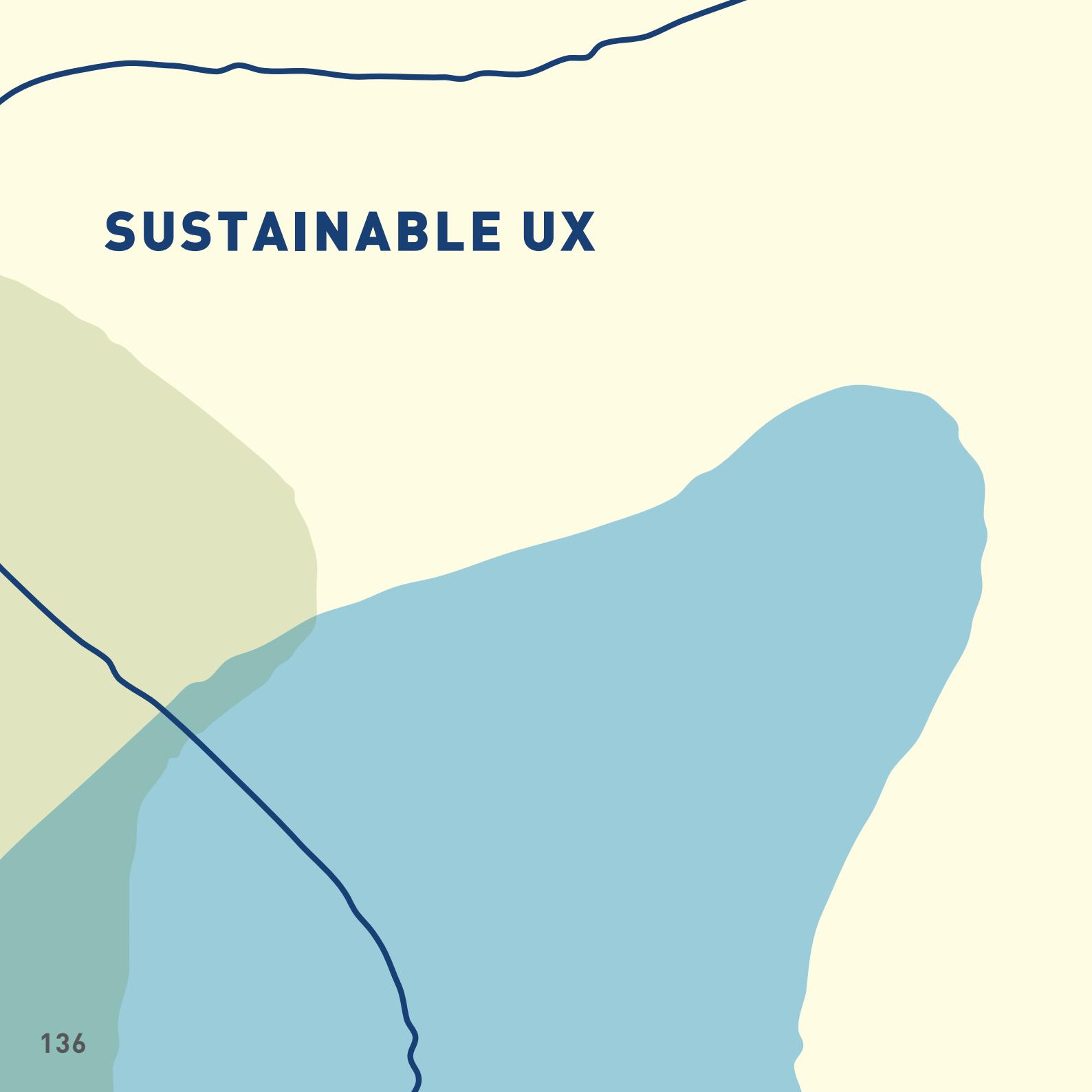
The hosting provider DomainFactory, for example, neutralises the environmental impact caused by servers by purchasing high-quality emission reduction certificates for a UN wind power project. It is not only DomainFactory itself that benefits from the »Climate-Neutral Hosting« seal of quality, but also all customers hosting via this website.<sup>166</sup>

## **Green IT also drives new business models.**

The German climate consulting company ClimatePartner is already helping 3,000 companies to operate in a climate-neutral way.<sup>167</sup> Besides green hosting, this involves aspects such as modern hardware, hardware leasing and recycling as well as paperless offices.

Even though a printer manufacturer does not operate in a paperless environment, Canon's contribution shows how small steps can be taken to make everyday office work more climate neutral. The electronics giant offers climate-neutral office paper with low CO<sub>2</sub> emissions that is FSC certified and bleached without chlorine. In addition, Canon uses a tool that automatically calculates all emissions generated when printing with leased Canon equipment. With just one click on »Climate Neutral«, Canon customers can offset their CO<sub>2</sub> emissions and then receive an ID number as confirmation.<sup>168</sup>

**Companies that use Microsoft cloud services instead of traditional data centres save 93% of energy emissions and up to 98% of CO<sub>2</sub> emissions.<sup>169</sup>**



# SUSTAINABLE UX

Quick page load times, simple navigation and high-quality, easily consumable content – these are all UX and usability goals that have a positive impact not only on user experiences, but also on the environment.

**The better a website is designed, the lower are its energy consumption and thus the carbon footprint caused by its use.**

Investing in UX and usability optimisation therefore not only ensures more conversions, traffic and sales, but also makes a sustainable contribution to combating climate change.

**In order to increase the performance of websites, it is advisable to begin with photo and video optimisation.**

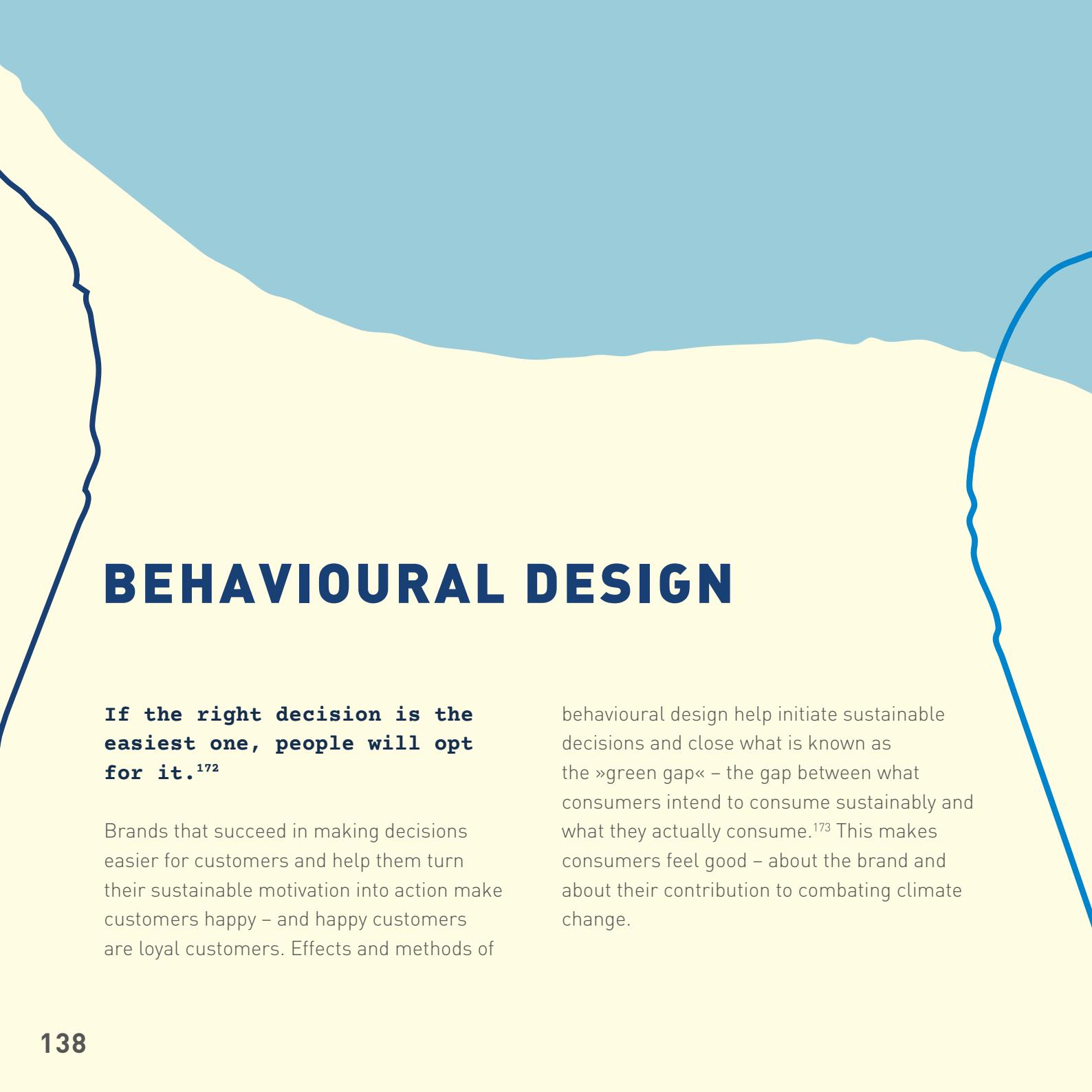
When users call up a page, audiovisual content in particular should be available immediately. Photos, GIFs and videos that take longer than 2.5 seconds to load increase not only the probability of users bouncing, but also the computing power required and thus data and energy consumption.

Design tools with built-in image compression options help reduce data usage and speed up page load times. For this reason, programmes like Adobe Photoshop or Pixelmator Pro should be part of the standard repertoire in the creative departments of digital companies. Depending on the amount of content, quality requirements and team size, less expensive tools with CMS plug-ins such as ImageRecycle can also fulfil this purpose. Moreover, vector graphics, which can be created with Adobe Illustrator, for example, make it possible to scale images as desired without loss of quality.<sup>170</sup>

## **SUSTAINABLE UX ON STAGE**

Five years ago, international design experts such as James Christie and Jen Briselli made it their mission to actively promote »sustainable UX« – sustainable user experience and usability design. Even before 2020, their event of the same name took place online via Google Hangouts – for the sake of the environment.<sup>171</sup>

Coding and design specialists worldwide have joined these pioneers and formed a community around the trend of sustainable UX. UXD teams that share this mindset literally contribute to making the performance of digital companies sustainably successful.



# BEHAVIOURAL DESIGN

**If the right decision is the easiest one, people will opt for it.<sup>172</sup>**

Brands that succeed in making decisions easier for customers and help them turn their sustainable motivation into action make customers happy – and happy customers are loyal customers. Effects and methods of

behavioural design help initiate sustainable decisions and close what is known as the »green gap« – the gap between what consumers intend to consume sustainably and what they actually consume.<sup>173</sup> This makes consumers feel good – about the brand and about their contribution to combating climate change.



## WYSIATI EFFECT – WHAT YOU SEE IS ALL THERE IS

What stands out is also taken more into account in decision-making. Eye-catching labels for sustainable products, such as those found at Zalando, visually set green products apart from conventional ones.<sup>173</sup> This way, Zalando is also responding to the results of its first research report on sustainability. Among other things, it found that the number of customers opting for sustainable products increased from 18 to 50 per cent over the course of 2020.<sup>174</sup>

## STATUS QUO

According to the Hermes Barometer, almost 60 per cent of German logistics decision-makers are aware that reducing their own carbon footprint is a permanent competitive factor. However, just under a quarter consciously choose sustainable fleets when selecting their service providers.<sup>175</sup> If the sustainable option were the predefined choice, for example, companies would have to actively deselect it if they preferred the conventional option.<sup>173</sup> Such a change could make climate-neutral logistics service providers and sustainability-oriented business decisions the standard.

### HOBSON'S + 1 CHOICE EFFECT

Another way to influence decision-making situations is to change the options people can choose from. If energy suppliers offer more green electricity tariffs than conventional options on their websites, there is a higher probability that people will choose sustainable tariffs.<sup>173</sup> In 2021, seven municipal utilities from the Black Forest region joined forces under the brand enverde, which offers exclusively green electricity tariffs throughout Germany and also entices people with attractive switching incentives.<sup>174</sup>

### AFFECT HEURISTIC

Rewards trigger positive feelings. It is not uncommon for consumers to make decisions based on whether they like or dislike alternatives on an emotional level.<sup>173</sup> Brands can influence consumers' emotional acts by aesthetically presenting their website and products and by convincing users with an emotional visual language as well as an authentic form of address. enverde is for green energy what IKEA is for furniture – encounters with the brand are authentic, its content reaches users in their everyday lives and is aesthetically and emotionally designed.

## BYSTANDER EFFECT

When confronted with their consumer behaviour, consumers are more likely to reflect on their decisions.<sup>173</sup> The Swedish payment service provider Klarna, for example, makes customers aware of how much CO<sub>2</sub> their orders and returns produce. The transparency of data therefore also makes consumer behaviour transparent – and those who feel visible are more likely to act in line with society's expectations such as sustainability.<sup>173</sup> In the Klarna app, customers can view the life cycle assessment of every purchase as well as a monthly individual report. The »Give One« initiative aimed at combating climate change is linked to this. It gives Klarna customers the opportunity to donate to renewable energy and emission reduction projects as well as non-profit organisations in order to offset their carbon footprint.<sup>177</sup>



# ACTING SUSTAINABLY

## FROM NICHE TO BUSINESS PRIORITY

Sustainability and transparency have played an important role in retail for some years now. In 2022, however, it is no longer just about reasons related to image, but also about competitive pressure. Sustainability has become the main selling point and thus a business priority.<sup>178</sup> Brands that procure, produce, pack and ship sustainably are no longer niche examples, but are increasingly becoming the status quo, especially in the fashion industry.

## FASHION CHANGERS ON THE RISE: LEVI'S & BONPRIX

Vegan sneakers by SAYE, sustainable underwear by erlich textil – among new up-and-coming brands, there is hardly one that does not have sustainability as a core value. Established brands and successful fair fashion drivers have been leading the way for years. One of them is Levi Strauss & Co.

with its »Water179 Thanks to more than 20 different water-saving production processes, Levi's has been able to save almost two billion litres of water and recycle 130 million litres of water in the production of its famous jeans. The fashion brand also makes these climate-neutral methods transparent to ensure that they become industry standard.<sup>180</sup>

Other fashion companies like bonprix are following suit as well. Since 2019, the OTTO subsidiary has been working with the innovative dyeing technology DyeCoo. Instead of water and process chemicals, liquid CO<sub>2</sub> is used to dye fabrics, 95 per cent of which is then recycled. In 2021, bonprix announced its »positive choice« campaign, pledging to achieve further ambitious sustainability goals by 2030, including 100 per cent supply chain transparency, sustainable products and packaging.<sup>181</sup>

## NO POWER TO RETURNS: PRESIZE

Returns remain a vexed subject – from several perspectives. They do not increase customer satisfaction, they do not boost online retailers' sales and they certainly do not improve the carbon footprint of companies. Each returned parcel costs retailers 20 euros on average. In 2019, returns caused 238,000 tons of CO<sub>2</sub> in Germany alone.<sup>182</sup> 50 per cent of the products returned in the fashion industry do not have the right size or fit. Considering that half of all online orders in this industry are returned, this presents a huge problem.<sup>183</sup>

In order to keep financial losses and CO<sub>2</sub> emissions to a minimum, the B2B company Presize developed a body scan AI for online shops. More than 20 successful shops and brands, including Nike, adidas and VERO MODA, already use the software of the Munich-based start-up. The results speak for themselves: thanks to the very precise measurement method, Presize was able to reduce return rates by up to 50 per cent on average and increase sales by at least ten per cent.<sup>184</sup>

## SUSTAINABILITY INSIDE AND OUT: CONTINENTAL

The technology company Continental has also been committed to circular economy for years. In 2020, the tyre manufacturer collaborated with the German Federal Ministry for Economic Cooperation and Development (BMZ) and succeeded in making its rubber supply chain completely transparent via a digital traceability system – from cultivation in Indonesia and further processing to tyre production in Germany.<sup>185</sup> This way, Continental promotes the cultivation of higher-quality natural rubber, prevents deforestation and contributes to securing the livelihoods of 450 farmers in Borneo by training them in sustainable cultivation.<sup>186</sup>

And Continental is even going one step further: From 2022 onwards, the material for its tyre production is to consist of recycled PET bottles. This is made possible by a technology that Continental developed together with the Chinese fibre specialist OTIZ. It ensures that polyester yarn can be obtained without intermediate chemical steps.<sup>187</sup>

Sustainable supply chains, long-term value creation and social commitment are essential elements of Continental's sustainability management – along with emission-free mobility and industries as well as 100 per cent carbon neutrality. Other values that are firmly anchored in the company's strategy and culture include:

- **fair and healthy working conditions**
- **clean and safe factories**
- **responsible digital transformation and continuous innovation**
- **maximum safety in mobility**
- **sustainable management processes and corporate governance<sup>188</sup>**

Committing to sustainability is not a question of industry. Brands, retailers and manufacturers in B2C and B2B that are committed to conscious consumption, sustainable value chains and charity initiatives hit the sweet spot of megatrends such as sustainability, customer behaviour and added business value. This way, they secure a sustainably successful future – in both senses of the word.



- WHAT CONTRIBUTION DO YOU MAKE?**
- HOW GREEN IS YOUR IT?**
- WHAT FOOTPRINT DOES YOUR WEBSITE LEAVE?**
- HOW DO YOU INITIATE SUSTAINABLE DECISIONS?**
- IS SUSTAINABLE COMMITMENT ON YOUR AGENDA?**

# IT IS A BUSINESS MATTER



IT is the main driver of digitalisation. However, it is also the Achilles' heel of digital champions. This makes it all the more important that reliable IT becomes part of all business units. To achieve this in 2022, companies should particularly focus on measures that ensure **security**, a high **degree of standardisation** and **upgradeability**. These include **local cloud environments**, **security-driven design** and trends such as **containerisation**, **GitOps** and **service meshes**.

# PEOPLE EAT TECH FOR BREAKFAST

Technology alone does not make digital champions. For technology to become the best tool and not the biggest obstacle, companies need to link IT and business even more closely. On this basis, trends grow into innovations that prevent expenses from skyrocketing, attack surfaces from growing and even processes from coming to a standstill.

The American economist Peter Ferdinand Drucker is one of the pioneers of modern work. Anyone looking for a »single source of truth« for modern work in the digital age will find it in Drucker's famous statement: »Culture eats strategy for breakfast«.<sup>189</sup>



**No matter how sophisticated a strategy, how innovative a technology or how modern a tool, it is no guarantee of digital success.**

In the end, the success of any project depends on the people who implement strategies and use technologies as well as tools, who are open minded and courageous enough to test new methods and solutions, who make technology their tool and not their magic bullet.

Companies can only become digital champions if they have the right corporate culture – a culture in which all employees share the same values and in which there is a cross-departmental understanding of corporate vision, tasks, processes and responsibilities. This requires all teams to speak the same language, share knowledge, identify competencies and link them.<sup>190</sup>

Especially when looking at the connection between IT and business, it becomes clear how crucial these factors are for the success of digital companies. In this context, business means not only the management, but all departments – from marketing to production.

The closer IT and business units are connected, the better companies are able to adapt quickly and flexibly – be it unexpected crises in society as a whole, challenges in projects with external stakeholders or changing internal requirements. Besides the provision of a modern infrastructure and the use of highly automated technologies and tools, this requires a demystification of tech on the one hand and business on the other.



Monthly company-wide meetings are a good platform to share knowledge across departments and inform all teams about news, developments and processes. Not every employee

needs to understand every technical term or new process. It is about transparency and the opportunity to ask questions.

## **SUCH SHORT PRESENTATIONS OFTEN RESULT IN SYNERGIES AND NEW IDEAS, WHICH IN TURN**

- FOSTER EXCHANGE BETWEEN IT AND BUSINESS UNITS**
- IMPROVE INTERNAL COMPANY PROCESSES**
- ACCELERATE PROJECT STARTS AND OUTCOMES FOR CLIENTS**
- DRIVE INNOVATION**
- ENSURE SECURITY**
- ENABLE UPDATEABILITY AND UPGRADEABILITY**
- OFFER A HIGH DEGREE OF STANDARDISATION**

## IN SUCCESSFUL DIGITAL COMPANIES, IT IS<sup>190</sup>

- integrated into the corporate strategy
- no longer a service department but part of every team
- an innovator of business processes
- no longer just responsible for operating stable infrastructures, but also an enabler of business goals

# SECURITY, STANDARDISATION, UPGRADEABILITY

**90%** of German companies use cloud services.

In 2015, this figure was only 21%.<sup>191</sup>

By 2024, cloud is projected to account for **14%** of global IT spending.

In 2020, this figure was only 9%.<sup>192</sup>

German companies that say no to cloud computing do so in

**60%** of cases because  
they fear compliance violations

**50%** of cases because they have  
doubts about sufficient security<sup>191</sup>

## CLOUD COMPUTING IS THE NEW NORMAL

Nevertheless, there are many companies that are hesitant to move their business to the cloud – not only because of the costs involved, but also for compliance and data protection reasons. Most of the big players in cloud computing come from the USA or China. However, there are also alternatives, for example the Gaia-X initiative, which advocates for an independent European cloud infrastructure. In several data centres in Germany, Gaia-X offers high-performance cloud environments that meet even the strictest European data protection regulations. Existing IT infrastructures can be seamlessly integrated as well.<sup>193</sup>

The German hosting provider plusserver is also a founding member of these cloud services for Germany and Europe. As an independent multi-cloud provider, plusserver is building a cloud in Gaia-X that is operated by German companies in Germany and offers similar services to the large service providers.

The »Made in Germany« seal of quality has also proven effective when it comes to cloud services. The advantages are obvious<sup>194</sup>:

- **INCREASED CUSTOMER TRUST THROUGH »MADE IN GERMANY«**
- **ON-SITE SUPPORT AND TAILORED CLOUD SERVICES BY EXPERTS**
- **CUSTOMER SERVICE IN CUSTOMERS' NATIVE LANGUAGE**
- **COMPLIANT WITH THE GDPR**
- **CONTROL OVER WHERE DATA IS STORED**

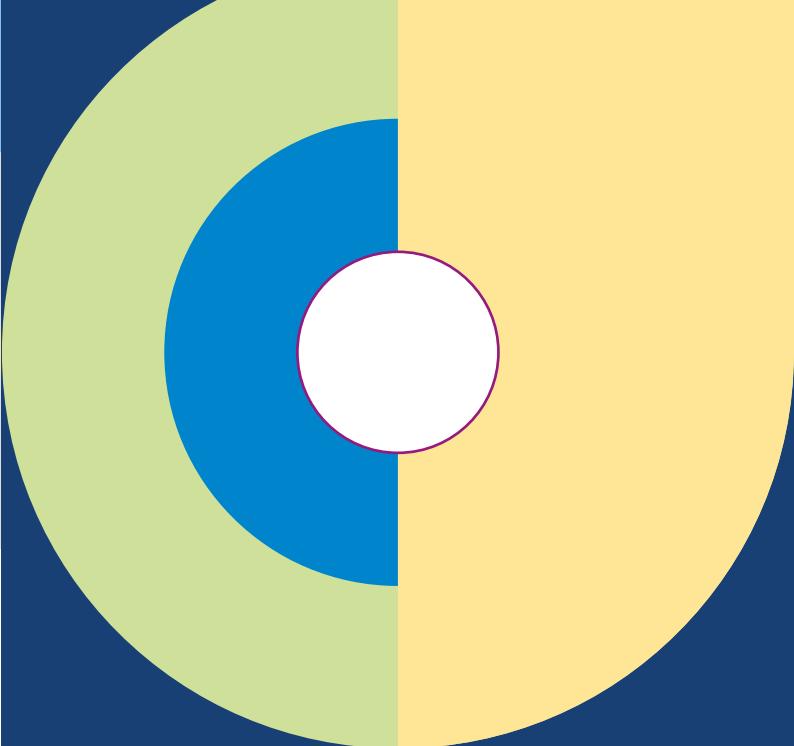
# SECURITY BY DESIGN

SECURITY BY DESIGN MEASURES REDUCE ATTACK SURFACES BY MORE THAN **95%**.<sup>195</sup>

Using cloud services offered by local service providers is one approach to boosting the level of security. With the growing number of applications being moved to the cloud, the need for reliable cloud security increases once again.<sup>196</sup> This also means that the need for cloud specialists continues to grow. Unsurprisingly, the remote year 2020 led to a higher demand for such digital experts in general. German companies advertised almost 6,000 jobs related to cloud computing.<sup>196</sup>

In 2022, those who have cloud and cloud security specialists on their payroll or an experienced agency behind them will be among the companies that have one foot firmly planted in cloud-driven e-business.

***Adding cloud security at a later stage is not a substitute for security by design.***<sup>192</sup>



## PREVENTION IS BETTER THAN CURE

They take security requirements into account from the outset when building infrastructures and developing software products. Such security measures are based on an approach that Microsoft already shaped 20 years ago: security by design.

In 2002, the software giant developed its »Security Development Lifecycle« (SDL) – a holistic process that takes **security** into account in all stages of software development instead of relying on updates to do so.<sup>197</sup>

In order to have both feet firmly planted in e-business and to roll out new products, features, services or even security updates in the shortest possible time, the technical foundation must be able to act just as dynamically as the people who decide on this content. The ménage à trois consisting of containerisation, GitOps and service meshes has developed into an approach to solving this problem – not only in terms of security, but also with regard to the core issues of standardisation and upgradeability of processes and applications.

# CONTAINERISATION

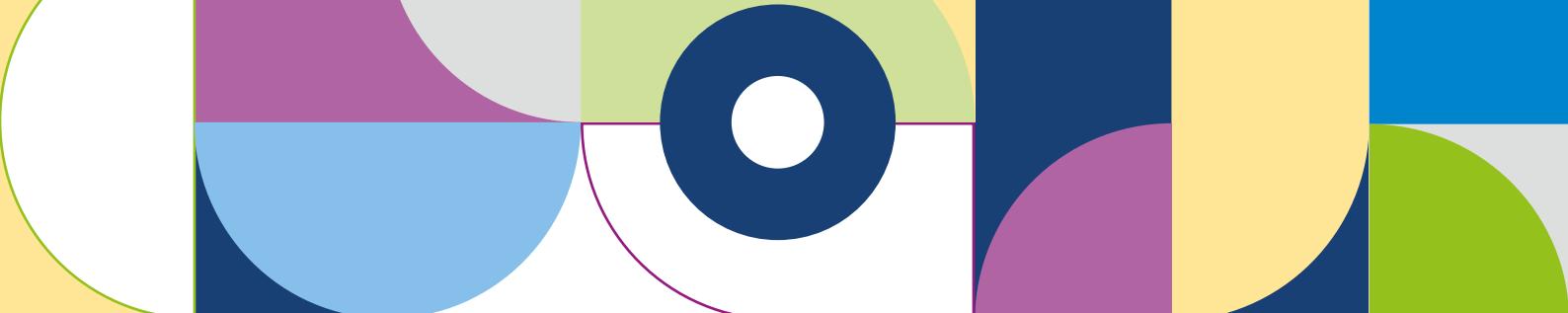
An approach that has already been used for around ten years and has become increasingly established over the last few years is the use of containers. It is based on the cloud native principle and applications are developed directly for the cloud. Containers enable companies to encapsulate individual applications of their technology stack, making it possible to run and maintain them independently of each other.

A **container** is a virtualised, autonomous and transportable environment that is tailored to the application being run. This is achieved by integrating only the required software components and dependencies instead of setting up a complete operating system.

This lightweight structure and container orchestration tools such as Kubernetes make it easy for users to configure entire infrastructures and roll them out accordingly.

An online shop, for example, can be divided up as follows:

- **DATABASE**
- **WEB SERVER**
- **APPLICATION SERVER**
- **FRONT END**
- **MICROSERVICES (FOR EXAMPLE AN INVENTORY SERVICE)**

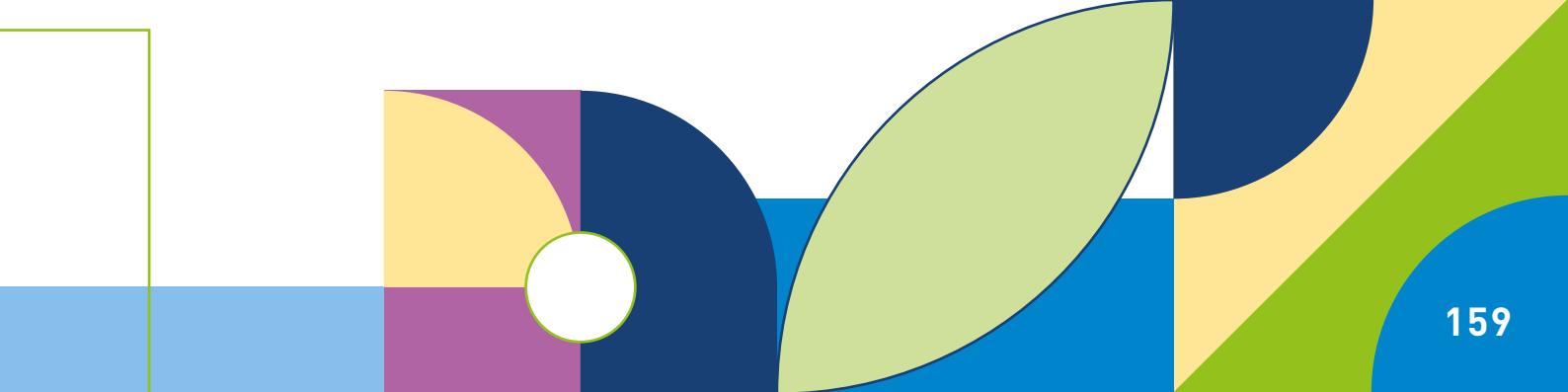


Previously, each of these components had to be manually installed and configured on the corresponding server. By using containers, only a text file describing the component is required in addition to the automation infrastructure.

An abstract example of such a text file could be as follows:

```
„Install web server version  
8.2.1;  
Set port to 8080;  
Start web server;”
```

Even when it comes to ad hoc changes, the principle of containerisation helps to respond quickly to new and often unpredictable requirements. If there is a critical security vulnerability on the web server in the example mentioned above, the container can be updated independently of the other components by adjusting the configuration and reinitialising the container. This saves time and ultimately also builds trust among customers because the infrastructure is brought up to date through simple **update processes**.



# GITOPS

Especially when it comes to connecting with cloud native applications such as Kubernetes, GitOps has established itself as a method for the automated deployment of containers. Just like containerisation, GitOps is not an unknown trend: The methods have been used in innovative digital agencies for quite some time, but there is now a growing awareness of them among the general public. Unlike other DevOps approaches, GitOps focuses on the tool Git, which is part of developers' standard repertoire.

## AUTOMATED DEPLOYMENTS

Git is used not only to version source code, but also to manage all container definitions in one central place (hence the name GitOps). Automated deployment pipelines ensure that changes to code or container definitions are immediately deployed to the corresponding systems.

The big advantage here is that developers do not have to learn how to use Kubernetes and spend a long time building containers in order to test their apps and deploy them to the live system. Especially in the case of new developers, this standardisation shortens the time required for onboarding from weeks to days.

## WHAT YOU SEE IS WHAT YOU GIT

Due to the traceability of changes, GitOps also has special qualities when it comes to system failures and security. In the event of a complete failure, the whole environment can be rolled back or rolled out on a new system in next to no time since the entire system is defined and versioned in Git. If a change that does not match the definition in Git was accidentally made to the live system, it can also be reversed.

# SERVICE MESHES

With the increasing complexity of a running application, the number of containers to be managed increases as well. If there are performance problems, for example, it is not initially clear where to look. Although each component comes with monitoring or logging features, manual inspection takes a lot of time and only partially reveals problems that may exist in the communication between containers.

In an increasingly complex environment, there are many different questions that need to be answered:

- How does adding a new microservice affect overall performance?
- How do you secure communication between services?
- How long does it take to re-establish communication between two services after a system failure?
- What data is exchanged between individual containers?

**Service meshes provide answers to these questions. The virtual networks close such gaps in information supply and monitor the state of entire systems by using existing container definitions and rules.**

## SERVICE MESHES ENSURE THAT

- REPETITIVE CODE IS ELIMINATED
- MANUAL EFFORT IS REDUCED
- PROBLEMS ARE DETECTED IN GOOD TIME
- PERFORMANCE BOTTLENECKS ARE UNCOVERED
- ALL COMMUNICATION BETWEEN SERVICES CAN BE TRACKED
- FUTURE SYSTEM FAILURES ARE PREVENTED BY MAKING CHANGES TO SYSTEMS



- DOES YOUR IT KNOW WHAT YOUR BUSINESS UNITS ARE DOING?**
- DO YOU TRUST YOUR CLOUD PROVIDER?**
- DO YOU PROACTIVELY INCLUDE SECURITY IN YOUR SOFTWARE DEVELOPMENT?**
- HOW MUCH MANUAL EFFORT GOES INTO YOUR (PRODUCT) INFRASTRUCTURE?**
- HOW QUICKLY CAN YOU RESPOND IN THE EVENT OF A SYSTEM FAILURE?**
- HOW CLOSELY DO YOU MONITOR YOUR SYSTEM?**

# FACTS & FIGURES

More than halfway there: German SMEs across all industries scored 58 out of 100 points in the Digitalisation Index.<sup>198</sup> Another piece of good news: all industries have almost reached the digital status quo. This is an impressive development, but all industries still have room for improvement – and that is not due to an inadequate repertoire of modern technologies and systems, a lack of ideas or creative minds, but to a large extent due to a lack of corporate culture itself. 41 per cent of HR professionals see this discrepancy as the main obstacle to digitalisation.<sup>199</sup>

**Companies that are not geared towards innovation from within cannot drive innovation either.**

Big names like BayWa and Würth show that it is even possible in traditional industries to create a culture of employees who are motivated to innovate in order to become a digital champion. However, there are also up-and-coming digital companies that are role models, showing that success is not a question of industry or company size, but a question of mindset.

The construction industry seems to have the right mindset as well. Although SMEs from this traditional industry come in last in terms of figures, they are only slightly behind the retail industry – a sector that has seen a lot of change in the last ten years. The fact that these two industries are so close to each other is emblematic of the importance of digitalisation across all industries. Everyone agrees: digital is better! Companies' pace of digitalisation, which has increased in the last two years in particular, is also reflected in their output. Productivity has increased considerably. New business models with digital products and services have emerged, contact with customers is closer than ever before – thanks to digital channels.<sup>198</sup> Selected facts and figures for digital champions show what customers want, what industries are doing to meet these demands and which systems support them.

# DIGITAL SOLUTIONS FOR CHAMPIONS IN EVERY INDUSTRY



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## RETAIL



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# E-COMMERCE

Online sales will grow by **60%** by 2024.<sup>200</sup>

Almost **HALF** of all B2C e-commerce sales in Germany are generated on online marketplaces.<sup>200</sup>

At least **90%** of B2B product sales are generated through personalised services.<sup>201</sup>

With commercetools' Customer Engagement Framework, costs in B2B commerce projects are reduced by up to **50%** and time to market is shortened by up to **TWO** months.<sup>202</sup>



Adobe Commerce, Salesforce Commerce and SAP Commerce are the **TOP 3** most common shop systems among the top 1,000 online shops in Germany.<sup>203</sup>

The migration of Dildoking's e-commerce system made the brand one of the **TOP 5** most popular adult shops in Germany in 2021.<sup>204</sup>

The replatforming of ESPRIT's e-commerce system helped the brand take **FIRST PLACE** in the ranking of the fastest online shops in Germany in 2021.<sup>205</sup>

The migration of hessnatur's e-commerce system resulted in **45%** more online sales and **45%** more new customers in 2021.<sup>206</sup>



# MARKETING

Content marketing generates **3 TIMES** more leads than SEA.<sup>207</sup>

**90%** of companies primarily use digital channels for communication.

Before COVID-19: **38%** in B2B   **53%** in B2C<sup>208</sup>

**60%** of companies consider digital communication channels to be beneficial for increasing sales and saving costs.<sup>208</sup>

# DATA-DRIVEN BUSINESS

Companies that rely on data-driven insights grow by **30%** per year on average.<sup>209</sup>

Companies that use data-driven marketing strategies can save up to 30% of costs while increasing revenue by as much as **20%**.<sup>210</sup>

**56%** of German SMEs use data analytics to develop data-driven digital business models.<sup>198</sup>

# CLOUD COMPUTING

Cloud computing will be the IT infrastructure market leader by **2025**.<sup>211</sup>

Companies that opt for green clouds save up to **40%** in terms of total cost of ownership (TCO).<sup>212</sup>

# PIM

For **90%** of B2B companies worldwide, PIM is a top priority.

**56%** of B2B companies worldwide increase their sales through enriched product data.

Enriched product data enables almost **HALF** of B2B companies worldwide to charge higher prices for the same product.<sup>213</sup>

# USER EXPERIENCE DESIGN

Design sprints lead to realistic MVPs within **5** days.<sup>214</sup>

Visual effects such as 3D increase the likelihood of users staying on a page by **45%**.<sup>215</sup>

# CRM

Good UX optimises processes in CRM, sales and service:

- More productivity and leads
- Less costs and effort

**3 out of 4** CRM customers indicate they would trade functionality for ease of use.<sup>216</sup>

# WE DIGITALISE



**Digital Consulting**  
Quickly achieve measurable success



**System Selection**  
Technology for your business



**IT Architecture & Cloud Services**  
Flexible with scalable systems



**UX & Brand Design**  
Design brands in a user-centred way



**Digital Marketing**  
Successfully showcase brands



**Content Management**  
Merge content and commerce



**Marketing Automation**  
Personalise user experiences



**E-Commerce**

# MARKETING, SALES AND SERVICES

**Implementation**  
Agile from idea to productt



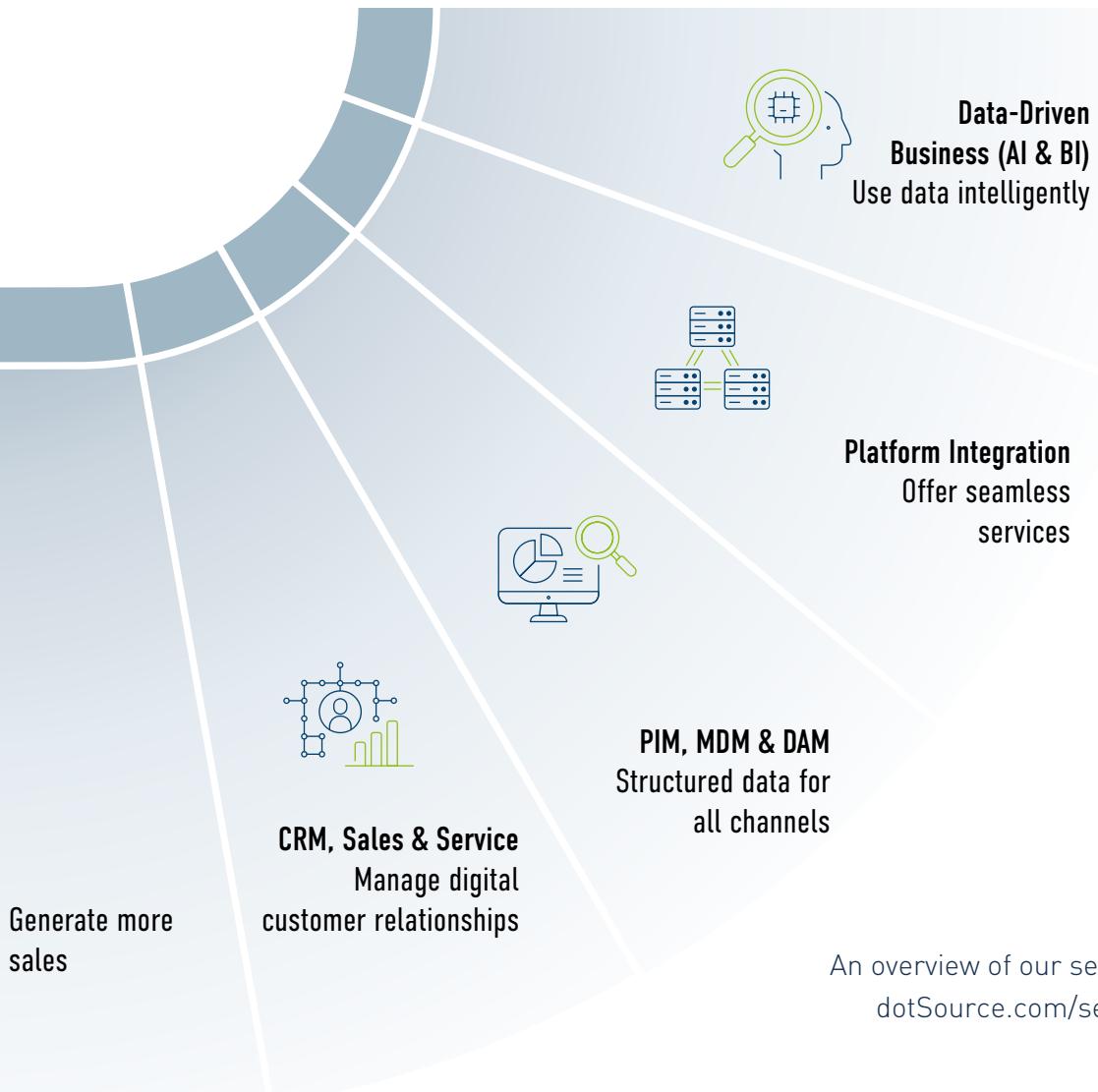
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# DIGITAL CHAMPIONS CELEBRATE PEOPLE

Success connects people. It has a motivational effect and it is visible. However, whether in sports or in digital business, you do not become a champion alone or overnight. Champions are team players and have competent coaches – coaches who see themselves as service providers and deliver the **WHAT** to their team<sup>217</sup>: What is the vision? What is the mission? Coaches of champions hand over the responsibility for the **HOW** to their highly talented team without leaving their team alone.





The establishment of an innovation-motivated corporate culture, the further development of business models and the shaping of digital customer relationships are always processes – processes that are permanently subject to technological changes, question traditional corporate structures and promote new working models.

Successful companies today and in the future are those that have digital leaders who drive these restructurings, promote team spirit, increase motivation and ensure transparency. Only companies that create an environment where employees feel connected because they are valued and given a high degree of personal responsibility succeed in becoming innovation-motivated pioneers – true digital champions.

Digital champions are not only able to respond to technological and social change, but they can also predict it. Because they not only observe developments, but also analyse them in a data-driven manner. Because they create a corporate culture in which all employees participate. Because they develop old virtues further and have clear, modern marketing goals. Because they tailor their business models to their customers and not to their product. Because they share knowledge and link competencies. Because they build on strengths and do not see mistakes as a shortcoming, but as an opportunity they can take advantage of.

Digital champions are the people who drive every business forward. Finding these people, supporting them and letting them work creatively is crucial to digital success – or as Champions League-winning coach Thomas Tuchel puts it: »It is the HOW that determines success, not the WHAT!«<sup>217</sup>



# ABOUT dotSource®

## **dotSource transforms companies into digital champions.**

dotSource has been developing and implementing scalable digital products for marketing, sales and services since 2006. Specialised consulting and development teams rely on a highly integrated combination of strategy consulting and technology selection – from branding, concept creation, UX design and conversion optimisation to operation in the cloud. Whether it is e-commerce and content platforms, customer relationship and product data management or digital marketing and business intelligence: dotSource solutions are user-oriented, targeted and data-driven.

When it comes to collaboration, dotSource relies on New Work, integral planning and agile methodologies such as Scrum and design thinking. More than 400 digital natives see themselves as partners of their clients, taking

into account individual requirements and living up to the dotSource vision of »Digital Success Right from the Start«. Companies like ESPRIT, hessnatur, Ottobock, TEAG, KWS, BayWa, Axel Springer, C.H.Beck, Würth and Netto Digital trust in this expertise.

On the agency's own blog Handelskraft.com, in the annual Trend Book and at the Handelskraft Conference, dotSource networks industry knowledge and provides insights into current opportunities and developments of digital brand management. Digital Business School, which was launched together with Steinbeis Technology Group in 2015, comprehensively prepares professionals and executives for the entrepreneurial challenges of the digital world.

dotSource has established itself as one of the leading digital agencies in German-speaking Europe and is now one of the top 10 most successful companies in the industry.

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**EDITORS/TEXT** Christian Otto Grötsch, Managing Director · Luise Beyer, Digital Business Analyst  
Agnieszka Herrmann, Digital Business Analyst · Oliver Kling, Handelskraft Digital Evangelist  
Franziska Kunz, Digital Business Analyst · Mike Rucinski, Marketing Tech Engineer  
Paul Schäfer, Digital Business Analyst · Birthe Struffmann, Digital Business Analyst

**COPY-EDITING** Louisa Reichstetter, Digital Business Analyst

**TRANSLATION** Maximilian Ciasto, Marketing Manager & Translator

**DESIGN/LAYOUT/TYPEFACE** Alexandra Andrä, Graphic Designer · Timon Bongartz, Graphic Designer  
Katharina Jänicke, Graphic Designer · Fatemeh Shahvirdi, Graphic Designer  
Steffen Soens, Graphic Designer · Janine Gabel, Graphic Designer

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THANKS TO THE dotSource Team 😘

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**Every company has the potential to become a digital champion!**

**Office Jena**  
Goethestraße 1  
07743 Jena

**Office Leipzig**  
Hainstraße 1-3  
04109 Leipzig

**Office Dresden**  
Bergstraße 19  
01069 Dresden

**Office Stuttgart**  
Feuerseeplatz 14  
70176 Stuttgart

**Office Berlin**  
Hardenbergstraße 9  
10623 Berlin

PHONE +49 (0) 3641 797 9000 | FAX +49 (0) 3641 797 9099 | E-MAIL [info@dotSource.de](mailto:info@dotSource.de)

[dotSource.com](http://dotSource.com) | [handelskraft.com](http://handelskraft.com) | [digital-business-school.com](http://digital-business-school.com)