

DELIVER

Pre-qualified Commerce & Supply Chain Meetings



Europe 2023: Bonus Keynote Insights Report



DELIVER Europe 2023

Bonus Keynote Insights Report

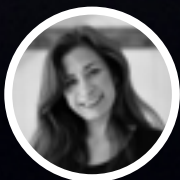
DELIVER Europe 2023 in Amsterdam featured an incredible agenda of keynote sessions from some of the most important and influential global voices in our industry.

We sat down with each of these speakers after their keynotes to learn more about their unique perspectives – on everything from the changing role of DEI, to the future of retail, to the health of the circular economy, to the challenges facing supply chain leaders... and so much more.

You can now read our compilation of these extra insights in this Bonus Keynote Insights Report.

And you can watch the original keynote sessions [HERE](#).

DELIVER is the handshake – and the applause.



MICHELLE GARRES

Director Distribution & Logistics Projects
EMEA, Crocs

Change Management - the Key to Supply Chain Success!

Mobilising Change

"How can you mobilise fast digitalization changes in the supply chain? Because everybody struggles with that. First of all, they think change management is a complete entity that needs to come on board on your project in order to start executing it. And usually, that happens at the very end. That's so wrong. You need to start Change Management from day zero – from the time you get the budget."

Choosing the Changemakers

"A project manager needs to be a very holistic person. You need somebody influencing others – a very hands-on person that does the work. Not just PowerPointing and chasing people, but behaving like a product owner. They need to live it."

Mapping the Future

"I think you need to have a roadmap with flexibility. So you need to have an understanding of what is what is your end goal – what will it look like? And that way, you won't build a monster!

Think 'plug and play'. Work on the things you need. We always forget about the users – but they are the key to change. We're always thinking about data and numbers and not enough about who's going to enter the data, who's going to use this solution.

Then you need to hire a person capable of selling the change. Just like an influencer selling shoes – suddenly everybody really believes in it."

43%

of employees are willing to support enterprise change, compared to 74% in 2016 (Gartner)

Why getting these changes right is so important: The Harvard Business Review reports that employees are losing patience with change initiatives



CAROLINE ZIMMERMANN

Director of Supply Chain, Planning & Purchasing, Jack Wolfskin

S&OP - the Cost of NOT Doing Things

Embracing Collaboration

"Good planning is about collaboration. You need to watch what your colleagues are doing – the player next to you, as in an orchestra. And if you do not engage in the same strategy by watching their movement, you won't know what's different in the business.

So it's about really embracing the collaboration, the coordination, the synchronisation of the plans. And that's really about trusting your partner, and working together."

Conducting the Orchestra

"You need to have kind of a conductor or a coach: you need your CEO or CFO to endorse a culture of collaboration, because as long as you can prove the benefits to all the participants – and that comes with data transparency, or a single source of truth – that's sufficient enough to coordinate them with results. Everyone can profit in that process in a different way. So you will still need your senior management to be the ones endorsing and defining the strategy."

A Single Source of Truth

"Ensure that your systems are matched, that your reports are efficient, that they are trustable. It's very important to have a single source of truth. Very open organisations have multiple systems: they have ERP, they have supply chain management, logistics systems, they have PLM.

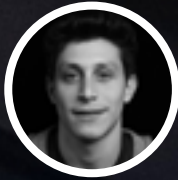
All of those systems may overlap from time to time. It's very important that all the functions coordinate and control input, so the output you get is your single source. Different visuals, yes, and great analytics – but all based on the input."



40%

of global CEOs think their organisation will no longer be economically viable in ten years' time on current course (PwC)

What are the current concerns of over 4,000 global CEOs? Find out in [PwC's 26th Annual Global CEO Survey](#)



GABRIEL MOOS

Senior Program Manager, Amazon

Expanding Your EU Business Internationally: the UK and US Opportunity

4.2%

is the increase in value of goods imports in the UK in May 2023 (Office for National Statistics)

Read about the UK Government's cross-border plans in its [2025 UK Border Strategy](#)

Cross-border, Post-Brexit

"The UK is positioned to make cross-border business easier. There is the 2025 UK Border Strategy, and they are super engaged with the EU authorities; there is a trade agreement that is going to be signed with the US as well.

The UK is trying to find its position in not only e-commerce but in trade more broadly. Maybe that's a more positive perspective than we have internally in the UK, but the UK always bounces back. And they always like find innovative ways."

Simplifying the Challenge

"I think we're at the stage where Amazon has understood the challenge, and we are offering solutions around improving the experience. Crossing the border is very cumbersome – it's not an easy process, it's very unclear if you haven't done it before. There are lots of fees that you necessarily haven't looked at. The origin of the product – based on whether the product is made in the UK or in China, for example – is different. We're trying to really simplify."

Customer-focused Solutions

"A lot of logistics companies are focused on their operational processes. And that's why Amazon is successful. Everything is customer-obsessed: what is the feedback we receive? And can we actually make something better for people, based on their actual experience?

It's not only about cost efficiency. It's also about what the customers want. Obviously, we need to create solutions that make financial sense. But we're really trying to be innovative and do things that very few people do."



MARIAN TEMMEN

Senior Director Supply Chain Transformation and Innovation, PVH
***Maintain Supply Chain Continuity and High Performance,
without Compromising Partnerships and Sustainability***

Supply Chain Transparency

“Speaking for the industry in general, we come traditionally from a space where you have enough business, you have interaction with a level one, like the manufacturer, and then maybe, if you’re doing well, the level two in terms of providing the fabrics. But that’s about it.

Over the last couple of years with sustainability, traceability, compliance requirements, and legislation coming our way, it’s not just about satisfying consumer and shareholder needs, but really being on top of your entire supply chain. And that means having data available, making it transparent, and verifying it.”

Staying ‘Close to the Needle’

“It’s not rocket science – if you look at a garment, the complexity, in terms of the making of all the components that are needed to make the product, is rather straightforward. Automation is also there, progressing and advancing, but it’s still a very manual way of manufacturing the product. You’re very ‘close to the needle’, as we call it – very close to where things happen. That’s where you very quickly have a handle on things you can change and positively influence.”

Service Provider Support

“You have brands, manufacturers, suppliers in that ecosystem that basically come up with a great product. But you don’t have all the necessary service providers, providing the right technology to then also recycle and bring back a product or garment into its original shape, so that you can re-use it – or refuse it – into the cycle. So that’s still a big challenge. Once that backbone, that kind of support function is in place and also at scale, there shouldn’t be any constraint or limitation to implementation.”

<1%

of the global fiber market was from recycled textiles in 2021 (Textile Exchange)

Where your fabrics come from: read the [Preferred Fiber & Materials Market 2022 Report](#)



TONY SCIARROTTA

Executive Director & Publisher, Reverse Logistics Association

***Embrace Circularity, Exceed Customer Expectations,
Reduce Returns Pain***

The Escalating Returns Crisis

"We have created a culture of entitlement, because returns are easy and free. And that is now the benchmark to be a successful e-commerce retailer. It's a consumer culture where people will order ten garments online, and send nine back. And that's frightening. It's averaging over 50% in the apparel industry. So what's going right is e-commerce business is booming. That's exciting. But what's going wrong is no-one's fixed the returns problem at the front end."

Changing the Mindset

"The solution involves things like making sizes consistent around the world for clothing and shoes, and making electronics easy to use. The two-dimensional experience that we have online has to be matched by the three-dimensional experience of opening the carton at home. Does it fit? Does it look like what I expected?"

When many manufacturers and retailers check the products on return, so many of them are touched, but there's nothing wrong with them. In apparel, you could put it back on the shelf. In electronics, it's now used, it cannot be sold as new. So returns are growing as fast as e-commerce is moving."

Locating Liability

"Where does the liability belong? Does it belong with the manufacturer? Or with the retailer? That's a double-edged sword. There are examples in the States where computer monitors have a disposal fee that the states are putting in their budgets, supposedly, to help the landfills where the monitors are being dumped.

In the automotive industry, tires have a disposal fee. Oil has a disposal fee. When you take your car in for service, they tell you it's going to cost \$100 to get rid of these tires. We don't see that as much in other industries. And maybe we should. But the excitement for a year from now is that in the States, the investment community is looking at ESG scores, they're looking at carbon footprints. And now people are going to start putting their money where their scores are."

48%

of UK shoppers returned online purchases at least 'some of the time' in 2023 (Statista)

Read about how [UK retail returns hit record levels in 2022](#), despite lower online sales



ESSAM ELOKDA

Global Digital Transformation Director, Unilever

From Digital Transformation to Retail Evolution - The Skills You Need to Adapt and Thrive

The Retail Revolution

"There's a huge revolution taking place in the retail industry, specifically in the last two years. And this is not coming in parallel with the evolution happening in skills – for two reasons. The first is the speed of the retail transformation powered by the pandemic. The second is that the technology providers are putting the technology in a position where it's not serving this digital transformation: it's serving their businesses. Digital transformation should be serving humanity."

The Hybrid Future

"Some companies have been expecting that Web3 will do. And it came as a surprise to their investors that consumers didn't want to move fully into the digital life – they still need to interact with each other and touch the product. So we will have a hybrid, like moving from fossil fuel to electric."

Look at the Amazon Go experience: a certain kind customer wants to go to the store and take the product, but with the added value of a seamless and enjoyable experience while still in the classical model of retailing."

Communication Is Golden

"It's about understanding the right skills to be acquired by people working in retail, how to deal with AI as part of the workforce. But on the other side, we need to be more empathetic. We need to understand the customers more. We need to use emotional intelligence and active listening. The most critical and important skill, the 'golden skill' is communication – either with AI or with other human beings."

41%

of retailers cite hybrid 'hub & store' models as a top area for investment in 2023 (Adobe)

Learn more about the hybrid retail experience: read the [Adobe 2023 Digital Trends – Retail in Focus Report](#)



AMELIA KALLMAN

Futurist, Speaker & Author

Great Techspectations: Retail, Reality, & the Future

AI as Another Colleague

"The four areas that AI is playing in already are productivity, predictability, personalization, and content creation. Every business can start to include it. There are free plug-ins and bolt-ons and APIs that are just going to accelerate processes and conversations, make our lives easier, and build that comfort with understanding that AI is something that we can work with: it can become another colleague, something that isn't scary or overwhelming."

The New Fakes Market

"One of the big struggles we have currently is because we're looking at this global landscape – different regions are taking different actions, or inactions, when it comes to regulating in this space. But even in our physical retail, we still have a fakes market."

The truth is that when these innovations come out, often the early adopters are bad actors, and they want to see how they can exploit it. At one point, it was something like 95% of NFTs on Twitter were scams. And this is really bad, because it creates this distrust for something that actually could be quite beneficial."

Educating against Risks

"This is just the first iteration – we're not at an end point here. These are all building blocks to where these technologies are headed. I think the eventual solution is going to come from blockchain, and from having a level of technology that gives it some kind of security so it can be tracked, however it's being used. But we're still a long way off from that, so there is huge opportunity for piracy between now and then."

Education is powerful. There are some very real risks here around AI today and what it can do in things like marginalising minorities and perpetuating bias, and those are the kinds of things that I think we need to be addressing right now."

73%

of employees at high-performing organisations expect to be reskilled over the next three years as a result of AI (McKinsey)

You can find out more about the state of AI in 2023 in this McKinsey survey about [AI's 'breakout year'](#)



ANDREW BUSBY

Founder, Retail Reflections

Shopper Mark Two - Understanding Them Is Key to Your Survival

The Return of Brick & Mortar

"We're all Shopper Mark Two: we have all evolved in our shopping behaviour. And what most people want is the high street: something more authentic, more artisans and independents. It's about physical retail thinking more like a museum or an art gallery. When it's a high street, which is mainly populated with independents, you don't know what you're going to find. That's part of the draw. So that in itself gives a reason for us to want to go there – we want something different."

The Market Town Renaissance

"Space management as a discipline has been in the doldrums; it's been a little bit peripheral. What we're going to see in our typical market towns is a more exciting and therefore inspirational use of space. And that is a combination of wellness, traditional retail, hospitality, entertainment. Our town centres are going to become a destination."

Educating against Risks

"Against the macro-economic background we've got at the moment, which will continue for some time, we're looking at price, value and service, within a wrapper of great customer experience. Brands and retailers like to think they are really advanced with this. But think of it as Mount Everest – we're hardly at basecamp."

Supermarkets could learn from the airlines. Why isn't there, if I qualify, a VIP Lane checkout that I can go to? There is so far to go until we really deliver a service to people that is actually effortless, that adds real value, where we come away thinking, that was really good. That was a great experience."

in Meetings



45%

*fewer UK stores closed
in 2022 than in 2021
(Coresight Research)*

*Read more about the
[reinvigoration of the UK
high street](#)*



DR CAROLYN MAIR

Fashion Business Consultant, Carolyn Mair Consulting Limited

The Population Ignored by Fashion Brands – Who Are Missing Out

Understanding Inclusivity

"I think there needs to be a broader understanding of the size of this population of people with disabilities that spans the entire population, all segments, from birth right up to old age. And so how do we make our products inclusive, truly inclusive? Companies talk about diversity and inclusion, but they miss out disability, because many companies see that as an add on – and it needn't be. So we can talk about designing clothes for everyone."

Designing for Everyone

"Even people without disabilities can't wear everything in a clothing collection. Make garments with Velcro fastenings, or magnets, or zips with large ring pulls. It's very important that people are able to read labels so they can take care of their clothes, in terms of sustainability, but they're tiny anyway! You can make labels in Braille. People with sensory disabilities, such as some people on the autistic spectrum, feel on their skin very differently. You can have flat seams, removable labels, or labels printed on the insides of the fabric. And that's better for everyone."

So if we call it 'inclusive design', rather than 'accessible' or 'adaptable', then we're designing for everyone."

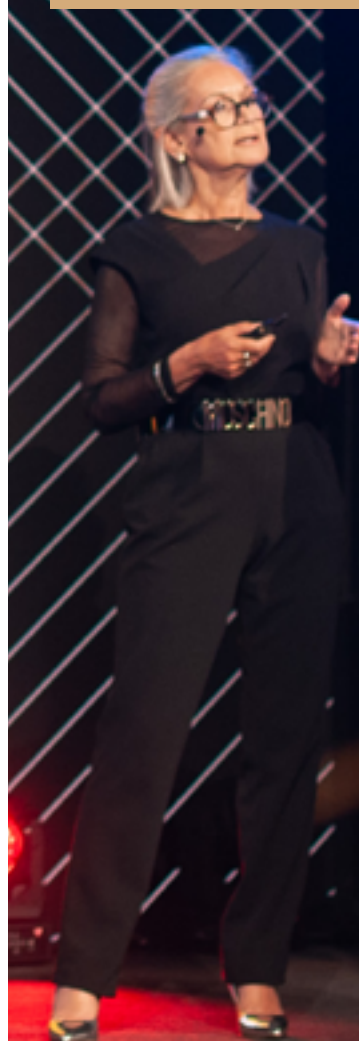
Mindful Retail

"Help the consumer think more carefully about their purchases, so they don't necessarily rush into buying something on the spur of the moment. Of course, we all do that, for different reasons. But this is about thinking more mindfully when they're about to buy something. Do they really need it, or do they want it? Are they going to enjoy using it? Is it going to be value for money? Customers want to see brands doing the right thing."

72%

of people with a disability said wearing non-adaptive clothing or footwear made independent living more difficult (Coresight Research)

How this demographic is being neglected – read the Coresight Research Highlights: [Adaptive Apparel in the US](#)





JANE BURKITT

Vice President Supply Chain Operations EMEA, LEGO Group

Modernise Your Thinking about Supply Chain Leadership – Before It's Too Late

Leading by Welcoming

"How do we freshen up and modernise the way we look at leadership in the supply chain? At DELIVER, we've been talking about sustainability, digital enablement, omnichannel, all these good things. But even with the best technical answers in the world, you need to lead in the right way to bring it the stuff to life and make it happen. It doesn't just mean ticking boxes. It's about truly embracing and welcoming a broad range of perspectives into your business."

The Power of Representation

"You need to represent the people that are out there in the world, the people that are buying your product. When you walk around this event, what's the male female gender balance? I don't know. But the minority is bigger than it was before. One of my accountabilities is to pull up through the organisation people from underrepresented groups of any gender, any ethnicity. How do we take full advantage of the neurodiversity in our population? Because those people with non-neurotypical brains can bring a different perspective."

Energising through Engagement

"It's quite fun working for a toy company – you can have all sorts of a lot of analogies with playgrounds and play. And we talked about creating a space where everyone is energised every day. And then we talked about our leadership behaviour, and our expectations. There is such a clear direct link to inclusion, because if you want to create an environment where everybody is energised every day, you better start with being inclusive in your leadership and engaging lots of different people."



54%

of global business leaders say business leader DEI efforts and employee perceptions are misaligned (PwC)

Learn more about how business leaders are [using play to prepare for the learning revolution](#)

DELIVER

THREE REGIONS, 
ONE UNIQUE VISION



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