

Emerging Multichannel Customer Experiences in Grocery Retail



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Multichannel retail is growing at a rapid pace in developed economies across several retail sectors with customers becoming increasingly accustomed to making buying decisions and shopping using a combination of newly emerging retail channels.

In this white paper we identify four emerging multichannel experiences that are radically changing the grocery customer's experience. It proposes how grocery retailers can leverage new technologies into their existing infrastructure to cater to these emerging customer experiences effectively. We also discuss how Wipro can partner with grocery retailers in executing their multichannel strategies and in harnessing the true potential of customer need fulfilment.

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Contents

Introduction	3
Online Channels Capture Grocery Customers’ Interest	3
Increasing Customer Comfort	4
The Price Advantage in Online Grocery	4
Combining Online and In-Store Channels for Customer Service.....	5
Making Online Grocery Shopping an Interactive Experience	5
Mobile Commerce Unravels Immense Possibilities.....	6
Customers as Communities, Not Just Individuals	9
Shopping Anytime, Anywhere	10
Conclusion.....	11
References.....	12
About the Authors.....	12



Introduction

In the good old days, retail experience was purely brick & mortar. Customers would travel to their nearest retailer to shop. The shopping experience was uni-channel and there were no other touch points with a retailer except visiting the retail store or writing a letter with grievances or compliments. This was followed by catalogue retailing where retailers mailed a catalogue of products along with a telephone number to place orders. The emergence of this channel allowed customers to shop from the comfort of their home. The ability to contact a phone based customer service added another dimension to the customer's shopping experience.

About a decade ago, another important retail channel came into prominence - shopping on the internet. The online retail channel was slow to take off due to speed and security concerns. But in the last few years online retail has started growing at a fast pace providing a comfort and convenience that it is making it a mainstream retail channel. Over the last five years the introduction of broadband, 3G, Wi-Fi coupled with proliferation of the mobile internet connected devices and social media has transformed the entire shopping experience.

Today's consumer can interact with the retailer using multiple channels for any retail transaction. He/she can walk into the store with a smart phone, corroborate the store associates advice by looking up product reviews, compare prices across retailer's, call up customer service for help, use social media to tweet about her product requirement and update her status on purchases made, all while physically browsing the store during a purchase transaction.

This growth in the number of channels has added tremendous pressure on retailers. Retailers must be completely attuned to each customer, be spot on with consumer behaviour and tailor the shopping experience accordingly. While this puts the consumer in a position of advantage it is also an opportunity for the savvy retailer. Retailers can leverage this multi channel trend and use it to their advantage if they are able to create a true cross-channel experience that helps increase consistency in messaging, pricing and also cross-sell / up-sell through an endless aisle.

Online Channels Capture Grocery Customers' Interest

The online channel has emerged as a frontrunner among customers looking for more convenient and cost effective channels of grocery shopping. The growth of online grocery shopping has been varied across the developed economies with United Kingdom leading the adoption of this channel. According to Eurostar, 16% of web users in UK purchased grocery online in 2010 as compared to 7% users in Germany and 5% in France. UK customers are using the online channel for their grocery shopping with increasing regularity with online food and grocery sales growing by 15.8% in 2010 according to Verdict Research. The online grocery sales value is expected to grow from \$7.4 billion in 2010 to \$15.3 billion in 2015 as per Institute of Grocery Distribution. Several of the leading UK brick and mortar grocery retailers such as Tesco, Asda and Sainsbury's have presence in the online grocery market.

In 2010 Tesco dominated the online grocery shopping segment with 45% of sales with Sainsbury's and Asda following at 14% and 13.7% respectively. The other leading UK retailers including Morrison's and Marks & Spencer are expected to launch an online grocery shopping site in the near future.

The online grocery channel in United States is currently available for customers based in particular regions of the country with retailers trying to evolve grocery delivery formats that enable them to match the sales with delivery costs. In a January 2011 poll conducted in the US by National Grocers Association and SupermarketGuru close to 1% of US customers participating in the poll said that they purchased grocery online regularly.



Increasing Customer Comfort

As retailers constantly improve the online shopping experience aided by better grocery delivering capabilities, customers are increasingly comfortable with purchasing grocery online. A significant customer segment of online grocery is the 'at home mother with young children'. The online grocery channel enables her to save time, reduce hassle and allows her to spend more quality time with her children. The online channel has also seen a high level of adoption in the single parent households where the regular grocery shopping chore can be managed in a much convenient manner. To begin with, customers used the online channel to order packaged foods and other household goods such as electrical appliances and health & beauty products. With time, the level of customer's ease in this channel increased and orders have started including fresh vegetables, fruit, meat and fish products. The time of grocery order delivery is chosen by the customer in most online grocery websites which provides the flexibility to place an order at any time of the day or night and not worry about being unavailable at the delivery location at the time of delivery.

In order to drive existing customer spend in online grocery, retailers are coming up with innovative service offerings that enhance a customer's convenience and boost her confidence in online grocery shopping. Grocery shopping is a frequently repeated activity with little variance in the number and quality of products being ordered by a customer. A new service by UK online grocery retailer Ocado allows a customer to set up a fixed time slot each week at which the grocery order would be delivered to her. This regular time slot booking avoids the customer missing out on a preferred slot booking due to any reason. Retailers are also offering guarantee on fresh food items bought online to dispel any hesitations in the customer's mind towards using this channel.

The Price Advantage in Online Grocery

Low price is a critical driver in determining where to shop for grocery needs and this is one of the major reasons for phenomenal success of retailers such as Walmart and Costco in the grocery segment. Today's customer is very sensitive towards the prices of grocery products and makes it a point to be aware which retailer can offer the highest value for money. The online grocery channel places this information at a customer's disposal so that he/she can browse through the grocery product prices being offered by several retailers and make a decision to place an order with the best available prices. In addition to the individual retailer websites, a customer can visit grocery price comparison sites such as www.mysupermarket.co.uk that allow him/her to compare grocery prices across retailers while shopping and get the best possible deal for groceries. Several online retailers have also contributed in increasing transparency in the product prices by offering same prices of grocery products across the online and in-store purchase of goods.

In order to maintain common product prices across the in-store and online formats, most grocery retailers charge a delivery fee to the customer. Trends have shown that the online customer is quite sensitive to the delivery charge and is ready to switch retailers even if the delivery charge varies by 1-2 dollars. This has led to investments into building the delivery infrastructure by retailers that can enable lowering or removing of the delivery charge. Some retailers such as Waitrose have begun offering free deliveries for orders above a certain amount thus addressing this critical customer behaviour.



Combining Online and In-Store Channels for Customer Service

To increase customer interest in the online grocery channel and influence the well established grocery purchasing habits, retailers have launched services combining the grocery website and brick & mortar grocery stores. A customer can place an order online after searching for the best available prices and then pick up the order from the grocery store of the retailer. This service is being preferred by time pressed customers who see significant value in ordering grocery online and picking it up on the way back from work. Another advantage of this service is the reduction in delivery charge for the grocery order as the customer is picking up the order from the store itself. The 'Click and Collect' offering is being rapidly embraced by established retailers as their fulfilment model for providing superior service to their existing store customers.



Fig. 1 - Click & Collect Process Flow

The 'Click and Collect' service can also assuage customers that are ambivalent about the freshness of the grocery delivery booked through the grocery website. As the customer picks up the grocery delivery from the neighbourhood supermarket at which he/she has been shopping from, for a long period, the confidence in the online order booking is increased. As customers become increasingly adept in using a combination of the various channels we will see the emergence of more such services in the grocery shopping segment shaped according to customer habits.

Making Online Grocery Shopping an Interactive Experience

Grocery shopping is a routine but nevertheless a critical activity of a customer's life. Therefore personalized tools in the online channel can help provide opportunities to a retailer to engage with its customers in a closer manner. The online grocery website can enable a customer to record his/her personal preferences for certain grocery products such as food items that can be delivered as per these preferences. Online retailers are now providing such tools to engage with shoppers on product quality thus making online grocery shopping an interactive experience for the customers. For instance, some online grocery retailers enable a customer to write in his/her online account whether the fruits being delivered at home should be medium or slightly squidgy. This level of personalization can appeal to the customers that do not have the time available for selecting food items themselves in a store and standing in the checkout line.

Acknowledging the fact that a customer is not just an individual but is influenced by her surrounding community, grocery retailers are now establishing their presence in the social media sphere. While some customers may not be interested in using their Facebook or Twitter to discuss their grocery product preferences, there is still a large segment that will be doing it. For instance, social media can be an effective tool in sharing tips and advice on cuisines and food habits thus enabling online grocery



retailers to reach out to their target customers. While there are risks in opening online public forums that can invite bouquets as well as brickbats the long term benefits of interacting with customers via social media tools far outweigh such concerns.

Mobile Commerce Unravels Immense Possibilities

Over the last decade technology has leapfrogged and changed the way consumers shop and interact with brands. The emergence of the smart-phone coupled with high-speed mobile web has armed the consumer with real time information on products, prices and service levels. This has created new challenges for multi-channel retailers who are trying to drive foot-traffic to their stores and improve loyalty. The mobile channel has the potential to transform the humdrum shopping experience into an engaging and entertaining one as well as improve customer satisfaction while providing retailers with useful data about shopper behaviour inside the store.

The emergence of the smart phone has created a unique value proposition where the customer can merge all the channels together wherever, whenever and however she wants. Customers are no longer confined to the physical store or computer to compare prices, view product information or place orders. All this is now possible on the go with the simplest of smart phones and the mobile web.

Mobile applications have the potential to create a perfect fusion of the online and offline experience. A careful mix of applications can enable customers to service themselves in the store while reducing interaction with store associates. The same applications with relevant privileges can provide store associates with timely data and analytics to resolve customer queries without follow-ups. Moreover, with customer consent, the mobile phone can help retailers get important data about consumer behaviour inside the store much like web analytics provides customer behaviour data online.

The typical grocery shopping experience can be summed up as follows:

1. Customer creates a shopping list
2. He/she compares product quality and prices
3. Search for stores with availability and competitive pricing
4. Drives to the store
5. Navigates the store to search for the product
6. Scrutinizes the product
7. Scans products at the checkout
8. Makes payment and leaves the store

Each of these experiences is a touch-point which is influenced by the internet, social media and the smart phone. Customers' today typically research online, use social media forums such as Facebook and Twitter to get product suggestions, compare prices on different sites, place orders online and then pick it up from a store. However, a number of these touch points, especially inside the store, can be further explored and enhanced to provide a more personalized and interactive experience to the customer. The ideas discussed below can be exploited by grocery multi channel retailers to create a mobile enabled customer experience.

- **Creating lists:** A quick search on the app store brings up more than 100 shopping list apps. Most of these allow adding products to a list by typing, by voice or by scanning products. However in most of the current applications a customer has to choose between various products, brands, prices, types by himself/herself. Retailers have a unique opportunity to further enhance their brand and get more insights into customer shopping patterns by creating smart shopping lists



Using a smart shopping list a customer can create a generic list (milk, bread, cereal, etc.) on the smart phone. The application will then use the customers past purchasing history, daily consumption pattern, health data (allergy or ailment information) and shopping preferences such as organic, price, brand, etc, to scour the retailer’s product database for products which match the customer’s profile. The application then converts the shopping list into a specific list with the right brands and prices (Land’O Lakes Milk, Kelloggs Chocolate Cornflakes, etc). It can also suggest stores which have these products in-stock.

Furthermore, the app could enable adding entire recipes to the customer’s shopping list, along with the right measures with a single click. Applications can also ask the customer to provide what they want to do and help them plan the entire task. As an example consider a customer who is planning a barbeque party. The app guides the customer about the right wines, the kind of meats and cheeses that go with the wine and also suggest recipes that will make the entire party experience more enjoyable. The app can create a shopping list and recommend the nearest stores which stock these items.

- **Getting to the store:** Before the customer reaches a store, a mobile app can check if all the items in the customer’s shopping list are available in the store. It is possible that some items are available in one store and others in a different store. Rather than losing the customer to another retailer, for such items, the app can suggest the customer the best possible route to go to the respective stores and collect items. The retailer can also highlight a mobile coupon based promotion to make the multiple store visits worthwhile
- **Inside the store:** On reaching a store the mobile app can prompt the customer to check-in. This will integrate the customer’s loyalty and reward data with the shopping list. To incentivize the customer to check-in, the retailer can offer mobile coupons which can also be an opportunity to notify the customer if their favorite associate is on duty or not

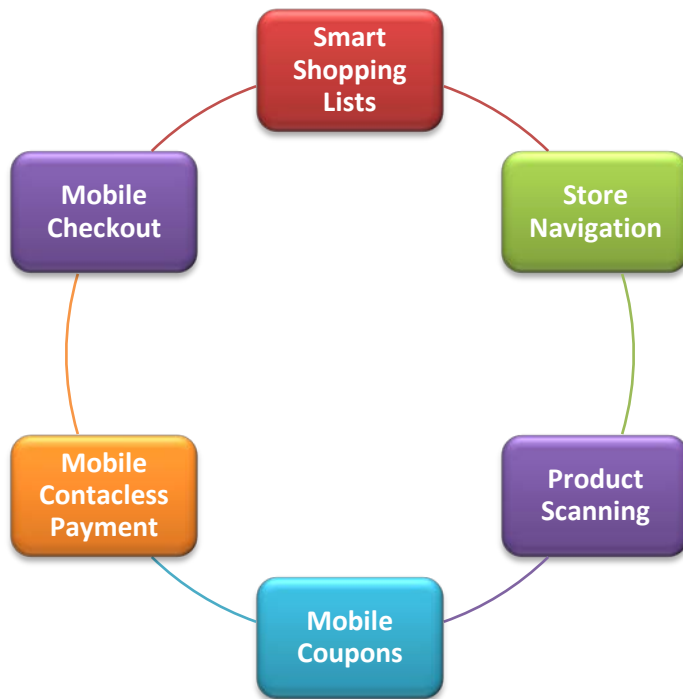


Fig. 2 - Mobile Applications Redefine In-Store Customer Experience



A store navigation app can help the customer navigate inside the store using the shortest possible route to locate products in the shopping list. The app can be further used to cross-sell or up-sell products when a customer is in a certain aisle. As the customer visits a particular aisle, the app can look at the products in the shopping list and suggest complementary products that the customer could try. This can improve the potential to provide relevant cross-sell or up-sell by showing items which are not in the customer's shopping list there by leading to increased revenues without intervention from a store associate.

- **Checkout:** For a customer, checking out is possibly the least value added activity in the entire shopping process. The long queues can be frustrating and frequently result in cart abandonment. A number of retailers today have self-checkout counters. This approach still has drawbacks since it takes up valuable retail space, requires maintenance and can still result in long queues during rush hours

Retailers can create applications that can perform the task of scanning products and creating a running total. To incentivize customers to scan products as they add to their cart, the app can provide promotions on items or future purchases. This can help retailers reduce queues at the checkout counter by converting their customers into cashiers. The application should be able to work like a virtual Point of Sale (PoS) by connecting to the store's database. This approach can be useful for queue busting and has the potential to improve customer satisfaction by reducing time spent in long queues which is a reality in most grocery stores. Although this is feasible for small basket sizes, for larger baskets retailer intervention will be required to ensure bagging of items and checking for fraud and loss prevention.

- **Payment:** Retailers today have an option to integrate with available payment apps or create an app that can take payments in various tenders like PayPal, food stamps, credit/debit cards, gift cards, and mobile coupons. Near Field Communications (NFC) is a nascent technology but with industry trials in progress it will soon become main stream. This can further improve the payment process by making the process contact less and hassle-free

Using the right mix of apps, retailers can convert their customers' into their sales force. Apps can encourage and drive customers towards self-service, thereby reducing the need to approach a store associate. Mobile devices have the potential to create a completely associate-independent and extremely rich experience inside the store. This can significantly reduce costs for the retailer as more associates can be employed towards making sure the right products are stocked on the shelves, for inventory checks and other store activities.



Customers as Communities, Not Just Individuals

Social media has become a primary way for individuals to share thoughts – both positive and negative, as well as photos, videos, likes and dislikes with their online network of friends, family and colleagues.

It has opened yet another channel for the companies to reach out to their target audience and has provided another medium for companies to differentiate the customers’ shopping experience. As per a survey in 2010, Americans spend nearly a quarter of their time online on social networking sites and blogs, up from 15.8% just a year ago.

Top 10 Sectors by Share of U.S. Internet Time				
RANK	Category	Share of Time June 2010	Share of Time June 2009	% Change in Share of Time
1	Social Networks	22.7%	15.8%	43%
2	Online Games	10.2%	9.3%	10%
3	E-mail	8.3%	11.5%	-28%
4	Portals	4.4%	5.5%	-19%
5	Instant Messaging	4.0%	4.7%	-15%
6	Videos/Movies**	3.9%	3.5%	12%
7	Search	3.5%	3.4%	1%
8	Software Manufacturers	3.3%	3.3%	0%
9	Multi-category Entertainment	2.6%	3.0%	-7%
10	Classifieds/Auctions	2.7%	2.7%	-2%
	Other*	34.3%	37.3%	-8%

Source: Nielsen NetView – June 2009-June 2010

Fig. 3: Top 10 Sectors by Share of US Internet Time

The most vital aspect for success in the use of social media strategy is engagement with the audience. Grocery retailers have started using social media channel for extending the brand experience of its brick and mortar stores by sharing knowledge, providing excellent customer service and building lasting relationships. They actively try to leverage this channel as a venue to virally share their messages with shoppers. The ideas discussed below can enable a grocery retailer to utilize the benefits of social media.

- **Go Where Your Customers Are:** The conversation with customers is essential to the company, whether it happens in person, at a store or on a social network. Recent research from Forrester Research revealed that one out of five adults aged between 18 and 24 spend one fifth of their online time on social media sites; when people aged between 25 and 34 spend one tenth of their online time on social media sites, which is still significant. This influences their online spending habits and as a result online retailers are following their target shoppers to social sites like Facebook, MySpace and YouTube
- **Match the Channel with the Audience:** With the presence of so many social networks, identifying which service is best suited for individual channel can hold the key for success of the online programs. Whole foods has done a remarkable job in identifying how best to use each service. For example, they have found that for customer service, Twitter is much more effective than Facebook. On Twitter people can easily @reply a question and they can quickly respond. On the other hand, they prefer Facebook for “rich media,” including embedding videos or longer posts or responses. Similarly they use their blog for posting original content allowing staff from various



departments to share material. The company also created a nifty iPhone application with 2,000 searchable recipes and a store locator, which is a great platform for disseminating static information

- **Paid Social Media Becomes A Bigger Tool In The Arsenal:** According to Forrester, 64% of online buyers find user reviews important when making a purchase, while 47% of online users say that information provided by other consumers is more important to them than information provided by marketers. It is therefore important to identify influential bloggers relevant to the customer communities and incentivize them for blogging about the retailer's services. Similarly paid placements in social media, like reviews in social network, promoted tweets etc. would help retailers in driving sales and traffic from these communities' sites
- **Empower the customer:** Online rating systems, discussion forums and blogs hold more credibility over conventional marketing strategies like email campaigns, public relations (PR) and more. Retailers need to empower their customers and provide avenues to express their customer experience (positive or negative) without leaving their website so as to establish credibility. The same can be done by effectively using social networks such as Twitter and Facebook, enabling features like reviews and rating on their websites etc. Sears and Kmart have hit upon a successful formula to generate online reviews and user comments with their interactive sites *MySears.com* and *MyKmart.com* which empowers users with the freedom to read and write reviews as well as communicate with each other in a variety of ways. As a result these sites have become highly popular amongst the users

Further, retailers can also create a richer user experience by syndicating their product catalogues to blogs, social rating sites, by enabling social networking on their sites, allowing visitors to view comments and ratings from friends, indulge in real time conversations on the retailer's site, easily registering for a website using their Facebook identity, the ability to share their favourite recipes with their family and friends by pressing the Facebook "Like" button or Twitter "Tweet" button featured on each recipe detail page on their favourite grocery retail websites. Creating such differentiations can go a long way in winning customer's loyalty and eventually helps by transforming customers into brand ambassadors.

Shopping Anytime, Anywhere

Grocery retailers are using the latest technology developments to target their customers in out of store locations and for selling new products and services. While vending machines and kiosks have been in vogue in grocery retail for several decades, research shows that 50% of the customers do not purchase from a vending machine if the 'Use Exact Change Only' light is on. Recent innovations in wireless technology have enabled vending machines to authenticate cashless payments, transmit sales and inventory data and inform about component failure. Technologies such as touch screens and robotics have improved the self service capabilities of vending machines and make them more amenable to customers. With high cost of labour and limited retail space available in certain locations vending machines have merged as a preferred retail channel for several product categories. Walmart has established a multi-billion business in the past decade by installing Redbox DVD vending machines at thousands of its retail stores. Redbox and NCR are among the largest US operators of DVD Rental Kiosks with sales of up to US \$ 1.3 Bn in 2010 and competing with other rental services such as Netflix, Apple iTunes and Blockbuster Entertainment.



Apart from selling products, emerging technologies now also enable grocery retailers to capture the customer's attention in a much more effective manner. Digital Signage Displays controlled by proprietary software programs permit animated content to be shown easily also adapting to the context and the audience. Digital signage can cater to a variety of uses for a grocery retailer including information sharing, promotions and also allow interactions with mobile phones. The latest digital signage technology enables users to send Twitter messages from customers to the displays. These developments provide opportunities to grocery retailers in engaging with their customers more effectively.

Conclusion

A multi channel approach not only offers additional opportunity to push products & services but also helps in turning this challenge into an opportunity to connect with customers. Grocers are looking at a sea change in customer shopping habits, customer demand in shopping experience and options in services that are on offer. This multitude of customer demand will lead to grocers changing their strategy and enable it with technology. Grocers will look at 'personalization', 'customer interaction touch points' and 'customer centric analytical capabilities through out stores or online channels'. Use of technology to facilitate customer experience will help supermarkets tailor services per individual customers. Planned and designed multi channel touch points will enhance customer experience and help grocers differentiate them from competition.

The key factors that would enable grocers achieve this would be an ability to understand their customer and use of technology in this enablement. Supermarkets have to plan to bring together their multi channel operations under a technological platform which may include brick & mortar store, online and mobile channel including social media. Finally, grocery retailers have to ensure a seamless integration across channels for data and services so customers could see one source of truth across organizations channels.



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- My Kmart Community. Website: <http://www.mykmart.com/>
- Walmart – Save Money. Live Better. Website: <http://www.walmart.com/>

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