



Unrealized Value in the Retail Sector:

Leveraging **Advanced Analytics** to Predict the **Profitability**
& **Hidden Growth Potential** of Private Equity Retail Deals

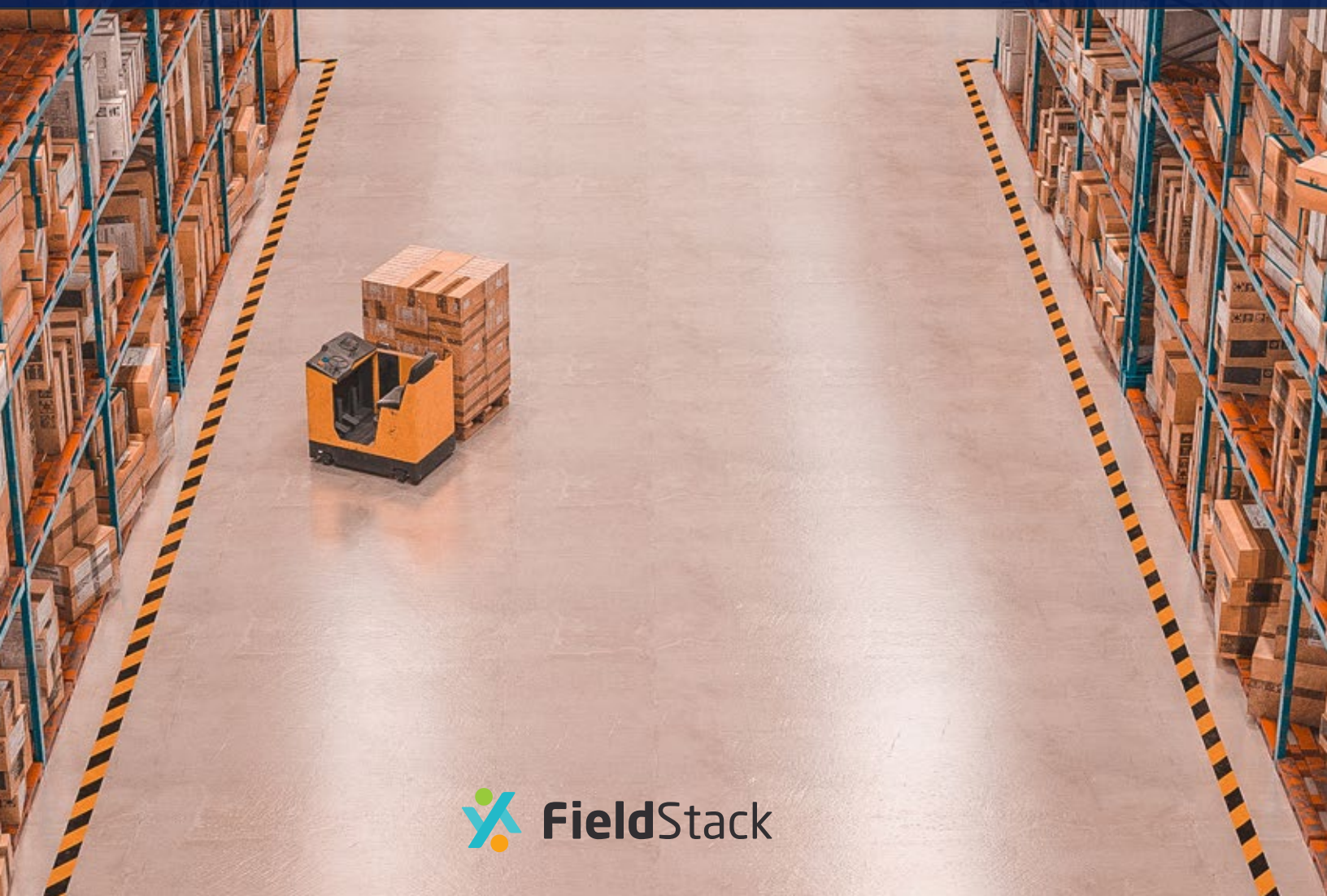


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1. Executive Summary

Welcome to the FieldStack report on **Unrealized Value in the Retail Sector**.

The retail industry is constantly evolving. From rising interest rates and inflation to the newest slew of struggling retail chains declaring bankruptcy across segments, private equity dealmakers have a lot to consider when selecting their next investment.

In this paper, we look closely at the retail sector as it pertains to private equity deals. We will look at the hidden opportunities that exist within underperforming retail chains – whether those chains are facing bankruptcy or operating profitably with the potential to further optimize and scale. Most importantly, we introduce our proprietary method and tools that are now available to private equity investors to help them assess the hidden growth and profit potential of prospective retail investments. These opportunities to create significant value are brought to light through the advanced modeling of a fully unified retail operation.



2. The Opportunity

The current state of the retail landscape presents some interesting challenges and opportunities for private equity investors. On one hand, consumer spending power⁹ remains strong but on the other, economic uncertainty looms ahead. Retail dealmaking slowed over the past year in tandem with the rise of retailers struggling to stay afloat. In fact, the running list¹⁰ of major retail bankruptcies continues to grow at a rapid pace. This suggests that we will continue to see more faltering companies join this list as the industry continues to face economic pressures, high-interest rates, inflation, and labor challenges.

As a result, valuations in private equity dealmaking have recently declined, though it is possible that they will regain momentum as many investors have been sitting on capital throughout the slowdown. Additionally, the high volume of chains, either in bankruptcy or ripe for optimization, offers a unique opportunity for investors to find highly profitable deals. However, private equity dealmakers will need to be increasingly selective about their chosen investments.

According to the recent Axios Pro report¹¹, “*What an economic downturn means for VC, PE and M&A,*” dealmakers are seeing the most promise in specific types of retail chains that offer growth potential during economic uncertainty. These chains include discount stores, resale, department stores, outlet stores, and consumer staples. While chains in these safer segments are perceived as the lowest-hanging fruit of the retail world, there are significant opportunities across the board.

Success will lie in the private equity dealmakers’ ability to sift through the retail chains that have stalled or are facing bankruptcy to uncover the ones with hidden growth potential, no matter which retail segment. But how? Looking through this vast pool of prospects for the hidden gems is easier said than done. **The only way to know is within the data, and specifically looking at data at a micro level within the context of a fully unified and optimized omnichannel retail operation.**

Who is FieldStack?

At FieldStack, we take the complexity out of technology so retailers can achieve omnichannel excellence, create great customer experiences, and profitably grow their businesses.

Our unified commerce platform combines the core systems necessary to enable omnichannel excellence and run a thriving retail chain: POS & store ops, eCommerce, inventory & supply chain, loyalty, and CRM. This cloud-based, connected platform replaces the cobbled tech stacks that hold retailers back from maximizing their operational efficiency and profit potential.

Why Lean Retail?

Lean Retail is the data-driven method of running a retail chain centered around adding customer value — sometimes by removing activities that do not provide value, and often by shifting resources toward higher-value activities. **Lean Retail** improves the flow of information and products to deliver customer value. In turn, **Lean Retail** software enables retailers to transform their chains into customer-centric, data-driven operations to optimize efficiency and improve the customer experience.

What is the Lean Retail Analytics Engine?

Our **Lean Retail Analytics Engine** powers our adaptable, cloud-based platform. The engine refers to the real-time data and advanced analytics that flow throughout the core retail systems within. These analytics allow for real-time actionable insights and game-changing automation. Additionally, this engine is capable of ingesting massive amounts of historical and real-time data to simulate a unified view of a prospective retail chain investment.

Informed dealmakers do not have to narrow their investment prospects to the chains that show the most obvious opportunities. By assessing retail chains through a lens of what's possible, they can unearth profitable opportunities other dealmakers will overlook. By leveraging the right technology and analytical tools, it is possible to mitigate risk and get full visibility into the potential investment.

Retail chains that lean into unified technological innovations as an enabler to improve efficiencies and exceed evolving customer expectations will thrive during uncertain times and beyond. For example, FieldStack's unified technology platform brings operational efficiency and enhanced customer experiences together – enabling fast-growing, lean, and profitable operations. To complement traditional private equity investment analysis, FieldStack is making its core analytics engine accessible to private equity investors – allowing private equity firms to simulate what is possible for a prospective retail chain investment.

Additionally, this technology can go beyond assessing the investment and identifying opportunities for specific value creation. Once opportunities are identified, the same technology can then be used to implement and accelerate the changes necessary to quickly transform the chain into a unified and optimized organization.

*To complement traditional private equity investment analysis, **FieldStack** is making its core analytics engine accessible to private equity investors – allowing private equity firms to **simulate what is possible** for a prospective retail chain investment.*

Of course, it is not just the struggling chains that can be transformed by unified commerce. This technology can further optimize and help scale any chain that is currently operating with disconnected systems. FieldStack's unified technology platform is transformative, with the power to identify immediate and ongoing optimization opportunities and see them through with accelerated implementation timelines.

What is a Lean Retail Assessment?

Our **Lean Retail Assessment** is made possible by the advanced analytics from our **Lean Retail Analytics Engine**. Beyond the scope of most retail solutions, the **Lean Retail Analytics Engine** allows us to plug massive amounts of data into our platform and easily identify the growth and profit potential of a retail chain – even for those currently operating with disconnected systems. The output of this analysis is a report called the **Lean Retail Assessment**.

With our **Lean Retail Assessments**, we provide the insights private equity firms need to make informed investment decisions, leverage operational strengths, and discover unrealized value. This report provides opportunities for value creation demonstrated by modeling scenarios, including revenue growth potential, profit improvement, and increased cash flow.

What is the Shared Success Partnership Model?

Beyond the initial assessment and modeling scenarios, we also help growth-minded retailers and private equity investors leverage the advanced analytics of our unified platform through strategic partnerships. We sit on the same side of the table as our clients while providing ongoing business and technology expertise. Through this partnership, we help our clients continuously innovate and adapt to ever-changing customer expectations – outmaneuvering the competition with an eye toward growth and profit.

3. Background

The retail industry is constantly changing. Today, consumer expectations within each segment are pushing retailers to strive for omnichannel excellence, a standard that many aspire to, but most will never attain. The conveniences that customers became accustomed to during the pandemic – curbside pickup, BOPIS, delivery, etc. – have become the mainstay, although the quality and consistency of these services vary greatly. And consumers are constantly looking for more. This means retailers must continuously adapt their operations to provide an exceptional experience for their customers as expectations continue to evolve.



Customers are demanding omnichannel excellence. In fact, 75% of consumers³ expect a smooth omnichannel experience. This is significant considering that omnichannel consumers are at least 1.25x more valuable³ than their single-channel counterparts. These findings reinforce the need for retailers to provide a seamless, unified shopping experience, at an unprecedented level of operational efficiency.

Unfortunately, too many retail chains fall short of omnichannel excellence and consumer expectations. They are unable to deliver a seamless omnichannel experience, and this hurts their customer relationships, growth potential, and profits. To keep pace with industry changes and demands, retailers need to take a customer-centric focus – this means applying **Lean Retail** principles⁶ through unified commerce. This approach allows retailers to leverage the real-time customer, inventory, and operational data that flows throughout their connected systems to deliver customer value in the most operationally efficient way.

Lean Retail finds the hidden sweet spots that others miss – by simultaneously bringing value to the customer and improving operational efficiencies.

In his book, *Lean Retail and Wholesale*⁸, Paul Meyerson defines this shift to **Lean Retail** as a dramatic change in the way products are ordered and distributed that is far more data-centric and focused on understanding and meeting customer demand. **Lean Retail** is a customer-focused and data-centric approach to growing your bottom line by following **Lean Retail** principles. There is a false assumption in the retail industry that delivering an exceptional customer experience can only come at the cost of operational efficiency and profit. That is not the case with **Lean Retail**. Instead, **Lean Retail** finds the hidden sweet spots that others miss – by simultaneously bringing value to the customer and improving operational efficiencies. You can exceed customer expectations in the most operationally efficient ways by running lean and utilizing unified technology.

Most retailers know they should operate more efficiently and attempt to exceed customer expectations, but few of them are truly running lean operations. Without a unified system in place, they find themselves battling their cobbled tech stacks and disparate data sources rather than using their technology as an enabler of change and adaptability. Therefore, the opportunity to uncover hidden value and realize the full potential of a retail investment is to see it through the lens of modern technology that can run a lean, adaptable, and customer-centric operation.

4. Proposed Solution

When it comes to evaluating potential retail chain investments, there are plenty of obvious opportunities and tactics to turn a company around. Often, these are the opportunities that will work across the board no matter which chain is purchased or acquired (i.e., reducing excess inventory, labor, or real estate costs). As dealmakers begin to assess their next investment in the face of economic uncertainty, these apparent opportunities are the ones that will be sought out as a top priority.

However, as private equity investors know, not every bankruptcy or retail chain is the same. There are often hidden possibilities that are unique to the investment at hand, and specific to the retailer's strategy and value proposition. Uncovering these unique opportunities to maximize the unrealized value of the chain requires a different approach and a new way of scrutinizing the chain's available data. FieldStack's **Lean Retail Analytics Engine** enables private equity firms to analyze chain-wide retail data through a unified lens at a very micro level, something not previously possible with traditional technologies.

This is where a unified approach comes in. A unified commerce platform that was built around a core analytics engine offers a new way to help private equity firms evaluate potential investments and prospective optimization improvements for any retail chain. Because the assessment involves every aspect of the business, it provides a unified way to analyze nearly all of the data in a retail organization at a micro level. This level of visibility and insight is not only invaluable during the evaluation and due diligence, but it is actionable and often automatable during implementation. **It's also a rarity within the retail industry to gain a lens into business opportunities that others cannot see, especially with the ability to execute on an accelerated timeline.**

Taking a **Unified Approach** to Private Equity Retail Investments

FieldStack is the complete unified platform that connects all the core systems needed to run a thriving retail chain. The platform enables seamless omnichannel experiences with robust POS, eCommerce, inventory, loyalty, warehouse management, and most importantly, real-time actionable data. It is these robust data analytics that allow us to apply a **Lean Retail** philosophy, resulting in value creation, efficiency, and optimization throughout an organization.

FieldStack's **Lean Retail Analytics Engine** is the intelligence at the core of the software. It enables machine learning to identify patterns, make decisions, and consistently improve operations (often without human intervention). We are making the analytic capabilities within this engine available to private equity investors to evaluate the complete potential of their investment—not just the more obvious opportunities that are possible with traditional retail technologies.



Acting as an additional lens of insight, a **Lean Retail Assessment** complements a private equity firm's arsenal of tools beyond the initial valuation methods to strengthen the confidence of an investment and maximize its short and long-term profitability. By leveraging the advanced analytics of FieldStack's unified commerce platform and **Lean Retail Analytics Engine**, investors can enhance their analysis with a comprehensive view of the entire unified operation, and most importantly, identify specific and actionable steps to take to improve cash flows, while boosting sales and profit. Together, predictive models are run through the unified platform to demonstrate how an infinite number of strategic and operational decisions could impact profit and growth.

When combined with traditional investment analysis, the **Lean Retail Assessment** will help uncover data-driven answers to critical questions to assess the viability and potential of a prospective deal, such as:

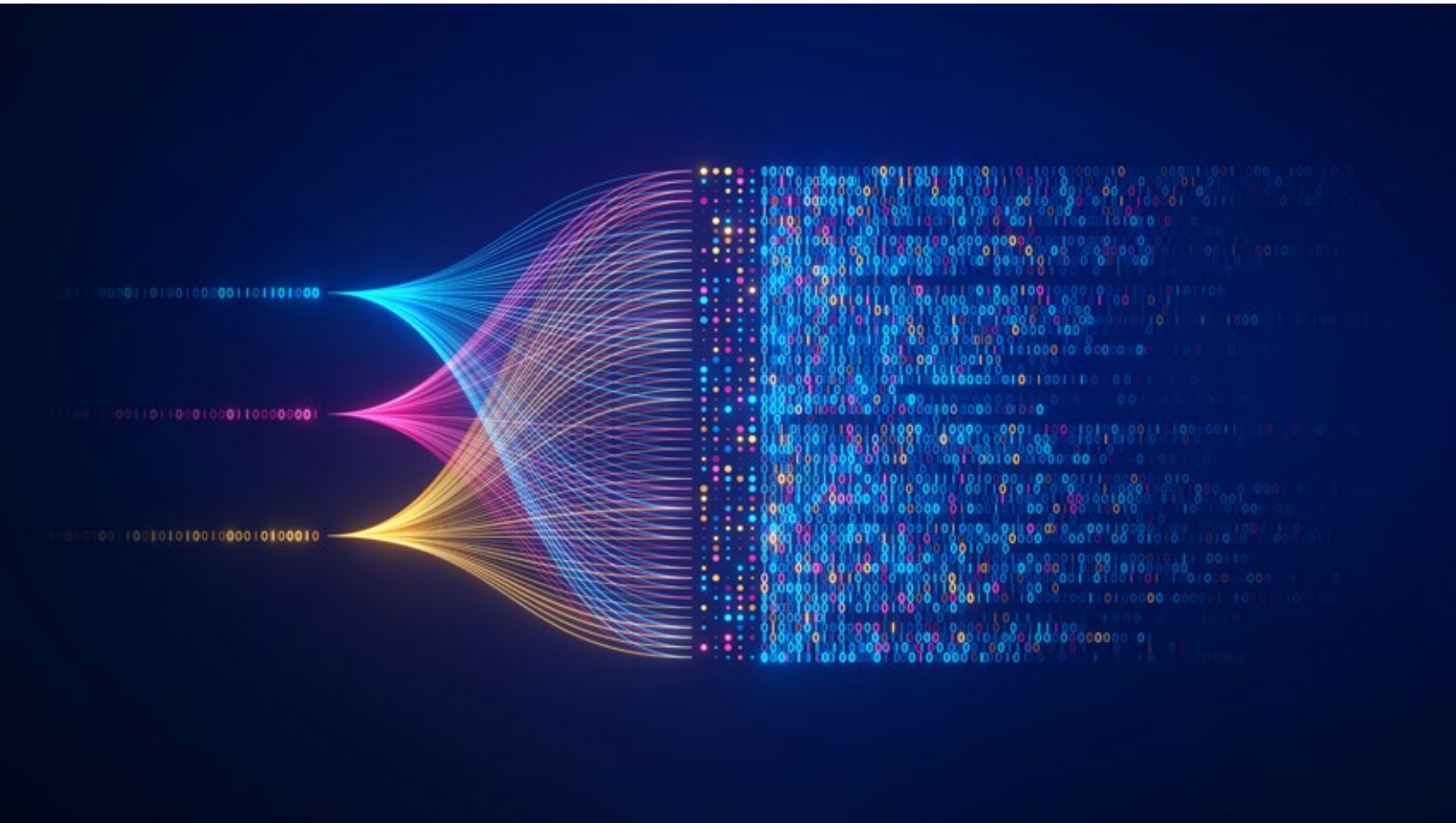
- Where are the pockets of strength within the organization that might be replicated across other stores?
- What is the potential value of replicating these strengths?
- What are the current omnichannel behaviors of customers and what potential exists for further value through omnichannel excellence?
- Are there expansion opportunities (i.e., product lines, store/geographical expansion, online) for the retail chain?
- In what areas might the retail chain capture market share from competitors?
- Who are likely to be the most profitable customers?
- What opportunities further exist to increase the loyalty of the most valuable customers?
- What hidden growth prospects exist for the chain?
- Where can the assortment and allocation of inventory be further optimized without negatively impacting sales?
- How efficient and effective are the organization's supply chain, vendor, and distribution capabilities?
- Where can value be created by strengthening distributed order management capabilities?
- What other opportunities exist to streamline operations or reduce costs?
- Which stores, if any, might be candidates for closure or consolidation?

Answers to questions like these (and many more) will be uncovered through the **Lean Retail Assessment**.

How Does it Work?

Our **Lean Retail Analytics Engine** ingests massive amounts of diverse historical and real-time data from the prospective retail organization. This enables a simulated unified view of the operation, even for chains that have been struggling with disconnected systems to this point. The input can include everything from multichannel data sets from various retail systems including customer information and transactions, loyalty programs and CRM, inventory, merchandising, orders, vendors, and supply chain.

Once the vast amount of data has run through our **Lean Retail Analytics Engine**, the output of our analysis is a report called the **Lean Retail Assessment**. In a presentation of our findings, we will discuss specific opportunities for value creation through revenue growth, profit improvement, and increased cash flow. Additionally, the **Lean Retail Analytics Engine** provides advanced modeling capabilities, as described below in the Modeling Capabilities section.



The **Lean Retail Assessment** is made possible by the advanced analytics at the core of our unified technology platform. Beyond the scope of most retail solutions, our **Lean Retail** method of analysis allows us to import massive amounts of data into our platform and easily identify the growth and profit potential beyond a traditional analysis. This method can propel the optimization and scaling of successful chains, those looking to expand, or chains facing specific challenges.

The Answers are in the Data

Many retailers, and subsequently many of the players in the retail investment space, miss out on the opportunity to fully capitalize on the significant impact that unified operations can have on customers and associates. The first step toward realizing this untapped value is to compare the historical performance of the retail chain against a unified **Lean Retail** model. This goes well beyond the typical channel-specific performance basis. The comparison helps identify opportunities for immediate and ongoing improvement within each part of the retail operation and across the operation as a whole.

Specific recommendations will vary by company, but our data analysis tends to uncover significant opportunities within, but not limited to, the following areas:

1. Customer Experience and **Loyalty**:

Retailers too often overlook the importance and full potential of customer loyalty programs. A positive customer experience is key to fostering brand loyalty and is pivotal to the success of any retail chain. In fact, 57% of consumers⁷ spend more on brands they feel loyal to, and top-performing loyalty programs can boost revenue up to 25% annually². Unified technology offers a way to connect detailed customer and product data from each retail system in real time. This gives retailers the ability to deliver an enhanced, truly omnichannel and customer-focused experience for consumers while remaining agile to stay ahead of the competition.



This unique capability comes together in what we call the omnichannel excellence factor – the potential for retailers to acquire new customers and grow existing customers by delivering advanced omnichannel capabilities in operationally efficient ways and ahead of the competition.

Considering the fact that omnichannel consumers are 1.25 times more valuable³ than shoppers who utilize single channels alone, the importance of consistently meeting or exceeding omnichannel expectations cannot be overstated. Additionally, over 75% of consumers² have changed their buying habits because of the pandemic, including 39% that have switched brands² and 79% that intend to continue evaluating their options² in the new normal. Pressures from economic uncertainty and inflation will surely encourage consumers to continue seeking out alternatives. Providing an exceptional experience paired with a strong loyalty program can give retailers the competitive advantage needed to improve acquisition and retention in times when customers are quick to switch brands.

*When we work with private equity investors to evaluate retail operations through our **Lean Retail Analytics Engine**, the unrealized value of **omnichannel excellence** is always **prominent and quantifiable**.*

2. Labor Efficiency & Optimization:

One of the most common areas in need of improvement for any retail chain involves labor optimization. This comes as no surprise, considering 56% of retailers¹ acknowledge the tight labor market as being their top challenge in 2023. Nationwide workforce challenges have only exacerbated the problems within individual organizations associated with rising wages, high turnover, and filling open positions. Optimizing labor efficiency has never been more critical. Retailers must reduce labor inefficiencies, shift resources to higher-value work, and improve retention rates to thrive.

FieldStack's **Lean Retail Assessment** discovers areas within the business where labor can be optimized, often through the inherent automation of labor-intensive tasks, enabled through a unified platform. Too often, employees waste time with manual activities and battling inefficient technology instead of providing exceptional customer service. When labor is optimized within the chain, barriers are eliminated that would otherwise prevent employees from delivering on omnichannel excellence expectations and providing great customer experiences. Additionally, empowering store associates to perform higher-value customer-facing tasks will positively impact job satisfaction and retention.

3. Inventory Optimization:

There are few retail chains that do not have improvement opportunities or critical issues with inventory. For those facing bankruptcy, the desire to reduce surplus is a great first step for turning a chain around, but the key to optimization goes well beyond inventory reduction to include other actions made possible through data-driven insights and automation. Even among profitable chains, inventory optimization is often an area where significant unrealized value can be found. FieldStack's **Lean Retail Analytics Engine** and dynamic forecasting capabilities result in reduced carrying costs, overstocks, out-of-stocks, and other inefficiencies that negatively impact the bottom line. These opportunities are identified through the **Lean Retail Assessment**.

With a unified platform like FieldStack, inventory management is optimized and automated using a virtually unlimited set of analytic configurations based on the needs of each chain. The many facets that inform this process include whole chain, regional and sub-regional inventory, supplier inventory, introductory periods for new products, SKU impact to customer journey, promotional products, and more. Data-driven automation is simply more efficient and often more accurate than humans at dynamically predicting buying demands and managing day-to-day inventory replenishment. For stores operating with inventory and supply inefficiencies, a focus on optimization will have a sizable impact on margins.

Here are three key areas within inventory optimization that can be improved through unified data and advanced analytics:

- **Assortment planning:** Determining the right mix of products to meet customer needs and maximize revenue.
- **SKU rationalization:** Determining the optimal number of unique SKUs to carry per location.
- **Demand forecasting:** Determining optimal stock targets through an analysis of customer behaviors, inventory patterns, and seasonal trends.

With an accurate analysis and unified technology, retail chains can effectively automate the stocking of the right product, in the right place, and at the right time. Our **Lean Retail Assessment** uncovers these inventory optimization opportunities and more.

4. Operational Efficiencies:

Inefficiencies within the retail chain manifest themselves in many ways. Manual tasks and inefficient inventory management, pricing, and distribution create challenges beyond overstocks, out-of-stocks, and expired stock. Siloed technology and disparate data sources are often the primary cause of operational inefficiencies across retail chains. Running a lean operation and connecting disparate systems through unified technology is the fastest and most cost-effective way to eliminate this type of operational waste. In doing so, the chain not only will operate more efficiently but the customer experience is enhanced as well.

For example, after implementing FieldStack, one client utilized our unified commerce software to accelerate their growth — from 32 stores to nearly 200 stores⁴ — in an increasingly competitive industry. They were able to gain a holistic overview of transactions and inventories across their entire operation. Real-time actionable data immediately flowed through their systems without the burden of manual intervention or disconnected sources. Armed with a new level of insight, the client used operational efficiencies and automation to free up its workforce. Their team can now focus on what matters most — the customers. By leveraging unified technology, retail chains can identify opportunities to operate more efficiently, outpace customer expectations, and grow in competitive environments.

5. Pricing and Promotions:

Stocking the correct items is only a piece of the equation. Each SKU needs to be priced appropriately to maximize margins and sales volume, both at base and promotional prices. Unfortunately, guesswork and instincts are not enough to set effective prices. Without a unified pricing and promotions strategy, it's difficult to get the right offer in front of customers that will influence shopping behaviors across channels, ultimately leading to a purchase. Pulling from vast data sets, FieldStack's unified platform helps clients analyze optimal pricing for each SKU, channel, and promotion. Effective pricing decisions will not only result in stronger financials and maximum promotional impact but also a better customer experience overall.

6. Resale Profitability:

As retail continues to transform based on consumer preferences, economic conditions, social trends, and emerging technologies, retailers across many segments are adopting buyback and resell programs to meet the moment. Otherwise known as recommerce⁵, resale is a rising trend that continues to grow in times of uncertainty. It offers retailers an opportunity for exceptionally strong margins and the chance to deepen connections with their customer base.

Resale offers significant opportunities for revenue and profit improvement when unified with store operations and eCommerce. However, most retailers are approaching resale as a standalone channel and are missing out on the unrealized value of operating their resale component through a customer-centric, unified lens. Resale functionality is part of the FieldStack unified commerce platform, with the automated ability to identify optimal buyback and resale prices for used products. As importantly, FieldStack removes the friction from the recommerce process, ensuring a steady supply of quality used merchandise. In turn, our clients are discovering that participation in buyback activities directly correlates to greater loyalty and increased spending. As economic uncertainty turns more buyers toward used goods, recommerce offers retailers an additional revenue stream and our **Lean Retail Assessment** can quantify the hidden value for chains looking to go this route.

In aggregate, the opportunities identified through a **Lean Retail Assessment** can offer investors a sustainable, adaptable path to revenue growth and gross margin improvements. Once the opportunities are identified, it's important that innovative technology is used to execute recommendations for maximum impact.

Modeling Capabilities

Utilizing our **Lean Retail Analytics Engine**, we work collaboratively with private equity investors to effectively model an infinite number of scenarios for a given retail chain.

Once our **Lean Retail Analytics Engine** has ingested a retail chain's historical data, we explore multiple modeling scenarios with strengths, weaknesses, and opportunities for value creation. Most importantly, we work with private equity investors in a collaborative session that combines their traditional analysis, expertise, and experience with our own findings and retail expertise.

At the macro level, we find opportunities to increase same-store sales, as well as eCommerce and marketplace sales. Additionally, our modeling capabilities allow us to explore micro-level data – evaluating expansion and consolidation scenarios together. We can even model specific growth scenarios for a given chain that equip investors to make pivotal decisions backed by data.

Modeling Scenarios: Unified and Optimized Operations

Unified technology allows us to demonstrate the profit and growth potential of a fully optimized retail chain. Analyzing the top opportunities, the **Lean Retail Analytics Engine** models how the prospective organization could ideally operate in a lean, unified fashion. In these modeling scenarios, each core retail system is connected to allow optimized automation with rich data and insights flowing throughout. Not only can private equity firms see the true potential of their prospective investments but also the steps that will deliver results against a clearly defined timeline.

Putting the Hypothetical into Action

The first step toward a profitable retail turnaround is accurately identifying the opportunities, including those opportunities that others don't see. But as any investor knows, the real potential hinges on the execution that follows the assessment.

The possibilities of a unified platform extend well beyond leveraging the technology for an initial analysis of the chain. The same platform that helps you uncover the opportunities can then enable you to implement those changes across your chain. This effectively allows you to create a plan with the option of executing it through the same technology platform. From the initial **Lean Retail Assessment**, private equity firms can easily identify the next steps toward profitability with their prospective investment. With FieldStack's unified commerce platform, the opportunities discovered from the **Lean Retail Assessment** are ready to be turned into action with a partner that is aligned with your success. In addition to the impactful business results, this approach significantly reduces IT complexity and cost.



5. Offer for Private Equity Investors

For private equity firms wanting a holistic overview of their potential investments with accurate modeling and forecasting, FieldStack is the answer.

Not only do we provide a solution that acts as an additional lens of analysis to identify prospective retail strengths and opportunities, but we also offer the unified technology to implement the improvements.

The **Lean Retail Assessment** in 4 Simple Steps:

1. Gather Historical Data

First, we'll ask you to provide historical data under a mutual non-disclosure agreement. The higher the volume and quality of the information available, the better. We will then input the data sets from the prospective retail chain investment into our unified platform.

2. Analyze the Data Sets

Next, our **Lean Analytics Retail Engine** ingests the data to uncover retail strengths, weaknesses, and opportunities for value creation that can be leveraged throughout the chain.

3. Present Findings in a Collaborative Envisioning Session

Once we have analyzed your data, we will present our findings and the top opportunities we identify for the prospective chain. Through a facilitated working session, we will bring together your knowledge, expertise, and prior analysis with the fresh findings from our **Lean Retail Assessment**.

Together, we will identify specific areas of potential value through a lens of what's possible in a unified lean retail operation. We'll also identify any areas for further analysis before presenting our final report.

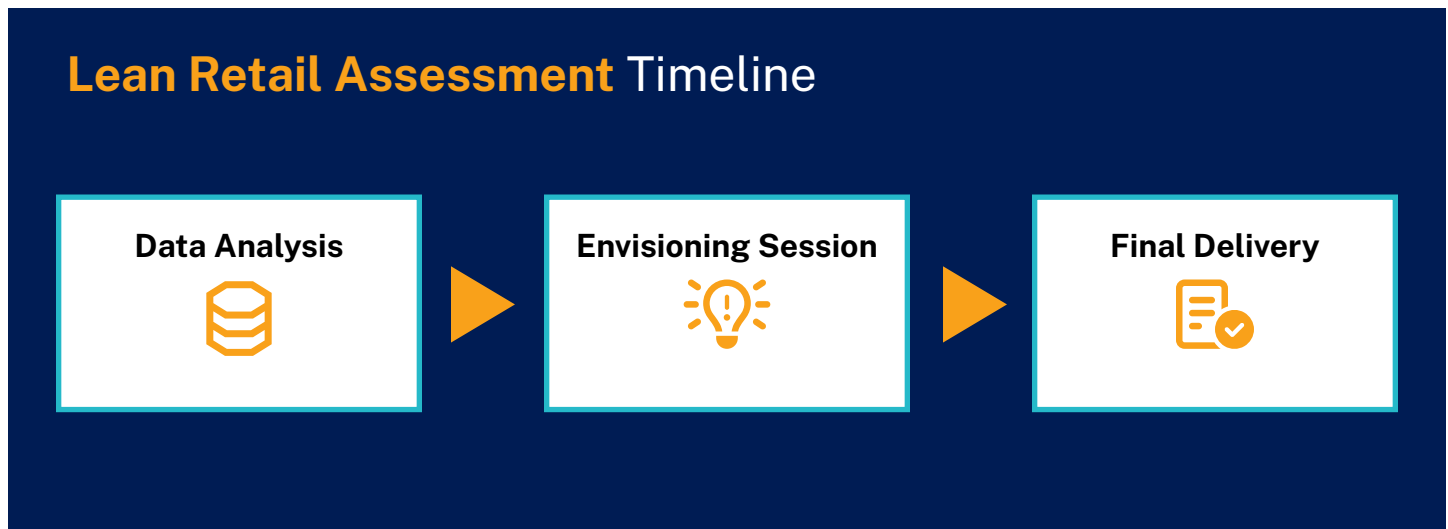
4. Deliver the Final Report

Following our Envisioning Session, you will receive a report that summarizes the outcome of our engagement. It will include the top opportunities for value creation as prioritized in our working session, additional findings related to other areas of analysis identified in our working session, and proposed next steps.

Lean Retail Assessment Timeline*:

- **2 weeks** for data analysis (following receipt of historical data provided by client)
- **3-hour collaborative Envisioning Session** with presentation of findings
- **2 weeks** for additional analysis and delivery of final report

* The typical timeline for a private equity **Lean Retail Assessment** is 30 days from start to finish. However, the timeline can be accelerated as needed.



Your Total Investment: \$15,000

Money Back Guarantee

We have demonstrated our ability to help clients identify and deliver revenue growth, increased profit, and improved cash flow. Our **Lean Retail Assessment** is now available to private equity investors to accelerate much-needed and transformative change across the retail industry. However, if you are not satisfied with the results of this engagement, we will refund your fee. No questions asked.

No Commitment to Proceed with FieldStack

Following the assessment, we will deliver a proposal with the final report to help you execute on the opportunities identified. Though our **Lean Retail Assessment** is being delivered at a highly discounted fee, you are under no obligation to proceed with FieldStack following this engagement.

6. About FieldStack

At FieldStack, our unified commerce platform combines the core systems necessary to enable omnichannel excellence and run a thriving retail chain – POS & store ops, eCommerce, inventory & supply chain, loyalty, and CRM. Data flows through each system, allowing for real-time actionable insights and game-changing automation.

Through strategic partnerships, we help retail chains utilize advanced analytics within a unified platform to transform into lean, customer-centric, data-driven operations. With our **Lean Retail Assessments**, we provide the insights private equity firms need to make informed investment decisions, leverage operational strengths, and discover unrealized value.

[Schedule your free consultation](#) to learn how our **Lean Retail Assessment** will increase the value of your private equity deals.



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