Forbes insights

SHIPPING AS STRATEGY:
How Small and Midsize Retailers Can Best Meet Customers' Delivery Expectations in the Age of Amazon

IN ASSOCIATION WITH:

pitney bowes

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INTRODUCTION

"No single company has had as great of an impact in the marketplace as Amazon. It has changed the behavior of both buyers and sellers and also how shipping and logistics providers deliver."
—Mark Schoeman, CEO, The Colography Group.

The U.S. domestic e-commerce marketplace is dominated by Amazon and large retailers, all setting the tone and pace of customer shipping expectations by offering expedited delivery options at low or no cost to the customer. Retailers of all sizes are finding themselves needing to compete on the same turf to meet customer expectations, creating challenges for smaller retailers in matching the delivery speed and price options provided by the larger retailers, while managing their own costs.

"Competing for customer loyalty has taken on a critical new dimension for small and medium-sized businesses," says Michael Griffiths, vice president of global marketing and communications for retail and ecommerce at Pitney Bowes. "Next-day and even same-day free shipping are becoming the norm in retail. Speed, efficiency and choice in how items are sent to consumers are now must-have parts of the consumer experience, suddenly putting organizations in a position where shipping technology is a strategic area of investment.

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"It's important to remember, however, that companies like Amazon that play a significant role in setting these expectations are first and foremost technology companies," he adds. "They have a flexibility in making these offers that many other retailers don't. This makes the choice of partner and solution for shipping that much more critical to help retailers compete effectively in this new reality."

We see this play out in the way small and midsize merchants are being squeezed by the costs of shipping. Without the shipping volumes of Amazon, retailers lack the negotiating power that could net meaningful discounts with commercial carriers. In addition, carriers often assess accessorial charges for certain shipments—such as delivering to a residential address—penalties for failing to meet contracted volumes, and peak holiday premium surcharges.

A recent study conducted for Pitney Bowes by The Colography Group, a technical market research, publishing and consulting firm specializing in the expedited transportation market, found that these issues are exacerbated by the parcel shipping systems in place at many retailers. While most retailers make use of the carrier-specific shipping software provided by commercial carriers, such as FedEx and UPS, to handle the bulk of their shipping, aspects of these same systems make it cumbersome for shippers to switch carriers seamlessly and access more favorable pricing.

The study also found that shippers selectively utilize the United States Postal Service (USPS) for its broad geographic, six-day-a-week residential delivery schedule and up-front pricing structure. The conclusion is that many retailers are juggling multiple carriers with discrete shipping systems to meet consumer needs and control costs.

This report discusses the challenges posed by increasing customer expectations around shipping for small and midsize retailers, and how those challenges and the costs associated with them can be managed with a shipping strategy that includes automation, a mix of carriers including the USPS, as well as the added benefits of working with a trusted shipping partner. Retailers that successfully weave these elements together will be better able to meet their customers' expectations and lower costs, allowing them to remain competitive in the age of Amazon.

LEAVING MONEY ON THE TABLE

Retailers don't need to think of matching Amazon in terms of technology spend, but the e-commerce giant has raised the bar and set new delivery expectations that must be addressed. One example is providing low- to no-cost delivery as a standard. "Retailers are battling the Amazon effect," says Kenny Pate, vice president of product management, global ecommerce at Pitney Bowes. "Amazon is changing the way that distribution is done. Four years ago, if you bought something on Amazon, your expectation was that you'd get it in three to five days. Now the expectation is two, or less. They've closed the delivery gap—and now that same customer expectation extends beyond Amazon to everyone else."

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> VICE PRESIDENT OF PRODUCT MANAGEMENT, GLOBAL ECOMMERCE, PITNEY BOWES

In order to meet these increased customer expectations, retailers rely heavily upon commercial carriers such as UPS and FedEx, which together handle approximately 65% of all parcel volume, according to the Colography survey (p. 6). Yet doing so without the clout of an Amazon or a Walmart means retailers are likely left paying more than necessary, and potentially locked into multiyear contracts that will escalate shipping costs if target volumes aren't met, even for periods as short as one week. There can be further unexpected charges, too. Accessorial, or value-added, service charges are those assessed by carriers on certain kinds of shipments—for address correction or for large parcels, among other reasons.

Customer expectations and shipping volumes rise exponentially during the holiday season, when many e-commerce retailers do the bulk of their business. To meet the demands, some commercial carriers add extra fees—this includes UPS, which announced recently it would begin assessing a 27-cent surcharge on all ground packages sent to a residential address during the upcoming holiday season.[1] The costs are higher for air services. Understanding when these accessorial charges may be levied and how to avoid them is one important step toward optimizing shipping.

Knowing when and how to avoid these charges is difficult, and even if a shipper understands how to avoid them, they may be locked into a contract or parcel shipping system that prohibits them from doing so. Single-carrier shipping systems account for approximately 85% of all parcel shipping systems, according to Colography's study (p. 6).

"The commercial carriers are really trying to drive usage of their systems for the traffic they receive. It helps them manage their operation—and that's very, very evident in the survey," says Darren Lamb, Colography's director of research and business development.

While these single-carrier systems are well designed for the carrier they represent, the same systems often make switching between carriers difficult or prohibitive—either because of the contracted volumes they often come tied to or the unwieldiness of having separate systems for different carriers.

1 UPS Peak Surcharges. (n.d.). Retrieved September 11, 2017, from https://www.ups.com/us/en/shipping/zones-and-rates/peak-surcharges.page

"We find shipping systems are being provided either in a contractual manner, or at no cost, as these systems can provide a wealth of information about the shipper's package characteristics, as well as ensure that the volumes that were committed to are truly received by the carrier," says Colography CEO Mark Schoeman. "Interestingly, these carrier-provided shipping systems often do not accommodate multicarrier shipping. So it does tie users specifically to that carrier."

None of this is to imply the commercial carriers aren't good at what they do or a useful, required part of any efficient shipping strategy for retailers of all sizes, because they are. However, with cost pressures increasing and the bulk of midsize retailers (91%, according to the Colography survey) relying on the same parcel shipping system they've used for more than four years, the fact is many of these businesses are leaving money on the table by failing to turn the strength of using multiple carriers to their advantage.

SHIPPING SYSTEM AND PARCEL VOLUME SURVEY

The Colography Group is a technical market research, publishing and consulting company specializing in the transportation market. Since 1993, it has conducted an annual national survey of 700,000-plus businesses to learn about shipping habits and track trends. The company was contracted by Pitney Bowes to conduct separate research, the Shipping System and Parcel Volume Survey, to learn about the parcel shipping systems that businesses are using, how long they've used them, and how they are being used. Colography received responses from 972 companies, identified through its annual national survey, that met industry and volume parameters defined in the supplemental survey.

KEY FINDINGS:

65%

of domestic parcel volumes are handled by commercial carriers

85%

of respondents use carrier-provided, single-carrier shipping systems (even though they may actually use more than one carrier and/or more than one system)

91%

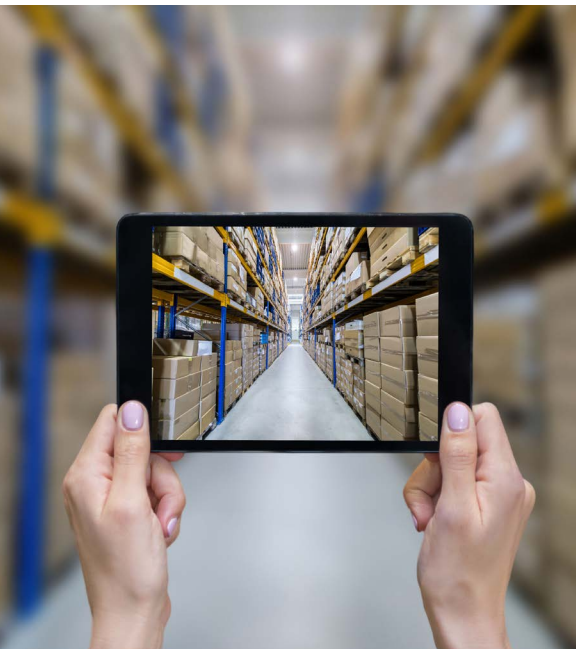
of midsize retailers **(60 to 1,999 shipments a month)** have used their current parcel shipping system for four years or more

39%

of parcels are shipped **more than 350 miles,** where the USPS offers very competitive rates and transit times compared with commercial carriers

What it means:

Retailers may be leaving money on the table by failing to review their parcel shipping systems regularly and instead locking into carrier-specific systems. These systems may offer volume discounts but ultimately may not be cost-efficient when compared with a multicarrier strategy that takes advantage of the USPS, especially for shipments greater than 350 miles from a fulfillment center.



SHIPPING AS A STRATEGIC INVESTMENT

With the "Amazonification" of customer shipping expectations, e-commerce merchants of all sizes face serious impacts—potentially including lost future business—if those expectations are not continuously met. Meeting the expectations requires shipping to be treated as a strategic investment to prevent the cost of providing a positive customer experience from cannibalizing profit margins.

Merchants can incorporate a range of solutions into their shipping optimization strategy to help meet customer demands, but the cornerstone should be a multicarrier option that incorporates the USPS. The following sections identify the benefits of this strategy, and how the right shipping partner can add further benefits.

A MULTICARRIER STRATEGY

"It's kind of phenomenal in this day and age how hard it is to figure out how to ship something cost-effectively," says Rick Hernandez, vice president of partner development for global ecommerce at Pitney Bowes. An automated multicarrier strategy is one way to take the pain out of that equation.

Successful multicarrier strategies take advantage of the differing strengths and skills of each carrier. For example, a retailer may ship the same item to different customers via separate carriers depending on which carriers offer better service, rates and delivery times in different geographic markets. "The goal for any company, from a fulfillment standpoint, is to drive down costs but increase customer satisfaction," says Pate. "And if those two things are not aligned, vis-à-vis their carriers, then they're going to have to switch up."

Such a strategy is best served by software that enables merchants to access all those carriers from one system. Chris Dunn, CEO at order management software company ReadyCloud CRM, describes what a multicarrier system should look like. "Today's e-commerce retailer needs an intelligent shipping system that can import all orders, from every e-commerce sales channel, into view. Seeing everything on screen simplifies decision making, rules can be easily applied to like-orders, and shipping labels for USPS, FedEx or UPS are made in seconds," he says. "Getting your parcels out fast makes your customers happy and means you can go home early. That's really what it's all about—getting your job done faster and doing it cost-effectively, while saving money on shipping and meeting customers' expectations."

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> **RICK HERNANDEZ**
> VICE PRESIDENT OF PARTNER DEVELOPMENT FOR GLOBAL ECOMMERCE, PITNEY BOWES

A few key considerations:

CARRIER MIX: Retailers should make use of a variety of carriers to take advantage of their respective strengths and cost efficiencies, whether UPS, FedEx, the USPS, regional carriers such as OnTrac or Lone Star that service specific states, or expedited and same-day services such as Deliv or UberRUSH.

TECHNOLOGY AND WORKFLOW: The process should be automated as much as possible, "from click to deliver," says Pate. That means using software that can dynamically choose the best carrier and delivery method to get a parcel to its destination within the delivery window required, and that can handle carrier scheduling and pickup, billing, label printing and tracking, all in one.

PACKAGING AND WEIGHT: Packaging, dimensions and weight can all make a difference in the cost of shipping—so e-commerce retailers need a better understanding of how to optimize each and when to use free flat-rate packaging, for example, to keep costs low.

WHY USPS?

The USPS is already being used by shippers of all sizes and even other commercial carriers for the final mile of delivery, because of the scope of the benefits and cost savings it offers. However, there is opportunity for it to be used to even more advantage, especially by small and midsize retailers.

"For an SMB retailer or e-commerce retailer, the USPS is a must-have," says Pate, "if you want to drive down costs as much as possible and you want to be able to fulfill your brand promise. The USPS is now a big player in the parcel carrier space, and it's starting to rival the dominant players in the United States."

The general underutilization may be the result of a lingering impression that the U.S. Postal Service is not suited to commercial needs. However, the opposite is true. "It turns out that you can use the USPS for a very cost-effective solution with a very strong service level, and a lot of people just don't know that," says Pate. "The Postal Service, no secret, was all about mail for a very long time, but the huge growth in the past 10 years has been all about e-commerce, and over that time the USPS has improved its service level pretty dramatically."

The Postal Service has made significant investments in its infrastructure and sorting capabilities as well as its products

and business-friendly flat-rate Priority Mail offerings. The sorting equipment, explains Hernandez, is designed to handle small parcels—5 pounds and under—which constitutes the bulk of e-commerce deliveries. "If the package fits through its screening devices, then the USPS has a huge competitive advantage in terms of how much it costs to deliver that package to the last mile," Hernandez says. That means, he adds, you can apply a general rule of thumb for parcels: "If it's five pounds or less, ship it Postal Service. If it's five pounds or less and it's direct to consumer, to a house or residence, it's almost always going to be cheaper with the Postal Service."

All the improvements are making a difference, says ReadyCloud's Chris Dunn. "We've seen our customers make a huge shift to Priority Mail, away from ground services. Some of that is to meet customer expectations, and some of that is strictly cost," he says. "There are more and more ways to meet basic customer expectations these days, with Priority Mail, and save your bottom line. It's all about meeting expectations on the side of the consumer, about cost competitiveness on the side of the merchant, and about delivering the time efficiencies in your software."

These factors mean it is worth revisiting the USPS in any new shipping strategy review. Among its benefits:

- Six-day-a-week delivery, with a Sunday delivery option, to almost every residential address in the United States
- Tracking, parcel handling, delivery windows and reliability—on par with commercial carriers
- Lower freight and accessorial charges with levels of visibility, regarding tracking, on par with commercial carriers
- Free packaging for all flat-rate and many other Priority Mail and Priority Mail Express products
- Delivery to PO Boxes and military (APO/FPO) addresses
- Innovative products, especially regarding flat-rate shipping, making it cost-effective for lightweight parcels
- A comprehensive network of mail distribution points

USPS: SHIPPING PARTNERS

The established reliability of the USPS has attracted a multitude of commercial third parties that want to partner with the service to provide added value to customers, Pitney Bowes among them. "If you work with a partner that has an ability similar to the USPS to give you even greater assurances or guarantees, that's a win-win for everyone," says Griffiths of Pitney Bowes, "because you get the power and benefit of the USPS as a really strong alternative to a commercial carrier alone."

For small and midsize retailers, working with these third-party partners, instead of on a one-to-one basis with the USPS and other carriers, is a way to access the negotiating clout of larger enterprises (for example, Amazon or Walmart)—without the hassles of doing their own negotiations. Typically merchants work with third-party partners either directly, by integrating an application program interface (API) into their own systems, or indirectly, by using broader order management or e-commerce software where the shipping partner's software is an already-integrated option.

Regardless of how a partner is accessed, there are some key benefits that retailers should look for when selecting a partner:

PRIORITY MAIL GUARANTEE: Shipping partners may be able to add further value to the already reliable Priority Mail service by guaranteeing the promised delivery date—with a financial reimbursement if it is missed. In the event of a delay, the customer would be entitled to a reimbursement of the shipping cost at the partner's expense, giving both the customer and the retailer peace of mind in the process, and helping to protect the relationship.

PRESORT CAPABILITY: This comes down to behind-the-scenes operations and logistics and may not be immediately apparent. A partner that has a close relationship with the USPS may have its own vehicles and regional facilities to help speed the transport and sorting of mail along the way. That means the partner is closely entwined in the value chain and can directly help the USPS meet the promised service standards.

FLEXIBLE PAYMENT TERMS: While the USPS does not offer payment terms to merchants directly, working with a partner can allow retailers a number of options, including interest-bearing prepaid postage accounts or revolving lines of credit and billing, that consolidate shipping activity with multiple carriers into a single bill. This capability enables retailers to better manage their cash flow and streamline payments across multiple accounts and carriers.

INBOUND/OUTBOUND INTERNATIONAL: Accenture estimates that by 2020, the value of cross-border e-commerce will be approximately $3.4 trillion,[2] and if retailers want to take advantage of that opportunity, it will be even more important to manage shipping costs. Here, too, the right partner can help, extending the strengths of the USPS domestically through relationships with international postal partners.

RESTFUL API: Another behind-the-scenes quality, a "restful API" is one that's designed to be more nimble for receiving and implementing updates from the partner, with minimal to no impact on the customer. This is important to smaller merchants who may not have the IT capabilities to handle unwieldy updates. As Griffiths puts it: "Finding a partner that offers restful APIs as the connection mechanism for the USPS could offer some really strong benefits in letting the retailers focus more on customer and strategy, rather than the technology and hand-holding."

MICHAEL GRIFFITHS
VICE PRESIDENT, GLOBAL MARKETING & COMMUNICATIONS, RETAIL & ECOMMERCE, PITNEY BOWES

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2 https://www.accenture.com/cn-en/insight-cross-border-ecommerce

STRATEGIC SHIPPING: PARTNER INSIGHTS

Forbes Insights researchers spoke with representatives from four technology companies, all of which have businesses where shipping is, to differing extents, part of the services they offer customers. All companies are partners of Pitney Bowes (as well as other companies in some cases). They discussed the challenges and opportunities around shipping for their customers.

- **Chris Dunn,** CEO and Cofounder of ReadyCloud CRM
- **Tim Hooper,** Director of Operations at ConnectShip | iShip
- **Nick Maglosky,** CEO of Ecomdash
- **David Potts,** CEO and Founder of SalesWarp

SHIPPER CHALLENGES

Amazon is setting customer expectations in a way that other e-commerce merchants are expected to match, or at least come close to, in terms of speed and reliability of delivery at a low cost. SalesWarp CEO David Potts sums it up: "The biggest challenge that our clients are facing is, 'I need to provide services that are on par with or better than the consumer experience with Amazon.'"

Where retailers do offer free shipping, Ecomdash CEO Nick Maglosky says it's important to make sure the margins are still profitable, and that your staff and processes support handling shipping accurately and speedily. "In order for those things to happen, from a back-end perspective, your labels have to be right, your packing slips have to be right, your scan forms need to be accurate—and you have to have a reliable platform to manage all of the moving parts."

Changing modes of business are also creating challenges, says Potts, whose customers are now grappling with how to send partial shipments from thousands of different locations, while also being connected to more digital marketplaces. "Consider ship-from-store situations where a retailer has a physical store that now ships directly to the customer, or traditional brands moving from freight shipments to handling high volumes of parcels for Amazon orders. You have to make solutions for modern retail operations that really improve performance," he says. "To match Amazon performance, we need to make management of all the various technologies easier to use, more foolproof and easier to adapt. Then intelligent management systems are needed to manage and automate key order fulfillment and shipping operations. Ideally, we give this power to the end-users, in such a way that they don't make mistakes. All the logic and intelligence is done by the software in the background, and all the user does is say 'ship'—and the system returns a label."

Tim Hooper, director of operations at ConnectShip | iShip, says the day-to-day process for comparing costs between carriers is unwieldy and time-consuming for retailers using single-carrier

systems. "Operational efficiency takes a hit when large shippers segment their manifesting operation by carrier system," he says. "They have to manually rate-shop across multiple systems to determine the least-cost alternative."

AUTOMATION

Automating decisions about delivery methods is key to managing costs. Chris Dunn, CEO and cofounder of ReadyCloud CRM, says software can quickly and easily determine the best mode of delivery, based on weight, for example. "What we can do is turn that into a very, very cost-effective method of shipping. So, orders that come in under a pound, we can instantly flip over to First-Class," he says. "Orders between one and four or five pounds, which most e-commerce orders are, we can instantly flip to Priority Mail. It's very, very important these days to be competitive with the time of delivery."

Hooper says automated decision making is a huge value in a shipping system, and that his customers make decisions based on rules configured in the software rather than burdening the shipping department, thus reducing human error.

Maglosky also cites the need for automation, with emphasis on a streamlined back-end: "You want to make sure, from an inventory management perspective, that you're organized and you have really streamlined your back-end," he says. "Are you manually using spreadsheets, or are you using automation software to manage when orders are coming in? How fast can you route those orders to your suppliers?" he says. "It's a lot of, 'the devil's in the details.'"

USPS

Another key is increasing utilization of the USPS, particularly its flat-rate products: "Priority Mail really figures prominently for a use case for most shipping these days, and the option addresses how to expedite and really fulfill the expectations of customers," says Dunn.

"USPS is much more cost-effective than ground services," he adds. "Priority Mail figures in prominently because it's an elite service that is often cheaper than the ground services offered by FedEx and UPS."

A STRATEGIC APPROACH

"It's certainly wise to leverage multiple carriers to get the best rates out there," says Maglosky, citing the need for e-commerce technology to support a multicarrier strategy. "Make sure you're using your technology platform to manage your e-commerce supply chain, specifically to ensure that your shipping carriers are integrated in one place."

Implementing this type of strategy can lead to big savings, and it's a key selling point for a company such as SalesWarp. Potts says one of his clients, with approximately $50 million in annual revenue, realized a six-figure savings "right off the bat" from its detailed shipping analysis. He cautions, however, that a holistic view, not a siloed approach to shipping, is needed. "It's really important not to look at shipping or fulfillment activity in a silo," he says. "Many retailers forget that all this data needs to come together in this unified commerce view, and most of their supply chain management approaches are likely very dated. So if you're looking at shipping practices, make sure it's not a single-point project. You need to be looking at the broader picture—how are you going to deliver to your customers as the future of retail changes year after year? Look at shipping as a broader strategy for the company and you."

WRAPPING UP: TAKEAWAYS FOR STRATEGIC SHIPPING

It is entirely possible and achievable for small and midsize e-commerce retailers to meet the shipping expectations of today's customers in a cost-efficient manner. Implementing technology that supports multiple carriers is a key step to realizing this goal, allowing retailers to leverage the strengths and services of different carriers to meet customer expectations at the best price. E-commerce retailers should also seriously consider the USPS as part of their carrier mix, as the service offers rates and product options that are competitive with commercial carriers, especially for smaller parcels or those delivered more than 350 miles from fulfillment. Finally, merchants should consider partnering with a third-party shipping platform that can provide additional guarantees, discounts and services over and above what the carriers offer directly.

Key takeaways:

CREATE A MULTICARRIER STRATEGY: Review your carriers and pricing. Discuss your options with other services in your area. Will you offer next-day or same-day shipping? Is the USPS part of your existing shipping mix?

USE THE USPS: The upgrades the Postal Service has made over the past several years coupled with its scale of presence across the United States six days per week makes it very well positioned for B2C deliveries. Look at how and where flat-rate packaging can help you save money. Pick up some flat-rate packaging from the post office and experiment.

HAVE A PLAN FOR PEAK PERIODS: All carriers have challenges with parcel volume during peak shipping season, including delays to delivery that don't meet their normal service standards. Prepare for high-volume shopping periods by scaling up available labor as needed for pick, pack, ship and customer service. Forge a relationship with your carriers so that you know in advance what their deadlines and cut-off dates are. Keep the communication lines open during peak periods. And have a contingency plan in place—failovers to different carriers, if necessary.

AUTOMATE THE PROCESS: Think about where automation can help your business and support a multicarrier strategy. Automate your processes as much as you can from click to delivery.

IDENTIFY SHIPPING PARTNERS: Look for partners that can provide service guarantees, APIs that are easy to work with, and favorable pricing and payment terms, all of which should lead to deeper savings for you.

KNOW YOUR PRODUCTS, AND KNOW YOUR OPTIONS: "If you know your products, then you will be able to much more easily forecast your shipping costs," says Dunn. It means knowing your data, product dimensions, weight and more. Import that data into the system and the software can "fill in the blanks."

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