



supply chain **commerce** delivered™

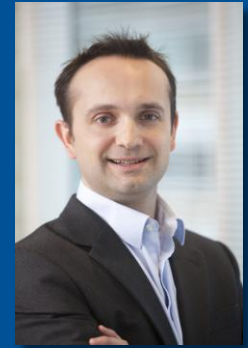
## Manhattan Associates' Vision for the Future of Supply Chain

supply chain **commerce** delivered™

A green rectangular sign with rounded corners and a white border, mounted on a metal structure against a blue sky with clouds. The sign contains the text "The Future" in a large white font and "STRAIGHT AHEAD" in a smaller white font below it.

The Future  
STRAIGHT AHEAD

Martin Lockwood  
Senior Director, EMEA



- The Advent of Multi-Channel & Supply Chain Commerce
- Customer Case Studies
- Why Manhattan?

- The Advent of Multi-Channel & Supply Chain Commerce
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- Why Manhattan?

# Multiple commerce channels converging to serve a marketplace of savvy buyers:

# US!





# Multi-channel and Omni-channel



***Serving **All** Customers,  
In **All** Channels, Using **All** Inventory***

# THE NEW NORMAL

Omni channel has changed:

- Our goals
- Our roles
- How we operate

# EVOLUTION

The goal of commerce has always been the same:  
connecting people with products

# The River Danube: A trade waterway that has been connecting Eastern and Western Europe for centuries



**& Budapest** is perfectly placed in the centre of Eastern Europe – the gateway for commerce between East and West



Circa 1950s

## Cars and shopping centers:

Commerce game changers of the 20<sup>th</sup> century



Circa 1990s



eCommerce circa 1994:  
a small wired world

Pizza Hut is the  
first retailer to go online



## Customers want ...

Choice with **convenience**

&

Delivery with **delight**



## You need ...

Single view of **inventory** across your network

&

Flexibility to make it **available, profitably**



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## So let's talk Supply Chain Commerce

## Supply Chain Commerce:

# Where supply chain & the market



## Why now?

- The advent of multiple commerce channels puts customers in the driver's seat
- They control their choices and experiences and the supply chain needs to respond
- The supplier needs the visibility and capability to fulfil anywhere, anytime, everywhere.

There's a **FACE** on every order.



And a **profit** or **loss** on every face.



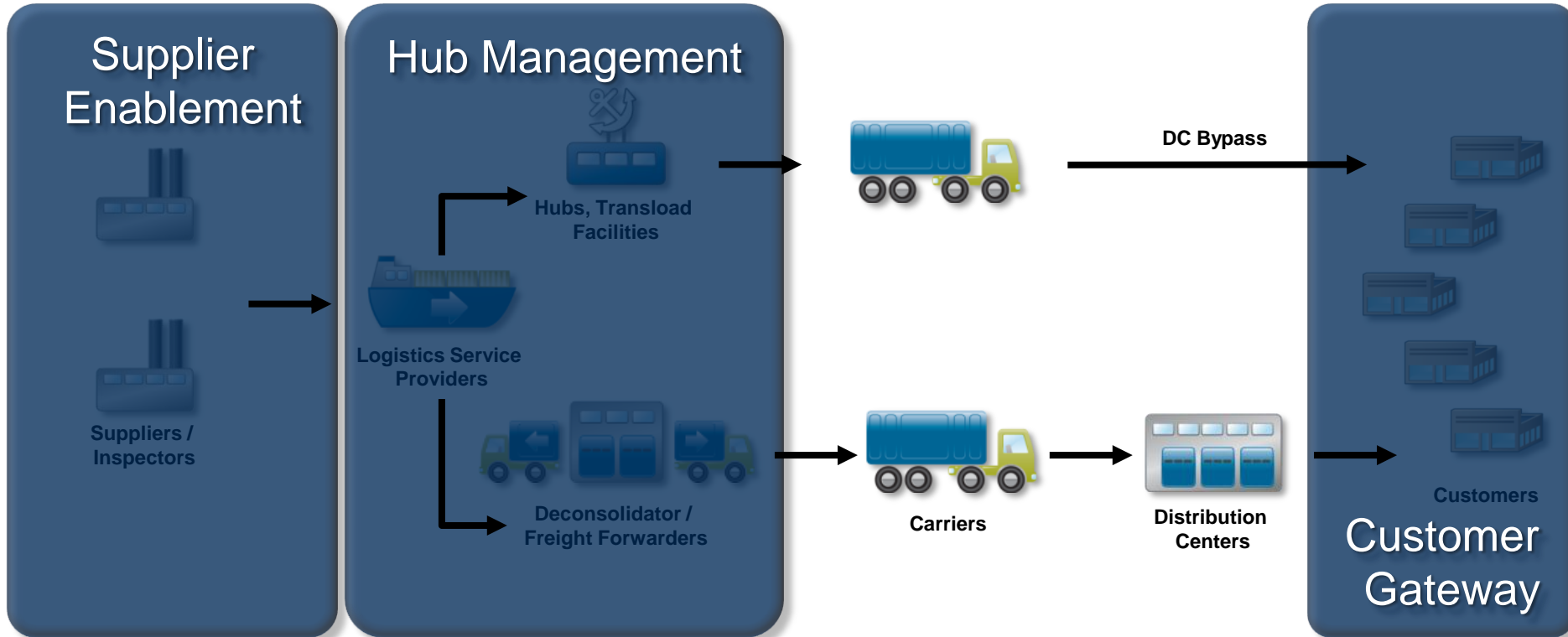
# Supply Chain Commerce





# Inventory Visibility

# The need for visibility across the Extended Enterprise



Supply Chain Visibility

Supply Chain Event Management

# A Perspective on Supply Chain Visibility

Central repository for the current status & relevant history of...

## Supply Chain Visibility & Event Management

**Orders**

**Shipments**

**Inventory**

**Costs  
(TCS)**

**Inter-Connected**

*“zero limits to participants”*

**Holistic**

*“end-to-end coverage”*

**Versatile**

*“leveraged by any dept,  
any function”*

**Personal**

*“must be my way”*

**Flexible**

*“agnostic to technical  
sophistication”*

# Single Global View of Inventory

- Truly single view on one system
- Includes
  - PO's at suppliers
  - Inventory in transit
  - Inventory in stores
  - Inventory in DCs / Hubs
- Gives you the power to:
  - Make business decisions
  - Protect your margins
  - Give your customers real-time information





**maximizing revenue**

**reducing costs**

- More opportunity
- More savings



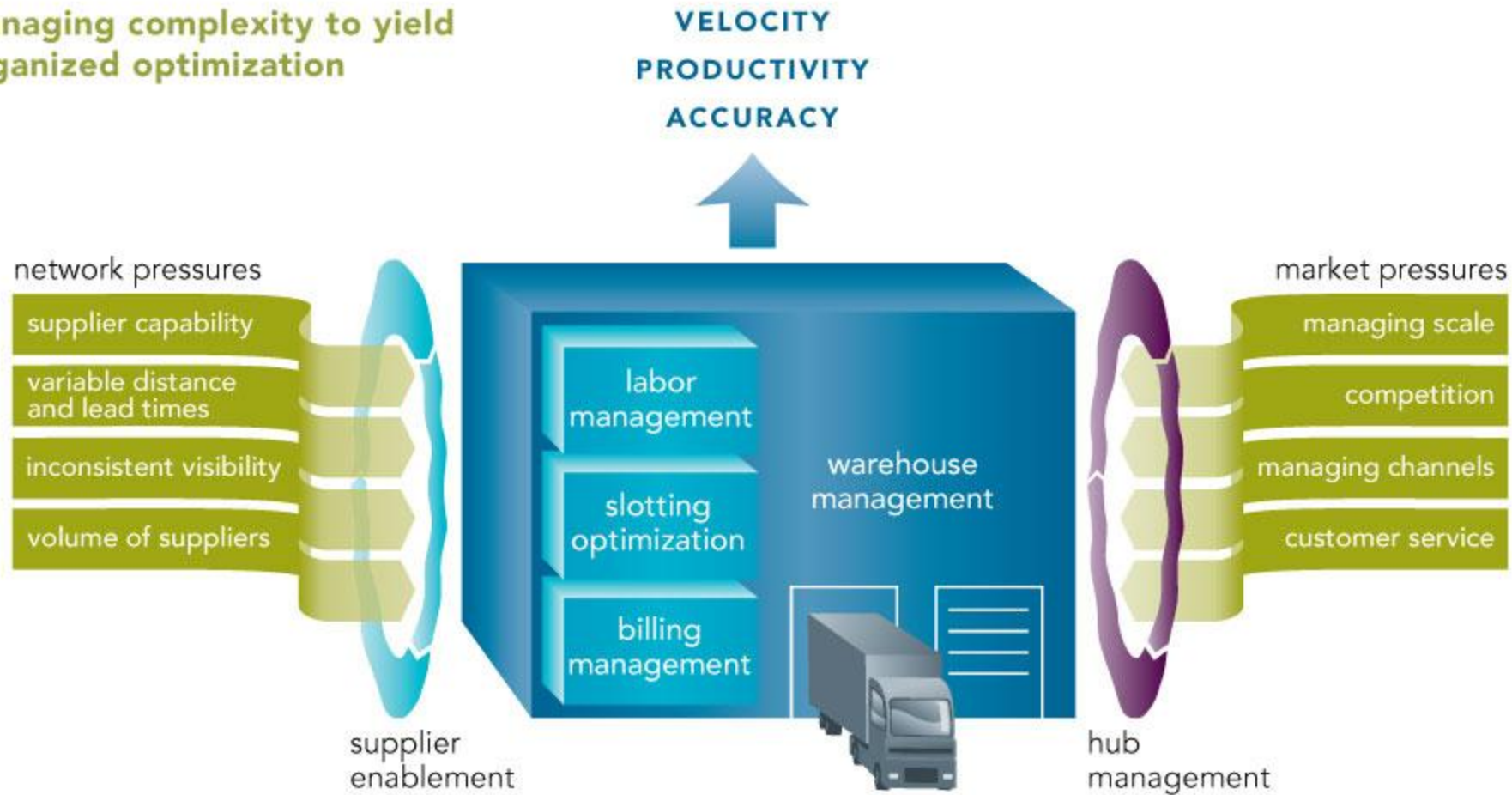
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**Which brings us to...**

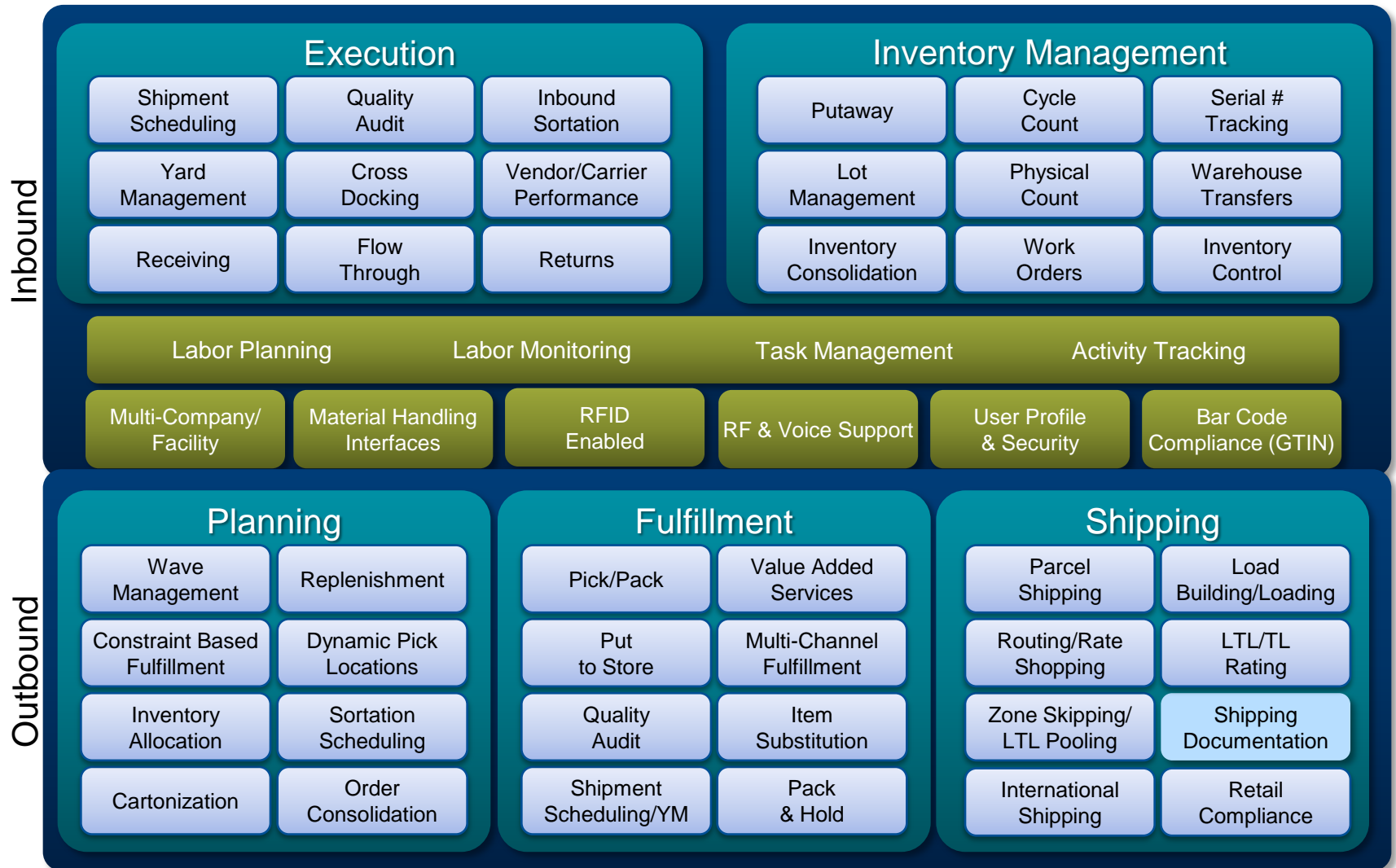
**Ensuring your Warehouses are in Order**

# distribution management:

managing complexity to yield organized optimization



# Warehouse Management



- The Advent of Multi-Channel & Supply Chain Commerce
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- Tesco Stores Ltd is the UK's largest supermarket.
- Company also runs a multi-channel non-food arm offering over 11,000 items via its website, of which over 7000 are available by catalogue.



### Business Challenges

- Rapid growth in Tesco Direct sector of company
- Customer ordering and delivery options
- Need to handle products from order placement right through to delivery
- Software integration with Tesco operating systems and Microsoft server components running Tesco.com

### Manhattan Products

- Warehouse Management for Open Systems
- Supply Chain Intelligence

### Implications

- Complete control over supply chain to handle growth
- Multiple delivery options and instant information about product availability for customers

# empik

- Empik is one of the largest multi-channel retailers in Poland
- Company has a chain of nearly 190 stores across the country and a robust online offering
- Product range includes books, music, film and games sold to more than 28 million customers annually



## Business Challenges

- Empik required a centralised and fully configurable WMS to optimise supply chain processes and support rapid growth

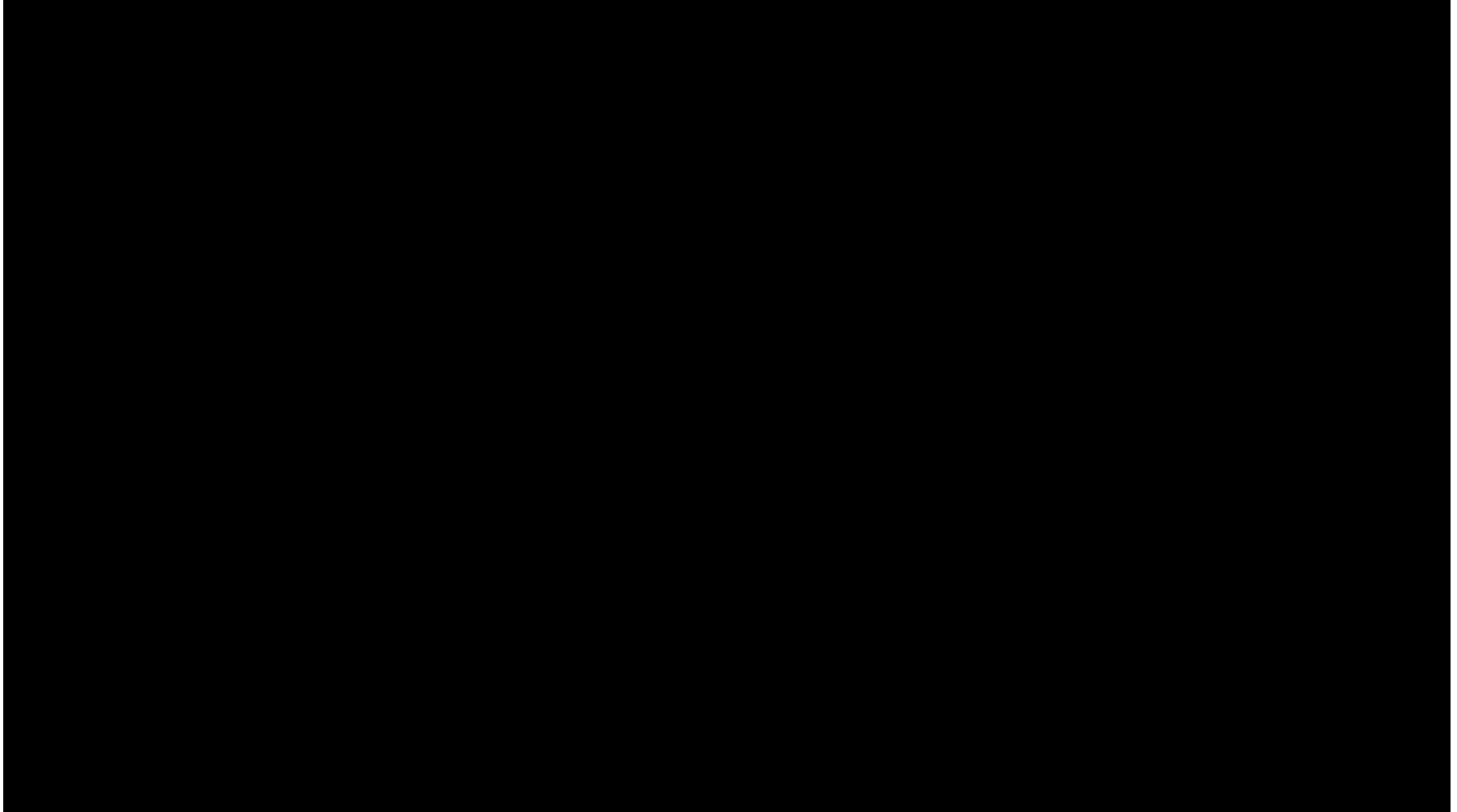
## Manhattan Products

- Warehouse Management for Open Systems

## Implications

- Cost savings
- Enhanced service levels
- Compressed cycle times
- Improved order accuracy levels
- Faster order consolidation and fulfilment process

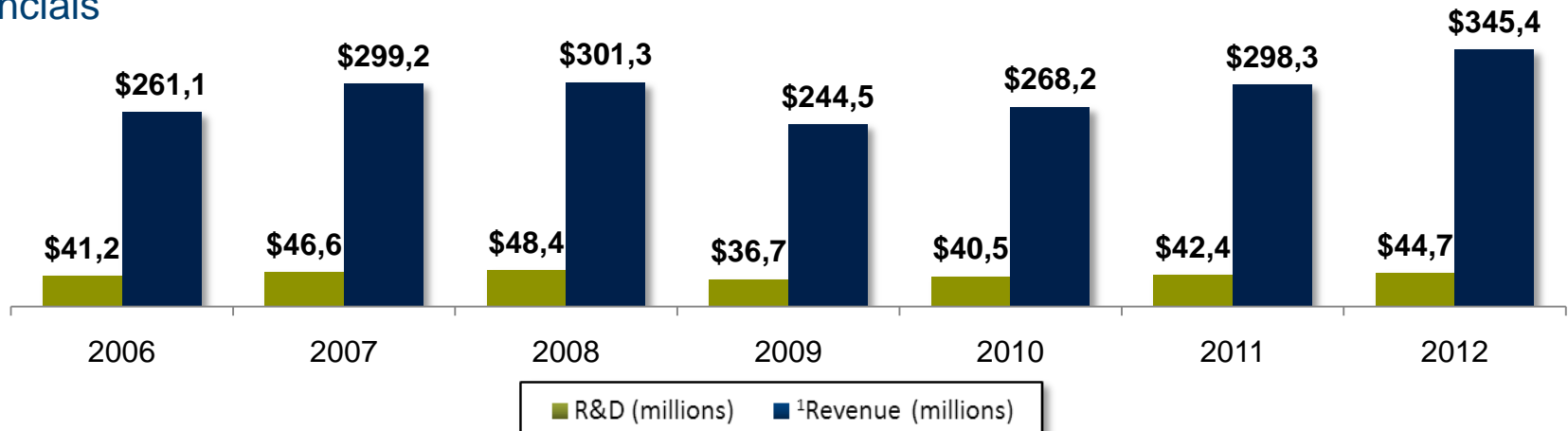
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# At-a-Glance

<b>Founded</b>	1990	<b>Core Markets</b>	<ul style="list-style-type: none"> <li>• Retail</li> <li>• Food/Grocery</li> <li>• Consumer Goods</li> <li>• Logistics Service Providers</li> <li>• Life Sciences</li> <li>• Industrial/Wholesale</li> <li>• High Tech/Electronics</li> <li>• Transportation Providers</li> <li>• Government</li> </ul>
<b>Nasdaq</b>	MANH		
<b>Global Customers</b>	More than 1,200		
<b>Deployments</b>	287 Go Lives in 2012		
<b>Supply Chain Focused R&amp;D Investment:</b>	Nearly \$45 million in 2012, Total cumulative \$301 million since 2006	<b>*Leading Companies Use Manhattan Solutions (2012)</b>	<ul style="list-style-type: none"> <li>• More than two-thirds of the top 10 U.S. mass merchants</li> <li>• More than half of the top 20 retailers</li> <li>• 16 of the top 20 apparel retailers</li> <li>• 15 of the top 20 supermarkets</li> <li>• 8 of the top 10 pharmaceutical companies</li> <li>• Half of the top 100 motor carriers</li> </ul>
<b>Employees Worldwide</b>	~2,400 (December 2012)		

## Financials

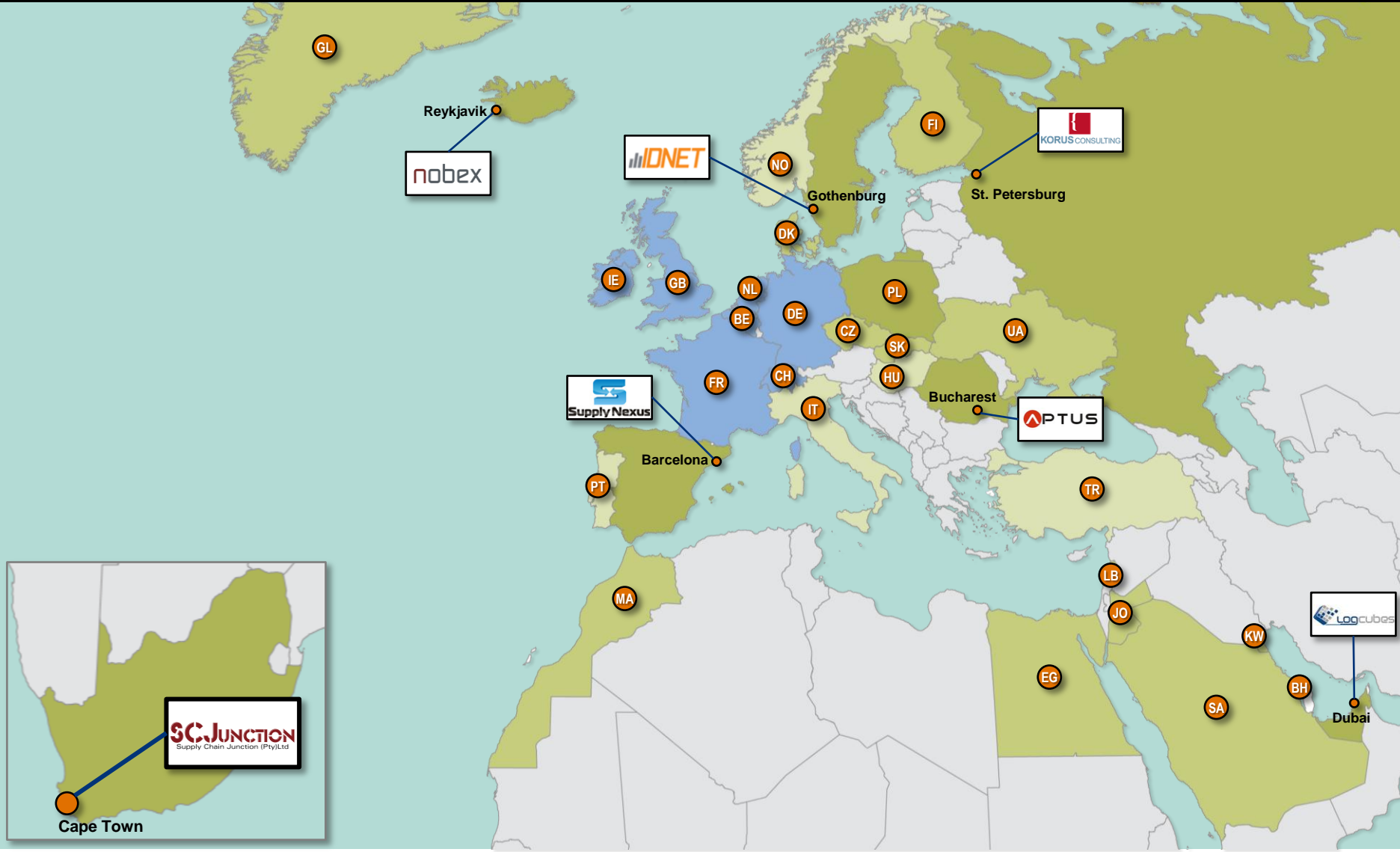


Revised: March 2013

\* Sources for "Leading Companies" provided in speaker notes

<sup>1</sup>Revenue excludes Hardware & Billed travel

# EMEA Territories & Partner Locations



# Representative EMEA Clients



# supply chain **commerce** delivered

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