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k3retail
joined up thinking



&Movers
shakers

by Glenn Davis
retailinsider.com



“...who really is making a difference in this exciting part of the industry.”

About the survey

Retail first started to become organised, and resemble something akin to what we have today, as far back as the 1830s. So when you consider online retailing has been with us for little more than 10 years it's fair to say it is still a newborn. But in this short space of time e-commerce and its close cousin multi-channel have had a massive impact on the retail sector, which makes the people involved in this cutting edge element of the industry extremely valuable.

For this maiden Multi-channel/e-commerce 70 survey Retailinsider.com has canvassed opinion from across the retail industry by speaking with consultants, City analysts, software vendors, head-hunters, and leading figures in the sector. The objective has been to find out who really is making a difference in this exciting part of the industry.

What we've unearthed is a heady mix of big company leaders, consultants, entrepreneurs, technology focused specialists, and investors. Some of these will probably be very well known to you while others will be completely unknown. But what unites them all is that they have been highlighted by their peers, contemporaries, and in some cases rivals as having something special.

The only thing that can be guaranteed from this first survey is that many people will disagree with some of the names that have been included and maybe, in some cases, are disappointed not to have been listed themselves.

In response to that, all we can say is, there is always next year's survey.

Glynn Davis
www.Retailinsider.com



Foreword

K3 are delighted to be sponsoring the first Multi channel 'Mover and Shakers' report and the first of many I hope as we progress into this decade. So from K3 it's a big thank you to Glynn Davis whom with all of his journalistic charm influenced his vast network of retail contacts to come up with their preferred 'Mover and Shaker'. What is great about this first addition is the diversity of individuals and their roles and in some ways shows how dynamic and fluid Multi channel retailing is in the UK and Globally.

I would like to thank all 70 named individuals and the businesses they represent for all the fantastic 'entrepreneurial' work they have done in the space and also somehow managing to stay ahead of the curve in this ever changing retail environment in which we work.

I trust you will find the survey interesting. We hope it will stimulate some debate, and we welcome your feedback.

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1

Aamir Ahmad, founder
Dwell

Dwell has been built as a true multi-channel business with its store employees incentivised to collect data on the customer. This approach was no doubt honed by Ahmad at catalogue company Ocean that he also founded.

2

Sally Bailey, CEO
White Stuff

Bailey is helping to drive a multi-channel approach at the clothing retailer that she has headed up since 2004. She has the whole team on-board with her philosophy that is helping grow store numbers as well as catalogue and online sales.

3

Jeff Bezos, founder
Brian McBride, managing director
Amazon.co.uk

Bezos is the pioneer of online retailing and continues to push Amazon into new categories. McBride has run the UK operation since 2006 having joined from T-Mobile.

4

Walter Blackwood, creator
Home Delivery Network limited

Most recently at Collect+, which he helped found, Blackwood also set up Parcelnet and HDNL that have all oiled the wheels of e-commerce. There is little he doesn't know about the last mile.

5

John Bovill, group IT director
Hash Ladha, group multi-channel director
Aurora

The bit is between the teeth at Aurora (owner of Karen Millen, Oasis etcetera) to develop the business into a multi-channel operation with Bovill and ex-Asos director Ladha heavily involved.

6

David Callow, head of business systems – (customer)
Debenhams

Behind the scenes Callow the technologist helps to keep all the plates spinning at Debenhams, which arguably punches above its weight online as it has a small team and operates to tight budgets.

Jim Clear, e-commerce marketing controller
Sara Weller, managing director
Argos

Under Weller Argos has been a leader in multi-channel retailing for many years and has pioneered much copied initiatives like 'Click & Collect'. Clear joined the business in 2004 and heads up its marketing and 7564 multi-channel activities.

Mark Cody, channel business manager for interactive services
O2

Mobile is where the action is within multi-channel retail and O2 are doing plenty of interesting marketing and media related activities with Cody responsible for the network's retail clients.

James Cronin, executive director and chief architect
Venda

Cronin is credited with great strategic vision and after building the Boo.com infrastructure he parlayed this into creating the multi-tenanted architecture that is the platform on which Venda is built.

Andrew Curran, co-founder
Sarah Curran, co-founder
My-wardrobe.com

The complementary skills of the Curran pair have helped build My-wardrobe.com into a dynamic growing fashion business that recently secured £6 million of funding from Balderton Capital.



Wendy Derbyshire, director of e-commerce
Jacques Vert

Derbyshire is involved in the turnaround currently taking place at Jacques Vert where she brings great online experience having done stints at Scotts of Stow and that fertile training ground for e-commerce N. Brown.

7 12

Jana Eggers, CEO
Spreadshirt

Eggers became global CEO of innovative retailer Spreadshirt in 2007, and has helped build its three distinct business units: direct to customer, shop partner platform, and design competitions.

8 13

Alexandra Eilitz, head of e-commerce
Ted Baker

As well as running the e-commerce channel Eilitz is the champion of customer experience at Ted Baker where she has built up the online capability. She previously did a stint at Thomas Pink.

9 14

Mark Evans, General Partner
Dharmash Mistry, partner
Balderton Capital

Formerly the European arm of revered Silicon Valley VC firm Benchmark Capital, Balderton has been a major investor in e-commerce including Yoox, The Hut and MyWardrobe.com. Evans and Mistry sit on various boards.

10 15

Andy Ferguson, head of multi-channel
New Look

New Look is one of the rising stars of multi-channel retailing, with traffic numbers rivaling Asos, and Ferguson has been integral to its progress to date and will be crucial to its future success.

11 16

Peter Fitzgerald, director
Google UK

Google has its finger in many pies and retail is one of them. In the UK Fitzgerald is one of their key people on the ground and he has an online retail pedigree having worked at Amazon.

11 17

Ashley Friedlein, CEO and co-founder
Econsultancy

Econsultancy encompasses training, conferences, research and reports, consulting and events hosting within the digital space, which gives its founder Friedlein an informed view on the industry.

18

John Gallemore, chief operating officer
Matthew Moulding, CEO
The Hut

The Hut was quietly built as an online platform for the likes of Tesco, Dixons and WH Smith but co-founders Gallemore and Moulding have branched out to now also operate their own sites including Mybag.com, Zavvi, Iwantoneofthose and Confetti.

19

Graham Green, consultant and part-time multi-channel director
Barratts Priceless

Alumni of N. Brown and co-founder of its delivery firm Zendor, Green is bringing his experience of direct mail and multi-channel retail to bear as a consultant to numerous retailers including Ann Summers, Scotts of Stow and Barratts Priceless.

20

Clare Gilmartin, VP EU Marketplaces and managing director
UK eBay

As eBay attracts growing numbers of retailers to sell their goods on its Marketplace the role of Gilmartin in UK retail will become increasingly important.



21

Ben Gordon, CEO
Mothercare

Mothercare has been transformed into a multi-channel business under the leadership of Gordon with in-store ordering via the internet one of the many key features he introduced.



22

Chris Griffin, head of e-commerce
Indira Thambiah, non-exec director
Supergroup

Griffin was sufficiently valuable to Supergroup that they bought out his business 888 Clothing, which sold the fashion group's goods on eBay, and brought him in-house. He is assisted by non-exec director Thambiah, previously of Argos and DSGi.

23

Quentin Griffiths, co-founder
Achica

As a co-founder of Asos, Griffiths has a great pedigree but with serial entrepreneur tendencies he decided to leave the business in 2005 for more start-up action. He has tried his hand at various ventures and his most recent is online hardware retailer Achica.

24

James Hart, e-commerce director
Nick Robertson, co-founder
Asos



As e-commerce director and 10-year Asos veteran Hart is vitally important to the business. He compliments Robertson whose mix of entrepreneurial drive and trading nous has helped change the landscape of online fashion retailing.

25

John Hinchcliffe, marketing director
Alan White, CEO
N. Brown

With a strong focus on the customer relationship N. Brown is being transformed from a catalogue company into an online (and recently shops) powerhouse with Hinchcliffe and White the key drivers.

Guy Hipwell, managing director of online
Liberty

Experienced operator Hipwell has been involved in dotcom-land since his time at zoom.co.uk in 1998. Via Arcadia and Harrods he is now at Liberty with responsibility for online and the supply chain.



Brent Hoberman, co-founder
Lastminute.com and private investor

Hoberman made his name, fame and fortune as co-founder of Lastminute.com. Although he is not a pure retailer his investments and backing of disruptive businesses Mydeco, Made.com and Keynoir make him a player with real influence.

Mark Hodgkinson, digital and financial services director
Doug Gurr, executive development director
Asda

Gurr is regarded by some as brilliant and will probably pop up one day as CEO of a FTSE 100 business. He set up online wholesaler Blueheath and is now developing multi-channel at Asda, ably assisted by ex-EMI man Hodgkinson.

Richard Houlton, head of multi-channel retail
Clarks International

Formerly head of supply chain development at B&Q, Houlton is quietly getting on with developing Clark's multi-channel business. Two children's websites recently launched as part of the company's drive to grow beyond its stores.

Brett Hurt, founder and CEO
Bazaarvoice

Customer ratings, reviews and analytics are increasingly important to online retailers and Bazaarvoice is the big player in the field. It is run by Hurt who also founded Coremetrics.

26 31

Rob Jones, business systems manager for e-commerce
Harvey Nichols

It's all about the customers' shopping experience for Harvey Nichols and its head of e-commerce Jones is successfully replicating the look and feel of the group's famous Knightsbridge flagship store online.

Ajay Kavan, marketing & strategy director
Homebase

Very experienced multi-channel operator, Kavan has been in his current role since 2004 having cut his teeth running multi-channel at B&Q and as e-commerce director at Littlewoods Home Shopping.

Kristine Kirby, e-commerce & multi-channel marketing director
Michael Wood, head of web
Monsoon Accessorize

Recently installed at the fashion company, Kirby quickly brought in Wood and they are both working on re-building the group's websites and developing its multi-channel capability. The pair worked together at Lipsy.

Saul Klein, partner
Index Ventures

Klein has an excellent pedigree as an operator, having set up Video Island which merged with Lovefilm. As a partner at well respected Index Ventures he is involved in investments in young web-focused businesses and sits on the boards of Glasses Direct and Lovefilm.

Tanya Lawler, director of direct channels
Sainsbury's

It's a big job to grow both Sainsbury's food and its less developed non-food offer through non-store channels but with 20 years industry experience Lawler is well qualified for the role.

Natalie Massenet, founder and executive chairman
Net-A-Porter.com

Overcame the naysayers who said luxury and fashion would never sell online to build Net-A-Porter into a business that sold for £350 million to Richemont.

Martin Newman, Consultant

With over 25 years experience Newman has run the e-commerce divisions of Ted Baker, Burberry and also worked within Harrods, and Pentland Brands. He now passes on his e-commerce and multi-channel skills to retailers as an independent consultant.

Dan O'Sullivan, web and data analyst
Urban Outfitters

O'Sullivan is very much immersed in the data at Urban Outfitters, as he also was at his previous employer Boden. This gives him great understanding of customer metrics and behaviour and positions him well for a potential multi-channel director role in the future.

Ben Pearson, commercial director
Trainline.com

At Trainline.com, Pearson continues to impress the people that matter as he utilises his online experience gained from The White Company, Virgin Wines and Deckchair.com.

Tony Prescott, e-commerce director
Focus DIY

Gained a lot of respect for his work at consultants Javelin Group where he was able to call on his experience as an early multi-channel director at Asda. Recently took up the in-house role of running e-commerce at Focus DIY.

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Simon Pritchard, group e-commerce director
Arcadia Group



Joined Arcadia in late 2009 and is in the process of developing its internet business through the experience he gained at DSGi. He has recently re-launched all Arcadia's seven websites.

Michael Ross, co-founder and director
eCommera



A very rare beast that has worked across multiple online platforms, Ross helped set up Fagleaves.com before consulting for Baugur Group. As director of eCommera he works with and advises many retailers.

45 49

Alison Lancaster, consultant
Alison Lancaster Consulting

Chiefly splits her time between roles at Feather & Black and White Stuff helping them both deliver on their marketing objectives and home shopping propositions. Lancaster has vast experience from John Lewis, Harrods and Charles Tyrwhitt.

50

Fran Minogue, managing partner of global retail practice
Heidrick & Struggles

A heavy-hitter in the world of retail recruitment, Minogue pulls the important strings behind the scenes when placing people into senior positions in the sector.

46 51

Jo Molineux, head of multi-channel
Republic

Republic is developing its business across channels under new owners TPG and Molineux is tasked with ensuring consistency across the business and understanding customer behaviour across channels.

51

Mark Newton-Jones, CEO
Jonathan Wall, director of online
Shop Direct Group



Newton-Jones has turned around what was the troubled Littlewoods catalogue business into a multi-fascia online operation. Wall brings vast experience from his time building up Dabs.com before its sale to BT.

47 52

Tony Stockil, CEO
Richard Wolff, Chief Operating Officer
Javelin Group

Javelin was founded 10 years ago and has gone on to advise many of the biggest retailers on their e-commerce and multi-channel strategies. Its success is down to the extremely experienced team assembled including Wolff.

48 53

Robin Terrell, executive director of multi-channel and international
House of Fraser

One of the most experienced players in the industry having worked across numerous platforms. At House of Fraser he has set the objective of generating 15% of revenues from online within three years.

Simon Wolfson, CEO
Richard Palmer, Online design/
development manager
Next

Wolfson is clearly the figurehead and driver of Next but behind him is a strong team that runs the extremely successful online business Directory. Based in Leicester makes them the hidden heroes and in their ranks is the able Palmer whose responsibilities include customer experience.

Simon Perrée, managing director
Play.com

Perrée heads up what is a relatively low-key operation but also incredibly successful as an online retailer of DVDs, CDs, books and gadgets. It attracts the second highest level of traffic among online retailers in the UK, according to Hiltwise.

54

Neil Saunders, consulting director
Verdict Research

Saunders holds a senior role at well respected and long-standing retail research house Verdict where he is the in-house specialist on e-commerce and multi-channel retailing. There is little Verdict does not know about the industry.



55

Carl-Olav Scheible, managing director
PayPal UK

Payment methods are vitally important to the growth of online commerce and Scheible runs the big boy PayPal in the UK, whose power is enhanced through its association with parent company eBay.

56

Sue Shipley, head of retail practice
Odgers Berndtson

There are few people as well connected in the retail industry as Shipley so it is no surprise that she is charged with discretely filling some of the key vacancies in e-commerce and multi-channel retailing.

57

Jason Shorrock, programme director for multi-channel retail
BT Expedite

Within the specialist retail division of BT is BT Expedite that provides e-commerce and multi-channel solutions to many leading retailers. And within this sits its multi-channel expert Shorrock.

58

42

Christian Robinson, director
Tiffany Rose



With 10 years at Firebox.com, Robinson helped build the business into a £13 million a year operation and was almost regarded as a co-founder. He recently moved to maternity fashion label Tiffany Rose, which was set up by his wife.

43

Steve Robinson, CEO
M and M Direct

Robinson has helped to change the business model of M and M Direct from a catalogue operation to an online operation, made doubly difficult by its exposure to the very competitive market of discount clothing. He previously set up Tesco Direct.

44

James Roper, CEO
David Smith, managing director
IMRG

Set up by Roper, the IMRG has been around since day one and is arguably the voice of the e-commerce community, providing most of the data that is quoted in the media. Smith helps run the organisation's day-to-day operations.

59

Kieron Smith, managing director
Book Depository

Smith has cleverly built Book Depository up into a sizeable business despite the presence of Amazon. And he even points customers to his rival if he doesn't stock a product.

60

Neil Stuart, commercial director
Salmon

Systems integrator Salmon has its fingerprints on many e-commerce implementations including Boots, Halfords and Argos. Stuart has worked at the company since 2001 and understands the all-important customer engagement aspect of online commerce.

61

Tim Steiner, CEO
Ocado

He's undoubtedly a bright fellow who co-founded Ocado but he found it hard to recently sell the business to the City. However, he got the float away and now needs to get the profits coming through at the online grocer.

62

Colin Temple, CEO
Schuh

Unlike many experienced retail leaders Temple has immersed himself in multi-channel activities and has learnt through trial and error through selling goods on eBay and N. Brown. He now 'gets' the whole multi-channel thing and is developing Schuh into an integrated organisation.

63

Ryan Thomas, head of direct channels
Comet

Thomas knows electrical goods and is regarded as very smart and switched on by contemporaries. He is expected to do well in the future and is definitely one to watch.

64

Simon Thomson, VP online
Apple

Chiefly a marketing man, who has done time at Honda and Lastminute.com, Thomson is now running the e-commerce channel at Apple and although this is new territory for him he will likely be increasingly influential.

65

Matthew Treagus,
managing director
Progenit

Consultant with 15 years in the e-commerce space, Treagus is now advising retailers on implementing digital strategies. He previously co-founded renowned web agency AKQA.

Laura Wade-Gery, CEO
Nick Lansley, head of R&D
Tesco.com

Wade-Gery sits atop the biggest business in its field and has been at the helm of Tesco.com through massive growth in both grocery and non-food. Many of the retail giant's cutting edge ideas come from Lansley who blogs at TechForTesco.



66

Patrick Wall, CEO
Metapack

As co-founder of Metapack in 1999, Wall has created a business that has led the way in providing customer-focused delivery propositions. It supports many leading retailers including Peacocks, B&Q, Currys, and JD Sports.

67

David Walmsley, director of e-commerce
DSGI

Having taken John Lewis to another level online, Walmsley was brought into Dixons in 2009 to utilise his strong technical abilities to help overhaul its online operation, which is crucial to the group's success.



68

David Worby, director of Direct
Harrods

Worby has been at Harrods since the start of the year and although not characteristically a 'disruptor' he is successfully building the direct operation to compliment the world famous store. He was previously head of direct at Debenhams.

69

Mark Zuckerberg, founder and CEO
Facebook

Nobody can be in any doubt about the power Facebook wields in the retail sector. Zuckerberg's creation already drives lots of traffic to retail websites and its planned virtual currency Facebook Credits could create lots of waves in the future.

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About K3 Retail

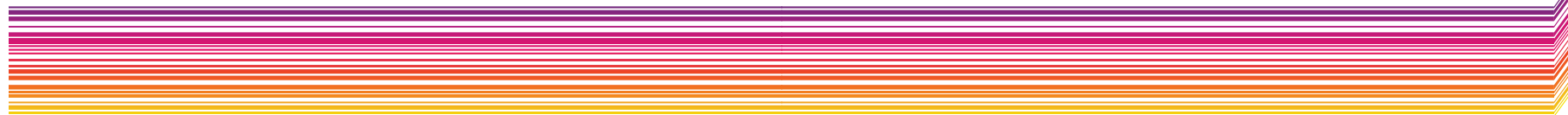
K3 Retail deliver multi channel solutions that enables retailers to create joined up shopping experiences for their customers whether they choose to buy on-line, direct or in-store.

18 years experience delivering award winning solutions, to more than 100 internationally recognised retail brands, has helped our experienced team of retail consultants develop the most complete range of multi channel retail solutions available to Microsoft Dynamics AX or NAV users. As a Microsoft Gold Certified Partner, member of Microsoft's Partner Advisory Council for Retail, invited member of Microsoft's Inner Circle and Presidents Club, we offer a clearly defined roadmap and proven products backed up by Microsoft's \$2billion investment in the Dynamics platform.

Our ability to translate thought leadership and multi channel experience into innovation and effective retail solutions has benefited customers including: Agent Provocateur, American Golf, Beales Department Stores, Booths Supermarkets, Carpetright, Clinton Cards, Dobbies Garden Centres, Dreams, Gamestation, GameStop, Give, Jigsaw, Kiddicare, Ryman's, Smyths Toys, SpaceNK, and The White Company.

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