

# Retail Snapshot

## Retail Key Messages

Symbol focuses on several critical areas in its end-to-end retail enterprise mobility solution approach. From the associates to the customers to the front- and back-office functions that form the operational structure of any store, Symbol retail solutions drive top line growth by:

- Transforming the customer experience
- Enhancing associate effectiveness
- Increasing supply chain efficiency

Symbol retail solutions help retailers both big and small grow and compete in an industry where efficiency, differentiation and customer service are predictors of success or failure.

There are a number of forces driving retailers to update their systems that focus on customers, associates and supply chain. Many of these forces are happening in parallel.

### **Multiple, Parallel Waves of Change**

- Aging technology installed base
- Maturing technologies
- New global standards
- Connected store environment
- New software architectures
- Customer, competitive and labor pressures
- Solution provider mergers and acquisitions
- Retail mergers and acquisitions
- Cross segment and new competition

All of these forces are relevant, but the primary force is (and likely always will be) **pressure for top line growth.**

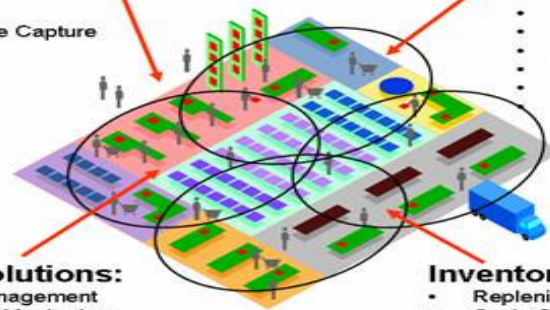
## Where Mobility Matters in Retail

### Point of Sale Solutions:

- POS Scanning
- Mobile POS
- Wireless POS
- Payment/Signature Capture
- Age Verification

### Customer Solutions:

- Clientelling
- Customer Service Kiosks
- Gift/Wish List Registry
- Loyalty Programs
- Assisted Selling
- Portable Shopping
- Price Checking
- Hot Spot Service



### Associate Solutions:

- Task Force Management
- Wireless Video Monitoring
- Mobile Manager/Supervisor
- Learning On-Demand
- Mobile HR Applications
- Merchandise Locator
- Competitive Price Checks
- POS Manager

### Inventory Solutions:

- Replenishment
- Cycle Counting
- Perishable Management
- Receiving/DSD
- Planograms
- Physical Inventory
- Price Verification
- Price Markdowns
- Sign Maintenance

## Selling Tips

- Know the current total IT spend by major category
- Know the names of the key competitors to the retailers that you are selling to
- Review annual reports and 10-Ks for number of stores, key strategic initiatives and competitive information
- Schedule store and DC visits to understand inventory management, pricing, merchandising and operations practices

## About Symbol

Symbol Technologies, Inc., The Enterprise Mobility Company™, is a recognized worldwide leader in enterprise mobility, delivering products and solutions that capture, move and manage information in real time to and from the point of business activity. Symbol enterprise mobility solutions integrate advanced data capture products, radio frequency identification technology, mobile computing platforms, wireless infrastructure, mobility software and world-class services programs under the Symbol Enterprise Mobility Services brand. Symbol enterprise mobility products and solutions are proven to increase workforce productivity, reduce operating costs, drive operational efficiencies and realize competitive advantages for the world's leading companies. More information is available at <http://www.symbol.com>.

**symbol**  
The Enterprise Mobility Company™

# Retail Snapshot

## Competitive Advantage

- Integrated network and device deployment, management and support
- Platform architecture serves as foundation for future extensibility

Feature Area	SYMBOL	Device Vendors	Device Mgmt. Vendors	Network Equip. Vendors	Network Mgmt. Vendors
Network & Device Correlation	✓				
Integrated Asset Mgmt.	✓				
Platform Architecture	✓				
Rapid Deployment	✓				
Remote Control	✓	Partner	✓		
Application Integration	✓	Partner	✓		
Application Development Tools	✓	Partner	✓		
Device Provisioning	✓	Partner	✓		✓ (some)
Device Monitoring	✓		✓		✓ (some)
Network Management	✓	Partner	Partner	✓	✓
Network Monitoring	✓	Partner	Partner	✓	✓

## Functional Pain Points

Function	Activities	Pain Points	Symbol's Play
<b>Store Ops</b>	Front of store (selling) Store floor (stocking) Back Room(receiving)	Lines, queues Inconsistent customer service Out of stocks Staffing/Scheduling Inventory/Control Labor mgmt.	Fast throughput scanners Mobile POS solution Payment Device Wireless POS Inventory management Mobile Computers Portable Shopping System
<b>Merchandising</b>	Retail mix: Right product Right placement Right time Pricing (markdowns) Plan-o-grams	Lost sales (due to bad pricing) Lost market Lost sales	Mobile merchandising applications Store execution of applications
<b>Marketing</b>	Advertising Promotions Competitive price checks	Data organization ROI Real-time competitive analysis	Mobile price checker Portable Shopping System MK2000 Payment Device
<b>IT</b>	Deployment Integration Maintenance	Integration with existing systems	DOS-CE migration strategy Migration and support Best practices
<b>HR</b>	Personnel handling	Training/usability Scheduling	MK2000
<b>Finance</b>	Purchasing Leasing Depreciation calc.	Financing ROI/TCO	Leasing options Best solution TCO in industry

## Top Trends

### Consumer Challenges

- Decline in customer store visits per week, month, year
- Shopping no longer for entertainment
- Shrinking loyalty due to education, time, media overload
- Retailers driving customer-centric marketing strategies
- Top customer dissatisfaction is "employees' lack of knowledge"
- Shopping experience quality is a competitive weapon

### Personnel/Associate Challenges

- Increasing associate turnover
- More work and less people
- Increased assortments
- Language and culture issues
- Faster product cycles
- Can't risk empowerment
- Largest variable store expense – common manager lever
- Workforce management technology is competitive

# Retail Snapshot

## Solutions That Enhance the Retail Customer Experience

### PSS – Customer-Centric Marketing

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• POS application</li> <li>• Central server</li> <li>• Terminal concentrator</li> <li>• Audits</li> <li>• Messaging</li> <li>• Promotions</li> <li>• Shopping lists</li> </ul>	<ul style="list-style-type: none"> <li>• PSS terminal</li> <li>• Locking cradle</li> <li>• PSS fixtures</li> <li>• Entrance head / micro kiosk</li> <li>• Wireless switch</li> <li>• Access ports</li> <li>• MSP</li> <li>• Services</li> </ul>	<ul style="list-style-type: none"> <li>• ↑ Customer satisfaction</li> <li>• ↑ Consumer-centric marketing</li> <li>• ↓ Labor cost</li> <li>• ↑ Operations efficiencies</li> <li>• ↓ Shorter queues</li> <li>• ↑ Basket size</li> </ul>

### Micro Kiosk

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• Price checking</li> <li>• Product locating</li> <li>• Time &amp; attendance</li> <li>• Music/listening kiosk</li> <li>• Task allocation/resource management</li> <li>• Training kiosk</li> </ul>	<ul style="list-style-type: none"> <li>• Payment device</li> <li>• Micro kiosks</li> <li>• Printers</li> <li>• Wireless Switch</li> <li>• Access ports</li> <li>• MSP</li> <li>• Service</li> </ul>	<ul style="list-style-type: none"> <li>• ↑ Customer satisfaction</li> <li>• ↑ Consumer-centric marketing</li> <li>• ↓ Labor cost</li> <li>• ↑ Operations efficiencies</li> </ul>

### Mobile Point of Sale

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• POS application</li> <li>• Item lookup</li> <li>• Payment options presently credit only</li> <li>• Receipt printing (Zebra)</li> <li>• POS returns</li> <li>• Suspended transaction</li> </ul>	<ul style="list-style-type: none"> <li>• Mobile computer(s)</li> <li>• Mag-Stripe Reader</li> <li>• Charging cradle(s)</li> <li>• WLAN</li> <li>• Wireless Switch</li> <li>• Access ports</li> <li>• MSP</li> <li>• Service</li> </ul>	<ul style="list-style-type: none"> <li>• ↑ Customer satisfaction</li> <li>• ↑ Faster POS</li> <li>• ↑ Operations efficiencies</li> </ul>

### Mobile Sales Assistant

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• Item lookup in-store and locator</li> <li>• Item lookup in chain</li> <li>• Inventory balance</li> <li>• Future order review</li> <li>• Place order on-site</li> </ul>	<ul style="list-style-type: none"> <li>• Mobile computer(s)</li> <li>• Charging cradle(s)</li> <li>• WLAN</li> <li>• Optional WWAN/PAN</li> <li>• Wireless Switch</li> <li>• Access ports</li> <li>• Service</li> <li>• MSP</li> </ul>	<ul style="list-style-type: none"> <li>• ↑ Sales</li> <li>• ↑ Customer satisfaction</li> <li>• ↑ Consumer-centric marketing</li> <li>• ↓ Labor cost</li> <li>• ↑ Operations efficiencies</li> </ul>

## Solutions That Increase Retail Associate Effectiveness

### Mobile Manager

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• Security</li> <li>• Sales reporting</li> <li>• Labor scheduling</li> <li>• Comm device</li> <li>• POS monitoring</li> <li>• Price checking</li> <li>• Web clients</li> <li>• Scan ahead/MPOS</li> <li>• Planograms</li> <li>• Email</li> </ul>	<ul style="list-style-type: none"> <li>• Mobile computer(s)</li> <li>• Charging cradle(s)</li> <li>• WLAN</li> <li>• Optional WWAN/PAN</li> <li>• Wireless Switch</li> <li>• Access ports</li> <li>• MSP</li> <li>• Service</li> </ul>	<ul style="list-style-type: none"> <li>• ↑ Operating cost</li> <li>• ↑ Management productivity</li> <li>• ↓ Walk time</li> <li>• ↑ Communications</li> <li>• ↑ Store operations</li> <li>• ↑ Customer sat</li> <li>• ↑ Merchandising</li> <li>• ↑ Extend POS</li> </ul>

### Age Verification

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• Driver's license formats</li> <li>• Read and detect birth date field</li> <li>• Parameters set for correct age based on municipality</li> <li>• Apply birth date against parameters</li> </ul>	<ul style="list-style-type: none"> <li>• Imager or 2D capable scanner to attach to POS</li> <li>• MSP</li> <li>• Service</li> </ul>	<ul style="list-style-type: none"> <li>• Positive proof of age verification log</li> <li>• ↓ Criminal penalties</li> <li>• ↑ Customer satisfaction</li> <li>• ↑ Productivity</li> <li>• ↓ Liability exposure</li> </ul>

Continued on next page

# Retail Snapshot

## Solutions That Increase Retail Associate Effectiveness (continued)

### Voice over IP (VoIP)

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• PTT</li> <li>• Access PSTN</li> <li>• Intercom broadcasts</li> <li>• Individual paging</li> <li>• Silent security</li> <li>• Text messaging</li> <li>• Store &amp; forward</li> </ul>	<ul style="list-style-type: none"> <li>• Mobile computer(s)</li> <li>• Charging cradle(s)</li> <li>• WLAN</li> <li>• Optional WWAN/PAN</li> <li>• Wireless Switch</li> <li>• Access ports</li> <li>• MSP</li> <li>• Service</li> </ul>	<ul style="list-style-type: none"> <li>• ↓ Operating cost</li> <li>• ↓ Redundant systems</li> <li>• ↑ Management productivity</li> <li>• ↓ Walk time</li> <li>• ↑ Communications</li> <li>• ↑ Store operations</li> <li>• ↑ Accuracy</li> <li>• ↑ Customer sat.</li> </ul>

### ADC - Pharmacy Pedigree

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• Electronic record of Rx script</li> <li>• Review for errors against database</li> <li>• Long-term storage and retrieval</li> <li>• Signature capture</li> </ul>	<ul style="list-style-type: none"> <li>• Handheld Imager</li> <li>• Service</li> <li>• Payment Device</li> </ul>	<ul style="list-style-type: none"> <li>• ↓ Devices at POS</li> <li>• ↓ Rx liability insurance</li> <li>• Future-proof scanning</li> <li>• ↓ Operating cost</li> <li>• Data accuracy</li> <li>• ↓ Data entry</li> <li>• ↑ Archive</li> </ul>

## Solutions That Drive Retail Supply Chain Efficiency

### Mobile Dispatch, Pickup & Delivery

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• Dispatch</li> <li>• Scan-on/Scan-off</li> <li>• Pickup &amp; delivery tasks</li> <li>• Proof of Delivery (POD)</li> <li>• Messaging</li> <li>• Material tracking</li> </ul>	<ul style="list-style-type: none"> <li>• Mobile computer(s)</li> <li>• Vehicle cradle(s)</li> <li>• WLAN/ WWAN/ PAN/</li> <li>• Wireless Switch</li> <li>• Access ports</li> <li>• Charging cradles</li> <li>• MSP</li> <li>• Service</li> </ul>	<ul style="list-style-type: none"> <li>• ↑ Freight visibility</li> <li>• ↓ Operating cost</li> <li>• ↑ Driver productivity</li> <li>• ↑ Vehicle utilization</li> <li>• ↓ Cycle time</li> <li>• ↓ Stops/hour</li> <li>• ↑ Collections</li> <li>• ↑ Data accuracy</li> <li>• ↓ Mis-ships</li> <li>• ↓ Data entry</li> <li>• ↑ Freight claims</li> </ul>

### Mobile Warehouse Management

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• Directed task mgmt                             <ul style="list-style-type: none"> <li>- Receiving</li> <li>- Put-away</li> <li>- Storage</li> <li>- Picking</li> <li>- Packing</li> <li>- Shipping</li> </ul> </li> <li>• Cross-docking</li> <li>• Inventory mgmt.</li> <li>• Quality control/inspection</li> </ul>	<ul style="list-style-type: none"> <li>• Mobile Computers</li> <li>• Vehicle Computers</li> <li>• Handheld Scanners</li> <li>• WLAN/VOIP</li> <li>• Wireless Switch</li> <li>• Access ports</li> <li>• Charging cradles</li> <li>• MSP</li> <li>• Service</li> </ul>	<ul style="list-style-type: none"> <li>• ↓ Cost</li> <li>• ↑ Inventory accuracy</li> <li>• ↑ Labor productivity</li> <li>• ↓ Cycle time</li> <li>• ↑ Throughput</li> <li>• ↑ Asset utilization</li> <li>• ↑ Storage efficiency</li> <li>• ↑ Order fill rates</li> <li>• ↓ Data entry</li> <li>• ↓ Freight claims</li> </ul>

### Mobile Maintenance

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• Work order management</li> <li>• Parts inventory management</li> <li>• Tool crib management</li> <li>• Real-time access to technical resources</li> </ul>	<ul style="list-style-type: none"> <li>• Mobile Computers</li> <li>• WLAN/ WWAN</li> <li>• Wireless Switch</li> <li>• Access ports</li> <li>• Charging cradles</li> <li>• MSP</li> <li>• Service</li> </ul>	<ul style="list-style-type: none"> <li>• ↓ Cost</li> <li>• ↑ Inventory accuracy</li> <li>• ↑ Labor productivity</li> <li>• ↓ Mean-time to repair</li> <li>• ↓ MRO inventory</li> <li>• ↑ Asset utilization</li> <li>• ↓ Equipment downtime</li> <li>• ↑ Accuracy of records</li> <li>• ↓ Freight claims</li> </ul>

### Mobile Fleet Management

Application Components	Symbol Components	Value Proposition
<ul style="list-style-type: none"> <li>• Automated Vehicle Location (AVL)</li> <li>• Vehicle/driver performance monitoring</li> <li>• Driver hours of service logs</li> <li>• Fuel tax reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Mobile Computers</li> <li>• WLAN/ WWAN/PAN</li> <li>• Wireless Switch</li> <li>• Access ports</li> <li>• Charging cradles</li> <li>• MSP</li> <li>• Service</li> </ul>	<ul style="list-style-type: none"> <li>• ↑ Vehicle utilization</li> <li>• ↓ Out of route miles</li> <li>• ↑ Driver productivity</li> <li>• ↓ Operating cost</li> <li>• ↓ Cycle time</li> <li>• ↓ Stops/hour</li> <li>• ↑ Data accuracy</li> <li>• ↓ Mis-ships</li> <li>• ↓ Service personnel</li> <li>• ↑ Data entry</li> </ul>