# The State of Store Comms

Retail is changing. Shouldn't Store Communications change, too?



A new study conducted by Qualtrics on behalf of Zipline surveyed 356 retail professionals in the U.S. and Canada to find out whether comms is being disrupted as the industry undergoes transformation.

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### **EXECUTIVE SUMMARY**

Store closures. Furloughs. Dark stores. BOPIS. Curbside. The Great Resignation.

2021 saw so many shifting trends and priorities, and left many retail organizations reeling.

In the midst of it all, we learned what separates thriving retail brands from those that falter. We know that today's successful retailers fully embrace change. They constantly experiment to find the best path forward and then follow-up quickly with other good ideas.

Like Darwin said, it's not the smartest that survive — it's the ones that adapt the quickest. And the key to adaptation is communication.

That's why we created the Zipline State of Store Comms report: to establish an industry benchmark for an historically overlooked and underserved section of the retail organization. We want to inspire executives and communications professionals to reconsider the way they are currently communicating to stores and check their assumptions around "status quo" communications methods.

This report reveals that 85 percent of retailers have invested in the headcount and tools necessary to support a full-time, dedicated store communications team — most of them made up of two or more individuals. But how are retailers measuring the impact of these investments? Almost half still rely on anecdotal evidence via in-person store visits and opinion surveys.

From a tactical perspective, more than half of retailers surveyed do not maintain a workload planning calendar to map out communications in advance — even though retailers that do are over 15 times more likely to feel communication their stores receive from HQ is "always accurate."

Perhaps most concerning is the fact that "comms channel overload" still plagues the industry. More than half of the retailers we surveyed use four or more channels for Store Communications. Some use as many as 12. Retailers that don't consolidate platforms risk disseminating conflicting information, confusing teams, and slowing the business.

Our hope is that retail leaders can use data like this to look within and make the most of the incredible talent, ideas, and technologies already within their organization. By learning how to communicate with their stores more effectively, leaders can truly tap into the full potential of their field teams.

Melissa Wong CEO & Co-Founder, Zipline



### **Key Findings**

Companies that have access to auto-generated readership + task execution metrics are 6.5 times more likely to feel their field teams understand exactly where to go to get the information they need to do their jobs

Companies that do not measure the effectiveness of their store/location communications were 11 times more likely to feel their field teams did not read all of the communication sent to them

Organizations using a workload planning calendar were over 15 times more likely to feel communication stores/locations received from HQ is always accurate.

Companies with a well structured publishing cadence were 2.5 times more likely to have employees read communications from HQ

Of companies that do not target specific audiences with their communications only 5.13% believe their field teams understand exactly where to go to get the information they need to do their jobs.

Companies that use 5 or more channels are 11 and a half times more likely to believe their employees do not understand exactly where to go to get the information they need to do their jobs

**98.8% of Zipline customers** polled agree that the communication stores/locations receive from HQ is clear and concise.

### **Study Demographics**

	fleet size (number of stores)		count by role		Respondent count by department	
	10-50	54	Director/VP	89	Communications	60
	51-100	86	Executive/C-Suite	39	Human Resources	50
	101-500	65	Individual Contributor	33	Learning and Development	17
	501-1000	66	Manager/Sr. Manager	181	Marketing	19
l	1000+	85	Other	14	Other	55
					Store/Retail Operations	113



### Introduction

The average person might have trouble understanding what "store comms" actually is. After all, not everybody has worked in a retail job where they've been on the receiving end of messaging from HQ. Unless you've managed a store, or worked on the store support side of a major retailer at corporate, you probably aren't aware of the specific nuances of this field of internal communications. In a word, it's "niche."

But Store Communication is incredibly important. Every day, there are dozens (maybe hundreds) of decisions being made at a retailer's corporate headquarters: which product to buy, and how much. Which promotion to run, how to advertise it, how to measure its effectiveness. There are teams deciding whether or not it makes financial sense to switch to a different receipt paper vendor. There are teams working around the clock to figure out if pricing a pair of socks at \$4.99 instead of \$4.95 is actually a good idea.

Every single one of these decisions impacts that retailer's stores. When one of these decisions is made, stores need to know about it.

1.1: Store Communications is solidly a "full time job," requiring resources and expertise.

Most companies understand that a headcount investment is necessary in order to manage communications effectively.

Despite the fact that little is understood about Store Communications outside of the retail industry, the vast majority of retail organizations do have a person, or a small team, responsible for wrangling all the messaging that headquarters teams need to get to the field.

This is an encouraging sign, as making the case for increased store comms resources or budget is undoubtedly easier if an organization acknowledges that it's a full-time job.



Within the 85% of respondents who have a dedicated store comms team, the size of that team varies:



The majority of teams are moderately sized — between 2-3 people. And in a somewhat surprising twist, we learned that a good number of teams are actually relatively large — greater than four people. This makes sense because, in addition to managing a daily cadence of communication from HQ to stores, Store Communications teams may also tackle special projects — like field trainings or large-scale store manager conferences that require building the delivering content to an internal audience. They are also often tasked with exploring and deploying new processes and technology that facilitate a tighter, more efficient feedback loop between HQ and stores.

Overall, it's safe to assume that Store
Communications is a moderate cost center,
headcount-wise. This means that retailers should
be thinking about how to rationalize these
resources. Multiple store comms team members
also means companies will need to support these
teams with technology and processes that
facilitate better collaboration, especially as
hybrid work becomes more common.

### Q:

Does store count correlate with the size of a store communication team's resources?

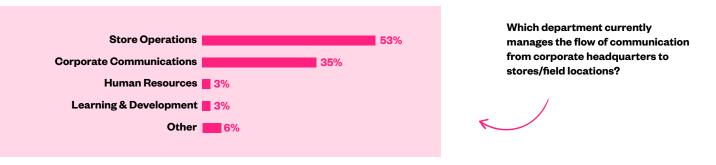
### A:

For the most part, yes. Organizations with less than 50 stores in their total fleet were three times more likely to employ a store communications team of only a single person. Smaller fleet sizes were also associated with a higher likelihood of not having a dedicated store communications team at all.



## 1.2: The vast majority of Store Communication responsibilities sit either within Store Operations or Corporate Communications

To a lesser extent, Human Resources functions are in charge of managing this piece of the business.



While it's clear that companies believe successful Store Communication requires a dedicated team, where to put that team still remains a bit of a conundrum. Store Operations is the most popular pick, but Corporate Communications is also a relatively common choice.

Store Operations teams are traditionally accountable for any business processes and initiatives that keep a retailer's brick-and-mortar fleet running smoothly — and that's a broad scope of responsibility. Everything from visual merchandising to loss prevention to back-of-house technologies to sales training likely falls under the remit of Store Operations. Store Operations teams usually manage the store labor budget, which is a significant portion of a retail organization's P&L.

### A Tale of Two Departments: Store Operations & Corporate Communications



In comparison, the scope of a corporate communications team could not be more different. The breadth of responsibilities underneath corporate comms is equally large. Most teams are responsible for leading both external and internal company communications, enhancing brand recognition, managing corporate media relations activities, and messaging the overall vision, mission, and values of the organization. From a financial perspective, corporate communications teams are typically seen as a "cost center"; their day-to-day efforts do not directly impact a retailer's revenue, and therefore they may have less bargaining power when it comes to advocating for resources and budget.

So what implications does this have for Store Communications as a function? Perhaps most importantly, store operations and corporate communications do not roll up to the same C-suite leader. Usually corp comms falls under HR or the office of the CEO; Store Ops sits under the SVP Stores/COO. When you think about how these different leaders might hold their teams accountable, it becomes clear: what success looks like for Store Communications at one retail company may look completely different from what success looks like at another.

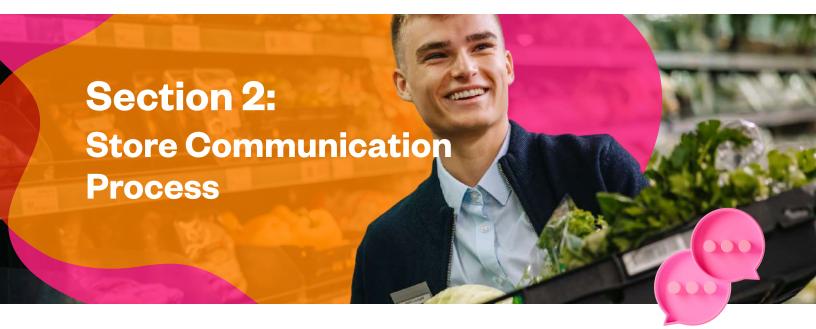
Additionally, none of these departments automatically has oversight over every piece of the business that impacts stores. If store comms sits within store ops, they may have the inside scoop on labor allocation and sales training initiatives, but are likely to be cut out of internal discussions around hot-button PR issues. Similarly, corporate communications typically has its finger on the pulse of the investor sentiment, but doesn't know the first thing about a merchandising strategy. This is why it's critical that a company's Store Communication strategy is built around strong cross-functional partnerships.



# Our Take: Companies need to look to define career paths and development opportunities for Store Communications team members.

Store Communications is underserved in the greater professional communications community. After all, there are no large professional organizations or industry events fully dedicated to Store Communications. And unlike Corporate Communications, PR, or Store Operations, Store Communications isn't a career. ("SVP of Store Communications" is a title that doesn't exist at most retail companies.) Finally, there is still debate as to where Store Communications belongs within a retail organization. This fact alone means a career path that includes a stint as a store communicator is likely to be non-linear — if not fraught with challenges.

Managing communication from HQ to stores can easily feel overwhelming. Without proper career guidance and development opportunities, employees may feel burnt out and look for a job elsewhere. But managing a retail organization's Store Communication is actually an incredible stepping stone to any number of leadership positions. A Store Communications manager has unique insight into virtually every aspect of the business that impacts stores. They understand first-hand how multiple initiatives come together to influence the customer experience. And in many ways, they are closer than most HQ employees to both the customer and store employees. Companies that neglect to engage and retain store communicators through clear career paths risk missing out on future strategic leaders that have a true 360-degree understanding of their company.



### Introduction

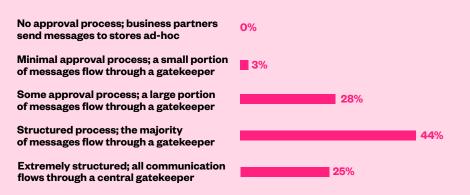
Managing store communication looks different from managing employee communication in general. Because the day-to-day responsibilities of a store manager or frontline associate look nothing like that of a white collar worker who sits in an office all day — the methods and tactics used to get the right message to the right person at the right time are unique.

This is why it's not just important to consider the content of the messages a team sends to stores, but also the way in which messages are planned, crafted, and delivered.

# 2.1 When it comes to process, structure pays off.

Most retailers have a well-structured communication approval process and publishing cadence.

How structured is your current
HQ-to-store/location communication
approval process?



Survey results show that no matter the size of a retail organization, most store communications teams are firmly "gatekeepers" of information between HQ and stores.

This means that team members likely won't create every message for their stores from scratch. Instead, they'll rely on partners in other departments — like Marketing, Merchandising, Loss Prevention, etc. to provide content. From there, it's up to the Store Communications leader to determine how to communicate: in addition to editing for voice/tone, they'll decide what level of information is included, which communications vehicle will be used, when the message will be delivered, and who in the field will need to see it.

28%

25%

No approval process; business partners send messages to stores ad-hoc

O%

Minimal approval process; a small portion of messages flow through a gatekeeper

Some approval process; a large portion of messages flow through a gatekeeper

Structured process; the majority of messages flow through a gatekeeper

Extremely structured; all communication flows through a central gatekeeper

Retail is an especially chaotic industry. It is up to retailers to manage that chaos for employees by establishing a communication structure that sets them up for success. Many retailers create cadences of communication to manage the volume of information they need to transmit. Survey responses indicated that well-timed messages are crucial in giving companies leverage over their competition. In fact, there was a direct correlation between a well-structured publishing cadence and reported likelihood of readership.

Companies with a well structured publishing cadence are

2.5 times more likely

to have employees read communications from HQ.

The relationship makes sense. When field teams know when to expect new messages, they're more likely to read the content HQ sends in a timely fashion. As a bonus — they aren't constantly pulled away from customers on the sales floor to check for new communication ad-hoc.

# Our Take: Once-a-day bundles are key to improving readership and execution.

Many retailers batch their store communication into bundles which are sent in weekly cadences. Although the plan is always to send information periodically, this rarely ends up being the case. The biggest problem with weekly communication is that it is never actually weekly — it somehow always turns into daily! That's because a weekly cadence won't allow companies to effectively respond to a sudden competitive sale that threatens their business. So instead they end up sending information on the normal weekly cadence, followed by daily change updates, clarifications, and reminders.

On the other hand, there is a tendency to want to communicate information as soon as it's known. But pummeling stores with real-time updates throughout the day creates confusion, chaos and distracts from customer focus. It also takes store teams off of the store floor (which defeats the purpose and is expensive labor spend!)

At Zipline, we've found that a daily communication cadence is the most effective way to transmit timely information from headquarters to stores. Retailers should stick to a once-a-day publishing cadence and, unless it's an emergency, hold off publishing new messages until the next day. This daily repetition builds better habits: Associates check for updates immediately after clocking in, then fully shift their attention on to their customers' needs without anxiously hitting "refresh" on their email every two minutes (or worse — running to the back office to check for new messages). Instead of becoming a source of constant stress, communication becomes instinctual, just like brushing your teeth in the morning.



### 2.2 More planful communication = more accurate communication

... but many retailers still struggle with planning in the first place.

An ounce of prevention is worth a pound of cure — especially when it comes to store communications. While there are always last-minute updates that need to be communicated to stores, survey responses show that taking time up front to plan out communication and workload pays off in the long run.



Organizations using a workload planning calendar were over 15 times more likely to feel communication their stores receive from HQ is "always accurate."

Unfortunately, when it comes to implementing a workload planning calendar in the first place, almost half of retailers still fall short:





The nearly 50-50 split makes sense. Managing a calendar that supposedly encompasses an entire organization's direction to its field teams is a daunting idea. It requires forming deep relationships with partners across nearly all departments, and then implementing a process that ensures that calendar is kept up-to-date. To be successful, teams would need to constantly negotiate trade-offs between departmental asks to ensure stores don't become overloaded with tasks on a single day.

Managing a workload planning calendar is a full time job — and the data shows this:



Companies that employ a Store Communications team of three people or more are four times more likely to use a workload planning calendar.

The good news? The retailers that do use a planning calendar tend to commit to the process. The majority of these teams plan communications and tasks over a week in advance.



How far in advance are information/tasks usually loaded onto your communication calendar?

More than one week in advance 47%

At least one week in advance 31%

At least one day in advance 22%



### Introduction

Getting things done in stores is hard. Store Leaders (and specifically, Store Managers) are ultimately responsible for the financial performance, customer service metrics, and HR management of their given store. Balancing the needs of their individual location with direction from Corporate is, at best, exhausting. Most store leaders spend their days planning labor schedules, checking displays, helping customers, and coaching their direct reports, which can sometimes be in the dozens. Executing direction from headquarters is simply another task on this unending list.

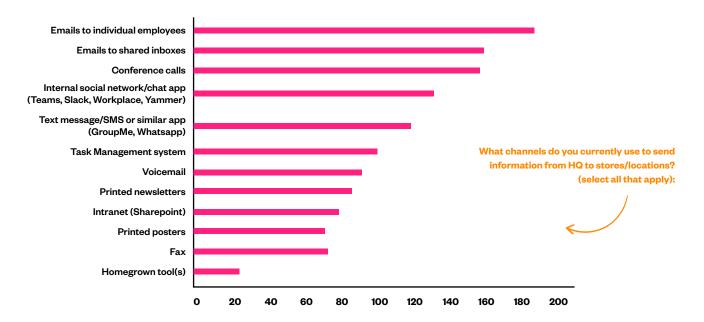
On top of that: store employees don't sit at a desk all day, watching their inboxes for new messages. They don't work a regular, predictable, 9-to-5 schedule. Most don't even have company-provided email addresses.

Getting information in front of store employees so that they can take timely, precise action is hard. Which is why so many retailers aren't great at it.

### 3.1: Retailers continue to suffer from comms channel overload.

More than half of companies surveyed use four or more channels for store communications. Some use as many as 12.

Many retailers rely on more than one communication tool to spread information through their company. Different communication channels satisfy different objectives, and when used properly, they can be quite effective. But most retailers lack the discipline needed to employ these platforms correctly, and their communication channels end up not doing the job they were intended to do.



In a world of multiple communication channels, legacy methods: namely email and phone calls are still king. But these methods are some of the most inefficient for a variety of reasons: the inability to target, to measure, and the noise they create.



### The problem with Email

Email isn't an effective means of communicating with stores. It works when the goal is to inform and delegate, but it's not a great tool to keep track of whether tasks were completed; there's no way of knowing through this communication channel. Stores often don't know whether an email is meant for every store, or whether it is a select store message that the communications manager is sending separately. And stores often find conflicting messages in updates that are sent later. Let's not even get started on message forwarding and reply-alls.

Before implementing Zipline, one 170-store retailer communicated with stores by emailing a weekly newsletter that was created in Microsoft Word. This form of communication resulted in many inefficiencies:

Writing, editing, and designing the weekly newsletter email was cumbersome and time consuming

Because the email was sent on a weekly basis, there was no opportunity to react to day-to-day changes in the business

The email contained information that wasn't relevant to all stores, causing many store managers to be confused about what initiatives were for them and they were spending too much time compiling and searching for information

Because tasks were not assignable, there was no way to follow-up on which tasks were completed and no way to have visibility into the execution

Many retailers have adopted social technologies in the form of employee apps/chat apps, which are good for fostering a sense of community but fall short when it comes to driving consistent execution. This is on par with the trends we've seen post-pandemic, with retailers hastily investing in any technology that can get their message all the way through to frontline and part-time employees.



### Communication channels: More isn't necessarily better

Companies that use more than five channels are 11 and a half times more likely to believe their employees do not understand exactly where to go to get the information they need to do their jobs.

A multitude of communications channels causes confusion. Conflicting messaging is a big problem in Store Communication: Intranet posts, back room binders, emails, text message threads... when stuff updates (and it will), how do you know if your employees are looking at the right thing?

On the other hand, not all communication channels are created equal. And in this way, adherence to a single channel or platform can actually hinder readership and execution, rather than help. A chat from a co-worker doesn't have the same priority as an email from the SVP of a company. But all of these communications can, and should, exist together to provide context for everyone.

It's important to note that the significant drop-off in confidence that "employees understand exactly where to go to get the information they need to do their jobs", happens once an organization reaches five or more channels. This indicates that, to a certain extent, a limited number of different communication channels is necessary — even good.

Why is this? We know that Store Leaders are usually operating in one of three "modes:" "reading mode," "doing mode," or "planning mode."

Maybe a leader has 10 or 15 minutes before the store opens on a Monday morning, so they take time to scan all of the unread messages in their inbox, jotting down important notes for later along the way. This is "reading mode" — best suited to long-form text-based channels like email and portal sites.

Other days — especially weekends, in retail are high traffic days heavy with tasks and promotions. On these days a Manager might only have a minute between clocking in for their shift and helping a line of customers that's stretched out the door. They want to know exactly what needs to be done to move the business forward — that's it. That's all they have time for. That's "doing mode" — a type of mode supported by short form, task-based, checklist-like communication.

Then there's "planning mode." Store Leaders always have one day set aside as their "office day" — usually midweek, when traffic is lower. That day is used for writing schedules for the coming weeks, pulling together sales plans, or focusing on long-term staffing needs. For this mode, teams need access to more forward-looking communication laid out in a calendar format, or perhaps summarized in a weekly newsletter.



# Our Take: Employ communications technology that creates a single source of truth.

In an ideal world, all retailers would implement a communications platform built to suit these three use cases in tandem. Depending on what the Store Leader is focused on, they could view the same communication in one of three ways: a well-written message is built for reading, a task checklist is built for doing, and a calendar is built for planning. Because everything stems from the same system, it's a "single source of truth." This ensures alignment and execution.

Not every retailer has the resources to be able to implement an out-of-the-box system that satisfies all of these requirements. Fortunately, there are best practices that can help establish a similar framework for your fleet, giving them fewer places to check for information, and reducing the likelihood of running into conflicting information.



### Where social apps fall short

To combat difficulties around adoption with clunky enterprise tools, and to address the issue of real-time communication, many retailers deploy some sort of "social media" or chat-type communications platform.

Before switching to Zipline, a 400-store clothing retailer deployed a chat-based internal social network disguised as a store communications platform. They were drawn to the app's slick, instagram-like interface and, as a highly visual and merch-driven company, liked the idea of giving associates an easy way to provide feedback to HQ and submit photo collections of store set-ups.

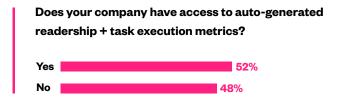
But solving for one tier of the organization didn't solve for all. After rolling out the app, this retailer's execution still suffered because district managers didn't find the tool user friendly. Additionally, with complex publishing and a lack of gatekeeping abilities, getting important directives into the app was difficult and messages were usually buried or fraught with errors. (Imagine 5,000 people in a single Slack channel!) Teams in stores may have enjoyed sharing photos and swapping texts, but the app only solved a tiny piece of the larger communications puzzle.

# **3.2** When it comes to measuring communication effectiveness, there's a lack of hard data.

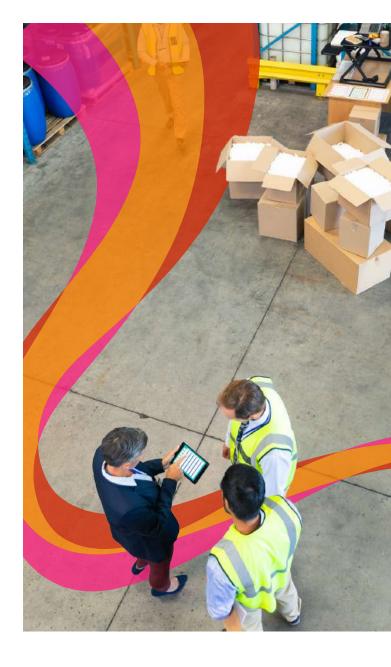
You can't improve what you can't measure.

In the online world, customer data can be collected, analyzed, and reported out in the blink of an eye. But among brick-and-mortar stores there's still a massive delta between "HQ telling stores to do the thing" and "HQ checking if the thing actually happened."

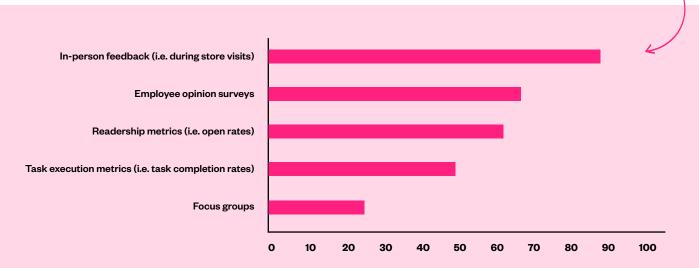
Almost half of retailers surveyed do not leverage "hard data" to determine whether or not their Store Communications are effective — not because they won't, but because they can't. They simply do not have the technology in place that generates these types of metrics on demand.



So how do retailers measure the effectiveness of their communication programs? According to the survey data, the vast majority of retailers still rely on constant in-person visits to understand if communications were received and actioned on, and if the initiatives they spent months developing actually worked. In short — they rely on anecdotal feedback (and in turn, act on assumptions.)



### How do you currently measure the effectiveness of your store/location communications? (Check all that apply)



The overall reliance on qualitative feedback is troubling. Part of the reason why brick-and-mortar retailers struggle to keep up with their online counterparts is because they lack the ability to quickly A/B test concepts, gather data, make strategic changes, and iterate. While qualitative feedback is useful for providing context and color, one person's (particularly overt) opinion can cloud the overall success of a particular message or campaign.

What if stores could move as fast as online and scale what's working fleet-wide in a matter of days, not months? What would they be able to achieve? Higher profits? More customer loyalty?



Companies that have access to auto-generated readership + task execution metrics are 6.5 times more likely to feel their field teams understand exactly where to go to get the information they need to do their jobs.

Companies that do not measure the effectiveness of their Store Communications were 11 times more likely to feel their field teams did not read all of the communication sent to them.

### Our Take: Retailers must implement data-driven Store Communications technology.

From our experience of working with retailers and studying human behavior, we know the only results a business can drive are the ones you track and measure consistently. If a company can't measure execution, it has no way to strategically improve it.

It's clear that retailers need the ability to track the relationship between their communications to stores and the execution rate at each store. This is how they can confidently measure how they might improve their execution.

When evaluating Store Communications platforms, retailers should make sure their pick surfaces actionable insights on what stores need to know (communication) and do (tasks) to every level of the organization:

Publishers should be able to determine the reach a message has across the fleet and for any subsequent updates, tracking if readership trends change with new information over time

Store Leaders should be able to easily view which stores are on track with assignments and which ones are falling behind so follow-ups are targeted and specific

Store Leaders should be able to hold their teams and each other accountable by seeing who in the store is tackling what and when it's been completed

### Conclusion



Communication is the train that brings initiatives from headquarters into stores where execution happens. If the track is broken, nothing gets to stores.

In this way, communication is the conduit for enabling better brand experiences. Sure, it's not as sexy as a new marketing or advertising campaign, nor is it going to immediately bring new customers or win awards... but it's how brick-and-mortar can set themselves apart from their online counterparts.

Think of a great store experience you had lately. Ok, now think of a great email ad you received lately. Which one sticks in your mind more? The in-store memory is way more memorable, personal and relatable. These are the experiences that have the potential to win customers' hearts, minds and wallets — if done in the right way, of course.

The store experience is the best manifestation of a brand; it's the only way a customer can truly experience what that brand is all about. But if that store doesn't know what to do, or isn't executing direction in a consistent way, the brand may lose customers.

Consistent store execution doesn't happen when headquarters only packages information. Effective communication is about making sure that information is organized, received and understood in an actionable way. This takes deliberate investments across people, process, and platforms.

Successful retailers will prioritize investments in their Store Communications function in the following ways:

# Define career paths and development opportunities for store comms team members.

Companies that neglect to engage and retain store communicators through clear career paths risk missing out on future strategic leaders that have a true 360-degree understanding of their company.

# Implement a strong communications cadence (like once-a-day bundles) to improve readership and execution.

Manage the chaos for your employees by establishing a communication structure that sets them up for success.

# Employ technologies and processes that create a single source of truth.

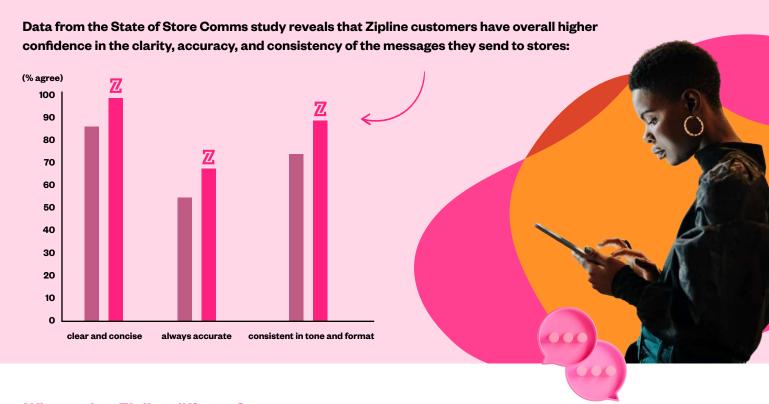
Help establish a framework of "reading," "doing," "planning" for your fleet, giving them fewer places to check for information, and reducing the likelihood of running into conflicting information.

### Invest in data-driven technology.

Make sure your platform surfaces actionable insights on what stores need to know (communication) and do (tasks) to every level of the organization.

### **About Zipline**

Zipline is the only platform purpose-built to drive field team enablement. Powered by communication and real-time insights, Zipline helps field teams understand company priorities and take action on urgent initiatives, while also surfacing data that coaches employees to better performance. Today, more than 60 of the best brands in the world and more than 40,000 remote teams around the globe use Zipline to drive agility, execution, and employee engagement.



### What makes Zipline different?

### Best practices and a best-in-class solution — all rolled into one.

Choosing Zipline means you'll join a community of world renowned brands, learn strategies from the best executors in the world, and participate in customer-only events and roundtables. We have a 5/5 Implementation Happiness rating, a NPS of 90 (versus an average of 41 for most SaaS companies), and comprehensive product training is rolled into your implementation (no need to pull in an expensive outside firm).

### At the intersection of engagement and execution.

Task Management platforms drive better execution, but they feel rigid and punitive. Communications platforms are fun and engaging, but they lack accountability. By bringing everything together, our platform connects the stuff your stores need to know with the stuff they need to do. Your teams know how their work supports the larger picture and have context that enables them to be better store leaders. This knowledge, in turn, drives a higher rate of engagement and execution. Everyone knows what good looks like.

### A true one-stop-shop for store teams.

With an open-API and pre-built integrations with the leading systems field teams rely on every day to get their work done - like Dayforce, Adobe, Docebo, Medallia, and more — Zipline is a one-stop shop for frontline teams. And integrating multiple systems into a single platform doesn't just save employee time, it also enables us to synthesize data from multiple tools into holistic, actionable insights that help drive the business forward.

Learn more today at getzipline.com.