

THE FUTURE OF RETAIL & CONSUMER

From clicks-and-mortar to anticipatory fulfillment.

For more than three decades, Jim Carroll has helped retailers, consumer brands, restaurants, grocers, distributors and CPG leaders understand how fast the customer changes - and how organizations must move with them.

Retail was never about the store. It was always about the shelf coming to you.

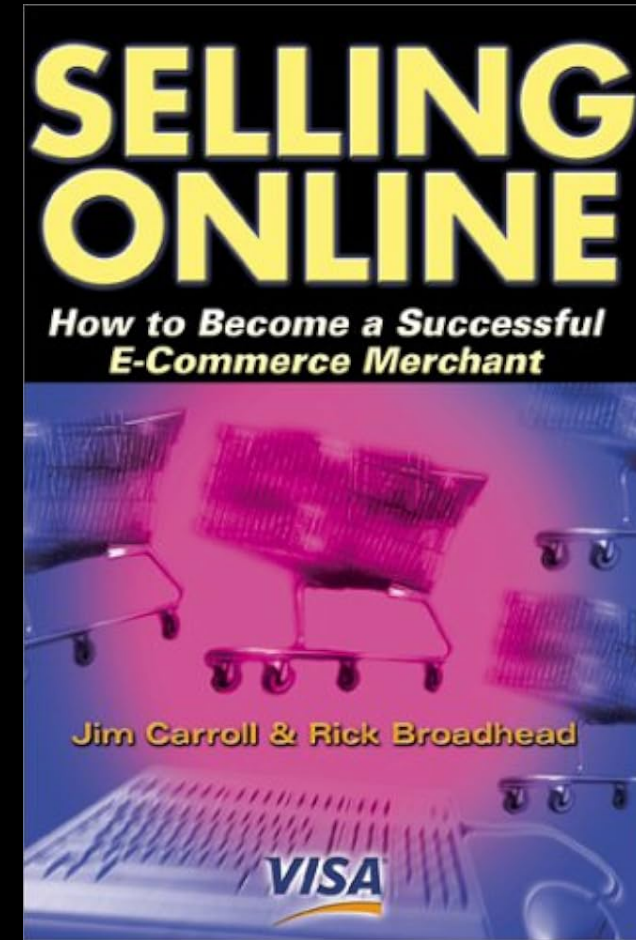


SELLING ONLINE. 1999. VISA-SPONSORED.

Before e-commerce became routine, the book became a practical merchant guide.

Jim Carroll and Rick Broadhead wrote *Selling Online: How to Become a Successful E-Commerce Merchant*. A senior VISA USA executive commissioned a custom edition of more than 60,000 copies, with VISA-specific content, corporate promotion and distribution to leading merchants.

The future was never clicks versus bricks. It was clicks transforming the bricks.



THE VISA-SPONSORED EDITION • 60,000+ COPIES

BEFORE THE E-COMMERCE HYPE SETTLED DOWN.

Clicks-and-mortar realism. B2B supply chains. Empowered customers.

01

NESTLÉ

Senior leadership: ten trends rocking retail, consumer fickleness, hyper-innovation and commoditization.

02

DISNEY RETAIL

Executive team: digital relevance, youth purchasing habits and hyper-velocity consumer markets.

03

GROCERY

CFIG, Save-On-Foods, Loblaw and others: e-grocery, loyalty, changing food preferences and clicks-and-mortar.

04

INGRAM MICRO + GRAND & TOY

B2B commerce, wholesale distribution, channel velocity and online ordering at serious scale.

05

SAP RETAIL

Retail user summits: technology, supply chain, consumer change and retailer operating models.

06

POPAI + ASSOCIATIONS

Merchandising, point-of-purchase innovation and What's Your Tin Can? business-model reinvention.

THREE DECADES INSIDE RETAIL CHANGE.

The terms changed. The structural story did not.

1996-99

CLICKS-AND-MORTAR

E-commerce realism, empowered consumers and B2B supply chains.

2000-05

DIGITAL RETAIL OPS

E-grocery, B2B ordering, loyalty, packaging and supply-chain integration.

2006-14

MOBILE + OMNICHANNEL

Mobile shopping, experience stores, changing checkout and store-as-showroom.

2015-21

AMAZONIAN DISRUPTION

Voice commerce, click-and-collect, dynamic pricing, intelligent packaging and last mile.

2022+

AI COMMERCE

Shopping agents, anticipatory fulfillment, machine customers and real-time personalization.

RETAIL IS A SPEED BUSINESS.

A pacesetter changes the rules and everyone else has to catch up.

Product cycles shrink. Consumer tastes flip. New payment methods spread. Fulfillment expectations reset. The leadership challenge is to recognize what is changing, decide what matters and move before the new expectation becomes table stakes.

The future belongs to retailers who can learn faster than the consumer changes.



ONE KEYNOTE. MULTIPLE WAYS INTO THE FUTURE.

Directions are selected and blended around the category and strategic agenda.

01

THE FUTURE OF RETAIL & CONSUMER

Fast consumers, intelligent commerce and relentless velocity.

02

RETAIL AT THE SPEED OF AI

Shopping agents, dynamic pricing, personalization and machine-mediated commerce.

03

THE STORE BECOMES A SHOWROOM

How logistics and fulfillment redefine physical retail.

04

THE FUTURE OF THE CONSUMER

Attention, trust, health, influence, value and convenience.

05

CPG AT THE SPEED OF CHANGE

Collapsing product cycles, intelligent packaging and supply-chain velocity.

06

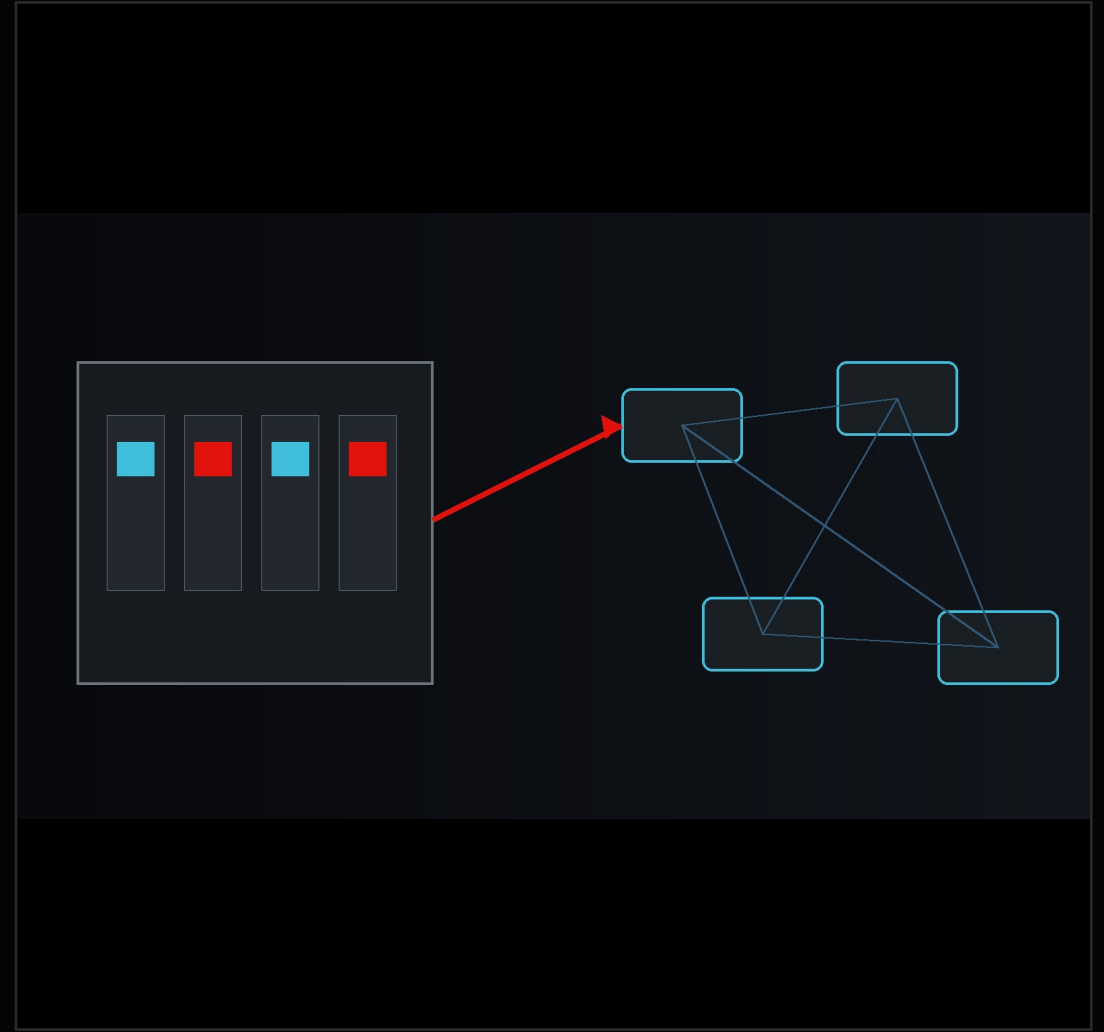
LEADING IN RELENTLESS VELOCITY

Innovation, growth and organizational speed.

THE STORE BECOMES A SHOWROOM FOR THE LOGISTICS SYSTEM.

The back end increasingly defines the front end.

Ship-from-store, click-and-collect, dark stores, micro-fulfillment and integrated inventory make the physical location one node in a larger logistics network.



The store stops being the inventory system and becomes part of the experience system.

THE CASH REGISTER DISAPPEARS.

The phone becomes the store interface.

Mobile payments, handheld checkout, tap-to-pay, digital wallets and cashierless formats turned payment from a place into a background process.

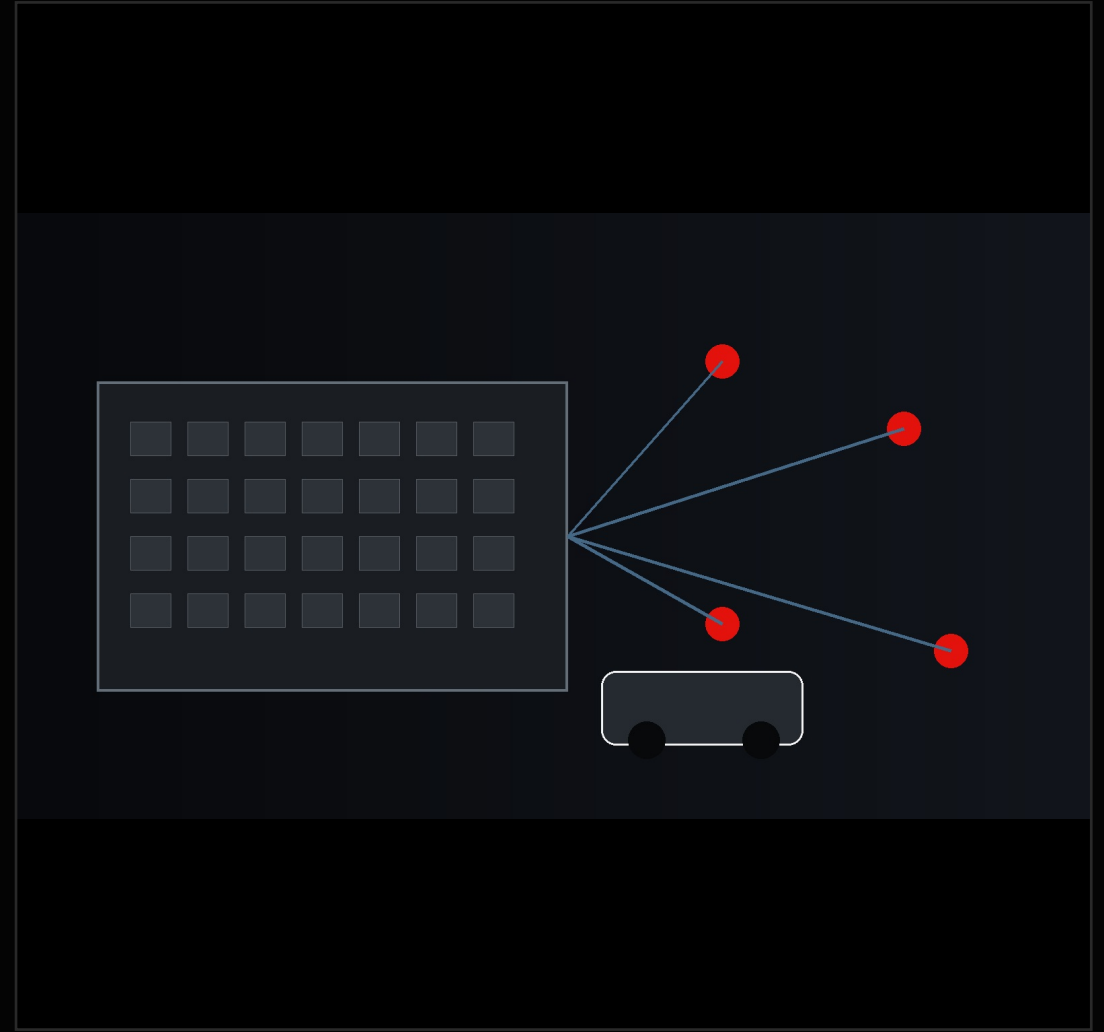


When checkout can happen anywhere, the entire store can be redesigned.

THE FUTURE IS ALL ABOUT FULFILLMENT.

Same-day and next-day expectations reset the competitive clock.

The biggest retail transformation was not always the most visible. Massive software-driven fulfillment networks quietly rewrote the operating model.

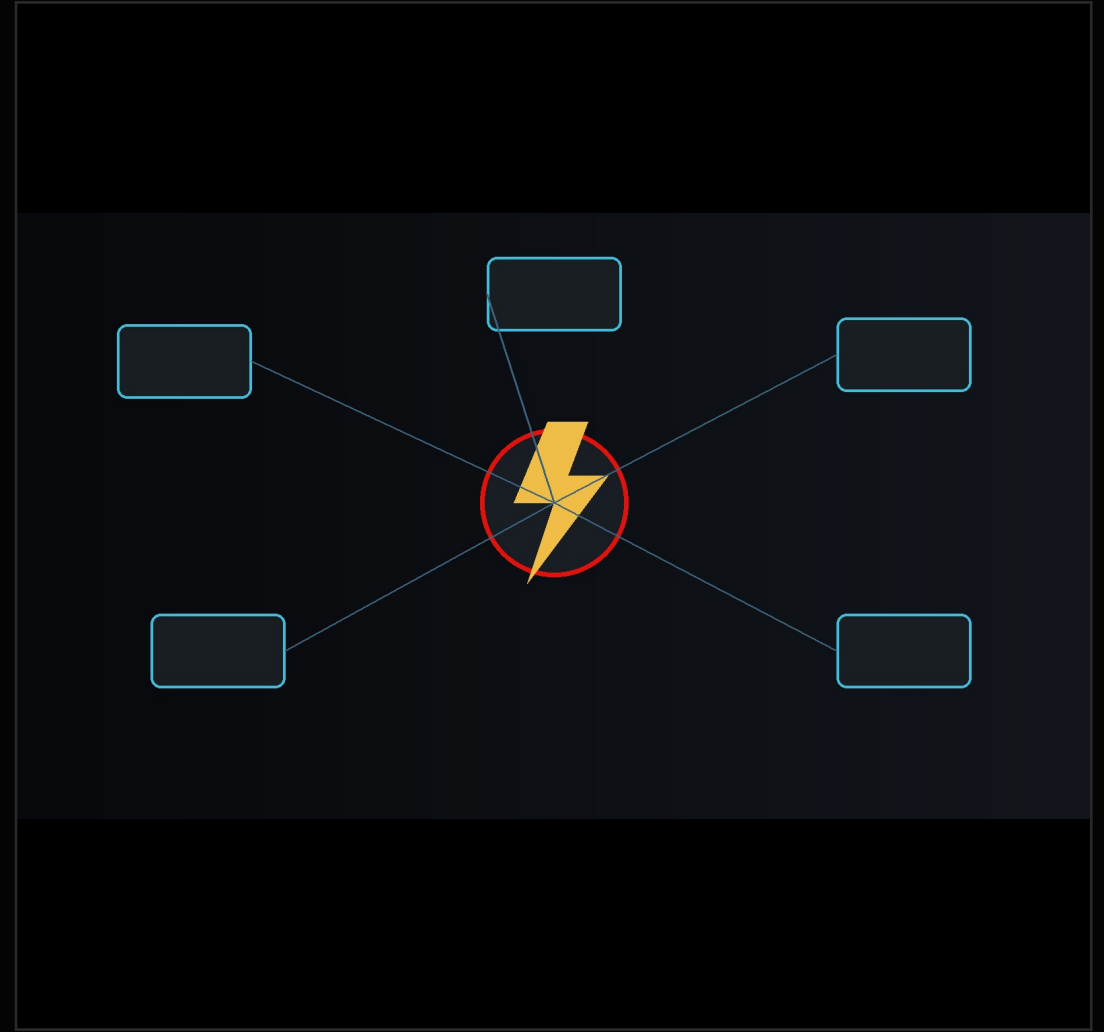


The boring innovation - logistics - beat the photogenic innovation.

THE MACHINE BECOMES THE SHOPPER.

Retailers increasingly sell to people and machines at the same time.

AI shopping agents compare products, check availability, evaluate value, assemble baskets and make decisions. Product data, trust and machine-readable proof become part of merchandising.

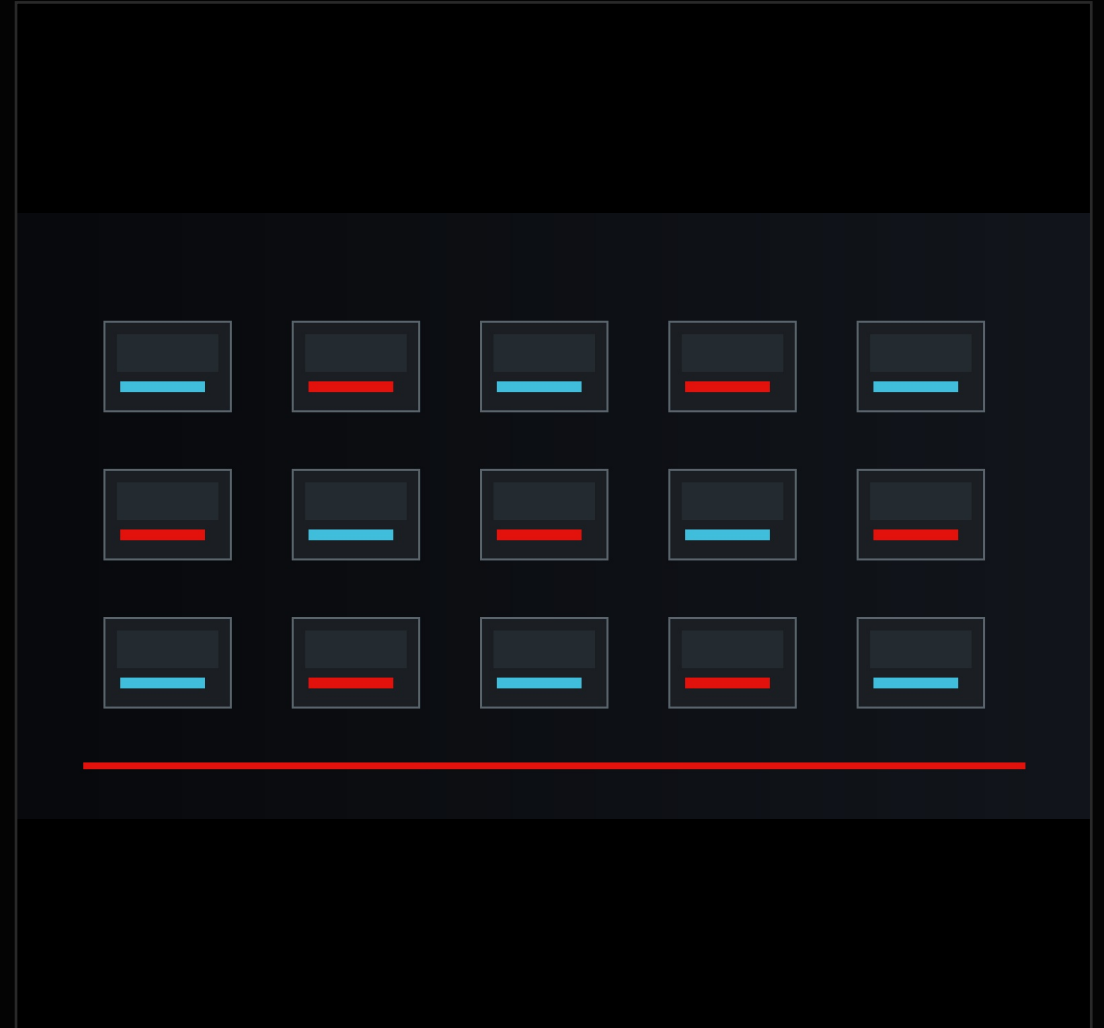


If the machine cannot see you, understand you or verify you, it can route around you.

PRICING BECOMES A SOFTWARE SYSTEM.

Price, promotion and inventory become more dynamic.

Algorithms increasingly connect price, inventory, demand, competition, weather, location, loyalty and promotion in real time.



Price is no longer only a tag. It is increasingly an algorithm.

THE PACKAGE BECOMES PART OF THE PRODUCT EXPERIENCE.

Packaging becomes data, brand experience and logistics infrastructure.

Active packaging, intelligent labels, sustainability, traceability and connected products extend the consumer relationship beyond the shelf.



Packaging stops being only a container. It becomes an information layer.

THE CONSUMER CHANGES FASTER THAN THE PLAN.

Attention, trust, convenience and value are continuously redefined.

Food trends, health priorities, social influence, youth behaviour and value expectations can flip quickly enough to make long product cycles dangerous.



The plan is static. The consumer is not.

THE STORE SHIFTS FROM INVENTORY TO EXPERIENCE.

When products can come to you, the reason to visit changes.

The strongest physical concepts increasingly emphasize discovery, service, advice, entertainment, community and ownership experience.



Experience is what the Web cannot put in a box and ship to your door.

I'VE BEEN MAKING THESE CALLS FOR YEARS.

The structural shifts landed. Some of the spectacle took longer.

1996

CLICKS-AND-MORTAR

The Web transforms stores and supply chains rather than simply killing them.

2012

STORE AS SHOWROOM

Physical retail becomes the front end for logistics and fulfillment.

2015

MOBILE EATS RETAIL

Checkout moves into the phone and away from the register.

2015

FULFILLMENT WINS

Same-day and omnichannel become core infrastructure.

2019

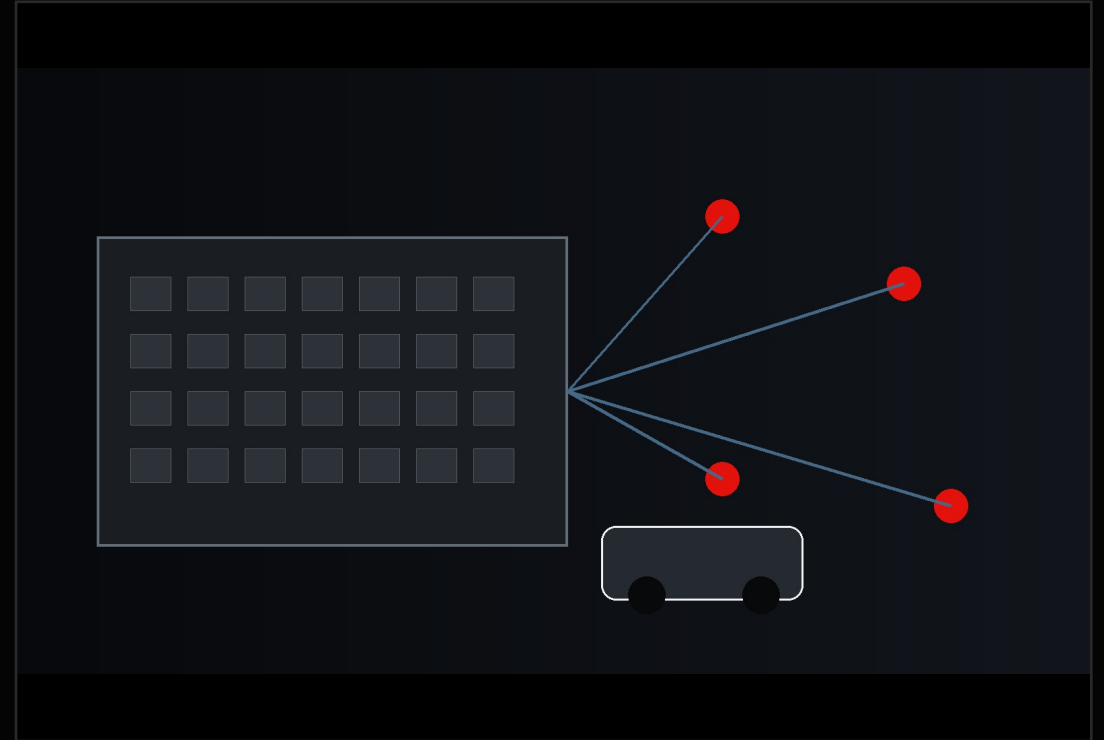
REAL ESTATE REINVENTS

Retail space evolves toward experience and logistics roles.

THE STRUCTURE SHOWS UP. THE SPECTACLE TAKES LONGER.

Good foresight includes grading the misses.

Jim was directionally right that last-mile delivery would become a major battleground. He was too aggressive on the timetable for ubiquitous driveway drone pads and mainstream urban drone delivery. Regulation, economics, airspace, noise and weather slowed the visible technology.



I overestimated the dramatic technology and underestimated the boring infrastructure that actually won.

YUM! BRANDS: GROWTH IN THE MIDDLE OF A DOWNTURN.

A global franchise leadership meeting in Las Vegas.

In 2009, fear was everywhere. Jim's keynote focused instead on growth: international expansion, changing consumer behaviour, mobile technology, brand innovation and the opportunities still emerging despite the recession.



The best leaders acknowledge the crisis - and then get back to growth.

RICH FOODS: THE FUTURE OF RETAIL POST-PANDEMIC.

The changed consumer and the changed operating model.

The CEO invited Jim to open the organization's first major post-pandemic leadership gathering. The assignment: make sense of changed consumer behaviour, retail acceleration, digital habits, fulfillment and the opportunities emerging from disruption.

Retail does not return to normal. It absorbs the new habits and moves on.



THREE ROOMS. THREE DIFFERENT RETAIL FUTURES.

Leadership, brands and retail technology.



THE GAP

Senior executives

End of inventory, consumer velocity and the trends sweeping global retail.



GODIVA / PLADIS

Global leadership

Consumer behaviour, food, supply chain and retail transformation.



REVIONICS

Retail technology

Real-time pricing, attention, data and innovating at the speed of retail.

RETAIL TRANSFORMATION IS LEADERSHIP WORK.

The question is not only what is changing. It is what to do before the change becomes obvious.

01

NESTLÉ

Ten trends rocking retail, consumer fickleness, hyper-innovation and avoiding commoditization.

02

DISNEY RETAIL

Digital relevance, youth purchasing habits and adapting to a hyper-velocity consumer market.

03

TETRAPAK

Packaging innovation, time-to-market, CPG supply chains and continuous business-model transformation.

04

INGRAM MICRO

Channel partners, wholesale distribution, supply-chain velocity and collaborative commerce.

05

SAP RETAIL

Retail technology, user communities and the implications of consumer change.

06

GRAND & TOY

Helping a traditional sales organization embrace B2B e-commerce ordering at serious scale.

MORE PROOF. LESS REPETITION.

Different feedback, all pointing to relevance, research and impact.

“Absolutely stunning. We know that retail and consumer behaviour is changing fast, but you really put it into perspective with detailed insight - it's obvious you did your homework. The best speaker we have ever had!”

RETAIL / CONSUMER CLIENT

“We thought we needed good insight into how we might be impacted by rapid changes in the business environment and consumer behaviour. We got more than we bargained for - concise details and workable action plans.”

LEADERSHIP CLIENT

“A stunning keynote with extremely powerful insight. Humour, energy, deep research and relevant content for our audience. We loved him!”

CLIENT EVENT FEEDBACK

“You were superb! As we make changes your message could not have come at a better time. This group likes tradition but unfortunately that often gets in the way of moving forward.”

LEADERSHIP CLIENT

BUILT FROM YOUR CATEGORY OUTWARD.

A grocery chain, luxury brand, restaurant franchise and pricing platform do not face the same future.

25-50+

HOURS OF CUSTOM RESEARCH

Client calls, retail reports, consumer data, market research, current news, agenda analysis and category-specific examples.

No two presentations are the same because no two retail categories face the same consumer, margin, supply-chain or technology issues.

LISTEN → RESEARCH → MAP THE TRENDS → BUILD THE STORY → CONNECT THE ROOM → LEAVE A PLAYBOOK



ACROSS RETAIL, CONSUMER & CPG.

Retailers, brands, restaurants, grocers, packaging, pricing and supply chain.

01

RETAILERS + BRANDS

The GAP • Disney Retail • Godiva • Pladis • Nestlé • Loblaw • Shoppers Drug Mart • Canadian Tire • Save-On-Foods

02

RESTAURANTS + FRANCHISE

Yum! Brands • Burger King • Subway • Multi-Unit Franchise Conference • Prime Restaurants

03

GROCERY + CONVENIENCE

CFIG • Grocery Innovations Canada • FMI • National Association of Truck Stop Operators

04

RETAIL TECH + VALUE CHAIN

Revionics • Retail Value Chain Federation • APICS • XCelebrate • Ingram Micro • Grand & Toy • SAP Retail

05

PACKAGING + CPG

PMMI • HAVI Global Solutions • Mondi • NatureWorks • TetraPak

06

EARLY E-COMMERCE

VISA USA • AIMS Online Retailing Summit • Retail Council of Canada • Canadian Retailer

WHAT'S YOUR TIN CAN?

A century-old package can become an innovation problem.

Jim used StarKist's shift from the traditional tuna can to a resealable pouch as a simple retail lesson: familiar formats often survive because of habit, not because they are optimal. Innovation begins by asking what assumption is hiding in plain sight.

Your biggest competitor may be your own attachment to the way the category has always worked.



WHAT DOES YOUR RETAIL LEADERSHIP TEAM NEED TO UNDERSTAND NEXT?

You do not need a finished brief before getting in touch.

01

AUDIENCE + CATEGORY

Retailer? Brand? Grocery? Restaurant? Packaging? Retail technology?

02

KEYNOTE DIRECTION

AI, consumer behaviour, fulfillment, pricing, leadership or a blend.

03

CUSTOMIZATION

Stakeholder calls, research, category trends and event integration.

04

PRACTICAL DETAILS

Timing, format, fees, travel, logistics and the best next step.

DIRECT ACCESS TO JIM

Jim is always pleased to jump on a quick exploratory Zoom or phone call to learn more about the audience, discuss the issues you want to address and talk through possible keynote directions.

CONTACT JIM

THE FUTURE BELONGS TO THOSE WHO ARE FAST.

Retail rewards those who see consumer change early and act before it becomes obvious.



THINK BIG. START SMALL. LEARN FAST. SCALE WHAT WORKS.

The consumer will keep moving. The technology will keep accelerating. The operating model will keep changing. The question is whether your organization can move with it.