Retail Revival
A fresh perspective
To be able to deliver sustainable competitive advantage in any industry, a business must constantly innovate and adapt to deliver products that meet the customer needs at that time. With this in mind, brainmates sought to uncover exactly what these needs are. Is it price – as many retailers seem to believe given their deep discounting; or could it be the need for online retailing as opposed to traditional stores (quoted as the reason for the closure of numerous Myer and Harvey Norman stores across Australia in the New Year). Furthermore, an understanding of the external environment and its constraints on consumers is critical. For example, do Australians now prefer to save their wage rather than spend it? Reports abound to suggest this is the case -attributing the retail downturn to the slowing global economy.

To explore the impacts of these changes brainmates was proud to partner with Nine Rewards to survey 1000 of their 1.4 million permission-based members across Australia to understand the mindset of today’s consumer. Product Managers must consider the end to end product experience that a customer has when they purchase and use a product – this understanding is crucial. The challenge then, is to deliver insights that will answer the burning question of the moment – what aspects of retailing are failing to deliver on the end to end product experience.

<table>
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<th>Current challenges for Australian retail industry</th>
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<td>• the volatility of the global economy</td>
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<td>• rise of online retailing</td>
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<td>• increase in the capabilities and penetration of mobile devices and rapidly evolving technology</td>
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<td>• a stronger Australian dollar</td>
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<td>• competition from international retailers</td>
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<td>• delivering sub-standard experience</td>
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This is a challenging time for Australian retailers, however some of the factors affecting these businesses now, are those that have spurred entire industries and companies including Toyota, Procter & Gamble, IBM, Microsoft and Sony, to transform and achieve great feats – in the face of rapid change and competition. This is an opportunity for Australian retailers to be great.
Sample Demographics

Thanks to Nine Rewards our research sample included 1073 men (47.7%) and women (52.3%), aged 18-64, from all over Australia. Respondents were concentrated in cities with 83% living in main cities (17% from outside major cities). Salaries ranged from under 30K (13%) to over 100K (36%). The majority earned 50-100K (56%). Additionally, 43% have children and 66% were married. Only 8% lived with their parents. Demographic information is on the next page.

About Nine Rewards

Nine Rewards, part of the Nine Entertainment Co., manages online panels in Australia and New Zealand to promote products, acquire customers and gather insights. With over 1.4 million members in Australia, Nine Rewards has an active online community with a unique recruitment source mainly across the NEC such as Ticketek, Magshop and ninemsn.

The Nine Rewards client focused team understand and have extensive experience with online databases, survey design, fieldwork and research best practice principles. With quality data and expertise, Nine Rewards is dedicated to providing excellent service and delivery on all surveys. Nine Rewards provides full-service online fieldwork services utilising quality survey tools;

• Online sample - Nine Rewards
• Online survey scripting and hosting
• Data output and coding
• Analysis and reporting

The Nine Rewards Omnibus runs every month achieving a nationally representative sample by age, gender and location of Australians aged 18-64 years old. Jump on to the omnibus with your question/s and receive your data in 10 days.

+61 2 9266 4214
www.ninerewards.com
The Consumer Decision Journey vs. Product Experience

Consumer purchase decisions have always been understood through the metaphor of a “funnel”—consumers start with a number of potential brands in mind (the wide end of the funnel), marketing is then directed at them as they methodically reduce that number and move through the funnel, and at the end they emerge with the one brand they chose to purchase (see below). The funnel concept however, fails to capture all the touch points and key buying factors resulting from the explosion of product choices and digital channels, coupled with the emergence of an increasingly discerning, well-informed consumer.

Although the most recent ‘Consumer Decision Journey’ model (see below) provides a more sophisticated, less linear alternative to help navigate this complicated environment, it mostly informs marketing communications strategy and neglects to address the product experience. It would seem that in this new world of online and offline retailing, consumers can no longer be understood and targeted using the traditional Funnel approach or the Consumer Decision Journey.

To successfully navigate the new retail landscape, a new model, which maps the new ‘Consumer Decision Journey’ against the ‘Product/User Experience,’ is required. This new approach recognises and addresses that the end-to-end product experience depends on more than just physical products. Though the product itself (in the case of retail, this can be your store, brand and the products you sell) plays an important role, other levers also need to be used. These include the consumer research process, buying process, service, packaging and value add components.

Contact brainmates for information on this new approach.
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The Consumer Decision Journey vs. Product Experience

Old Consumer Decision Model (Funnel approach)
- awareness
- interest
- consideration
- purchase
- loyalty

New Consumer Decision Journey Model
- initial consideration set
- moment of purchase
- loyalty loop

Product/User Experience Model
- connect & attract
  - the initial connection with the person and using that contact to make an effective and effective impression
- extend and retain
  - the person actively communicates their satisfaction to others
- extend and retain
  - the person comes back for more as their expectations are raised - at the same level of loyalty and leveragable relationships are achieved
- compelling
  - capture the users’ imagination
- reverberating
  - ‘you just have to try this’
- orientating
  - help users navigate through the world
- generative
  - promise more good things
- embedded
  - become part of users’ lives
- interact
  - the completion of valuable or valued activities while delighting the senses, skillling, and establishing expectations about the overall constant of the encounters
- loyalty loop
  - pre-purchase experience : ongoing success
Emerging from the shadows: what is keeping consumers up at night

Given the economic uncertainty, US and European debt crisis and talk of a double dip recession, you would expect consumers to be worried about losing their jobs. However, our study indicated that only 35% of respondents were concerned about this – while over 50% were concerned about their income falling.

The main concern was Superannuation losing value (61%), investments losing value (45%) and paying off personal loans and credit cards (40%). With investments and Super affected by the performance of overseas funds and share prices, this is not surprising. The degree to which respondents worried about their income and about losing their job decreased with age.

When asked what would make people spend less, the rising cost of electricity and gas led (59%), followed by the rising cost of food (54%), then petrol (52%), and interest rates (50%). Interestingly, 47% claimed the carbon tax would cause them to reduce spending and the global economy (46%).

A recent online survey by mortgage provider Loan Market showed that consumer worries about interest rates have been overtaken by concerns about the impact of the carbon price and utility costs on household finances. In this survey 39 per cent of respondents nominated the carbon tax as their biggest financial concern for 2012, while 30 per cent nominated utility costs and 21 per cent said interest rates. This survey also found Gen-Y’s were more concerned about the carbon price, with 51 per cent of respondents in that age group saying it would have the greatest negative impact on their finances.

This should be viewed in the context of the November cut by the Reserve Bank of the cash rate for the first time in more than two and half years.
The cautious consumer

There is no doubt that Australians tightened the purse strings during the global financial crisis and this new found ability and trend to save has continued. While average household wealth hit a high of $266,600 at the end of last year, Australian consumers are saving 10% of their disposable income (up from 4% in the early 90s). 73% reported to be saving every month – and surprisingly 81% of 18-29 year olds are saving, disproving any perceptions of Gen Y’s being financially irresponsible.

Though the decline in retail spending has been attributed to the increased domestic saving and new ‘cautious consumer sentiment’ - a reality as evidenced by 46% respondents in our survey saying they were putting money away for a ‘rainy day’ – it would be inaccurate to claim this as a simple cause and effect relationship. Rather, our survey paints a more complete picture of the ‘cautious consumer’.

The Australia cautious consumer decoded:
(“how has your spending changed over the last 12 months”)

- Now considers whether they really need the good (65%)
- Researches the best price before buying (61%)
- Plans what they want to buy (46%)
- Doesn’t buy as much as used to when at the shops (46%)

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Interestingly, respondents did not claim to spend less, but have simply changed their spending habits to take a more considered approach to purchasing. Only 36% stated they only buy products on sale - a statistic that raises doubts about the appropriateness of the widespread discounting strategy retailers have adopted, especially in the lead up to Christmas. Respondents also indicated that they didn’t go to the shops as much (38%). But only 14% say they now mostly shop online – somewhat discrediting the claim that online retailing (which accounts for 3% of total retail sales) is to blame for the contracting retail revenues.

Given the above results and the implication that consumers are still spending on themselves (insignificant number surveyed saying they don’t shop for themselves anymore or buy anything more than they need to live, or don’t have time to shop) – we see that consumer intent and willingness to spend is strong.

Therefore today’s cautious consumer is spending, but cannot be swayed by traditional retailers’ discounts or online deals to do so without careful consideration.

Online spending and sentiments

In November 2010, the Australian eCommerce market was forecast to hit $36.8 billion by 2013, up from a figure of $26.86 billion for calendar year 2010. Now forecast to hit $37.7 billion in 2013.\(^1\) Additionally, domestic retail accounts for 73% of all online consumption and over 9 million Australians now shop online.\(^2\) Our participant’s responses supported the view that shopping online is now a part of life for Australian consumers, with all respondents confirming they had shopped online, and 96% having done so in the last 12 months. There was also a trend of increased online purchases with 34% suggesting they were making more purchases online. The main reasons for shopping online were quoted to be:

1. It’ cheaper (75%)
2. it is more convenient/”it’s delivered to my door” (74%)
3. Compare prices more easily (67%)

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\(^1\) eCommerce Secure Insight, November 2011
\(^2\) Forrester eCommerce Australia Market Size 2011
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With Australian traditional retailers and numerous reports attributing the decline in their revenues and sales to online retail, and with Australians spending billions of dollars online as indicated above—it is interesting to note that compared to traditional brick-and-mortar stores, online retail of goods is a fraction (3.7%) of total consumer goods retailing. Furthermore, this industry is fragmented with no single operator (of the 30,000 online retailers) controlling more than 3% of the market.³

Additionally, further analysis of internet trends reveals a number of factors that impact and will continue to impact on the health of e-tailing in Australia. Sindhav & Balaz (1999) examine how at each stage of the consumption process the following factors also have an impact: product-related (risk, efforts, and information intensity); medium-related (interactivity, variety of channels, logical capability, and underlying communication model); consumer-related (preference for home-based shopping, technical orientation, and access to the Net); firm-related (information intensity and expertise in direct marketing), and environment-related (critical mass of consumers and retailers online).⁴

³ IBIS World May 2011
⁴ A model of Factors Affecting the Growth of Retailing on the Internet, Birud Sindhav and Anne L. Balazs
http://www.springerlink.com/content/uk40817w908738t1/
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Further analysis of each would provide numerous insights, however the key areas to note include the following:

• The correlation between real household disposable income and retail spending: Higher income earners tend to spend more online.\(^5\) Given the recent interest rate decrease in Australia and GDP growth last quarter, this could see even further spending online.

• IT and telecommunications adoption: Higher IT literacy and the implementation of the NBN expected to be rolled out in 2012 will increase the speed, reliability and high speed access for a consumer to the internet - driving online sales. Higher speed internet will also facilitate more comprehensive websites from retailers.

Consumer Sentiment. In Australia, the consumer confidence rose 6.3% in November to 103.4 points from 97.2 points in October of 2011\(^6\). However, new figures suggest that Australian consumer confidence has scaled back to GFC levels.

Travel is the leading category in Australian online retail, accounting for $7.4b in 2011. Given that flights are such high value purchases, it is understandable that Australians are looking to make these purchases online to:

1. Get the best deal (value); and
2. Compare prices

Our survey results reinforce this, with 65% of respondents purchasing travel online. Interestingly, we found that people were least likely to buy shoes and groceries online. However note that other studies have shown that the grocery category is the second biggest sector for Australian online retail, and worth $5.5b. In this study, however, ‘groceries’ included alcohol as well as all pantry and consumable items.

\(^5\) IBIS World Research May 2011

\(^6\) The Westpac Melbourne Institute Index of Consumer Sentiment is an average of five component indexes which reflect consumers’ evaluations of their household financial situation over the past year and the coming year, anticipated economic conditions over the coming year and the next five years, and buying conditions for major household items. Compiled from a survey of 1,200 Australians, index scores below 100 indicate that pessimists outweigh optimists.
Purchase of electronics seems to be on the rise, with consumers again seeking better deals and using the internet for research and price comparing. As laptops and electronic goods become commodity items, male respondents’, in particular, are becoming increasingly comfortable purchasing them online with 51% claiming they do. Males also rated the ability to price compare as their main reason for shopping online.

So with few barriers for businesses to expand online and Australian online retail expected to grow 5.1% per annum over the next 5 years, the challenge is for Australian retailers to take advantage of the current consumer demand, confidence and willingness to pay, and develop a multi-channel approach.

Industry research supports this view, with estimates that nearly 40% of retail sales will be influenced by the internet and cross-channel behaviour in 2012 (WSGM, 2011) and confirming that engaging consumers across multiple channels has positive impacts such as economies of scale, access to new markets without the costs of building additional stores, increased customer satisfaction and loyalty and the creation of a strategic advantage over single channel competitors (WGSN, 2011- Paypal report). Furthermore, consumers that consulted the largest number of channel categories, had the highest levels of actual and expected spend, and half of all consumers consulted the internet, consistently as the most common channel for pre-purchase information search (ACRS, 2011).

Similarly, traditional retailers looking to launch digital products (channels) must take a strategic and customer-centric approach to multi-channelling. An online store cannot be a knee jerk reaction or should not be undertaken based solely on industry trends, competitor’s actions or instincts. Success is best achieved when observations and instincts are verified using complete, thorough and impartial (external) research and analysis of the market and most importantly – the customer.

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7 IBIS World Research May 2011
What do consumers want? It’s not just about the Price

Australian retailers, whether traditional bricks and mortar or online, need to focus on meeting consumer demand for competitive prices (85% voted this as the main factor they consider when shopping), and quality (83%). The desire for both good prices as well as quality suggests that consumer want value. While price is an important factor for consumers the cheapest price is not always selected. Rather, consumers are increasingly looking for trust, reputation, warranties, customisation, and other services, which add value to their purchase experience.

Unfortunately, the drive for value is being misinterpreted by many retailers. In a recent survey of Australian retailers, the current trend of year round sales, deep discounts and heavy promotional activity was found to have a detrimental effect on brand value and revenues. 44.9% of the retailers surveyed claimed the discounting was leading to customers haggling and an expectation that they would never have to pay full price. Additionally, the discounts and sales are giving consumers an impression of the goods being of sub-standard quality.

Our research points to the following as alternatives to what Australian consumers ‘value’:

Convenience
Today’s consumer is time-poor. Whether it is doing the grocery shopping, buying gifts or a new computer, these busy consumers want to be able to complete those ‘obligatory’ shopping tasks quickly, conveniently and easily. Online stores are obviously satisfying this need with respondent’s voting ‘online’ the most popular retail channel for shopping during the weekdays, and shopping centres most preferred for shopping on weekends. Online purchases are also reported to be mainly made while at work (61%), late at night (71%) and when the kids are asleep (65%). Furthermore, the emergence and popularity of mobile commerce points to the consumer desire for multiple channels through which to make purchases on the go and when they have a spare moment to. As of September 2011, 42% of Australians owned a smartphone and in the past 6 months 34% of Australians with internet enabled phones have purchased a product using their mobile.

8 IBIS World, May 2011
10 PayPal 2011
Customer Service and Customisation

Overwhelmed by choice of products, services and channels, customers today are looking to simplify their lives. They don’t want to be spending time trawling through an abundance of options – 90% of which will not satisfy all of their purchase criteria. They want retailers to do the culling for them – and customise products, service and the retail experience to suit their exact needs and specifications. More importantly, they are willing to pay to have all the features they want and none of those they don’t want.

Furthermore, to combat the boredom and disillusionment with traditional retailing and advertising, consumers are searching for more variety, greater engagement and more personalised products and services. 11 Retailers are recognising this need and responding, but they are still in the minority; only 10% of retailers said they were putting a real focus on non-price competition such as superior customer service. As one retailer notes, “I don’t run sales…It is about keeping in contact, offering something different and being positive about the opportunities that present themselves” 12b

Our results also highlighted a number of differences in purchase preferences and habits between genders, which emphasises the value in segmentation and a customer-centric approach to the business of retail. For instance, women seemed to be independent shoppers (58% say they shop by themselves); while men predominately shop with their wives (42% said they shop with their wives). US retailers are fast taking advantage of this knowledge about the different ways in which men and women shop. Fitness wear brand Lululemon, instils a community feel by localizing each store and adding simple touches like writing your name on the whiteboard that hangs on the dressing room door as you go in 13. Famous clothing brand Nordstrom was one of the first to provide seating for weary customers in their store – something that Myer has recently introduced also.

The key is to understand the customer and what little touches will be valued by them. For this, tools such as segmentation (to define your main customer groups) and user personas (to understand their key drivers and requirements) – are invaluable.

11 PayPal 2011
13 What women want when they shop, Derek Thompson, www.theatlantic.com
Case Study: Borders close

This year we saw the fall of Borders, the second largest chain of book stores. The company filed for bankruptcy-court protection in February, however was unable to make a recovery due to unmanageable outstanding debts. All hopes for acquisition also ended after negotiations with private-equity investor Jahm Najafi to buy the retail chain collapsed.

Borders demise has been attributed to the rise of digital book stores like Amazon and Barnes & Noble, as well as e-book sales taking an increasingly large share of the book market. The latter has been spurred by the launch of the Ipad, Amazon’s Kindle and Barnes & Noble’s Nook.

Given the changing external environment and consumer trends, many have suggested that Borders simply didn’t do enough, or took wrong actions to consolidate its position in the market. For example, outsourcing their online component to Amazon for too long and not using that time to develop this capability in their own organisation. Additionally, their selection of products did not adapt to changing consumer tastes, not to mention they lacked a digital strategy.

Good Product Management would suggest that programs of consumer monitoring, research and innovation should have been implemented as soon as sales began to decline and market share lost to digital shopfronts like Amazon – which was more than a decade ago.

If programs like these had been implemented and followed perhaps Borders would have been more in touch with their consumer’s needs and desire for wider variety, convenience and value, and been in a position to respond with a reinvigorated business model that combined the advances in digital, connectivity and technology, with their superior industry expertise and organisational knowledge.
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Mark Evans, Executive at Borders until early 2009 provides his insights. This is a question that many of us at Borders asked ourselves frequently and I think the answer is not a simple one. As someone who has given this a tremendous amount of thought and was Director of Merchandise Planning & Analysis for many years, I’ve outlined my assessment below:

1. Failure to adequately address the internet sales channel and the subsequent e-book market. Specifically, the decision to outsource Borders.com to Amazon.com. To be fair, Borders.com was costing the company millions of dollars in losses each year ($20m I think when they decided to outsource) and one could argue that the outsourcing solution was a case of letting the most efficient e-tailing organization (Amazon.com) handle the job and turn a big negative into a profitable business. In the short-term, this saved a lot of money. In the long run, the internet is too important to outsource in this manner and Borders’ branding, multi-channel strategy, and customer base suffered. They also dropped the ball on e-books, but by the time this became an issue they were just trying to figure out how to keep the whole house from burning down around them, so I find it more understandable.

2. Poor real estate strategy - Borders leased space that was too large, the storefronts did not compare well to B&N, and they were complacent in picking and relocating existing stores to the best locations. Some of this is subjective as I don’t have great data to back this up - just my own educated assessment based on observation.

3. Over-investment in music - while this was a big plus for Borders in the early to mid 90’s, it was a disaster in the long run. This is why the stores were too big once the music business cratered - stores were sized and modelled to provide a large music CD business which largely disappeared. In addition, infrastructure was sized to support this business, including a dedicated warehouse distribution facility. This last part has been addressed over time, but soaked up money, time, and energy. Music was also part of what made Borders a destination for many customers, so when music sales tanked, other product categories’ sales suffered as well.

4. Over-reliance on assortment size to compete as opposed to efficient operations - Borders was renowned for its wide and quality assortment of titles. The very large assortment size was an advantage early on before Amazon. However, by its very nature the internet was better at quickly and efficiently connecting customers with obscure titles and bringing the “long tail” to market. Thus, competing on assortment size was especially vulnerable to internet retailing and Borders suffered disproportionately as the “long tail” customers abandoned them.

5. Failure to build efficient systems and processes - While Borders’ legendary “expert system” was considered cutting edge and an advantage early on, the company failed to successfully build upon this foundation and create new, better assortment, replenishment, and supply chain systems and processes to keep pace with the changing state of technology and efficient retail operations. B&N invested considerable time/energy/money through the 90’s in systems and processes. To provide one example, a lower ranked title that sells out in a B&N will be replenished from a central warehouse within 2-3 days. The same process could take up to 16 weeks for Borders. Borders sought to upgrade systems with two large efforts in the 00’s: first one was a home grown effort called Common Systems. Second was a “buy and integrate” project to implement Retek and E3. Both failed spectacularly. The Retek effort dramatically hurt the Walden chain, the only business unit that was managed by the system. With both of these efforts, large sums of money and, perhaps more importantly, human resources and time were squandered.

6. Branding failure - In addition to the Borders.com problem, Borders never reached the mind share that Barnes & Noble did for a variety of reasons. Also, Barnes & Noble secured the exclusive U.S. Starbucks partnership, a major branding and traffic-driving win for them.
Recommendations

Eye on international trends
In this climate of advancing information and communication technology, economic uncertainty and globalisation, local markets are increasingly susceptible to global events. Hence it is necessary for Australian retailers to keep abreast of global macro-economic changes and retail trends. The key trends are outlined below.

1. Getting bigger and Going Global
The most successful retailers are those that are taking the plunge and entering new geographical markets. The world’s ten biggest retailers including Walmart (#1), Tesco (#4), Lidl (#5), Home Depot (#7), Costco (#8), Aldi (#9) and Target (#10), have been able to increase sales by 100% (from 2000 -2008) and expand from 96 countries to 155 countries over the same period. The take-away for Australian retailers is not only that the trend of internationals expanding into the Australian market is set to continue, but also that globalisation and consolidation will need to be considered by every local retailer if they want to remain competitive.

2. Building great brands
Retailers have traditionally been the distributors of great brands; however there is a significant shift to becoming the ‘builder’ of great brands. This strategy is epitomised by Tesco in the UK, and Woolworths in Australia, who have recently announced plans to expand their private label product offering. The pillars of this brand-building strategy include value added private labels, the extension of brands in related services, introducing a variety of store formats, and corporate citizenship.

3. Understanding the individual consumer
The new model of retailing puts the consumer at the centre of all things. International retailers are ramping up their customer relationship management in a push to understand shopper behaviour. The dominant strategy to achieve this is through loyalty programs, which enable retailers to develop comprehensive CRM systems, understand customer sets using multidimensional segmentation and then target product selection and range, as well as marketing communications and promotions to suit these consumers.

Given these top three trends, Product Managers should look at benchmarking against winning international formats, performing regular audits of brand image to ensure consistency in the eyes of the consumer, and increase efforts to take your brand and your relationship with your customers “beyond the store”.

‘Emerging from the downturn’. 2010 Global Powers of Retailing - Deloitte
Our research confirms that Australian consumers are still spending, however what they value and need from the end-to-end retail experience is changing. Satisfaction is now derived from having a retail experience that is more engaging, convenient, customised, and which goes beyond the traditional funnel approach. In response, retailers need to take the time to identify the gap between what their customer’s value and what their business currently delivers. This analysis should extend from the sales to the post-sales experience. The task then, is to close any existing gap by offering a mix of services and products, that will add value in the eyes of the consumer.

**Applying Product Management in the retail sector**

Ultimately to stay ahead of the challenges of an ever-shifting and competitive market, retailers need to adopt a customer-centric approach. This includes building capabilities in the following areas:

- Customer research, contact and engagement: understanding changes in customers’ behaviours to increase customer equity.
- Competitor analysis: keeping abreast of the changing industry environment
- Benchmarking: Looking across retailers and categories to identify and share best practices at the front end of the business
- Defining and developing your businesses core capabilities: operational and reshaping capabilities
- Instilling innovation in your business: using brainmates strategic product management methodology to design, develop and deploy products and services that will add value for your customers and will increase share of wallet.
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The brainmates methodology

The brainmates approach places the customer at the centre, and appropriately draws insights from the users of the products and services themselves. This is done through traditional means such as surveys, interviews and focus groups. Employing user and buyer personas and scenarios, the end-to-end product experience (in this case, the end to end retail experience), can be mapped and suitable products and services can be created. The brainmates methodology is depicted below. For more information, contact brainmates.
About the author

Brianna Ragel
Brianna has more than 8 years experience in crafting and executing strategic branding and marketing initiatives in Australia and London. As a product marketing consultant at brainmates, a boutique Product Management and marketing services agency in Sydney, Australia, Brianna has in depth knowledge of the issues affecting the retail industry both in Australia and abroad, and experience designing, developing and deploying products and services for numerous B2C companies. Brianna currently writes for the brainmates blog, brainrants, using the skills developed as a journalist and magazine editor.

About brainmates

brainmates leads companies to strategise, design and deploy customer-centric products and services. We offer professional services and training and have helped leading clients enhance their products and services. Our clients include industry leaders in media, communications, financial services, medical devices, software and hardware manufacturers. Contact us today to find out how we can help you.