

Movers & Shakers 2013

The Multi-Channel and e-Commerce Top 100 Report

GLYNN DAVIS Retailinsider.com



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To improve is to change;
to be perfect is to change often.

WINSTON CHURCHILL

In today's retail environment the consumer is influencing the change but some retailers and supporting individuals are ahead of the curve.

TONY BRYANT



Welcome

K3 Retail are once again proud to be supporting the 'Movers & Shakers' report.

Glynn Davis from the RetailInsider.com has managed to pull together new talent to join the Advisory Board and it's a BIG thank you to Glynn and the board for the many debates they had about this year's entries.

For 2013 I am delighted that the advisory board has carefully considered not only retailers but service providers, consultants, recruitment specialists and investors.

This edition again shows the diversity of individuals and their roles and the significant contribution they make to retailing in the UK and globally.

Whatever we call it - Multi-Channel, Cross-Channel, Omni-Channel, the people behind retail channel management are doing some great things to keep up and also influence the Anytime, Anywhere, Anyproduct consumer.

So personally I would like to thank all 100 named individuals and associated businesses they represent for all the amazing Entrepreneurial work they have done in the space which fundamentally is shaping the future of this dynamic and fluid business called retail.

I trust you will find this new edition as thought provoking as the previous ones and hope it will stimulate some debate, and as always we welcome your feedback.

TONY BRYANT

Head of Business Development
Tony.Bryant@k3btg.com

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The 2013 advisory panel



JOHN BOVILL IT and e-Commerce Director **Monsoon Accessorize**

Recently joined Monsoon Accessorize after holding the chief operating officer role at Jacques Vert. This followed a 10 year stint at Aurora Fashions where he moved from the initial position of supply controller for the Oasis brand to group IT director in 2008.



GUY HIPWELL Consultant

Entrepreneur and angel investor in various businesses following a recent acting-CEO role in a Multi-Channel European fashion retailer. Prior to this he held senior e-commerce roles and board positions at Harrods and Liberty.



ALISON LANCASTER Consultant

In a richly varied career Alison has held senior roles at Kiddicare, White Stuff, Feather & Black, Harrods, Charles Tyrwhitt, John Lewis and Buy.com, which have encompassed responsibility for marketing and Multi-Channel activities.



KAREN MOSS Editor **Retail Systems**

Editor of Retail Systems magazine for over two years, providing comment and analysis on industry trends as well as the future of retail technology. She was previously a freelance reporter for several national newspapers and magazines.



SUE SHIPLEY Partner **The Miles Partnership**

Joined The Miles Partnership in 2012 after a spell as global retail practice head at Odgers Berndtson. She specialises in the recruitment of CEOs and non-executive directors in the retail and consumer sectors and has a wide-ranging international client base.



CHRISTINA STARKEY Consultant **Odgers Berndtson**

Joined the London office of Odgers in 2008 and now focuses on the recruitment of senior executives across a broad range of functions in the retail sector. She previously worked within a family-owned private investment group.



JONATHAN WALL Group e-Commerce Director **Shop Direct Group**

Prior to joining Shop Direct Group in 2010 to head up its e-Commerce function he held the CEO position at Flowersdirect.co.uk and before that Wall was Marketing Director at Dabs.com which he joined in 1999.



While some legacy elements of the retail sector are having a tough time it is the digital component that represents the industry's potentially bright future.

GLYNN DAVIS



Welcome to the latest annual Retailinsider.com [Top 100 Movers & Shakers in Multi-Channel and e-Commerce] for 2013 that maintains its core aim of celebrating the achievements of the most influential people in this exciting part of the retail market and to also bring greater attention to the potential stars of the future.

What has remained constant through this report and its predecessors is the great fluidity in the industry. There continues to be significant movement of people within the e-Commerce and Multi-Channel areas.

This is undoubtedly driven by the shortage of experienced personnel who not surprisingly find themselves in great demand by retailers desperate to develop their digital capabilities. Many of the same names appear in this report as in 2012 but in many cases they are now plying their trade with a different employer.

It will be interesting to see if this movement continues throughout this next year. But what is guaranteed is the continued buoyancy in this part of the market. While some legacy elements of the retail sector are having a tough time it is the digital component that represents the industry's potentially bright future.

It is the constituents of this Top 100 who are making this digital future happen and we take this opportunity to applaud them for making a great contribution to their employers and to retail in general.

Their achievements have been recognised by an Advisory Panel of experts from within the retail industry who helped to create the Top 100 names and also ranked the Top 25 within this list.

I would like to thank them for the time and effort they gave to this rigorous process, and a final thank-you goes to K3 Retail for their ongoing sponsorship of this report.

GLYNN DAVIS

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Here it is. The Movers & Shakers of 2013. The Top 100 names and ranked Top 25 recognised by an Advisory Panel of experts from within the retail industry.

One to watch



Moving down from 2012



New entry for 2013



Moving up from 2012

The methodology

An initial long list of potential constituents of the Top 100 was drawn together over a lengthy period of consultation with a broad church of experts from within the retail industry.

These individuals comprised consultants, vendors, service providers, recruitment specialists, senior retailers, consultants, advisors and City analysts whose expertise straddled all areas of the sector.

The Advisory Panel then helped to reduce this long list down to the Top 100 names and to also select the Top 25 from within this list. This select grouping of names was then given to each of the panel to score them on various criteria - innovation, performance over the last 12 months, potential future performance, customer engagement, future business leader potential, and Multi-Channel strategy. By collating these scores a ranked Top 25 list was created.

To highlight the different skill-sets of the individuals in this year's report non-retailers have again been grouped under the headings: Service Providers, Consultants and Recruitment Specialists, and Business Investors.

The top 25



#01



MARK HOPWOOD

Director of IT Business Relationships & Digital Commerce +

CHRISTOPHER BAILEY

Chief Creative Officer

Burberry

With the creativity of the influential Bailey and the expertise of Hopwood, Burberry shows no sign of losing its cutting edge approach to utilising digital channels to burnish its luxury brand credentials.



#02



NICK ROBERTSON Co-founder +

JAMES HART Director

Asos

Robertson and Asos need little introduction as they continue to pioneer online fashion practices and deliver expectation-beating numbers from their increasingly global operation. Hart has been there from the early days and still plays a major role.



#03



ANGUS THIRLWELL CEO & Co-founder +

MELISSA SHACKLETON Head of Marketing

Hotel Chocolat

The lofty valuation placed on the Hotel Chocolat business highlights the success Thirlwell has had in creating a truly Multi-Channel business. He has been ably assisted by Shackleton in recently overhauling its online operations.



#04



MARK LEWIS Online Director +

SIMON RUSSELL Director of Retail Operations Development

John Lewis

Recently recruited from Collect+ Lewis is handling the firm's online capabilities and will complement the skills of Russell who is responsible for the role of the store in John Lewis' increasingly Multi-Channel vision.

...a real disrupter that seeks to help physical retailers and also create a new delivery model.

See **TOM ALLASON** of Shutl



#05

PETER FITZGERALD Country Sales Director +
JAMIE MURRAY-WELLS Industry Manager



Google UK

The appointment of Fitzgerald as a non-executive Director at Debenhams highlights the increasingly important role he now plays in UK retail and he remains the go-to man at Google for retailers. The appointment of Glasses Direct Founder Murray-Wells adds some interest to the Google equation.



#06

TOM ALLASON Founder and CEO



Shutl

Allason is a true pioneer in the industry with his Shutl business a real disrupter that seeks to help physical retailers and also create a new delivery model. He also has an enviable contacts book.



#07

CAMERON McLEAN UK Managing Director



PayPal

PayPal manages to create the effect of being an established payments provider while at the same time appearing as an innovative newcomer, which is achieved partly by the skills of PayPal's man in the UK McLean.



#08

JONATHAN WALL Group e-Commerce Director



Shop Direct Group

Shop Direct recognises that constant innovation is now an essential ingredient to success and the amiable Wall is very much the driver behind the group's cutting-edge activities that are helping keep it ahead of the competition.



#09

MARK ROGERS Senior Director EMEA



Apple

Some of the lustre might have been stripped off the Apple machine but it remains massively impactful on the retail sector and although senior faces of Apple are hard to come by Rogers is a top player within Europe.

Clarks

#10

RICHARD HOULTON Director of Channels UK and ROI +
JOHN ASHTON Head of Multi-Channel Retail



Clarks

Clarks is a low key player but it has widespread respect in the industry for its measured approach to developing its Multi-Channel offer that keeps things simple for its customers. Ashton joined from Screwfix last year to assist Houlton in delivering the company's ambitious objectives.



#11

CHRIS NORTH UK Managing Director +
DOUG GURR Vice President of Hard Lines



Amazon

The mighty Amazon pushes on ever forward and the low key man at the helm in the UK helps ease its pathway into new markets. The very capable Gurr heads up one of its biggest targets - food.



#12

ROBIN PHILLIPS Director of e-Commerce



Waitrose

The wrangling between Waitrose and Ocado has highlighted the desire for Waitrose to crank-up its online business and Phillips is now succeeding after some shaky early days. The launch of click & collect lockers highlights that innovation is happening.



#13

ROBIN TERRELL Group Multi-Channel Director



Tesco

Terrifically experienced Multi-Channel practitioner, who cut his teeth at John Lewis, Amazon, and House of Fraser before moving on to develop the offer at the UK's biggest retailer. If anybody is up for the task it is Terrell.



#14

STEVE WILLETT CEO of Group Development & Productivity +
ANDREW LIVINGSTON CEO of Screwfix +
IAN CHESHIRE CEO



Kingfisher Group

This triumvirate at Kingfisher ensures the retailer has the necessary group Multi-Channel buy-in from the CEO, a test bed for innovation at Screwfix, and a deliverer of operational best practice across the group.



#15

HUMPHREY COBBOLD CEO (Outgoing)



Wiggle

Since joining the business in 2009 Cobbold took leading online cycle retailer Wiggle from £33 million in sales to over £140 million and is enjoying surging sales, up over 20%, in the UK and overseas this year. He is being replaced by former CEO of Northern Foods Stefan Barden.



Rudoe is now very much the top man for all things digital and Multi-Channel at the grocer.

See **JON RUDOE** of Sainsbury's



#16



ANDY HARDING Executive Director of Multi-Channel
House of Fraser

Harding took over from Robin Terrell as head of Multi-Channel and has continued to innovate with a recent move to launch seven-days-a-week next-day evening delivery and same day Click & Collect in certain stores. Such initiatives have helped its online sales continue to grow at a cracking rate.



#17



RICHARD LONGHURST Co-founder +
NEIL SLATEFORD Co-founder

Lovehoney

Lovehoney continues to shake-up the adult toys market, with its tongue-in-cheek approach married to a determined desire to change things for the better. This has also helped their numbers significantly and they are a combined force to be reckoned with.



#18



JOHN WALDEN CEO +
BERTRAND BODSON Digital Director

Argos

With hundreds of stores on the high street and a major online presence the transformation strategy of Walden is being keenly watched. He recently brought in the capable Bodson whose digital experience at EMI and Amazon will help greatly.



#19



MARK SEBBA CEO +
NATALIE MASSENET Founder

Net-A-Porter

Sebba and Massenet continue to be a great double act with both contributing specific skills into the mix that has ensured the business remains at the forefront of online fashion retailing.



#20



JON RUDOE Director of Online, Digital and Cross-channel
Sainsbury's

With an expanded brief at Sainsbury's following the departure of Tanya Lawler to eBay Rudoe is now very much the top man for all things digital and Multi-Channel at the grocer.

Steiner certainly got one over his critics with the signing of a very valuable distribution deal with Morrisons.

See **TIM STEINER** of Ocado

next

#21

MICHAEL LAW Group Operations Director +
JOHN DICKINSON Head of e-Commerce



Next

Slowly as she goes seems to remain the (extremely successful) mantra for Next, with Law bringing great experience to the party and Dickinson now likely to have settled into the top e-Commerce slot after his appointment last year.

DEBENHAMS

#22

ROSS CLEMMOW Divisional Trading Director for e-Commerce +
MICHAEL SHARP CEO



Debenhams

Debenhams' non-store business plays an increasingly important role – with profits building up nicely – under the guidance of Sharp. Ex-Argos e-Commerce Head Clemmow is a great addition to the team, which is no doubt energised by the continued buy-in from the company's top man.



#23

TIM STEINER CEO +
SIR STUART ROSE Chairman



Ocado

Steiner certainly got one over his critics with the signing of a very valuable distribution deal with Morrisons. There is little doubt that the prior appointment of Rose as chairman helped steer that deal through to completion and he will continue to have a big influence.



#24

JEREMY FENNELL e-Commerce Director



Dixons Retail

Fennell has garnered a growing level of praise for his hard work at Dixons that has helped make the retailer a valued player in a viciously competitive category, which could have almost made the retailer an irrelevance some time ago.



#25

JOHN GALLEMORE Chief Financial Officer +
MATTHEW MOULDING CEO



The Hut Group

Richard Pennycook is amongst a group of big names on the board of Hut Group that continues to purchase online entities such as Probikekit and raise funds ahead of a long-mooted IPO. Gallemore and Moulding remain the heart of the expanding group.

The Retailers

A-Z

Chosen from our long list and deservedly included in the Top 100, these individuals have been recognised for their innovation, performance over the last year, potential future performance, customer engagement, future business leader potential, and Multi-Channel strategy. They are listed here in alphabetical order by the organisation employing them.

A

WARREN BENNETT Co-founder +
DAVID HATHIRAMANI Co-founder

A Suit That Fits

Looking to change an established sector is not an easy task and despite some hiccups Bennett and Hathiramani continue to plough the lonely furrow that is home to pioneers, but where results are gradually forthcoming.

WILLIAM COOPER Founder and CEO +
STEVE ROBINSON Chief Operating Officer

Achica

Private sales site Achica has been ably led by Founder Cooper who has carved out a place in the home category, but no doubt the business will benefit greatly from the vast experience of Robinson who joins from B&Q.

JOHN ROBERTS Founder

ao.com

Formerly Appliances Online, and founded by Roberts in 2000 as an online-only kitchen appliance retailer, which has carved out a valuable position in the category, the business is now supported by its impartial review site Appliance Reviews.



FRASER LOCKE Trading Director for Asda Direct

Asda

Two years into his role as a senior member of the Multi-Channel team at Asda and Locke has responsibility for general merchandise, which is of great importance to the group online, and suggests he is one to watch for broader future roles.

B



MAHMUD KAMANI CEO

Boohoo.com

The Manchester-based fashion site competes effectively with the big guns and is second only to Asos among pure-plays. With 160% year-on-year global sales growth including enormous demand in Australia Co-founder Kamani is driving this business hard.



NICK WHEELER Founder +

LUKE KINGSNORTH e-Commerce and Marketing Director

Charles Tyrwhitt

Wheeler is a true entrepreneur who long ago fully grasped the retail models that work and he has utilised this insight to create a very profitable business with Charles Tyrwhitt. Delivering on some of his vision is Kingsnorth who joined three years ago from John Lewis.

DAVID DEVANY European e-Commerce Director

Claire's Accessories

Formerly in a Multi-Channel role at JJB, Devany joined Claire's in late-2012 and is tasked with developing its online operations, which has so far included the launch of an English-language European transactional website with other languages to follow.



TIM STACEY Online and Business Development Director

DFS

Appointed in 2011, Stacey is tasked with developing the Multi-Channel proposition that is very much centred on the store portfolio, so his Boots experience will help. He is currently working on the business's new platform.



TESSA COOK e-Commerce MD

Dyson

Four years into her role at Dyson and Cook has developed a powerful online proposition at Dyson that undoubtedly calls on her experience while working within the publishing sector for EMAP.



TANYA LAWLER VP of UK Trading

eBay

Lawler has ideas aplenty for developing a stronger more profitable relationship with retailers that will benefit both merchants and eBay. The challenge for the former senior executive at Sainsbury's will be to make them stick.

NICK WILKINSON CEO

Evans Cycles

The well experienced and impressive Wilkinson has a strong stores-based background that he is successfully mixing with online at Evans to create a strong Multi-Channel proposition that is benefiting from continued strong demand for cycles.



ANDREW ROBB Chief Operating Officer +

JOSE NEVES Founder and CEO

Farfetch

Using technology to bring boutique brands together online from around the world is at the heart of Farfetch so it is no surprise to find Robb and Neves knee-deep in tech skills but they match this up with fashion nous. This has attracted some savvy backers.



Hitting £40 million in sales after only two years marks Malcher out as a serious talent

See **ANDREW MALCHER** of High Street TV

KEVIN CORNILS CEO

Glasses Direct

Highly thought of Cornils has been running the pioneering glasses retailer for five years and recently appointed advisors on a possible fundraising or a float that could value the business at £100 million. This would crystallise his efforts and Founder Jamie Murray-Wells who recently joined Google.

CLIVE WEST Group Digital Director

Halfords

With strong experience at Asda as new business operations West is well armed to take advantage of the changes at Halfords that include an overhauled Multi-Channel strategy being put in place by new CEO Matt Davies.

ANDREW MALCHER Co-founder

High Street TV

Hitting £40 million in sales after only two years marks Malcher out as a serious talent whose business cleverly sells on its own TV channels as well as supplying products to leading high street retailers.

CLARE DOBBIE Marketing Director +

GRACIA AMICO e-Commerce Director

Hobbs

Hobbs is taking its Multi-Channel development carefully but it is a coherent approach on an international basis with both Dobbie and Amico recognised as drivers of the changes taking place within the company.

DAN LUMB Global Online Director

Hunter Boot

The well travelled Lumb recently pitched up at Hunter Boot where he will be hoping to utilise some of the skills he has picked up at a variety of retailers - Reiss, Boux Avenue and Schuh. The global opportunity looks a key focus for Lumb.

WENDY BECKER Chief Operating Officer

Jack Wills

Becker is in the midst of a serious overhaul of Jack Wills that has included the replacement of much of the management team including those in digital roles. She is certainly one to watch.

JOHN HOBSON Multi-Channel Director

Jacques Vert

Recently recruited by Jacques Vert, Hobson joins from Disney Stores Europe where he held a business operations role. He now has a mixed bag of responsibilities under the umbrella title of Multi-Channel Director.

DAN FINLEY Group Multi-Channel Director

JD Sports

Finley is clearly one to watch having gained respect at Javelin Group and briefly at Peacocks. There is certainly plenty of opportunity at JD Sports so he undoubtedly has the right stage to deliver on the high expectations.

...this is a clear disrupter to the designer furniture market and Made.com is certainly making some waves

See **NING LI** of Made.com

K



LYNN RITSON Brand Communications Director

Karen Millen

Ritson has certainly built up plenty of experience in online fashion with e-Commerce roles at Space NK, CoutureLab and All Saints. She is now tasked with building up the international online business of Karen Millen.

L

TONY PREEDY Marketing Director

Lakeland

Preedy is steeped in the direct business from his time with Otto, Littlewoods and Shop Direct and he has been using this to increasing effect at Lakeland, which is not going to rush under the Rayner brothers' ownership but will absolutely get it right.



CHRIS MORTON Co-founder

Lyst

Lyst is among a wave of new online fashion businesses that are technology-driven and require a new skill set to run, which is certainly held in abundance by Morton who is building a strong differentiated business.

M



NING LI CEO

Made.com

With its direct-to-manufacturer model this is a clear disrupter to the designer furniture market and Made.com is certainly making some waves. Captain of the ship is entrepreneur Ning Li who is assisted by a capable team of Co-founders including Julien Caldele.

STEVE LEWIS CEO

RICHARD WEAVER e-Commerce Director

Majestic Wines

Majestic continues to hold the position of leading Multi-Channel wine retailer as it frequently shows it understands how to operate in a digital world as evidenced by its innovative use of social media.

LAURA WADE-GERY Executive Director for Multi-Channel and e-Commerce

Marks & Spencer

M&S is committing great resources to developing its Multi-Channel business and Wade-Gery is the driver of many of its innovations that have been hitting the business thick and fast this past year.



ULRIC JEROME Chief Operating Officer and Partner

Matches

Former constituent of the top 100 when running Pixmania for Dixons, which ultimately did not work out, but the vastly experienced Jerome has re-appeared at Matches where there must now be high hopes of future success.

JONATHON BROWN CEO

M + M Direct

Clothing retailer M + M Direct is certainly up against tough competition online so at least it has a very capable and experienced operator at the helm in Brown who latterly worked at John Lewis and has recently re-launched the website and launched an app.

Monsoon Accessorize has certainly appointed a couple of heavy hitters.

See **JOHN BOVILL** + **JOHN BROWETT** of Monsoon Accessorize



JOHN BOVILL IT and e-Commerce Director +
JOHN BROWETT CEO

Monsoon Accessorize

Monsoon Accessorize has certainly appointed a couple of heavy hitters with ex-Apple, Dixons and Tesco.com executive Browett brought in to rejuvenate the business, with a key component IT and online and that's where the experienced Bovill comes in.



NIGEL ROBERTSON Head of non-food online and Morrisons.com +
TIM PATTEN Multi-Channel Marketing Director

Morrisons

To suggest there has been change at Morrisons would be a big understatement. But after the personnel overhaul the two newcomers tasked with getting Multi-Channel back on track are the very capable Robertson and Patten who have the experience to pull it off.

SIMON CALVER CEO

Mothercare

It's an ongoing project for Calver to turn around the fortunes at Mothercare but there are signs of progress after the first year of a three-year strategy. Thankfully he has digital experience from his time at Lovefilm.

DAVID WORBY CEO

my-wardrobe.com

With the recent departure of Founder Sarah Curran from the board of Mywardrobe.com the top role is now wholly in the hands of Worby who will be looking to use all the skills he built up at Harrods to take the business on to the next level.



ANGELA SPINDLER CEO

N Brown

Former CEO Alan White has left the N. Brown business in good shape for Spindler who will look to continue to move it away from its mail order heritage to more of an online and Multi-Channel operation.

IAN TANSLEY MD - Mr Porter, and VP e-Commerce

Net-A-Porter Group

Tansley earned his spurs at John Lewis and has consolidated his position in his six years at Net-A-Porter with the successful launch of Mr Porter. His role looks likely to only broaden over time.



SHIVANI TEJUJA e-Commerce and Multi-Channel Director

New Look

Only one year into the role at New Look and Tejuja has a good opportunity to make her mark at the company that has been undergoing plenty of changes. Her experience at Expedia and Amazon will be useful.

JASON WESTON Chief Operating Officer

notonthehighstreet.com

Two years into the role - having previously spent 10 years at Amazon - and Weston is juggling the demands of expanding in the UK and overseas so he will need all the skills he attained from his time at the online behemoth.

...he has wasted no time in launching new innovations including a drive-thru click & collect service and overseas delivery

See **SIMON FORSTER** of Selfridges



HASH LADHA Chief Operating Officer

Oasis

Ladha has very much been a digital visionary in his previous roles at Aurora Fashions. Part of this business has morphed into Fresh Channels where his role is now very different but it will no doubt still reveal how digital-savvy he is.



SEAN MCKEE Head of e-Commerce and customer services

Schuh

McKee knows the Schuh business inside out having been at the company since 2000. This has helped him gradually develop it into a Multi-Channel operation but without losing sight of the fact it has to be simple for the customer.



SIMON FORSTER Head of Multi-Channel

Selfridges

After a successful stint at Debenhams Forster this year moved to Selfridges where he has wasted no time in launching new innovations including a drive-thru click & collect service and overseas delivery as part of a plan to push online sales to 20% of total revenues.

DAVID KOHN Head of Multi-Channel

Snow + Rock

He might joke about the fact that most of his former employers have hit the wall (Borders, Blacks Leisure, Woolworths) but he is a capable performer who is gradually bringing Snow + Rock into the Multi-Channel age.

CHRIS GRIFFIN Director of e-Commerce

Supergroup

Griffin oversees an increasingly important part of the Supergroup business, with online sales up 28% for the year to end-April and now accounting for 11% of sales versus 10% last year, and he is kept busy by the imminent launch in China.



Developing mobile, Facebook and tablet propositions will no doubt be keeping her busy

See **KATE WALMSLEY** of Topshop

EVE HENRIKSON Head of e-Commerce

Ted Baker

Growing international sales for Ted Baker have given Henrikson an increasingly important role at the fashion group. Future prospects remain bright for both Ted Baker and Henrikson.

ADRIAN LETTS Chief Operating Officer +

MICHAEL COMISH Group Digital Officer

Tesco

Following the recent Tesco purchase of Blinkbox, its founders Letts and Comish have entered the Tesco fold with the former continuing to oversee the digital media provider's operations while the latter has a broad digital role within the supermarket, which makes them both obvious ones to watch.

DUNCAN GRANT Director of Multi-Channel

The Entertainer

Grant has been taking on increasing responsibility at the toy retailer as it not only continues to expand its store estate but also develops its online operation that has included adding Shurt delivery, which highlights his forward thinking approach.

KATE WALMSLEY e-Commerce Director

Topshop

Her experience in the US will no doubt be coming in handy for Walmsley who has the vital role of running the global online operations for Topshop. Developing mobile, Facebook and tablet propositions will no doubt be keeping her busy when servicing the brand's tech-literate customer base.

ROB JONES Interim Head of e-Commerce

White Stuff

Presently heading up the e-Commerce function at White Stuff the able Jones has gained plenty of experience at Harvey Nichols and Astley Clarke. A big job beckons no doubt.

JOE MURRAY Co-founder +

RICHARD TUCKER Co-founder

WorldStores

The home products and furnishings retailer secured another £10 million of funding on the back of trading up 60% last year and sales are likely to hit £76 million this year, with Murray and Tucker firmly in the driving seats.

Service Providers

These individuals represent service providers that continue to thrive as they adapt to the changing needs of retailers and consumers alike. They are listed here in alphabetical order by the organisation employing them.

STEVE PARKIN Founder and Chairman +

SEAN FAHEY Solutions Director

Clipper Group

Massively well respected in the fashion world Clipper offers a broad range of logistics solutions including dealing with returns. European hubs are currently being developed by Parkin and Fahey who are certainly not standing still.

NEIL ASHWORTH CEO

Collect+

The rise of click & collect and the growing issue of returns are certainly helping Ashworth and the Collect+ model as the former logistics expert at Tesco and Woolworths seeks to grow the operation.

DWAIN McDONALD CEO

DPD

Fulfillment is increasingly recognised as a differentiator for retailers and among the national couriers taking on the challenge is DPD. Under the guidance of McDonald it is proving a popular partner for merchants who value its high customer service levels. Shoppers enjoy its utilisation of tracking and mobile confirmation of delivery times.

KEVIN McSPADDEN Founder and CEO

More2

It is tough to find many people who do not regard More2 and its Founder McSpadden as a very valuable part of their online businesses. While More2 remains a vital cog in the e-Commerce machine in the UK then McSpadden earns his place in the top 100.

GRAHAM COOKE Co-founder and CEO

QuBit

Founded by ex-Google executives QuBit is building up a strong portfolio of retail clients who recognise how it can help them use their data to create a personalised experience for shoppers online.

MATT HENDERSON Co-founder

Rangespan

Much is written about retailers supplying a long tail of goods online and Rangespan helps them make this possible to their customers with the minimum of hassle.

BRUCE DAISLEY UK Managing Director

Twitter

Twitter usage shows no signs of abating, which makes the newly-promoted Daisley a powerful figure. He performs his tasks with some aplomb.



Consultants & Recruitment Specialists

Listed here in alphabetical order by surname, these are the most influential consultants working in the retail industry today, and the leading recruitment specialists working at the heart of the industry to make things happen in the world of Multi-Channel and e-Commerce.

ASHLEY FRIEDLEIN CEO and Co-founder

Econsultancy

Almost a one-stop shop for e-Commerce and Multi-Channel consultancy and learning that is now part of the Centaur publishing business but Friedlein remains the man firmly at the helm.

GUY HIPWELL Consultant and Director

Vastly experienced, with roles at Harrods, Liberty and with various international retailers, Hipwell is in great demand in the UK for his forward-thinking views on e-Commerce and Multi-Channel. Another big role no doubt awaits him - if he wants it.

MARK HODKINSON Consultant

Former HMV executive Hodkinson is low key but remains a player in the sector currently advising investors including private equity investor Guy Hands.

ALISON LANCASTER Consultant

Alison Lancaster Consulting

Formerly chief marketing officer of non-food online at Kiddicare, Lancaster has a wealth of online experience working at White Stuff, Feather & Black, Harrods and John Lewis among others that is ensuring she is kept very busy.

CARRIE LONGTON Co-founder +

JUSTINE ROBERTS Co-founder

Mumsnet

Massively powerful website for parents with over four million monthly unique visitors that ensures its Co-founders Longton and Roberts have a big impact on retail as the voice of Mumsnet holds great sway.

ORLANDO MARTINS Founder

Oresa

As an e-Commerce and Multi-Channel recruitment specialist the well regarded Martins is keeping himself busy dealing with the continued high level of employee movement in these areas. He is also looking to expand his Northern-based operation.

Javelin has become one of the big beasts in the Multi-Channel consultancy jungle.

See **TONY STOCKIL** of Javelin Group

Massively powerful website for parents with over four million monthly unique visitors.

See **CARRIE LONGTON + JUSTINE ROBERTS** of Mumsnet

MARTIN NEWMAN CEO

Practicology

Newman continues to build Practicology into a powerful practice with global experience particularly in Australia and a growing list of retail clients who seek out his wide experience as both a consultant and retailer.

MICHAEL ROSS Consultant and Director

eCommera

The well respected Ross is successfully mixing his e-Commerce experience, intellect, and appetite for analysing data to give his clients something interesting to think about. He long ago earned his position as a major player in the industry.

SUE SHIPLEY Partner

The Miles Partnership

Extremely well connected and experienced in the retail sector Shipley plays an important role in the industry helping retailers overcome the challenge of sourcing quality digital executives with store-based experience.

CHRISTINA STARKEY Consultant

Odgers Berndtson

Starkey continues to build the e-Commerce and Multi-Channel capability within recruitment firm Odgers Berndtson building on her UK experience gained since joining the company in 2008.

TONY STOCKIL CEO

Javelin Group

Under the stewardship of Stockil Javelin has become one of the big beasts in the Multi-Channel consultancy jungle that continues to add to its roster of international marquee name clients. This has helped it to increasingly take a global view of the sector.



Business Investors

A mix of both private investors and senior individuals in specialist investment houses, this list comprises the most prominent figures currently investing in the retail industry. These individuals provide not only capital investment, but a wealth of industry expertise. They are listed in alphabetical order by their surname.

ANDY BOND Private Investor

Through Woodcliffe Associates the former Asda CEO has invested in a variety of businesses including Wiggle and online farmers' market Farmison. He is chairman of Wiggle and remains a respected operator in the retail sector.

HARRY BRIGGS Principal

Balderton Capital

Briggs is gaining a strong reputation at Balderton, which has made many digital investments including The Hut, Ybox, Worldstores, and Achica.

CARMEN BUSQUETS Private Investor

Busquets remains a power behind the scenes in the luxury fashion world following her backing of Net-A-Porter and subsequent investments with Astley Clarke, Moda Operandi, and Cult Beauty. She also founded CoutureLab in 2008.

BILL CURRIE Investment Manager +

IAIN McDONALD Investment Manager

William Currie Group

It might be a low key operation but William Currie Group has backed some strong names over the years including Asos, The Hut Group, Metapack and Ocado-Home.

MARK ESIRI Chairman

Venrex

The former chairman of Smythson, Esiri is a very experienced operator who has been involved in a number of retail investments with Venrex including Astley Clarke, Not on the high street and Lyst.

NICK HESLOP Director

Bridgepoint

Focused on the UK consumer sector, Heslop is on the board of Wiggle for Bridgepoint that continues to be a major player in retail. Hobbycraft is another investment.

BRENT HOBERMAN Co-founder of Lastminute.com and Private Investor

Made his name co-founding Lastminute.com and was an online pioneer in the UK.

He remains very influential having co-founded PROfounders Capital, which has invested in retailers including Made.com, and as an entrepreneur he advises the government.

Despite some question marks over his Tesco legacy Leahy is still a powerful figure

See **SIR TERRY LEAHY**

SAUL KLEIN Partner +
ROBIN KLEIN Venture Partner

Index Ventures

Between this father and son team they have invested in a myriad of retail-related businesses that have continued to be at the forefront of the technology wave. They continue to wield a lot of influence and respect.

SIR TERRY LEAHY Private Investor

Despite some question marks over his Tesco legacy Leahy is still a powerful figure whose investments in online businesses The Hut Group, Blackcircles.com, Eagle Eye Solutions and Metapack (where he is chairman) give them strong validation.



SCOTT SAGE Partner

DFJ Esprit

Marked out as one to watch, Sage specialises in mobile and consumer internet for US-based DFJ Esprit where he is currently working with Lyst and Conversocial.



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It's not just another news site but instead offers up a cocktail of opinions and insights on the retail industry along with the occasional leisure sector content to spice up the mix. These regular insights have recently been complemented by a range of carefully selected columnists, and regular slots such as Q&As with leading e-commerce & multi-channel retailers and the Innovative Retailers series.

k3retail
joined up thinking

The Multi-Channel and e-Commerce Top 100 Movers & Shakers 2013 report is sponsored by K3 Retail

K3 Retail deliver Multi-Channel solutions that enable retailers to create joined up shopping experiences for their customers on-line, direct, in-store & via mobile.

Over 20 years' experience delivering award winning solutions, to more than 175 internationally recognised retail brands, has helped our experienced team of retail consultants develop the most complete range of multi-channel retail solutions available to Microsoft Dynamics users. As a Microsoft Gold Certified Partner, member of Microsoft's Partner Advisory Council for Retail and member of Microsoft's Presidents Club, we offer a clearly defined roadmap and proven products backed up by Microsoft's \$2 billion investment in the Dynamics platform.

Our ability to translate thought leadership and Multi-Channel experience into innovative and effective retail solutions has benefited customers including: Agent Provocateur, American Golf, Beales, Booths Supermarkets, Bux Avenue, Clinton Cards, Dobbies, English Heritage, Evans Cycles, Fred Perry, Gieves & Hawkes, Hotties, Kiddicare, Links of London, M&Co, Oxfam, Ryman's, Smyths Toys, SpaceNK, Topps Tiles, The White Company, Weird Fish and White Stuff.

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