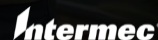


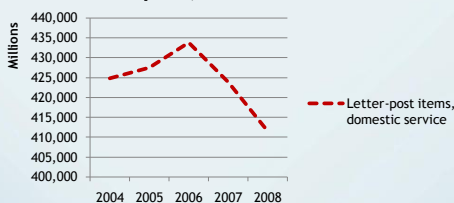
The best customer end to end experience
Traceability right to the doorstep

Tony Palmer

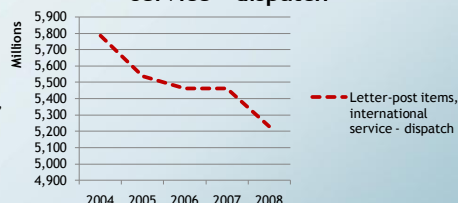


The new Post; technology at its heart, right the from start

Letter-post, domestic service



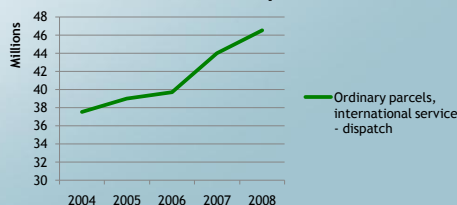
Letter-post, international service - dispatch



Ordinary parcels, domestic service



Ordinary parcels, international service - dispatch



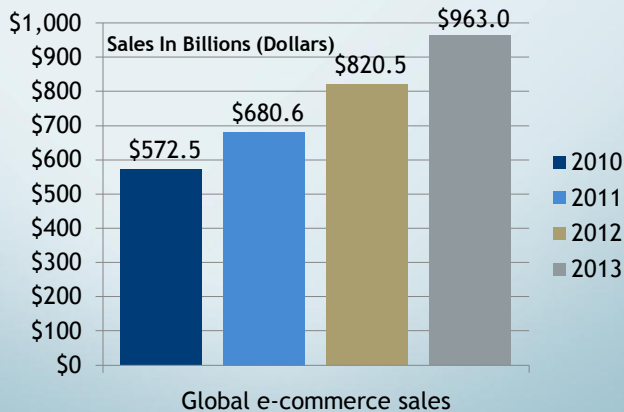
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Source: UPU Online database

2

Growth seated in e-Commerce

Global e-commerce sales are growing at more than 19% a year*

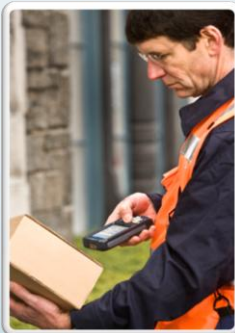


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Source: chart & * - Goldman Sachs via internetretailer.com
3

Increase in competition



- Posts are getting aggressive
 - USPS - "If it fits it Ships"
- New competitors are getting involved
 - Transforce Canada
 - Purchased Dynamex for ~\$800M
 - Now owns 5 parcel delivery services companies
- M&A activity driving consolidation
 - HDNL acquisition of DHL UK
 - FedEx Express acquires AFL Pvt. Ltd. India



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The best customer end2end experience

Customers always have an experience when they interact with a firm. The question is whether the firm is prepared to systematically manage the customer's experience or simply hope for the best. The customer's overall experience will determine brand preference.

Marketing Management article

By: Stephen H. Hackel, Louis P Carbone & Leonard L. Berry



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Good advice for retailers

...Just as good for Postal & CEP companies alike

Royal Mail w/IMRG: Five golden rules for retailers

- 1) Be flexible
- 2) Help customers to help you
- 3) Keep customers informed
- 4) Don't be late
- 5) No surprises

Source: www.royalmail.com

Snow Valley: What makes a good delivery experience

- Flexible delivery options
- Affordable delivery charges
- Flexibility on where the order can be delivered
- Effective communications about their delivery
- Fast fulfillment
- A good doorstep experience

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How?

Royal Mail's 5 Golden Rules are a great place to start:

#1 - Be flexible, give customers options

And

#3 - Keep customers informed on when & where

A Great example:
DPD UK's 1 Hour
Window Service
Offering

The Home Delivery Service Your Customers Have Been Waiting For

DPD will provide your customers with a one hour delivery window so they don't have to wait in all day for their parcels.

When DPD deliver for you:

- Your customers are given a one hour delivery window
- They are notified of this by text or email
- If the delivery date is not convenient, your customers can use the text or email to change it
- All correspondence from DPD to your customers can include your brand name

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#- DPD UK webpage

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How?

Royal Mail's 5 Golden Rules are a great place to start

■ #2 - Help customers to help you

- Accept delivery instructions and requests, as it will improve the chances of meeting your customers' needs

■ Utilize automated systems

- Replace paper with automated process*
 - On average, each courier saves ~2 hours per day*
- Reduce the amount of data errors & time to resolve
 - Save 5 minutes /error to investigate, resolve, and correct



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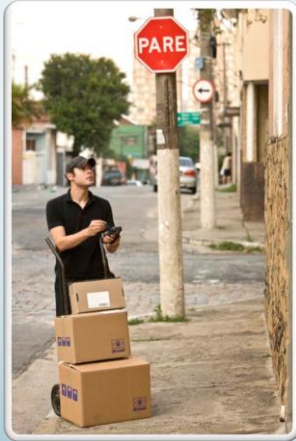
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* - Forrester Research

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How?

Royal Mail's 5 Golden Rules are a great place to start:



- **#4 - Don't be late - Make sure goods are on time**

And

- **#5 - No surprises - Explain your delivery service**
- **Track & Trace - Every item origin to destination**
 - Fewer customer phone calls
 - Reduce phone costs by 30%*
 - Customers track in real time*
 - Positive impact on customer satisfaction*

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* - Forrester Research



What are the technologies involved?

- **Imaging**
 - Bar code scanning
 - Document imaging (eMDI)
 - Verified data extraction (VERDEX)
 - Megapixel photography (embedded cameras)
- **Flexible Interfaces**
 - Tough touch screen & rugged keys for heavy use
- **Flexible software foundations**
 - Mature development libraries (IDL)
 - Well refined business solution components
- **Location Technologies**
 - GPS tracking / vehicles / assets / activities
 - Route optimization / turn by turn directions
 - ETA estimates / pre arrival notification
- **Communications**
 - Instant customer notification / status updates (SMS / email)
 - Real time backend system updates & integration (SKYNAX)



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The World's Most Complete Portfolio of Supply Chain Products and Services



Data Capture/
Scanning



Mobile Computers



Barcode Printers
and Media



RFID and
Wireless Network



Software Tools and
Applications



Implementation
and Support
Services



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 - Air21 Video case Study



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