Change Initiatives in the Retail Sector of India: A Literature Study

Lakhimi Jogendranath Chutia[1] & Dr. Papori Baruah[2]

[1]Research Scholar, Dept. of Business Administration, Tezpur University, Assam, India
[2]Professor, Dept. of Business Administration, Tezpur University, Assam, India

Abstract

The Indian retail sector is at present the 5th largest in the world (Sikri and Wadhwa, 2012) comprising of organized and unorganized retail. In the era of globalization, for the last few years it has seen many domestic and international players entering into the highly untapped organized retail segment of the country. Post liberalization, there has been an exponential growth of organized retail. The burgeoning middle class and their purchasing power due to the increase in per capita income have led to the growth and expansion of this sector. Realizing the change in tastes and preference of consumers and a shift of customers towards high service experience, different retail formats like specialty retail stores, discount stores, hyper malls, super markets, etc. have mushroomed in every big and small town and city of India. As a result a strong competition has emerged among Indian companies and between Indian companies and MNCs. The retail players thus, started feeling the need to bring the desired change in their present state of working with respect to technology, infrastructure, employee management policies, business strategies, etc. to provide better customer services to the highly sophisticated customer base. This paper aims to explore the retail change initiatives in India through the study of secondary resources.

Keywords: Indian retail sector, Change levers, Change initiatives, Change management.

Introduction

Change has been an integral part of organizations in the ever changing economic, political, technological and social climate. Changes, in turn, have led to great demands, challenges and opportunities for the development of the retail sector. The dynamics of change in the retail arena has generated interest as it has been seen that Indian retailers are taking bold innovative steps against its international competitors by redefining their strategies in order to stay competitive and woo customers. Well known international management consultancy AT Kearney identified India as the second most attractive retail destination globally (Singh and Agarwal, 2012). The entire retail market in India is expected to grow to $1.3 trillion by 2018 (Mishra, 2009). There have been rapid changes with respect to utilization of information technology like Radio frequency identification, global image positioning systems, supply chain management systems, etc. along with the changing dimension of retail culture. Influence of global retail is felt in the Indian context too. Thus the change management is a key issue for the retail industry. Dawson (qtd in Razzaq 2012) has identified factors that shape a particular change process as being: the substance (type and scale) of change, the politics (social conflicts, pressures, negotiation) of change and the context of change. The dynamics of these determinants create the specific image of change in a particular context. Change is a broad term covering an extensive range of concepts related to development particularly, renewal, evolution and innovation (Razzaq, 2012). Change requires effective management. The mentioned changes are felt in the Indian retail sector when retailers try to cope with the sudden gust of changes that occur in the social, economic, political and cultural spheres of the country. They, thus, adopt either of the processes of renewal, evolution or innovation.

Objectives

I. To identify the change levers in the retail sector of India as a whole
II. To identify the change initiatives in the Indian retail sector

Methodology

The study is based on secondary sources like company reports, literary works, etc. It thus analyses the retail sector through desktop research.

Evolution of Indian Retail Sector

India started its retail journey through the concept of weekly HAATs where all buyers and sellers used to meet to trade their needs (Gupta, Dubey and Patani, 2012). As the economy slowly progressed from ancient retail to modern one grocery store or the 'Kirana' stores came into the picture (*ibid*). Then it slowly moved into the traditional 'mom and pop' type culture owned by family members as family business. Traditional Kirana and 'mom and pop' type stores are still dominating in the unorganized Indian retail market (Kaur, 2013). However, soon there was a new dawn in the Indian retail sphere and transformation started to take place in the mid 1980's when the Indian economy began to open up. The concept of shopkeeper to customer was about to change from traditional grocery stores as few Indian textile firms decided to come up with their retail concept. Bombay Dyeing, S Kumar's, Raymond's, etc. opened up their textile retail chains thereby creating a transformation from grocery selling to cloth selling (Singh and Agarwal, 2012). Also single brand retailers like Liberty footwear started to operate in 1980's. Thus the trend was started from manufacturing business to pure retailing (Munjal, Kumar and Narwal, 2011). Large scale manufacturers like Tata also jumped into the

bandwagon along with others when they started their Titan watches retail stores. At present Tata group's Tanishq brand of jewellery retail has established reputation as a top class retailer in the diamond jewellery business. Slowly specialty retailers entered into the catering of food, music and electronics with more organized retailers like Food world, Planet M and Music world, etc. entering into the fray. Discount retailers like Apna Bazaar, Subhiksha and Nilgiris (Munjal, Kumar and Narwal, 2011) had also established its stronghold in various parts of the Indian metropolis. But the retail industry was yet to see radical changes. This shift occurred when mall culture started evolving in India with giants like Future Groups, Bharti retail, Reliance opening up malls across regions.

Though a wave of western retailing had started in India during the 1990's with the establishment of chains, there was a lack of international exposure with only few companies like Levi's, Pepe, Marks and Spencer, etc. operating in the huge middle class population of India. People were looking out for newer options and international brands. Modern retailing started with the operations of hyper malls and super markets.

With government opening up foreign direct investment into Indian retailing, international players like McDonald's, Pizza Hut, Nike, Adidas, TGIF, Benetton, Swarovski, Sony, and Kodak forayed into the unexplored segments. Recently IKEA also proposed its desire to establish its retail format in the furniture segment. This has created the need for Indian biggies to expand their operations by bringing change in their infrastructure, customer service and present style of catering in order to compete with these MNC giants. E-commerce is also in the expansion spree with retailers offering their services to the Indian masses online.

Studies show that retailers are experimenting more and more with sophisticated information management systems, computerized inventory management systems and supply chain management. The traditional retail formats are the most favored format of the Indian population due to their customized services, credit sales and home deliveries. Thus the need arose in the organized retail sector to make this segment move to organized retail stores by luring them with value added customer services. Organized retailers started to upgrade and equip themselves to capture the attention of the prospective customer (Dash, 2011). They realized the importance of giving the shoppers entertainment along with shopping.

Managing Changes in Human Resources Management and Human Processes Management Practices

Apart from providing merchandizes, customer service is an important aspect of modern day retailing. Organized retailers understood the need of integrating the human resources management practices with the strategic goals of the organization. It has been seen that retail businesses generally used to have part timers in the customer care and front staff divisions. However, the need to have proper human resource policies were felt as employee turnover rate was quite high. A study conducted by Reddy and Suresh Chandra Ch. (2011) highlighted that retailers like Spencer's, Reliance Fresh, More and Reliance Super focused on incentive based pay and employee involvement through group involvement, quality circle formations, etc. More focus is also put on multi-skilling, job enrichment, performance appraisals and training and development. Online training is provided to employees wherein they are shown visuals of well designed and successfully running retail organization's outlets. However, some essential dimensions of quality of work life practices like Employee rest rooms, recreational areas, first-aid centers, staff accommodation are yet to be looked at.

It has been seen that Indian retailers are hiring oversees talent to look into the human resource management aspects. Reliance retail appointed Peter Bracher from Wal-Mart as special adviser for Reliance retail (Tanwar, Kaushik and Kaushik, 2011). The void of quality manpower at executive levels is filled through such changes in the hiring process.

Raheja Group's Shoppers Stop brand brought in the concept of "Baby Kangaroo program" for efficient management of its human resources (Kesteloo et al 2013). The program helps the management in identifying potential associates within the firm. It is a mentorship program wherein a junior staff is associated to a senior staff who mentors him for his growth within the firm (*ibid*). It has been seen that the program has reduced the attrition rate of employees as it gives employees the scope to rise up the career ladder.

Big Bazaar empowers its employees to experiment and take risks. For performance management it brought changes in its traditional practices by bringing innovative concepts like Mrs. Iyer Audit. 'Employees and store managers were led to belief that Mrs. Iyer, a fictional character would visit stores anonymously to check orderly appearance' (*ibid*). This enhanced staff performance.

Career planning and development in retail organizations have also seen change initiatives. Some retailers have started using psychometric testing as a tool for evaluating competencies and basing promotions for its store employees ("Indian Retail Operations", 2013). 360 degree Feedback mechanisms across departments have also become a regular feature. Research reveals that Footwear retailing basically attracts people from the lowest strata and thus employee attrition rate from among these low caste employees is very high (*ibid*). Hence to do away with it, retailers recognized the importance of introducing changes in their career development polices. To motivate and induce employees to stay with the organization the change initiative is to appoint senior staff from within (*ibid*). Originally using traditional pay systems Pantaloons Retail now utilizes tools like balance score card to ensure that employees felt they were treated fairly and given their dues (Saraogi, 2006). Vishal Retail has a performance-based remuneration process in its back-end operations, whereby employees get higher perks and salaries based on their performance (Source Business Standard, November 2008 as cited in Indian Retail: Time to change lanes) .

Change initiative in Kishore Biyani Retail Group:

In mid 2008 Kishore Biyani Group utilized new strategy for its retail empire. It read "Garv se bolo hum kanjoos hain" i.e. "Say 'Yes, I am stingy' with pride". This campaign was initiated to bring the employees together to save operational costs (source: Mumbai Mirror, Sep 2008 as cited in Indian Retail: Time to change lanes). This cost cutting strategy helped to see that internal over-lapping of functions was avoided across departments to eliminate inefficiencies. For the smooth conduct of the process back-end and human resources and information technology were integrated in an organized manner *(ibid).*

Workforce management initiative at Marks and Spencer to increase employee engagement and commitment to the organization

It started with "People engagement" program which focused on recruiting, hiring and orientation, learning and development, talent management, health and well-being, work life balance and financial security ("Strategic issues", 2010). Its main aim was to reduce attrition rate of employees. In its phased program the scheme conducts an annual employee perception survey which is based on certain parameters like positivity index, commitment index and responsiveness index.

The induction program consisted of providing front-line staff as well as corporate staff information on products, values, company policies and procedures. It meant to build cohesive and collaborative understanding among staff. In the learning and development program front line staff is assigned individual development plans which consist of comprehensive training on operational and organizational procedures (*ibid*).

In the talent management phase staff receives 360 degree feedback and are made aware of their future career paths. Leaders of corporate head quarters and store managers are asked to train, coach and develop new leaders for succession (*ibid*).

The performance and reward management phase utilizes competency based performance management systems based on key performance indicators. It thereby rewards staff through linked pay and a range of financial and non financial rewards (*ibid*).

Pantaloons's planned change initiative for enhancing employee performances at the senior executive level:

Pantaloons retail launched programs called 'Step Up' and 'Turning point' to prepare departmental heads and functional heads for next stage of career development (Pantaloons Fashion & Retail Limited Annual Report, 2012-2013). For this the company established the in-house learning university 'Gyanodaya'. It has fully installed resources to meet the knowledge and development needs of the leaders. It has partnered with several leading institutions and corporations for collaborative learning. Executives are given intensive courses each year under this program. Feedback system is maintained to conduct conversations with people and understand their engagement with the other groups within the network. This survey is named as 'Vibes' which is conducted by external HR agency to assess further needs of the executives as well as their development (*ibid*).

Managing changes in the field of technology and supply chains

It was Wal-Mart which started using IT as early as 1970s (Bose, n.d). It installed barcode or the electronic data interchange and computer terminal network (*ibid*). The retail industry thus got Universal Product Code (*ibid*). Wal-Mart also started conveyor system in 1978. Point of sale scanning system entered in 1983. Later electronic purchase order management system was introduced. It went deeper into sales and tracking by utilizing RFID (radio frequency identification) (*ibid*). But in the nascent stages of retailing in India almost one third of the Indian companies had no supply chain strategy (Sahay et al. 2003 qtd in Dabas and Sternquist, 2012). Also there was lack of cross-functional team integration and lack of technology deployment (ibid).

But the scenario has been changing. Major retailers have shifted from non-integrated information systems to Enterprise resource planning systems to manage demand and supply effectively (Garg, 2010) by monitoring stocks and their movement. Beside this major investments are made by the retailers in QRDS (Quick Response Delivery System) and ECR (Efficient Customer Response) systems and developing the supply chain network (Gopal and Suryanarayana, 2010). It became an absolute necessity for retailers to monitor their trade areas, assess the impact of competition and choose new store locations strategically. Hence they started utilizing location intelligence tool GIS -Geographic information system (Mishra, 2009). U.S and European retailers started using GIS as early as late 90s but the technology got adopted in India at a very slow pace (*ibid*). Technology use is still in nascent stage in Indian retailing as most technological systems are used only for managing within firm-integration (Dabas and Sternquist, 2012). But nowadays major retailers have started using RFID, Business Intelligence software and Point of Sale (PoS) applications to efficiently handle demand and supply sides in retail ("Strategic Issues", 2010). Also Customer Relations Management application (CRM) is rapidly changing the retail scenario.

Big Bazaar implemented WebEx in every store to communicate and share information and also installed 'Store walk technology' which helps to view stores from head/zonal offices (Kesteloo et al, 2013). Pantaloons Retail developed optimum stock management policies by establishing direct link with manufacturers and hence enhancing its supply chain. Its automatic Replenishment System (ARS) ensures timely availability of products at all its store locations (Pantaloons Retail (India) Limited, 2008-2009 Annual Results). With the growing number of rich, Reliance retail's focus was to sell luxury brands and also built a robust supply chain. It thus acquired its own fleet of trucks and cargo planes as its planned change initiative to enhance supply chain network. A major change initiative to bring modernity in supply chain was made when Bharti Retails in order to get access to cold chain logistics and supply chains strategies of international companies' entered into joint venture with Wal-Mart. It meant Bharti getting the knowledge excellence of Wal-Mart's logistic arm-Gazeley (Bose, n.d). The Indian retailing structure is now moving towards a technology led centralized buying-supplying system (Dabas and Sternquist, 2012).

Shoppers Stop is planning to enhance its IT systems by investing in high end technologies that impart education to its users consisting of both internal and external customers. It introduced iCatalog an iPad based application for its customers (Shoppers Stop Annual Report 2012-2013). Its future plans are to invest in understanding its customers through CRM technologies by building data warehousing, data mining and CRM capabilities. It is also aiming for further investments in enhancing corporate governance, information insight, disaster recovery systems, etc (*ibid*).

Re-alignment of the supply chain in Landmark Group's retailing: A change management initiative:

Landmark retailing format was dependent on regional store linked ware-house systems. This decentralized structure created problems with respect to availability and replenishment of merchandize in its stores. In order to move to a more

efficient and smooth back-end distribution network Landmark has migrated to a more centralized distribution centre approach. Retail is, thus, evolving towards a centralized buying system (Dabas and Sternquist, 2012). Vishal retail also decentralized its structure and closed large centralized warehouses to create a balanced supply side across its sub centers (Indian Retail: Time to change lanes, n.d). Similarly Big Bazaar merged its back office operations *(ibid)*.

Managing change for the optimum utilization of space

Retailers like Wal-Mart, Carrefour started using space management tools to manage high real estate costs. However, the concept of space management is very recent in the Indian retailing scenario. Previously the concept of space management and hence space efficiency was not given due importance but with high fluctuations in real estate costs 74% ("Indian Retail Operations", 2013) of small and large format retailers in India have managed this change by utilizing advance space planning tools to increase their efficiency in operations at lower rental costs.

Retail in India is not just about shopping but is now considered an entertainment with the coming up of malls (Tanwar, Kaushik and Kaushik, 2011). Retailers now increasingly focus on providing fun and leisure based activities to customers along with shopping. The future of profit making in the retailing sector rests on entertainment oriented shopping. Activities like food courts, video game, parlors, book stores, cinema and theatre (Srivastava, 2008) are introduced in the retail malls. This changing ideology among the entertainment and shopping frenzy consumers also brought the importance of mall management. The retail industry is now seeing a change with respect to this dimension and hence has been seeking the help of professional mall managers as part of their space management strategy. Retailers want access to the best part or position in the mall for more visibility. Hence there has been a shift to Mall management strategy that is built on interdependence between the Mall developer and the Retailer. It focuses on the business benefits that can accrue out of collaborated business management between the Mall Developers and the Retailers through revenue sharing and space management. Change has been brought in space management by utilizing the revenue sharing model (Roy and Masih, 2007) under which retailers share a percentage of their sales with real estate companies providing the mall space (Indian Retail: Time to change lanes, n.d). It increases the responsibility of the developer to bring in foot falls by providing good upkeep of infrastructure *(ibid)*. Retailers thus do not have to bear the brunt of decreasing footfalls all alone that which normally used to happen in the initial stages of retail evolution. In India, the concept of space management is changing as retail companies has started approaching mall developers to harness the benefit of mall management. Inorbit mall in Mumbai is an example of such planned mall management strategy of K Raheja Group (Roy and Masih, 2007).

Retailers are managing the growing customer demand of having everything under one roof Srivastava, 2008) by planning to increase their retail space area. Major retailers planned massive expansions. They also planned to invest in multiple retail formats. Reliance planned to have pan India presence with different formats. Tata group's Westside chain of departmental stores under the retail arm Trent is currently planning to expand itself in all large towns which is a change in itself as initially retailers preferred cities to towns. The mall revolution is growing further with new retail outlets and malls being planned in Tier II and Tier III towns (Choudhary, 2013).

The middle class target retailer Big Bazaar's format innovation in 1990's: A change initiative

Indian masses believed that shopping in congested areas give them value for money. Realizing the mentality of the customers Big Bazaar created an atmosphere of crowded market in its mall with its smaller aisles. It created Bazar centric format to catch the attention of middle class customers (Kesteloo et al 2013). Merchandise was also managed on its shelves the way it is found in traditional 'kirana' stores where consumers get to touch the items like wheat, rice, etc. Bundled goods schemes and simple granite flooring allowed customers to be at ease *(ibid)*.

Expansion, marketing and promotional changes

Presence on television and online media has been seen as a new necessity. Retailers have started taking help of electronics and print media to reach larger customer base. Shoppers stop has you tube channel and facebook and twitter pages dedicated for its loyal customer base (Shoppers Stop Annual Report 2012-2013). Big Bazaar roped in Bollywood and sports personalities like Asin and Mahendra Singh Dhoni to pull in more people. Some retailers have taken up the gauntlet by creating specialized brand management departments in their organizations managed by a group of highly competent people from the marketing world. Other retailers like Reliance are managing the competition by offering customers 'cash back' offer valid for further purchase during the redemption period (Kesteloo, et al, 2013). Big Bazaar resorts to product assortment based on local preferences e.g. Private label 'Ektaa' was launched to cater to varied rice preferences of states *(ibid)*. Star Bazar has initiated Health week in food category to increase revenue through sales *(ibid)*. Another change initiative in the field of marketing is 'Below the line marketing' initiative ("Indian Retail Operations", 2013). To initialize this retailers have adopted store management brainstorming sessions to generate creative catchment engagement initiatives *(ibid)*. This shall be further linked to store managers' KRAs (Key results areas) *(ibid)*. In order to target customers shopping from home, fashion and apparel retailers have created their strong presence on e-commerce sites *(ibid)*.

To increase market presence and market share retailers like Shoppers Stop departmental format has managed change in its operations by flouting their own private labels like Stop, Kasish, Life and Carrot in the apparel segment to be in competition with the international apparel brands (Srivastava, 2008). Likewise Lifestyle has also floated its own in house labels *(ibid)*. This strategy is utilized to compete with the flooding of global apparel brands. Retailers are actively scouting for joint ventures and acquisitions to expand into new formats and offer a wider variety of products. Pantaloons managed this new trend by entering into strategic alliance with Planet Sports, Liberty Shoes and Unitech group to expand its range of premium offerings, footwear and home solution products. Pantaloons retail initially started with Men's wear retailing in 1987 in a small store format through franchisee outlets. But later the company evolved from product driven to knowledge driven and then design driven formats (Saraogi, 2006).

Discussion

The following are the highlights of the present trends taking place in the retail sector of India. Effective change initiatives in the retail industry thus focus on the following aspects:

i.   Structural considerations: With the increase in demand for leisure and entertainment along with shopping, the concept of mall management is gaining momentum. Thus structural considerations like zoning, visibility, layout, etc. are considered as an important segment in the mall management culture. The concept of the leisure, fun, entertainment and shopping under one roof is the present trend in the retail sector. At the same time the concept of space management has also been gaining grounds.

ii. Focus on human resources: Retail companies' focus on employee empowerment has increased for they understand the importance of empowered employees in providing excellent customer services. Greater importance is given on performance management to stay away from the problems of high employee turnover. Retail companies have started following a variable pay policy for their corporate and frontline staff. Talent management metrics is used in organizations and effort is made towards training and career planning of the employees.

iii. Use of advanced technology and its optimization: Though Indian Retailing saw the adoption of adoption of Information Technology and other advanced digital systems at a very later stage; the present trend seems to be shifting towards modernization. Use of Radio Frequency Imaging Devices, Geographic Information systems and technologies like WebEx has been seeing constant rise in its use in India. Even small time retailers are not lagging behind in technology used to maintain a robust supply chain network and optimum utilization of resources.

Conclusion

In a changing retail industry it is important for retailers to bring change and innovation in their day-to-day practices. Retailers who could not foresee the changes occurring in technology, structure, strategies and policies of their competitors find it difficult to sustain in the competitive environment and are being forced to take themselves off from business. Departmental retailer 'Subhiksha' lost in the race for it could not manage the changes occurring in the external and internal environment of the organization. Retailers thus feel the need to formalize and regulate the change agendas to stay in the competitive environment. In present circumstances in order to lead efficient change in an organization, the need of the hour is to create an emotional-connect with the employees and staff. Change initiatives can be many but it is the people in the organization who make change possible. Loyalty to the organization may come with a simple gesture of appreciation of work and a simple acknowledgment of 'thank you' which further helps the organization in leading the desired changes in the organization with little or no resistance from the employees. Realizing this need for reward and recognition the organized retailers celebrate December 12 as 'Retail Employees Day' with the theme *'Thank you Bola Kya?'*. Other major change initiatives that are coming up in the retail sector are the ethical response initiatives. Major retailers have started implementing Whistle Blower Policy to provide a formal mechanism for all employees to voice their opinion against unethical business practices. Committees are constituted to look into such matters which compromise with the ethics of the company. Certain change initiatives are also initiated in the corporate social responsibility sphere. Change is thus always for the betterment of the people, society and the economy. Though many revolutionary changes have taken place in the retail scenario of India it has yet to see further changes with respect to provisions like benefits to employees with respect to working environment, opportunities for higher education for the family members of staff, stake holder ship in company assets for the lower staff, etc.

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