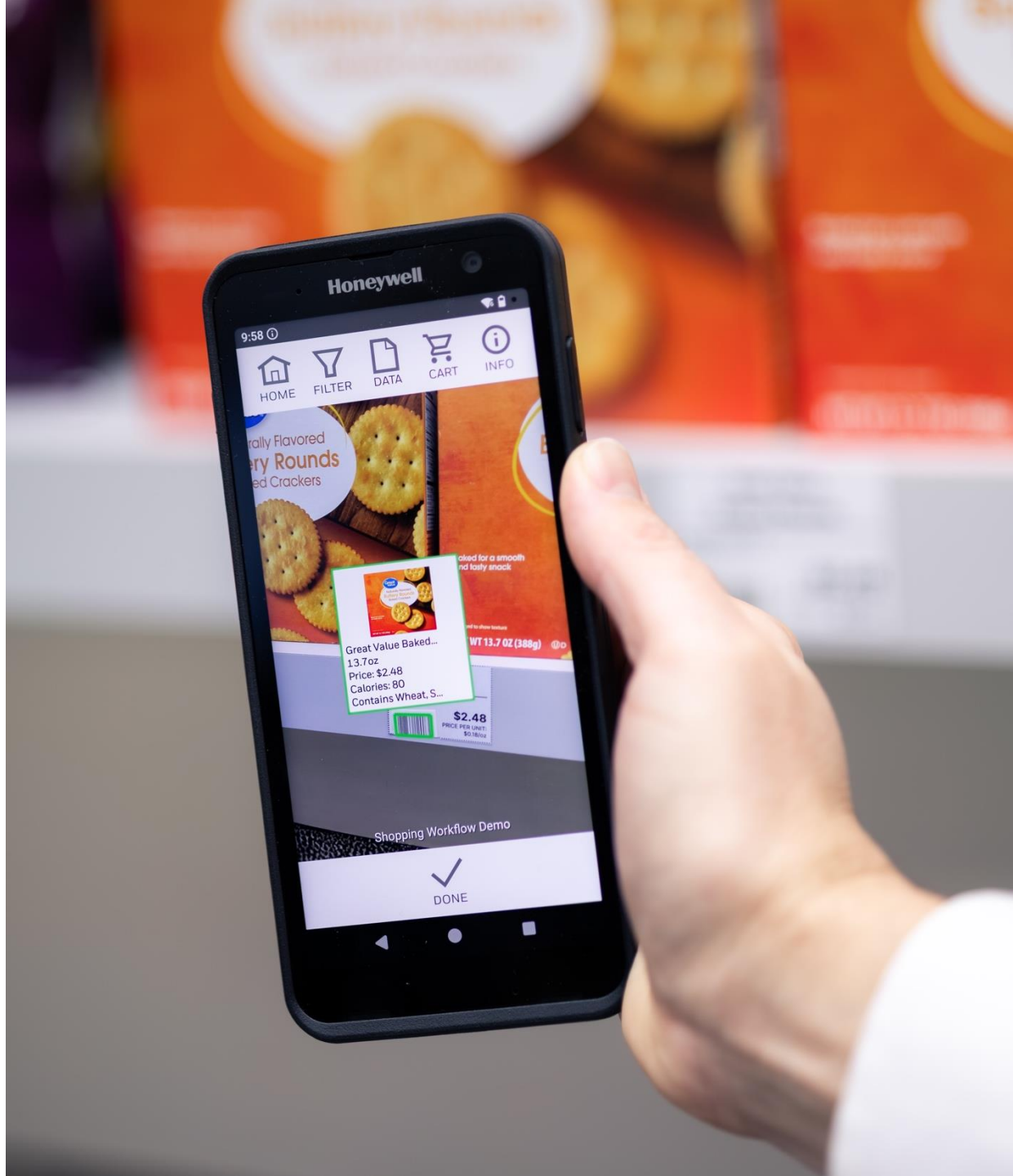
# The New Retail Operating Model

## From AI experimentation to everyday execution

Retailers no longer need more experiments, They need an operating model that makes **better decisions** repeatable.

This research shows where adoption is advancing, why enterprise-wide scale remains rare, and how **trusted data**, integrated systems, and frontline adoption can help retailers create value across operations and customer experiences



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# RETAIL AI HAS REACHED THE EXECUTION GAP

**11%***

**have scaled AI enterprise-wide**

**52%***

**identify inventory data as a top data-quality concern**

**51%***

**say stronger integration would build confidence**

*Source: Guidepoint AI Future Survey (n=82), 2026

## The big idea for retail leaders

- AI is moving quickly from experimentation to an operating-model challenge: the winners will scale decisions, not just algorithms.
- The primary barrier is not appetite for AI; it is the reliability of operational data and the ability to act on insights in daily workflows.
- Dynamic commerce is the path forward: connected data, adaptive decisions and human-centered execution across stores, supply chains and digital channels.

### Retailers Lens

**Retailers do not need another AI concept. They need a practical roadmap for turning trusted data into faster decisions, better experiences, more resilient operations and measurable margin improvement.**

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# FIVE LEADERSHIP TAKEAWAYS

| What retailers are telling us | What leaders should do next |
| --- | --- |
| AI adoption is widespread, but enterprise-wide scale is still rare. | Shift the conversation from “Where can we use AI?” to “Where can AI change daily execution?” |
| Store-level operations lag more centralized use cases. | Design AI around the realities of associates, managers, shelves, inventory and fulfillment. |
| Data quality concerns sit closest to operational decisions. | Prioritize the signals that shape availability, demand, pricing, tasks and service moments. |
| Integration and ROI evidence are the strongest confidence builders. | Build proof points that connect technology, process change and measurable business impact. |
| Insights are not consistently embedded in daily workflows. | Make AI recommendations accessible in the tools and moments where work happens. |

Source: Guidepoint AI Future Survey (n=82), 2026

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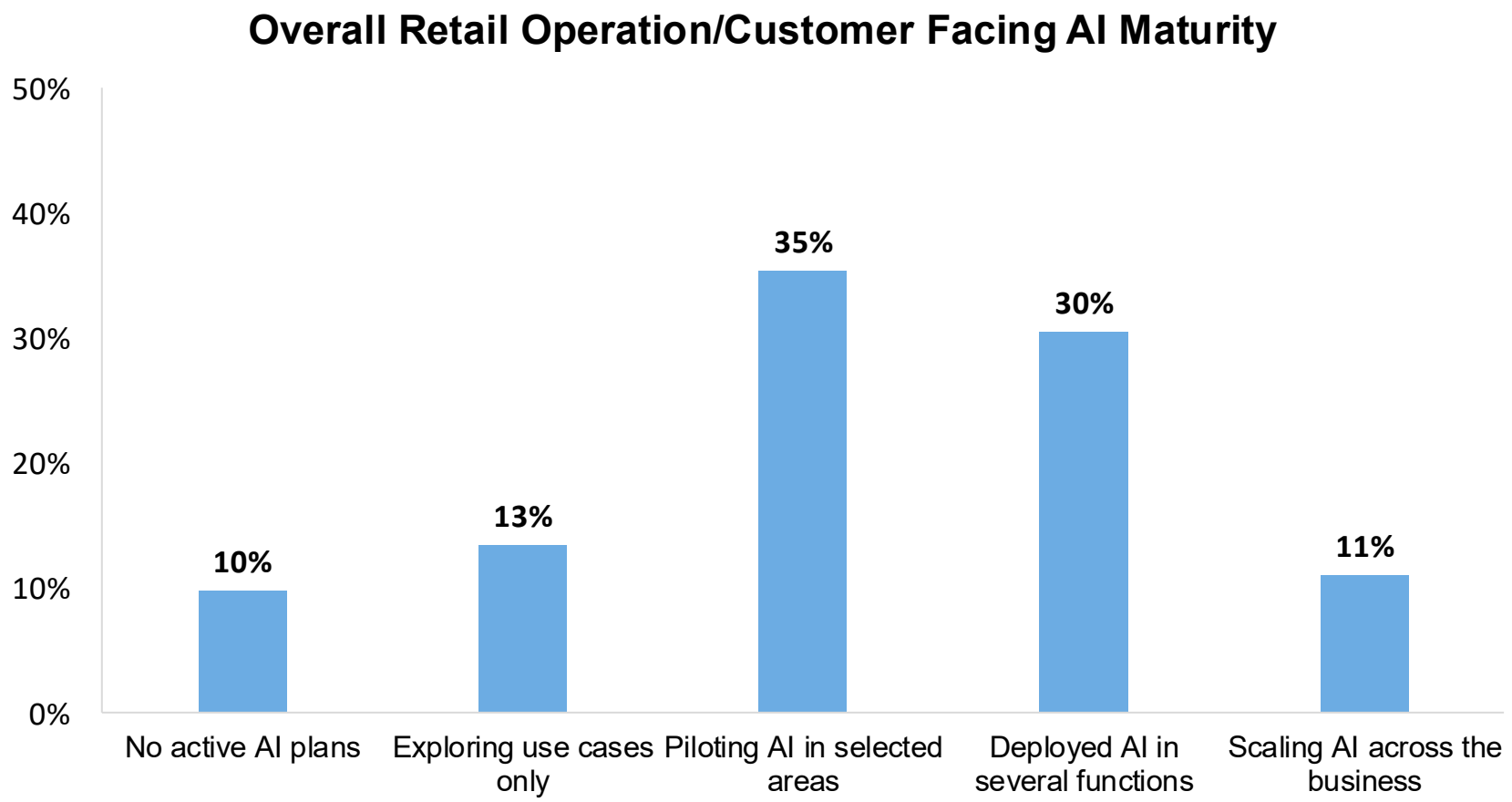
# WHAT THE SURVEY REVEALS

From AI ambition to operational readiness

Source: Guidepoint AI Future Survey (n=82), 2026



# AI ADOPTION HAS MOMENTUM, BUT SCALE IS STILL THE HARD PART




Source: Guidepoint AI Future Survey (n=82), 2026

## Retail leader takeaway

- Treat scale as an operating-model design challenge, not a technology rollout.
- Define the few decisions that would benefit most from real-time intelligence.
- Start with operational data that leaders and teams already trust.

**76% are experimenting or deploying; only 11% report enterprise-wide scale**

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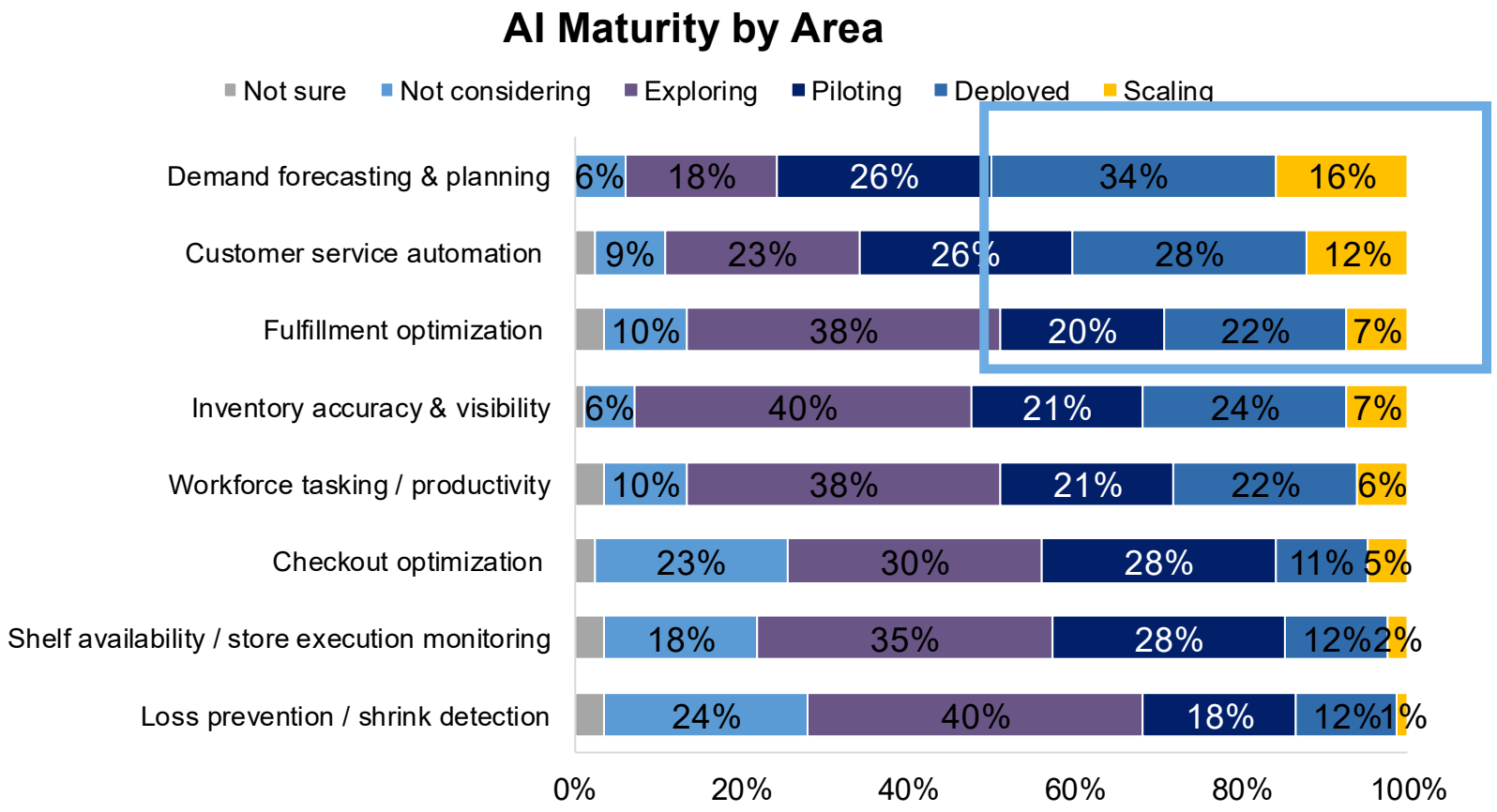
# THE NEXT FRONTIER IS STORE-LEVEL EXECUTION




Source: Guidepoint AI Future Survey (n=82), 2026

## Retail leader takeaway

- Design for the associate workflow, not just the analytics team.
- Connect enterprise AI to shelf, inventory, service and fulfillment moments.
- Measure whether insights change actions where customers experience the brand.

**76% are experimenting or deploying; only 11% report enterprise-wide scale**

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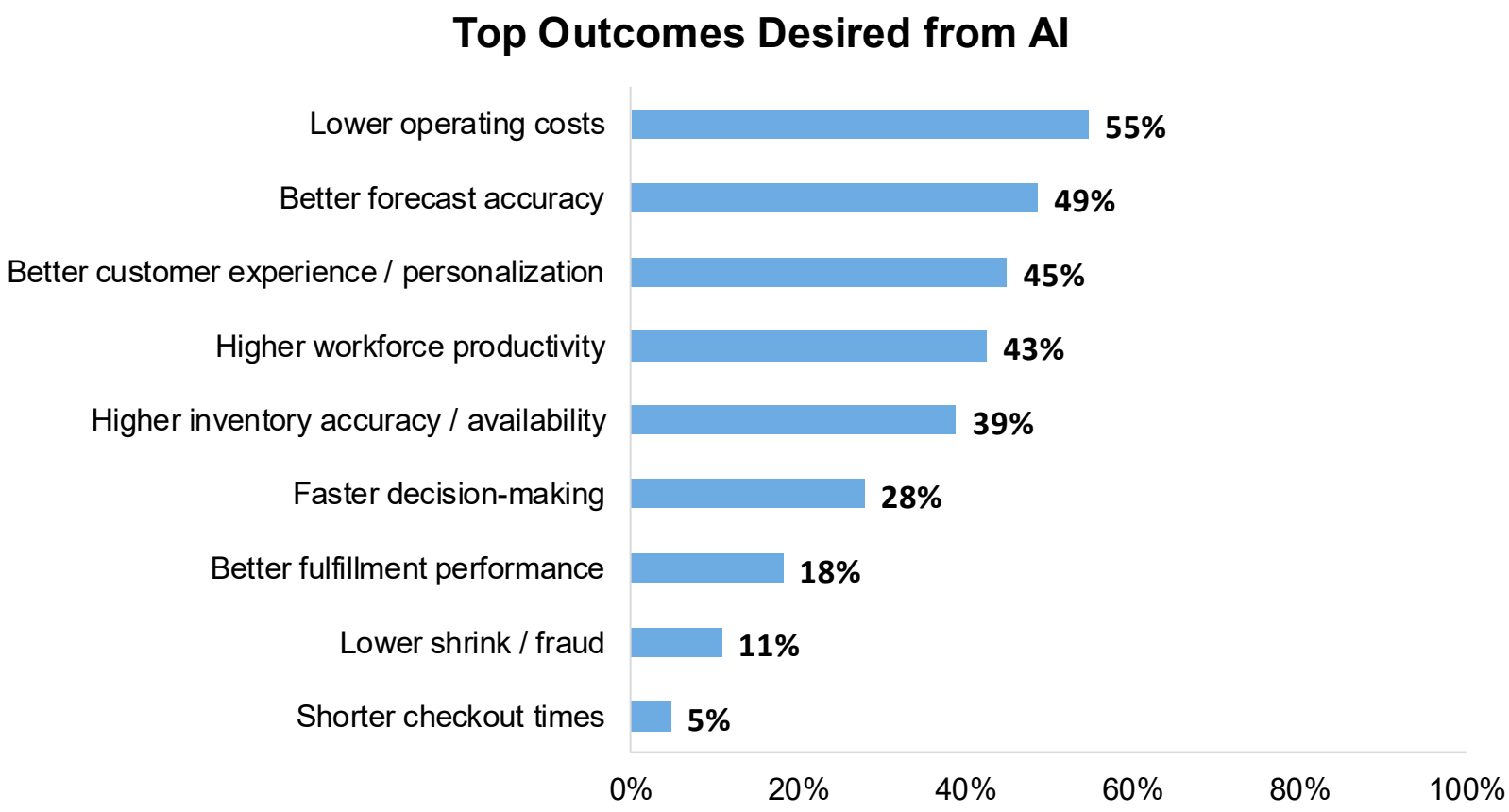
# RETAILERS ARE FOCUSED ON OPERATIONAL OUTCOMES FIRST




Source: Guidepoint AI Future Survey (n=82), 2026

## Retail leader takeaway

- Prioritize use cases with visible operating metrics and short feedback loops.
- Link customer experience improvements to inventory, labor and process performance.
- Avoid “innovation theater” by making every AI initiative accountable to outcomes.

**Cost, accuracy, forecasting and productivity are the clearest AI value pools**

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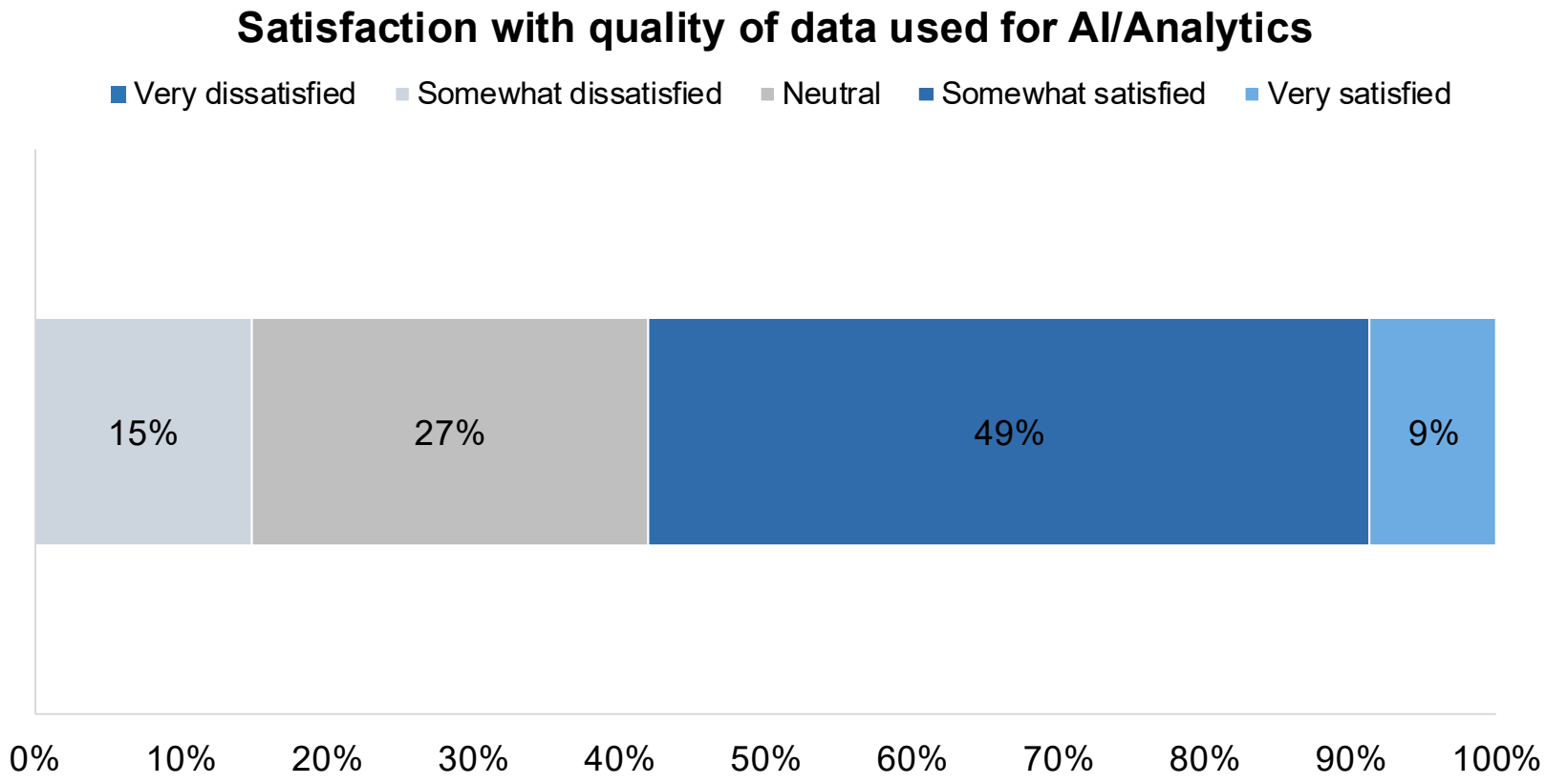
# DATA CONFIDENCE IS NOW A STRATEGIC CONSTRAINT




Source: Guidepoint AI Future Survey (n=82), 2026

## Retail leader takeaway

- Elevate data quality from an IT issue to a retail leadership priority.
- Focus on high-frequency operational signals: inventory, product, transactions and tasks.
- Build trust by showing how better data changes decisions and results.

**Initial AI efforts can run on imperfect data; scaled operations cannot.**

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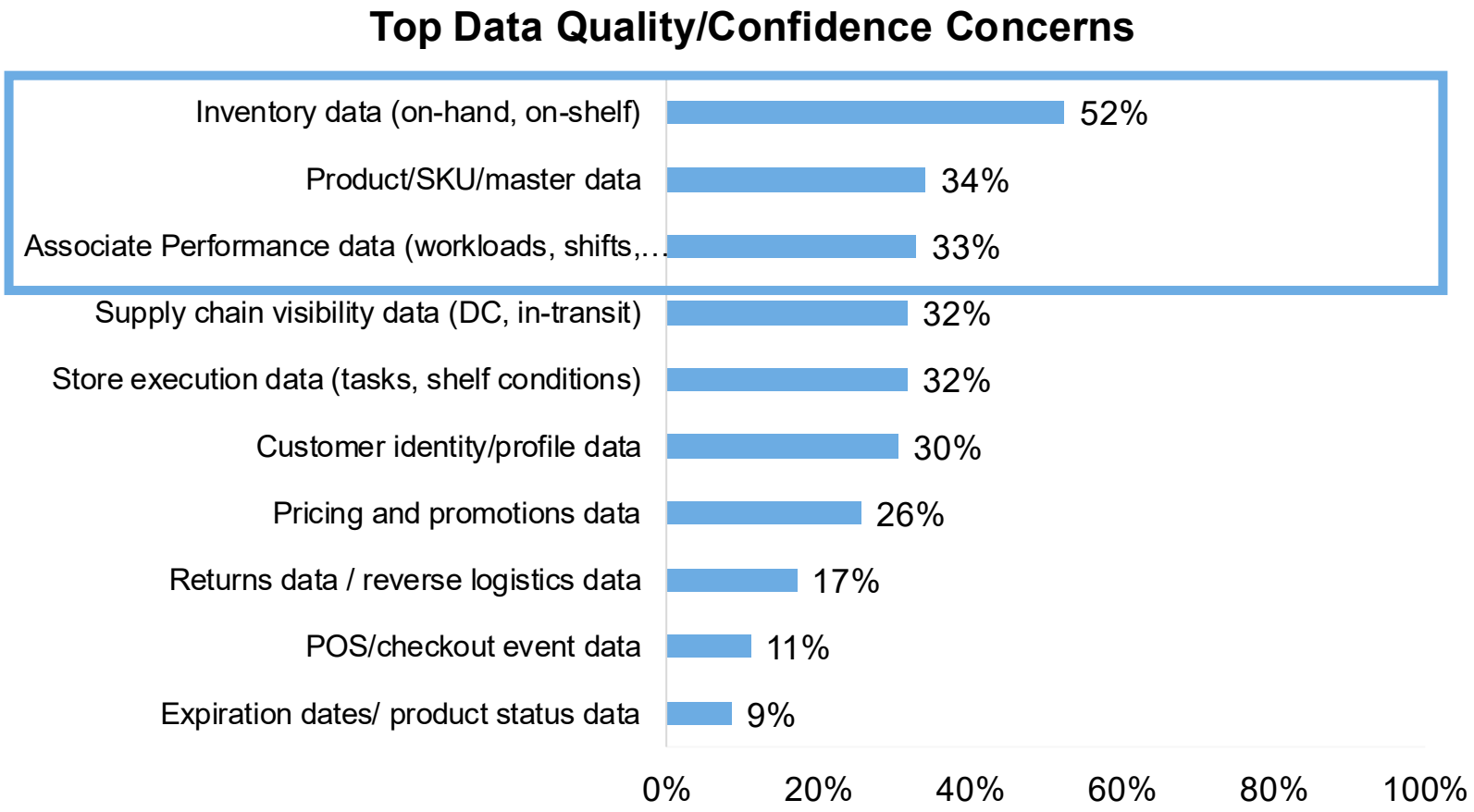
# THE BIGGEST DATA GAPS SIT CLOSEST TO THE SHELF




## Retail leader takeaway

- Close the gap between system-of-record data and what is happening in the store.
- Use better capture points to improve availability, substitution and replenishment decisions.
- Treat operational data as a customer-experience asset.

**Inventory and product/SKU data are where confidence breaks down most often.**

Source: Bridgepoint AI Future Survey (n=32), 2026

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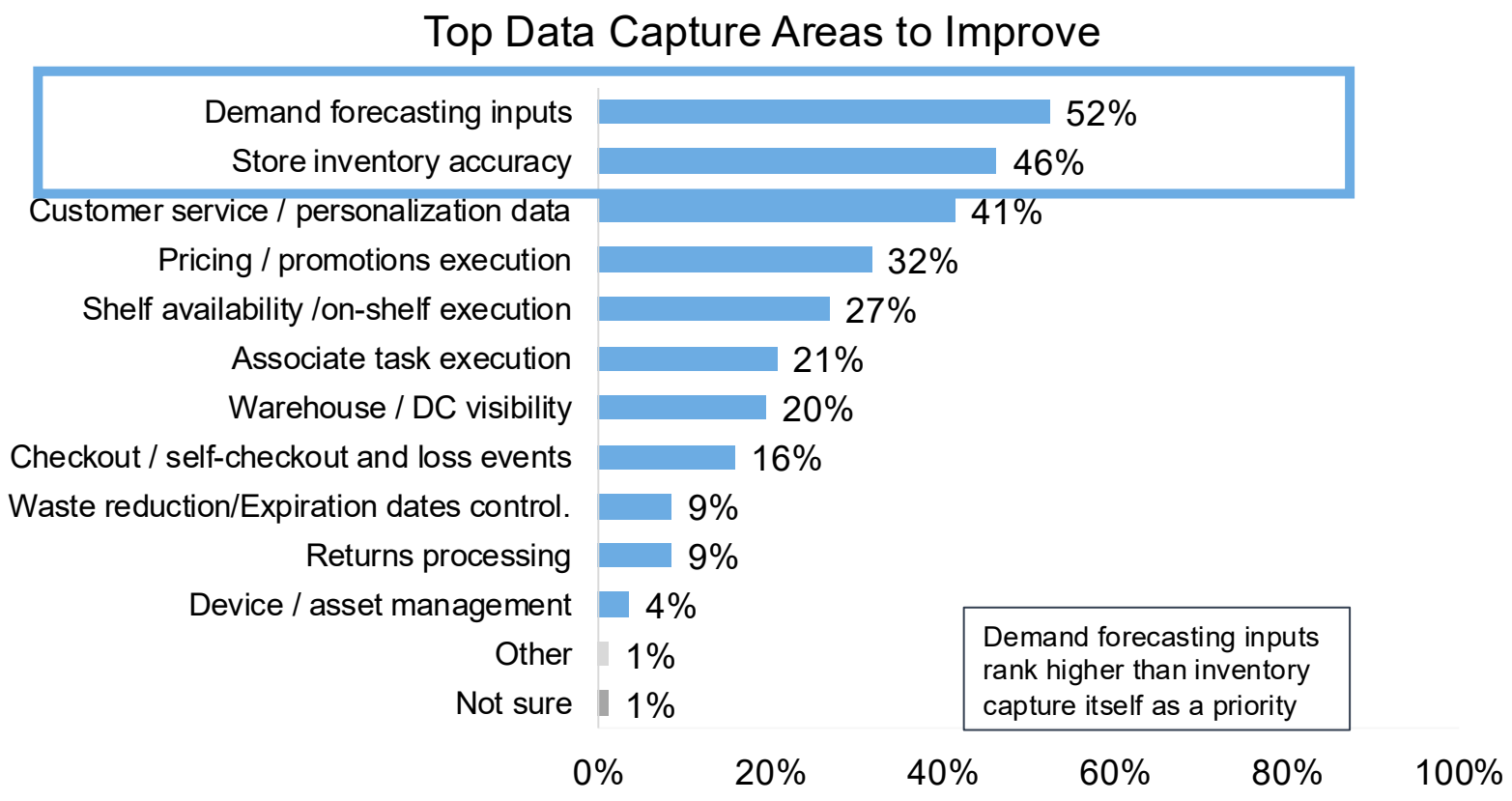
# BETTER DEMAND SIGNALS ARE A PRACTICAL FIRST MOVE




Source: Guidepoint AI Future Survey (n=82), 2026

## Retail leader takeaway

- Strengthen demand sensing across checkout, shelf, returns and fulfillment signals.
- Connect forecasting to execution so teams can act before issues reach customers.
- Use data-capture improvements to support personalization, availability and margin.

**Retailers see forecasting inputs and inventory accuracy as the highest-impact data improvements**

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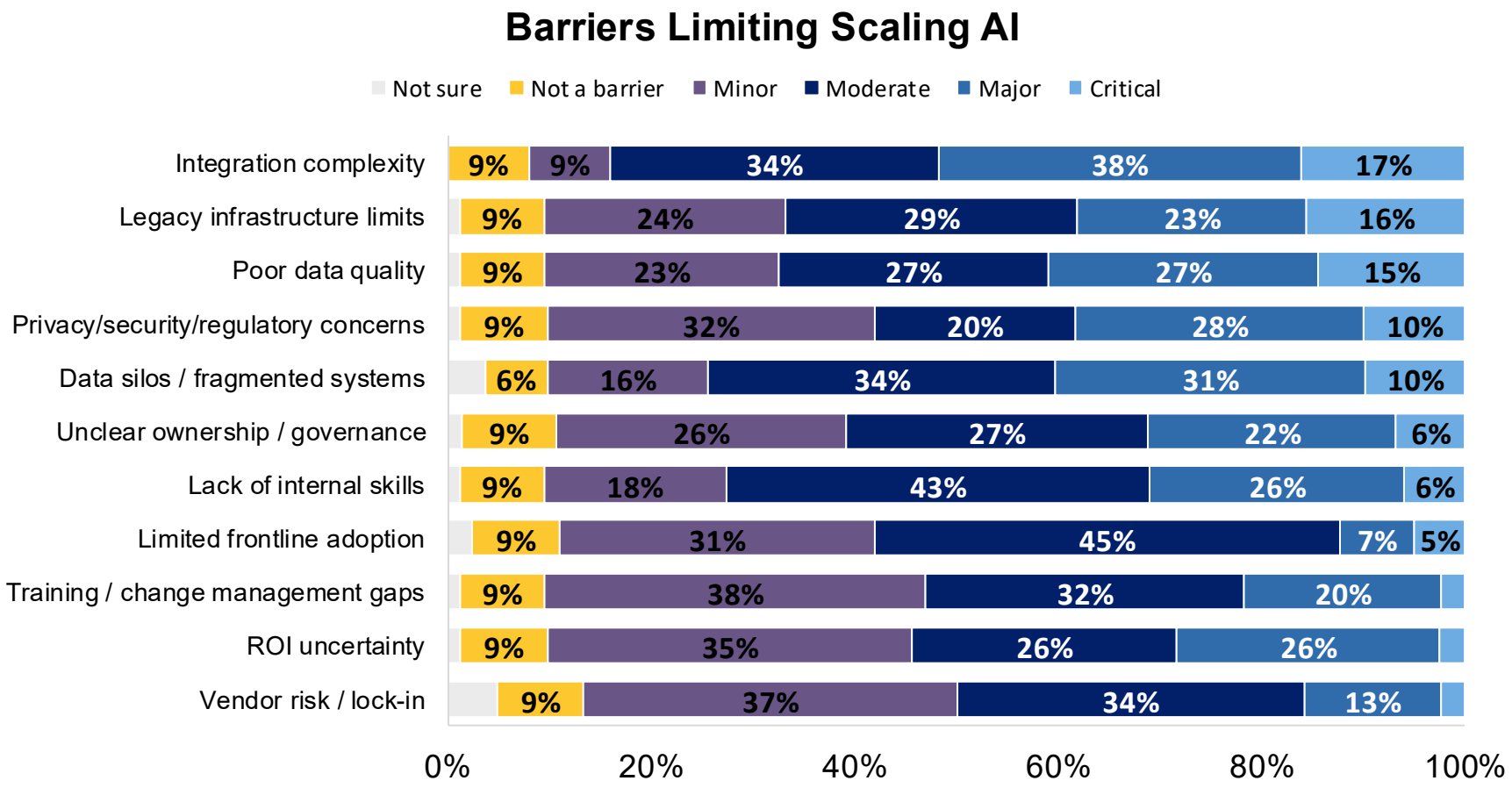
# BARRIERS TO SCALE ARE STRUCTURAL




Source: Guidepoint AI Future Survey (n=82), 2026

**Complex systems, legacy infrastructure and fragmented data slow progress even where AI appetite exists.**

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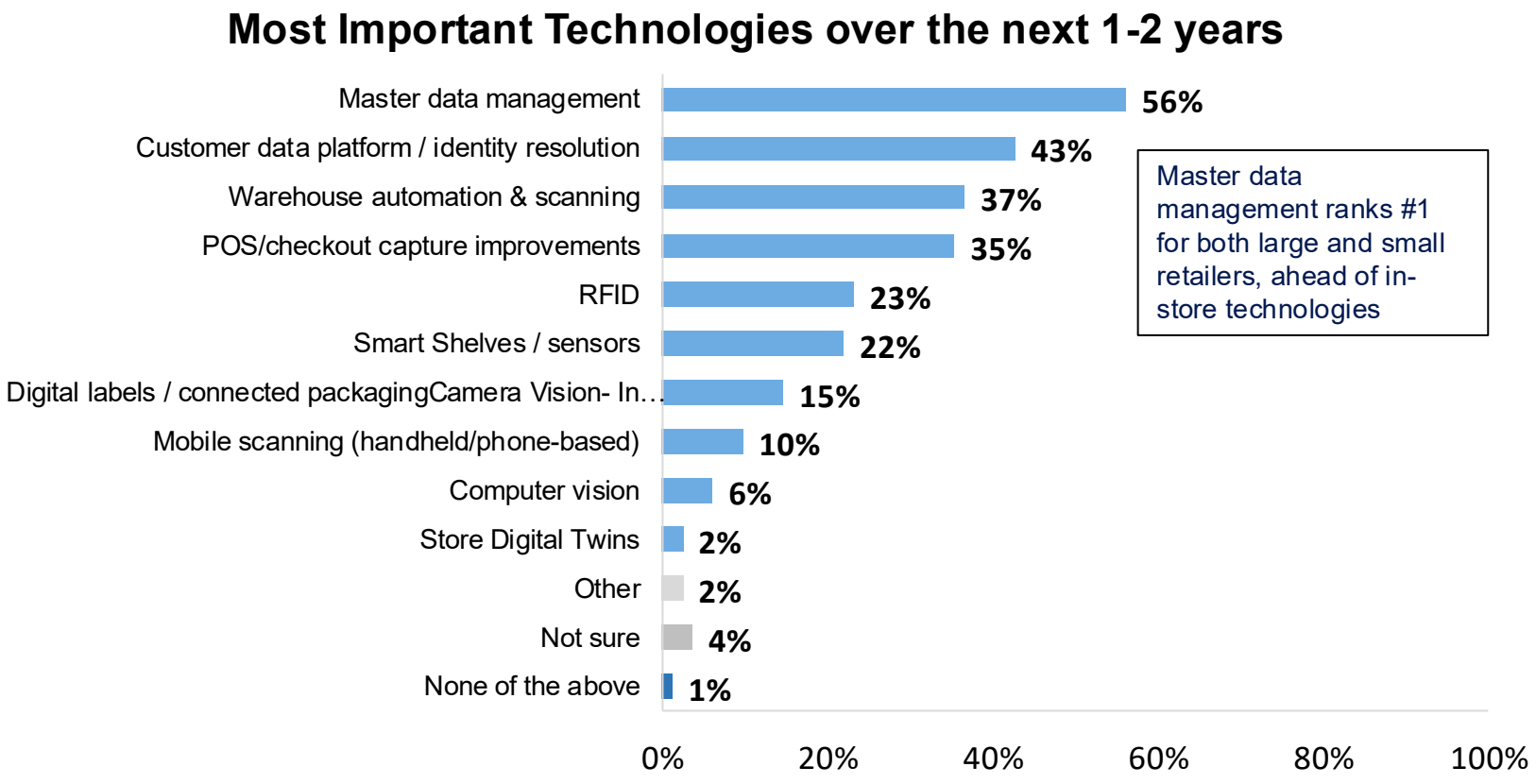
# THE INVESTMENT PRIORITY IS THE DATA FOUNDATION




Source: Guidepoint AI Future Survey (n=82), 2026

## Retail leader takeaway

- Balance enterprise data programs with frontline data-capture improvements.
- Make infrastructure investments visible through better store and supply-chain decisions.
- Evaluate tools by whether they improve speed, confidence and consistency of action.

**Retailers are strengthening data management and connectivity before adding more AI tools**

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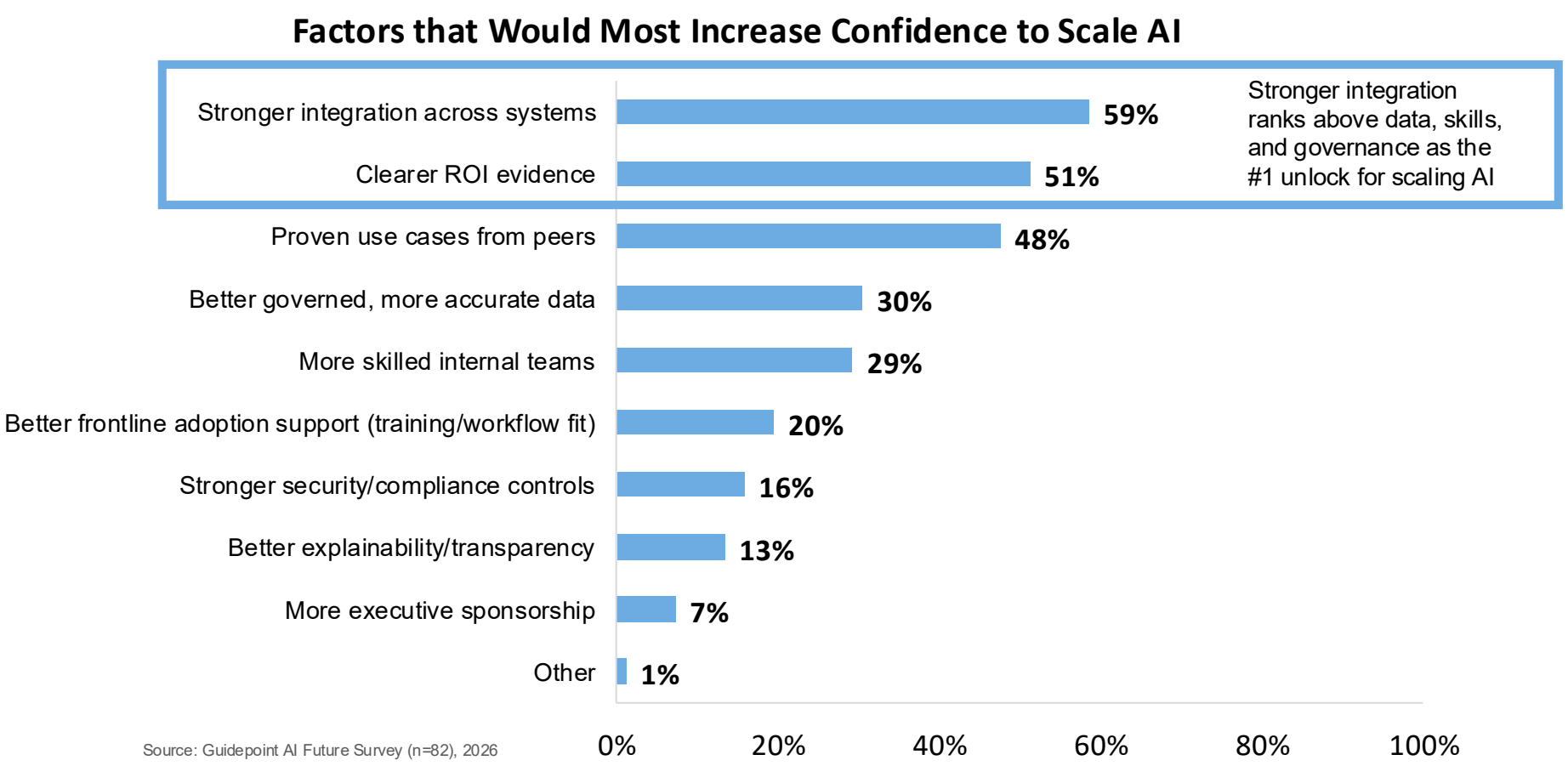
# CONFIDENCE COMES FROM PROOF IN REAL CONDITIONS




Source: Guidepoint AI Future Survey (n=82), 2026

**Retailers want proven use cases, ROI evidence and stronger integration before scaling**

## Retail leader takeaway

- Use proof-of-value work to test adoption, workflow fit and measurable outcomes.
- Document where value appears availability, productivity, shrink, service or speed.
- Scale what works through repeatable playbooks, not isolated pilots.

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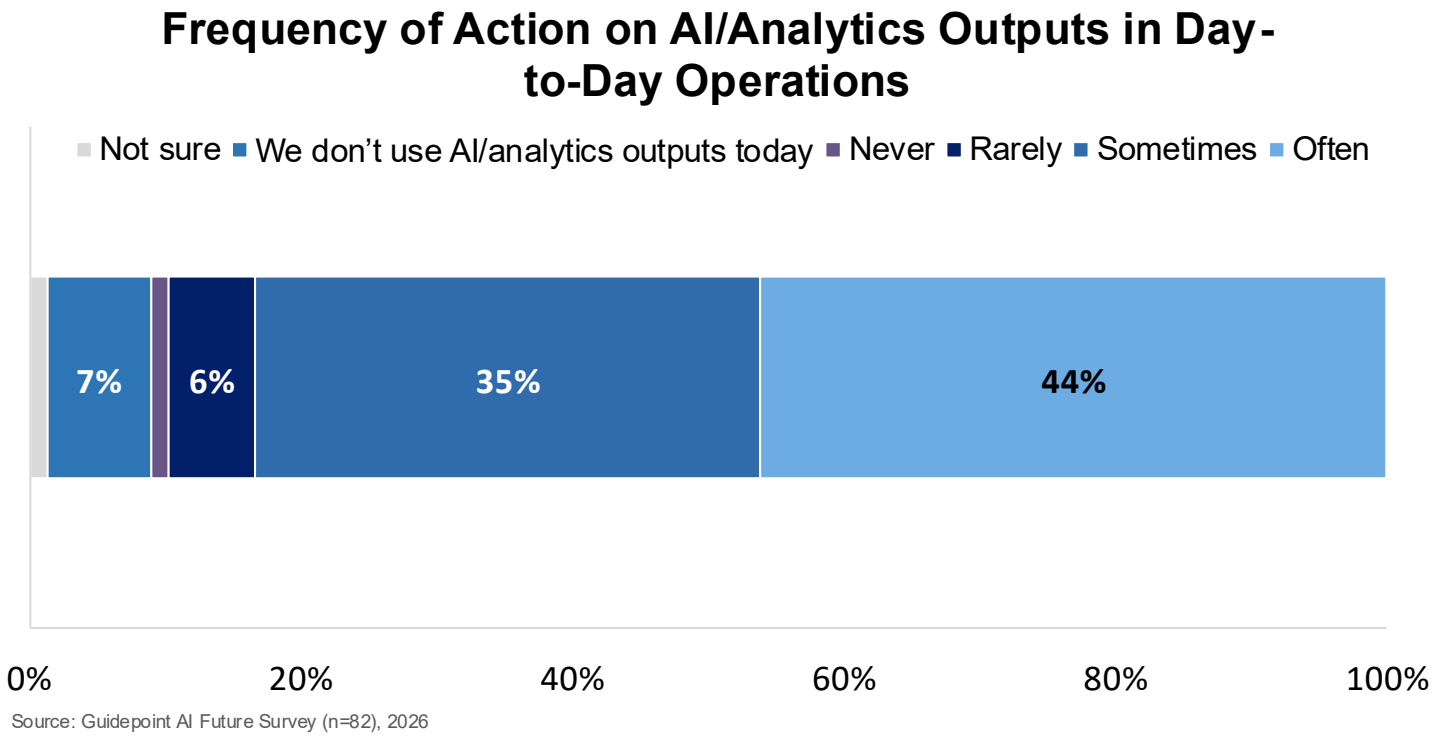
# THE LAST MILE IS TURNING INSIGHT INTO ACTION




Source: Guidepoint AI Future Survey (n=82), 2026

## Retail leader takeaway

- Bring recommendations into the tools where associates and managers already work.
- Make the next best action clear, timely and easy to execute.
- Track adoption as a business metric, not a training afterthought.

**Only 7% say teams do not act on AI or analytics outputs in day-to-day operations.**

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# LEADERSHIP IMPERATIVES

A practical agenda for dynamic commerce



Source: Guidepoint AI Future Survey (n=82), 2026

# 5 IMPERATIVES FOR SCALING AI INTO DYNAMIC COMMERCE

***Leadership shift: move from experimenting with AI tools to running a data-driven retail operating model***

| | | |
|---|---|---|
| **1** | **Define the decisions that matter** | Start with the decisions that most affect availability, service, productivity, shrink and margin, then apply AI to improve them. |
| **2** | **Build trust in operational data** | Prioritize inventory, product, transaction and workflow signals so recommendations are grounded in reality. |
| **3** | **Design for frontline adoption** | Put insight into the flow of work for store teams, supply-chain operators and managers. |
| **4** | **Prove value in real conditions** | Use pilots to test workflow fit, integration complexity, associate adoption and measurable ROI. |
| **5** | **Scale through a shared operating model** | Connect data, processes, technology and governance so each use case strengthens the next one. |

Source: Guidepoint AI Future Survey (n=82), 2026

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# DYNAMIC COMMERCE ACTION AGENDA

***Dynamic commerce is a leadership agenda: use trusted data and AI to adapt operations continuously while improving the experience for customers and teams***

| Leadership question | Operating move | Value created |
|---|---|---|
| **How do we move beyond pilots?** | Select use cases tied to high-value decisions and measurable outcomes. | Faster path to scale, clearer ROI and stronger leadership alignment. |
| **How do we make data trustworthy?** | Improve capture and governance around inventory, product, transaction and workflow data. | More confident recommendations, fewer blind spots and better execution. |
| **How do we make AI useful in stores?** | Embed recommendations into associate and manager workflows. | Higher adoption, better service moments and more consistent operations. |
| **How do we connect digital and physical retail?** | Unify signals across channels, stores, fulfillment and customer interactions. | Personalized experiences, stronger availability and more resilient fulfillment. |
| **How do we protect margin while innovating?** | Use automation and predictive insight to reduce waste, shrink, rework and manual effort. | Lower operating friction, improved productivity and better cost control. |

Source: Guidepoint AI Future Survey (n=82), 2026

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