



Zebra Your Edge Podcast

Host:

- **Mark Butler, Zebra**

Guest:

- **Mark Delaney, Körber Supply Chain Software**

Transcript

00:00:00:00 - 00:00:25:20

Mark B.

Welcome back to the Your Edge podcast. My name's Mark Butler and I'm a global partner manager here at Zebra. This is the fourth podcast where we've had the pleasure of speaking with SMEs from Körber Supply Chain Software. Over the past 8-9 months, we've talked with Körber about warehouse trends, voice picking/voice operations, warehouse management systems, focusing on AI and Slotting IQ.

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Mark B.

But for this podcast with Körber, we're going to be talking about direct store delivery, and I'm thrilled to welcome a former Zebra back to the podcast: Mark Delaney. Mark is now a hardware solutions leader at Körber Supply Chain Software. He's leveraging his extensive experience in retail and CPG to help manufacturers and their distributors find new efficiencies in their operations.

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Mark B.

One area in which he helps drive improvements is direct store delivery. In the past, he has also advised supply chain organizations from the point of production to the point of sale on how to get goods to consumers more quickly, sustainably and cost effectively. So I asked Mark if he could impart some of his wisdom on us, including things he's learned since shifting his focus from last-mile retail operations to more first-mile and middle-mile process improvements.

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Mark B.

Mark, thrilled to have you with us today.

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Mark D.

Yeah, no, you make me sound much smarter than I am, so thank you. But, no, pleasure to be here. And yeah, I also want to acknowledge the partnership between Körber and Zebra. It's been extremely strong and it's been a pleasure to partake in it.

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Mark B.

Thank you. All right. So you've spent many years advising retailers on how to improve stock levels, how to expedite order fulfillment, and how to reduce the operating expenses of essentially every aspect of brick and mortar and e-commerce operations. I remember in the first year of the pandemic, you were conducting a lot of analysis around various omnichannel fulfillment strategies, especially in the last mile.

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Mark B.

I also remember micro fulfillment centers were buzzy back then, and that was a big buzzword. And if I recall the underlying theme of almost every strategy behind every strategy being considered back then was speed to market. You know, how can we get products on shelves faster to improve stock availability for customers who are buying more and more and buying more often?

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Mark B.

And then how do we get online orders picked and in the hands of consumers faster?

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Mark B.

I think this really gave automation investments a jumpstart in the middle and the last mile. Retailers and their distribution partners upstream had to scale faster, move faster, and there just weren't enough people to make everything happen at the speed that customers expected.

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Mark B.

So this was the first big push towards greater automation and, to a certain extent, greater collaboration between people and machines. Agree?

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Mark D.

Yep. No, I mean, yes, sure. I mean, you and I were both at Modex, which seems like a year ago, but it was probably only a few weeks ago. And there's no doubt, you know, the automation space is on fire, no pun intended. I think there's a little bit of a pause that you're seeing in the marketplace right now for automation in general.

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Mark D.

And it's not because of any slowdown in terms of automation itself. I think what happened was in a lot of cases, organizations turned to automation especially as a result of the labor crisis. But in some cases they did it maybe a little bit too quickly, right? Because they didn't think through the changes to workflows that, you know, have to come about as a result of implementing any sort of automation.

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Mark D.

So I think you're going to see a little bit of a pause. But then I think you're going to see the accelerator go back down again because we simply see no end to the labor crisis. If you look at simple things like birth rates and things like that in North America, it's not going away anytime soon, right?

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Mark D.

And there's still, even in the sort of questionable economy that we're in right now, there's still two jobs out there for every one person looking. So clearly, organizations are going to have to automate. And, you know, at the end of the day, Mark, it's all about pick, pack and ship or stage, right? Right. How do you get that process

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Mark D.

faster, right? And more accurate because if there's one thing that COVID taught us, you know, we as consumers have become a lot less patient. And the Amazon effect has everyone sort of saying, hey, you know, look, I can get everything in 12 or 24 hours now, You know, do I need a dozen golf balls in less than 24 hours?

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Mark D.

I mean, I do lose a lot, right? But at the end of the day, you know, expectations amongst consumers have just come to the point where everything is about speed and everything is about accuracy. At the beginning of the pandemic, we were sort of okay if things weren't picked correctly, but any of that patience has been lost now.

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Mark B.

Yeah, that's interesting. A lot of good things. And you really made me fire up the memory banks there. But so if we fast forward 3-4 years, how much progress do you think has been made toward more efficient distribution? You know, if there were another global crisis today, heaven forbid, will supply chains be able to sustain normal safe operations for the most part? Have new efficiencies been gained through automation or even greater technology use at the edge of operations or over the road?

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Mark D.

Yeah, I mean, certainly I echo I hope there's not another COVID, right. But I think that one good outcome of COVID is that a lot of organizations were forced to take a really hard look at their supply chain and understand at a very sort of discrete level where the potential breaking points were.

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Mark D.

So I think a lot of them sort of stepped back and really mapped out - and I was part of a lot of those conversations working with retailers and manufacturers - where they would take their supply chain and in some cases do things like digital twin and look at, "Hey, if I change this part of my supply chain, what is that going to do in terms of efficiency, in terms of cost, etc.?"

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Mark D.

So, you know, certainly a lot more automation being put in place. And as a matter of fact, your colleague Andre, when he talked at Modex, you know, he talked about what's really interesting now is when you first saw automation get into place, a lot of the employees took it as a threat. They thought that, "Hey, the robots are coming for my job, right?"

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Mark D.

When that's really not the case at all, right? They're becoming much more accepting of automation being put into place because in fact, a lot of the tasks that automation is replacing are actually tasks that most people don't want to do anyway. I mean, it's very hard work to do if you're picking up large boxes or whatever and moving them from place to place. That takes a strain on you physically.

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Mark D.

It takes the strain on you eventually. Well, if you can have a cobot following you around during the course of the day and you're just doing the intelligent portion and then putting it onto a bot that is following you around, that makes for a much better work experience. And from an employer's standpoint, it actually leads to higher retention rates. So I think there's a lot of good things that are coming out of what was a very horrible two or two and a half year period.

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Mark B.

That's a good call out on automation and maybe bots. In that case, in your explanation, they're not necessarily coming for people's jobs, but augmenting and supporting them, right? They make people and make associates more efficient. But, you know, if we move on, how has direct store delivery changed for the better or worse in recent years?

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Mark B.

I know many CPG companies struggled with DSD early in the pandemic and kind of what you alluded to...not because they didn't have enough people at that time necessarily, it was because they struggled to forecast demand accurately and then get enough products made in the stores to keep up with the actual demand. Now, think about Purell and toilet paper.

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Mark D.

Yeah, Yeah. I mean DSD has been around for a very long time, as we both know. And I think some things were forced to change as a result of the pandemic. I mean, just folks being in stores or not in stores, that was a challenge. And certainly that had its effect on the you know, on the folks that are responsible for stocking those stores.

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Mark D.

And now, if you think about if you step back a little bit, you know, DSD categories in general are somewhat unique at retail. Because we think about a store's corporate office, a retailer's corporate office, they want to plan around those stores. That's valuable real estate that they pay a lot of money for.

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Mark D.

So they have very strict planograms in terms of how many facings each manufacturer's product can have on any given shelf. But if you think about DSD, it's a little bit of a different animal, right? Because what the retailer is doing is they're giving up a certain element of control within the store. But in exchange for giving up that control, they're actually giving consumers a better store experience or buying experience.

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Mark D.

So case in point, I don't think there's ever a time or week when Coke and Pepsi were on sale at the same time. All right. It's always Coke is on sale one week and, you know, maybe the next week Pepsi is on sale. So those two DSD suppliers and the drivers and the merchandisers have this sort of orchestration going on at the shelf level to say, okay, if you're on sale this week, then I'm going to give up whatever it is, eight feet of shelf so that you can expand on the number of facings to satisfy the demand by the consumer.

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Mark D.

And then the next week comes along and the other guy's on sale and they do the exact opposite. But what's interesting is that that's with no data... it's almost tribal knowledge. But I think what both of our organizations are doing are collecting more information sort of at the edge and understanding from a philosophy standpoint, is how much of that ebb and flow should really take place.

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Mark D.

And then also providing them the tools and the technology to make them more effective at shelf level because at the end of the day, the more stores that those folks can get to over the course of a day and do what they do best, the better it is for them, the more job satisfaction they have for them or the better their employers think that they're doing.

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Mark D.

So I think, you know, there's some control that the retailers give up. At the end of the day, we as consumers benefit because then, you know, if you're a Coke drinker and Coke's on sale, then, you know, you see it in stock at chain or store level. That's you know, that's how they win. Right.

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Mark B.

It's funny, I definitely noticed that. I won't say which camp I belong to, but I belong to one of those camps. And I've definitely noticed the alternate sales like you're talking about.

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Mark B.

Mark, I know companies like Bimbo Bakeries, USA turn to AI based demand planning software to stabilize operations quite quickly. So this is a good example of where people and AI can work together to solve problems, but getting a more solid demand for cash is only going to help you ensure you're producing enough products and stocking the right levels on trucks that are going stores.

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Mark B.

And while so important to reduce overstocks and understocks, CPG companies have to worry about much more like routing, merchandizing, quality control than even pricing. So talk to me a bit about what it takes today to keep DSD operations running smoothly from the first mile to the last mile. So if CPG companies use DSD to get goods to market and they're trying to get costs down or trying to reduce waste, what areas should they be targeting for improvement first?

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Mark B.

And what are the longer lead opportunities for improvement?

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Mark D.

Mark Yeah, so I think this is where you're seeing an evolution within the industry, right? So the whole area around DSD has been somewhat - I think if you surveyed most consumers, they wouldn't even realize that the folks that are merchandizers and the stores do not work for that store. And in fact, you see it quite often.

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Mark D.

You'll see a consumer walking around the store and they'll be looking for a certain product or, you know, what aisle something is in and that sort of thing, and they'll tap, you know, the guy or gal who's in there from Frito-Lay stocking the shelves. And they'll have to politely say, "I'm not with the store." So it happens all the time.

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Mark D.

So it's so it's somewhat of a, you know, tribal knowledge based way of merchandizing. But I think there's a lot of things that would improve the process from the store level to the retailer level. I mean, one is, could you do routing in terms of which store gets hit first by the driver and by the merchandise? Or could you leverage things like shelf edge camera technology or some other in-store technology via the mobile devices, the supplies and that sort of thing that would allow them to do routing based upon in-stock conditions at store level?

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Mark D.

All right. So the idea being that the you know, the store on that merchandizers list is most at risk of being out of stock. First is the store that they hit first, not not necessarily the stores that they always get first, but it goes to the top line because it's closer to being out of stock. Right. So that's one thing.

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Mark D.

And then just, you know, better communication, more effective communication between the drivers and the merchandisers. Because remember, in a lot of cases the driver drops off the product, but the merchandiser may arrive in his or her personal car or whatever the case may be. You know, it's a separate person and I'm not sure today how much coordination there is between those two folks.

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Mark D.

But of course, by using devices, by using software, by using technology, you can improve that level of communication and make for a much more effective routing and merchandising routine or workflow.

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Mark B.

Excellent. So we're going to we're going to keep on that technology piece there. But I ant to ask about environmental sensors. You know, I'd imagine that adding environmental sensors to the trucks to better monitor and manage perishables while in transit would also be helpful, right? I mean, I know bread and pastries are technically shelf stable, but if they're sitting on a hot box truck for

hours while the merchandise is making stops and stocking shelves at other stores

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Mark B.

and then inside, the climate changes - the truck and the door is open or closed - the fresh baked goods are going to be affected by the temperature fluctuations and humidity changes. You know, I've had moisture build up on bread wrappers after being exposed for a short period time to the colder items and then we get reactivated to warm room temperatures, you know, so even though the baked goods might be okay when they're stocked, their shelf life

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Mark B.

could be shortened if not properly handled in transit, right? I mean, all that could lead to excessive waste and financial loss. You know, think about ice cream.

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Mark D.

Yeah. I mean, there is so much focus now on sustainability that any organization that is not looking for ways to improve that whole process is really missing the mark. I think there's some fascinating things that we can do with some of the advances in labels that you guys have come up with in terms of, you know, noticing temperature changes and things like that.

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Mark D.

You know, you mentioned the in-truck sensors that you can do temperature tracking and things like that, because you're right. I mean, you see it happen even just within the store. You'll see a pallet of frozen food just being wheeled into the middle of the aisle. Now, clearly, that's going to get merchandise into the coolers, but you always have to question, you know, if the guy or gal is doing the stocking within the frozen aisle happens to be on their break. How long is that merchandise going to sit out in the middle of a warm aisle, especially if you live in the southern area of the country?

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Mark D.

You know, before it actually gets moved into the freezer? And what does that do? That creates maybe what's called freezer burn or you or I open up a pack of frozen vegetables or french fries or whatever, and they're all sort of, you know, crystallized. So it makes for a bad customer experience. So you and I will now take that out on either the brand or the store or both.

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Mark D.

So it's a bad customer experience. It's certainly not leveraging technology and it's certainly not giving that consumer a good fuzzy feeling about how important that particular retailer takes the environment. Right? So I think there's a lot of good advances that I think you're going to see start to really take off within the next couple of years.

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Mark B.

Yeah, that's a good, good call out with the impact on customer satisfaction, even though technically it didn't fall off at the moment right. Would you agree that adding more data collection points on the trucks, you know, via sensors or even RFID tags is important? You know, it's even more important for even back-office teams to have the technology tools they need to do something with that data, to act when the issue was flagged?

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Mark D.

Yeah, I think what's changed over the last few years and I've lived through this both in my time as a Zebra and my time here at Körber, is there's a lot more data being generated. And, you know, this is just sort of 2024 reality, right? We're all living with a lot more data on our smart devices.

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Mark D.

And just because you have more data doesn't mean that's better, right? It's more effective use of that data. So I think what both of our organizations are trying to do is take all that edge data and better leverage it to create better workflows for it. And I think you see that in terms of things like just basic communication between staff or DSD drivers and, you know, merchandisers in the case of DSD. You talk about things like labor management, you think about visual assessment.

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Mark D.

You know, being able to take pictures on some of these devices and understand what's really happening as store level or inventory management and even from a reporting perspective, giving that store manager a better idea of what's happening within the four walls of his or her own store. Because, let's face it, being a store manager at a large retailer is a very difficult job and trying to stay on top of everything that's happening is a huge challenge.

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Mark D.

But there's a ton of data coming off both of our systems from a software perspective and from a hardware perspective that I think could be better utilized by these retailers and by these manufacturers.

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Mark B.

Well, definitely, yes. You know, not just make the data actionable, but, you know, be able to maybe have some prescriptive suggestions for it through like AI and so forth as we kind of talked about earlier.

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Mark B.

With the right mobile device and software, I would imagine that would be easier to access and report back on shelf inventory, quantity and quality as well.

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Mark D.

Yeah, absolutely. I mean, just, you know, simple things like one of the things that we keep hearing about is, "Could you take pictures of sections and share those pictures with both the manufacturers or the DSD drivers or whatever the case may be?" And look, I mean, we're all... like I could walk out of my house without my wallet and without my car keys.

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Mark D.

But if I walk out of my house without my smartphone, you know, I go into some sort of panic attack. And I think we've all just become accustomed to having a huge amount of data sort of at our fingertips. And why should not that be different in a store setting or or in a DSD setting. It shouldn't be.

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Mark B.

Yeah. Well, you know, well said. You know, I suppose that depending on where you are in the world, there are also privacy, GDPR and similar type compliance considerations. So, if you're letting drivers use their own mobile devices to access customer data or details, programs, pricing, etc., then can you be confident that the data is being properly secured and that their privacy is protected?

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Mark B.

Probably not, right?

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Mark D.

So certainly from what I'm hearing from some of the European retailers, a lot of the aspects - I'm certainly not an attorney by any extent - but a lot of the aspects of GDPR actually prevent any employer for that matter from sort of forcing an employee to use their own personal device for any kind of business purpose.

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Mark D.

Right. And here in the U.S., we're already starting to see New York, California, a couple of examples that are enacting sort of similar - they don't call the GDPR - but very similar types of legislation around what an employer can or cannot do with a BYOD or bring your own device type of strategy. Also, the other thing that I would think would be a concern would be if you're allowing perhaps a DSD driver to use his or her own personal device to be doing their job for you, now, lose control over that data.

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Mark D.

Right? You have no idea where that data is. It's not necessarily being backed up properly. And that's all valuable sales and merchandizing information that you need to have as that manufacturer, whether you're Coke, Pepsi, Frito, whoever. So it's a really dangerous road to go down. I mean, I understand the appeal from a cost perspective, but I think if you look at total cost of ownership and if you look at data privacy and things like that, you know, that pretty quickly throws water on that argument.

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Mark B.

That was a great call out because I was going to reiterate the fact around TCO and some of these, you know, CPG companies may I be thinking, "Hey, let the driver use their own phone." Yeah, but thank you for calling that out. Traditionally, DSD has been reserved for perishable. But there is a cost savings argument or maybe even a sustainability benefit to using DSD for more shelf stable goods, too?

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Mark B.

I guess what I'm asking is: does it make more sense for all food and beverage, health and beauty or even electronics manufacturers to also consider DSD assuming that production facilities are geographically within a regional or a reasonable range of stores?

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Mark D.

Well, I mean, I think that's the trick, right? It's all about I mean, Professor Wolcott always talks about this, right? Getting the point of distribution as close to the point of consumption as possible. And I'm probably butchering this quote, but I think you'll forgive me.

You know, that is the trick, right? How close can you get the distribution to the stores?

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Mark D.

And I think the other challenge that CPGs would have, large manufacturers would have is, if you are - and I won't name a manufacturer per se - but if you're one of the larger manufacturers, you've got products that go from very high velocity to very low velocity. So if you think about the DSD categories that are there today, you know, salty snacks, chips and pretzels, that sort of thing, soda or pop, depending on where you live in the country, you know, bread and those sort of things.

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Mark D.

Those are all very high velocity categories. So those lend themselves to DSD. What I was talking about before, in terms of the benefit to the retailer, I just don't know if economically it makes sense for a DSD type of approach to be used for a very slow moving item, because then how often would that person have to be in that store to basically be packing out one case and then moving on?

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Mark D.

Right. That seems like it's just not a good use of time. But I could draw the analogy to, you know, direct-to-consumer. There was a time where direct-to-consumer was becoming very popular. And I think you've seen that start to wane a little bit because the fact of the matter is we like to shop in stores.

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Mark D.

I mean, we were prevented from shopping in stores for a period during COVID. But if you see what happened as soon as the pandemic started to wane, we all ran racing back to stores. So stores are not going away anytime soon. So I think the trick is just figuring out where is the customer demand and which of the categories makes sense to go direct with and which of the categories are better left to the retailer to figure out how to manage their own staff?

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Mark B.

Yeah. Yeah. So would it be fair to say that if you decide DSD is the best distribution method for you, it's also important that you don't cut corners when it comes to demand planning, routing, or even information sharing between your field and factory teams? You may need to use AI to help with predictive ordering and route execution. You may need to make sure that you're giving drivers devices that you have control over, kind of how you alluded to before, just so you can make sure they've got the right software loaded on there to enable secure real-time voice and data communications of reporting and then the potential GDPR type of consideration.

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Mark B.

As you also mentioned, you know, you need to be concerned that the not so obvious ways that your technology choices could help you improve business outcomes and potentially limit your ability to drive improvements. Mark, I'd love to hear any thoughts, final thoughts from you on that.

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Mark D.

Yeah, I think, a lot of it depends on sort of where the organization, whether it be retail or manufacturer, where they are on sort of their digital transformation journey. And what we've talked about with respect to DSD is interesting because I think a lot of the DSD knowledge is in those merchandiser's heads.

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Mark D.

And I would just question, is that good for the manufacturer or the retailer? Probably not, because I've seen just in the stores that I shop, there are clearly some very good DSD folks operating within those stores. And I bet you those folks have a ton of valuable information just stored in their head. And that's not a good situation for their employer, because if that person decides to retire or just find another job, all that knowledge is going to sort of go walking out the door with them.

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Mark D.

Right. So I think employing technology to not only collect data at the edge, but also use it more effectively. And, I mean, any trade show you go to these days, AI is everywhere. Everyone's talking about it. And there's certainly plenty of offerings... some that Zebra has around demand planning and forecasting.

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Mark D.

But frankly, everyone should be leveraging it. We shouldn't be relying on you know, I was with Nielsen for a period of time and I think about Nielsen now and I think about it about reading a newspaper. All right, tell me what happened two weeks ago. Well, that seems a little strange in 2024, right? That's not very valuable data.

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Mark D.

Right. The valuable data is leveraging data that I am collecting at the frontline, at the edge, and then leveraging AI to say, okay, well, that's what happened today, what's going to happen tomorrow? And if you know what's going to happen tomorrow, then you can more accurately plan. So from a picking perspective, you can have the right product in the right place at the right time.

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Mark D.

And from a merchandising perspective, you can make sure that the product is in stock for that consumer when they walk in the door. That's, you know, going forward, if we were to make a bet, three years from now that's going to be table stakes. So any organization that is not applying AI and leveraging some of these forecasting tools, I would argue is going to be probably left in the dust bowl.

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Mark B.

That's a very impactful place to leave it for today. Mark, really great having you on. I definitely want to thank our listeners as well as Mark again for sharing his DSD-related experience and wisdom. Definitely a true professional. Remember that this is the fourth Zebra Year Edge podcast we've done with Körber Supply Chain Software. You should be able to find the other three that I mentioned at the beginning of the podcast on the related page on the Zebra blog.

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Mark B.

And stay tuned because we will be announcing shortly or coming up shortly what podcast number five will entail. Thanks very much, everyone. Mark Thank you.

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Mark D.

Yep, Pleasure.



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