



How Shopify and EY Power OAK + FORT's Upmarket Journey

Last modified: May 2024



Meet OAK + FORT

Founded in 2011 in Vancouver, OAK + FORT is a female-founded lifestyle and fashion company. Valuing thoughtful design for a modern lifestyle, the brand has rapidly expanded and grown from one flagship to 42+ locations with over 700+ employees in both Canada and the US.

While this impressive growth showcases the strength of their omnichannel retail experience, behind the scenes OAK + FORT was struggling to find the right technology to support their continued growth.

Identifying opportunities

OAK + FORT believes in optimistically growing and adapting towards tomorrow. With this belief in mind, Jennifer Pearson, VP of Information Technology and eCom Solutions at OAK + FORT, wanted to identify opportunities to modernize the ecommerce engine for OAK + FORT. Pearson started to identify these opportunities as part of an ecommerce evaluation that included capability mapping, interviews and observations, but she also identified a problem.

Pearson found that, 'jack-of-all-trades,' ecommerce tools often had features that were lacking, whether it was marketing tools or omnichannel shopping features. OAK + FORT did not want to sacrifice their one-stop shopping experience, aesthetic vision, and uniqueness that loyal customers have come to know and love.

After completing an internal capabilities assessment, OAK + FORT, identified two major issues.

- 1 Maintenance on the website was tedious** and the ecommerce team was doing manual pushes for promotions.
- 2 Payment solutions were not supportive** of the accelerated growth rate OAK + FORT experienced.

In need of support, OAK + FORT sought a trusted partner to offer valuable guidance and to collaborate on implementing a solution to enhance their core commerce capabilities both for ecommerce and brick and mortar. Their goals were to boost operational efficiency (both in store and via their ecommerce channels), foster a cohesive commerce environment, and elevate their omnichannel experiences as they evolved and expanded.

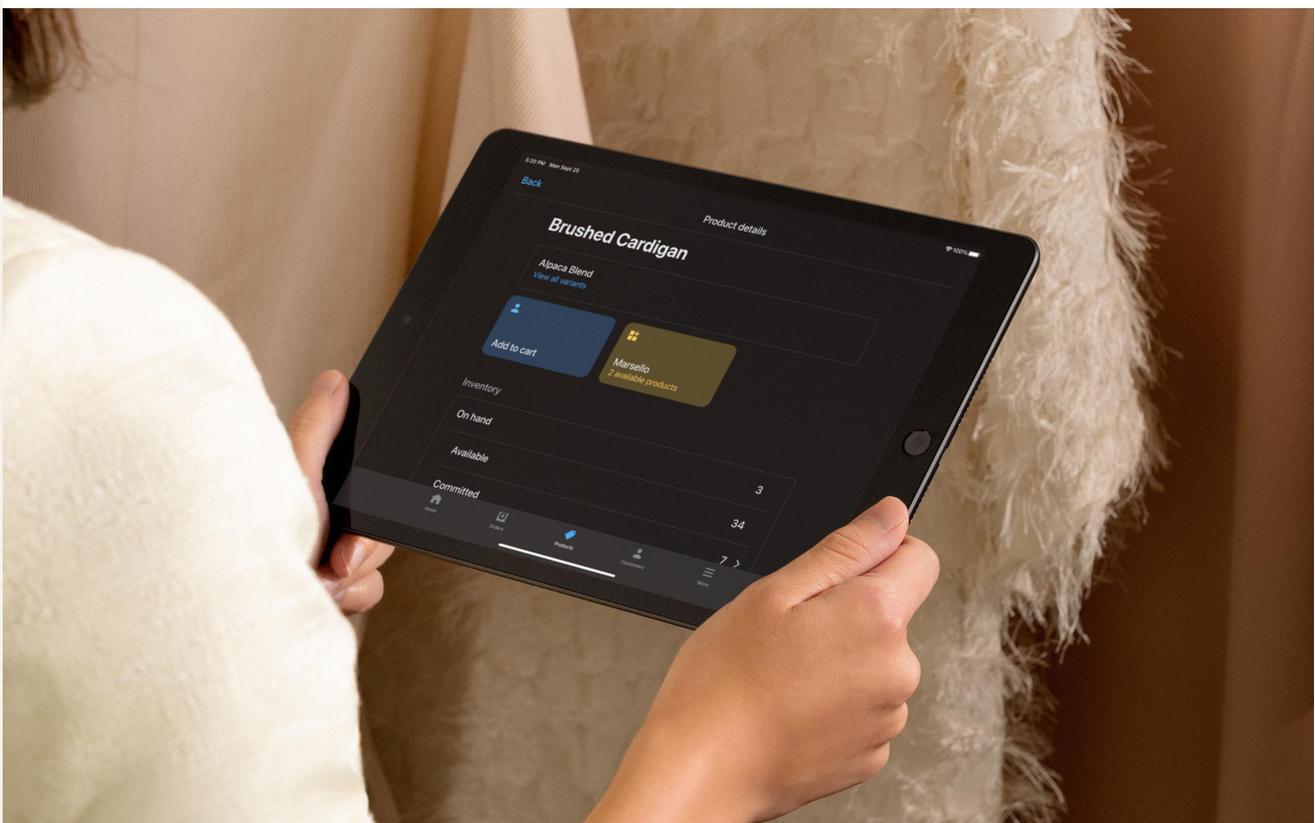
Finding the right partner and solution to accelerate growth with ease

OAK + FORT made the decision to collaborate with the EY organization, an industry leader in professional services.

While OAK + FORT was working with EY tax teams a recommendation was made to evaluate Shopify with the EY commerce team. Very quickly, EY teams built a trusted relationship with Jennifer Pearson at OAK + FORT. A strong rapport helped Pearson understand EY strengths in commerce transformation and how they would be able to de-risk a platform change to Shopify's Unified Commerce solution. The organization provides seasoned skills and services in de-risking transformation projects, and this especially appealed to Pearson given the ambitious goals she identified.

“We build trust by pulling the wool away from clients eyes. This isn't just a front end design project.”

EY Canada LLP — Stephan Megitt, Partner



It was a project that impacted every aspect of OAK + FORT's business.

With experience in commerce evaluations, EY teams were more than capable of finding an ideal solution for the growing pains that OAK + FORT were experiencing. EY and OAK + FORT aligned very quickly on a foundation technology transformation, such as re-platforming to Shopify, and how it would allow the company to adapt and tap into new markets for the growth and expansion they were looking to achieve.

Providing a unique and bespoke approach to re-platforming, EY teams conducted a full discovery with OAK + FORT by leading three 90-minute workshops to learn and discuss the business processes that would be impacted by moving to Shopify. EY recognized the strategic value of investing ahead of the curve and conducted these discovery sessions in order to ensure OAK + FORT understood the impact and benefit to each department involved across the organization.

These departments included:

- Sales
- Finance
- Marketing
- Ecommerce
- Technology

“Alignment is really key when taking on a transformation like this. Brian and the teams at EY were instrumental at making sure that all the executives understood the level of change we were talking about.”

OAK + FORT — Jennifer Pearson, VP of IT & eCom Solutions

EY teams knew that finding the right setup to achieve a streamlined omnichannel experience with one platform can be challenging when your ecommerce and retail systems are disconnected and don't provide a single view of sales, inventory, and customer data.

But they were able to find a solution that would be foundational to OAK + FORT and support their growth, and that solution was Shopify.

“Collaborating with OAK + FORT we spent a ton of time just understanding their business processes. Even before we knew the technology was Shopify, we understood the value proposition Shopify had.”

EY Canada LLP — Brian Peterson, Partner

Shopify understands that the right omnichannel retail technology can be advantageous for your business and your customers. With your ecommerce and retail systems working together seamlessly, you can have a streamlined multichannel shopping experience.

“We looked at our growth trajectory, what our roadmap included, how we wanted to communicate and work with our customers and we knew that we needed to find a partner that has that very same mindset who has taken the time to understand who their customers were and how they wanted to interact with them.”

OAK + FORT — Jennifer Pearson, VP of IT & eCom Solutions

With benefits to both business and customers, Shopify was the all-in-one solution OAK + FORT was looking for.

Benefits for businesses like OAK + FORT

Unified commerce

Duplicative solutions or manual work? With Shopify POS, save time and money with one consolidated tech solution that unifies commerce and enables you to manage your business operations more effectively.

Improved inventory management

Centralize your inventory data to one platform with a real-time view that spans across all sales channels both online and off. This way, you can optimize stock levels more effectively, transfer inventory between channels as needed, and offer order fulfillment options.

Manage access and permissions

Set staff roles and permission with ease. You can tailor who has access to update online and/or in-store inventory, can approve returns, and apply discounts all in one central hub.

“I’ve been blown away by the development of Shopify’s roadmap and what they delivered in the last 12 months and I know there are so many more incredible things to come.”

OAK + FORT — Jennifer Pearson, VP of IT & eCom Solutions



Seamless payments

Make it faster and easier to complete both in-store and online payments while simultaneously integrating purchase orders so staff have better visibility into inventory availability.

Customer insights

Analyze sales data, forecast demand, and replenish stock with speed allowing you to check inventory levels need to be closely monitored during peak season and/or during promotional periods.

“The time is now, don’t wait. If I could do anything differently, I would have engaged with EY 2 years ago and we would’ve been on Shopify way sooner.”

OAK + FORT — Jennifer Pearson, VP of IT & eCom Solutions



Benefits for customers

Uniform, positive shopping experiences

With a well-implemented omnichannel strategy, customers can effortlessly switch between channels while enjoying the same level of service, product availability, and brand aesthetic.

Fulfillment options

Customers can fulfill their order in the way they choose. Whether it's an online order pick-up in store or they're ordering in-store for a product to be shipped to their address of choice, customers can complete their purchase how they desire.

Personalization

Deliver a custom experience to your devoted shoppers. Whether offering a loyalty program or customizing discounts, you can provide your customers with what they want, a tailored, personal experience.

Returns

Accept customer returns with ease from online or in-store purchases and capture return reasons.

An all-in-one retail partner

Shopify focused on the omnichannel experience and unified commerce for OAK + FORT with products such as:

- Shopify POS
- Shopify Payments
- Shopify Marketing Tools

On top of the core benefits Shopify's omnichannel solution presented, OAK + FORT was extremely excited about Shopify's roadmap to continuously innovate the unified commerce experience for its customers.

By developing a transparent roadmap, Shopify is on the cutting edge of technology and able to set expectations for when helpful developments and features are created to ensure clients are not only informed, but better equipped to anticipate any changes that may impact them.

Providing a clear roadmap with the flexibility of omnichannel commerce allows brands, like OAK + FORT, to plan not only for today but for the future.

Partners



Meet EY

EY exists to build a better working world, helping to create long-term value for clients, people and society and build trust in the capital markets.

Enabled by data and technology, diverse EY teams in over 150 countries provide trust through assurance and help clients grow, transform and operate.

Working across assurance, consulting, law, strategy, tax and transactions, EY teams ask better questions to find new answers for the complex issues facing our world today.

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Meet Shopify

From opening record-breaking pop-ups to operating hundreds of stores around the world, Shopify POS provides brands with unmatched scalability, reliability, and flexibility. It's built from the ground up to offer seamless multichannel shopping experiences to customers and streamline workflows for staff.

Shopify POS also powers some of the world's most innovative businesses, from high-volume, multi-store brands to Fortune 500 brands, like Crate and Barrel, Glossier, Forever 21, Stüssy, and STUDS.

Brands trust Shopify POS to run their retail operations because of its award-winning modular hardware, reliable payment processing, extensible software, and intuitive customizability. Get key tooling out of the box, install integrated apps to extend its capabilities, and connect Shopify POS to your existing software with our developer tools and APIs for centralized orders, inventory, customer insights, and reporting.

We innovate at a pace no other commerce platform can match. Twice a year, we publish a product showcase of everything we've built in Editions. We're committed to building for the future so you're always ready for what's next. Commerce moves fast, but we move faster.

Learn more about the EY-Shopify Alliance [here](#).

Elevate your omnichannel POS experience

Stop juggling multiple systems for your POS, ecommerce, and payments.

Shopify POS was built to connect in-store and online sales seamlessly for you and your customers.

[Talk to sales](#)

