






# GS1 2D Pilot Toolkit

Updated July 2024

The role of GS1				
Executive summary				
Purpose				
How to use this document				
 <b>WHY</b> What business use cases can be unlocked using 2D barcodes	 <b>WHAT</b> What is the scope of the pilot and what variables to consider when setting up a pilot	 <b>WHO</b> Which supply chain partners and solution providers will you engage to create success	 <b>HOW</b> How to set up and implement a 2D pilot; looking at different pilot building blocks, learnings and pitfalls	 <b>REPORTING &amp; LEARNINGS</b> How to track your pilot, capture learnings and report back to the GS1 community
Drivers	Scope	Stakeholders	Summary	Summary
Goals	Pilot Learnings	Pilot Learnings	Project Phases	Pilot Tracking
KPIs			Checklists	Pilot Report
Benefits			Pilot Learnings	Storytelling
Costs				
Pilot Learnings				



Need more information  
CONTACT GS1 : [www.gs1.org/contact](http://www.gs1.org/contact)

The Global Language of Business

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## GS1

GS1 is a neutral, not-for-profit organisation that provides global standards for efficient business communication. GS1 standards improve the efficiency, safety and visibility of supply chains across physical and digital channels in 25 sectors. We enable organisations of all types and sizes to identify, capture and share information seamlessly. Our scale and reach – local Member Organisations in 118 countries, more than 2 million user companies and 10 billion transactions every day – help ensure that GS1 standards create a common language that supports systems and processes across the globe. Find out more at [www.gs1.org](http://www.gs1.org).

Collaboration with all key internal and external stakeholders is foundational to pilot success. GS1 can support your pilot from the start.



## Where GS1 can support

- Neutral partner in the process
- Help with guidance on data and 2D barcode choices
- Provide guidance on the use of globally-interoperable GS1 Standards
- Leverage standards and solutions that are already implemented
- Connect to other companies that are piloting or have piloted
- Assistance in connecting to technology solution providers



WHY

WHAT

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REPORT & LEARN



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# GS1 2D Pilot Toolkit Executive Summary

A set of practical and relevant building blocks to enable both manufacturers or brand owners and retailers to jump start their 2D pilots.





## WHY

What business use cases can be unlocked using 2D barcodes



## WHAT

What is the scope of the pilot and what variables to consider when setting up a pilot



## WHO

Which supply chain partners and solution providers will you engage to create success



## HOW

How to set up and implement a 2D pilot; looking at different pilot building blocks, learnings and pitfalls



## REPORTING & LEARNINGS

How to track your pilot, capture learnings and report back to the GS1 community

# Piloting 2D barcodes



## WHY

## KEY DRIVERS



**Consumer Engagement**



**Safety**



**Sustainability**



**Inventory Management**



**Traceability**



**Improved Packaging**

Decide the scope for your 2D pilot



**WHAT**

**SCOPE**



Geography & Product



Barcode & Data



Value Chain



Pilot Implementation



WHY

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# Identify Stakeholders for Pilot



## WHO

## STAKEHOLDERS

### Internal



### Manufacturers/ Brand Owners



### Retailers



### Solution Providers Local GS1 Office



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# Set Up Pilot



## HOW

### Pilot Steps








## REPORTING



## SHARE

Tools available for sharing your 2D pilot with the GS1 community:

### Report & Learn Additional Template for Detailed Storytelling



### Report & Learn

#### 2D Pilot Report for repository

---

**2D Barcodes case study template**  
[Author] | [Company] | [Country] | [Date]

**TITLE**  
[Include name of company, country]

**SUB-TITLE**  
[Introductory sentence highlighting the success or aim]

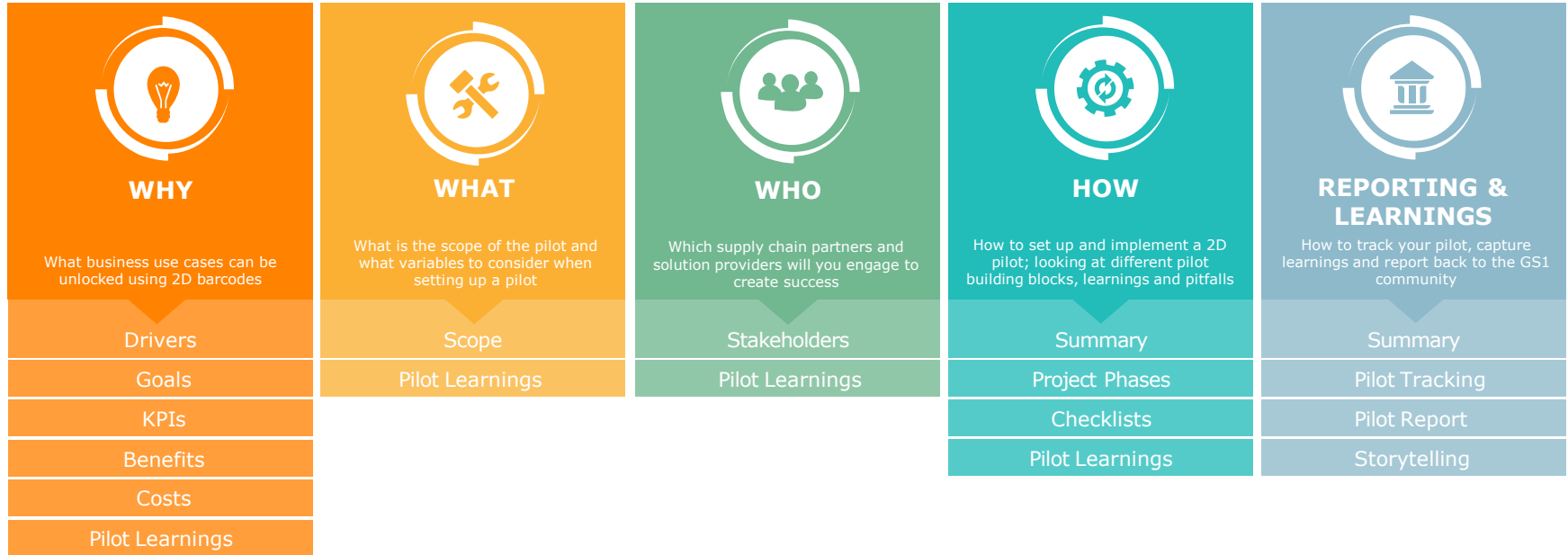
**Challenge**  
[Describe the challenge that motivated starting a 2D pilot]

**Solution**  
[Describe the solution]

**Benefits**  
[Outline the benefits realised by using 2D barcodes]

Business Use Case Definition		Organisation Details																																											
Description of business challenge and desired outcome:		<h3>Report &amp; Learn</h3> <h4>2D Pilot tracker</h4>		<div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <span><span style="color: green;">■</span> On Schedule</span> <span><span style="color: orange;">■</span> Minor risk/&lt;10% behind schedule</span> <span><span style="color: red;">■</span> Significant risk/&gt;10% behind schedule</span> <span><span style="color: blue;">■</span> Complete</span> </div>																																									
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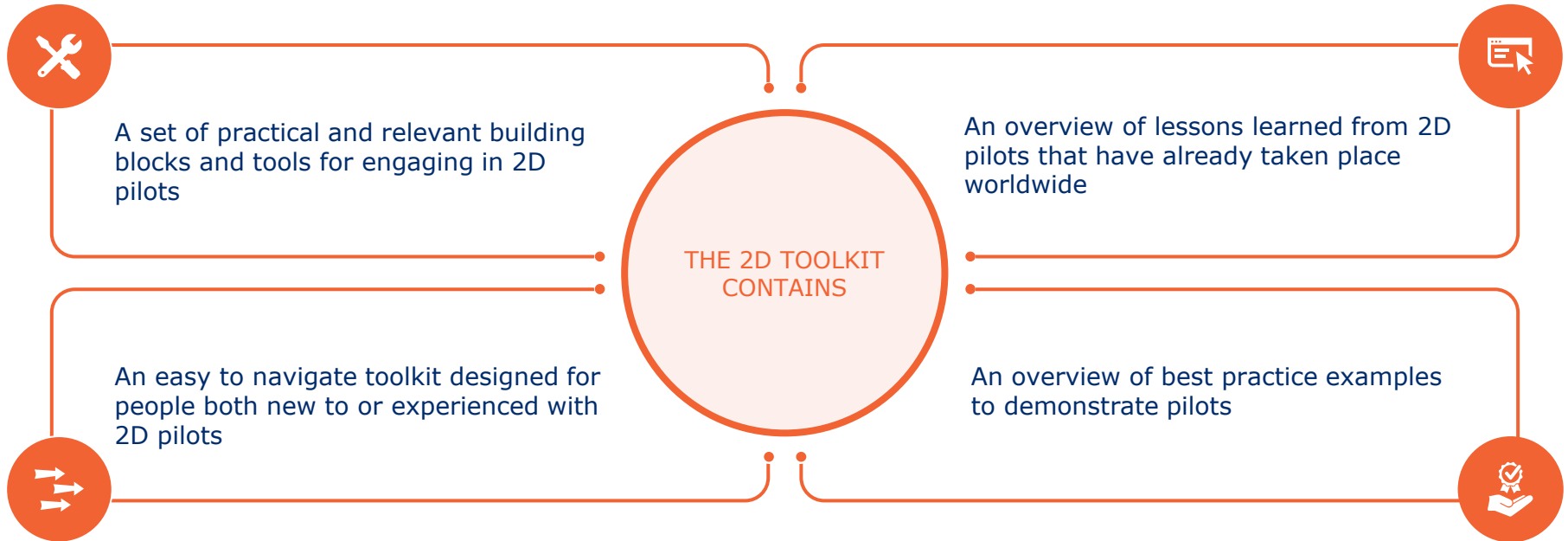
# Summary





## WHAT IS THE 2D PILOT TOOLKIT?

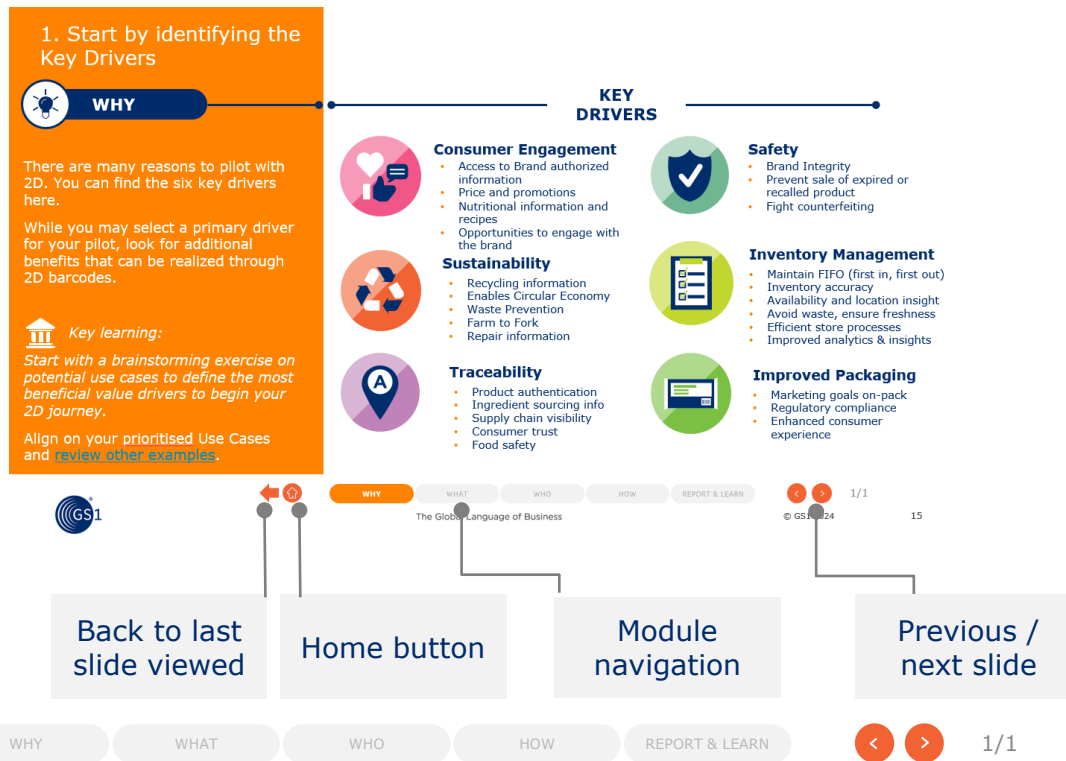
A set of practical and relevant building blocks to enable both manufacturers or brand owners and retailers to jump start their 2D pilots



# Manual

## How does the toolkit work?

- To use the toolkit: first enter presentation mode and then use the buttons in the tool to navigate to the desired modules.
- If you are thinking about starting a 2D pilot or have made first steps, then this toolkit will help YOU.
- On the index page you will find the outlay of the toolkit, with interactive links to the different chapters.
- While you can move to any chapter at any time, we recommend going through this toolkit sequentially on first use.



# Understanding the **WHY**



What business use cases can be unlocked using 2D barcodes

# 1. Start by identifying the Key Drivers



## WHY

There are many reasons to pilot with 2D. You can find the six key drivers here.

While you may select a primary driver for your pilot, look for additional benefits that can be realized through 2D barcodes.



### Key learning:

*Start with a brainstorming exercise on potential use cases to define the most beneficial value drivers to begin your 2D journey.*

Align on your prioritised Use Cases and [review other examples](#).

## KEY DRIVERS



### Consumer Engagement

- Access to Brand authorized information
- Price and promotions
- Nutritional information and recipes
- Opportunities to engage with the brand



### Sustainability

- Recycling information
- Enables Circular Economy
- Waste Prevention
- Farm to Fork
- Repair information



### Traceability

- Product authentication
- Ingredient sourcing info
- Supply chain visibility
- Consumer trust
- Food safety



### Safety

- Brand Integrity
- Prevent sale of expired or recalled product
- Fight counterfeiting



### Inventory Management

- Maintain FIFO (first in, first out)
- Inventory accuracy
- Availability and location insight
- Avoid waste, ensure freshness
- Efficient store processes
- Improved analytics & insights



### Improved Packaging

- Marketing goals on-pack
- Regulatory compliance
- Enhanced consumer experience

## 2. Consider Consumer Engagement Goals



### WHY

If your primary use cases for 2D are operational, consider how you can improve consumer KPIs by also using that same 2D barcode to engage directly with consumers.

Do you already have a QR code for your product?

**Adding the GTIN inside of your existing QR code can unlock additional use cases AND enable that same code to go “beep” at POS.**



*Check out [key learnings here](#)*

## CONSUMER ENGAGEMENT EXAMPLES



Consumer engagement use case examples:

### 1. Product as a channel

- In-store navigation
- In-store conversion
- Use at home
- Share product experience

### 2. Marketing campaigns

- Promotions
- Social media activation
- Customise products
- Storytelling

### 3. Contextualised content and services

- Product info
- Agility to incorporate multiple messaging into one 2D code
- AR: virtual try-on
- Loyalty services

### 4. Operational excellence

- 1st party data collection
- Traceability for recalls
- Brand protection
- Quick payments



# 3. Consider and define your KPI Framework



## WHY

Your prioritised use cases and drivers can influence several KPIs. Here are examples that can be impacted by implementing 2D barcodes:

- **Operations KPIs**
- Consumer facing KPIs



## OPERATIONS KPIs



### Operational Efficiency

- Sell-through rate
- Perfect order rate
- Throughput
- Shipment cost reduction



### Inventory Management

- Inventory accuracy
- Number of scanning errors
- Days Sales in Inventory (DSI)
- Accuracy of forecast
- Time to receive
- Lead time
- Safety stock levels



### Resource Utilization

- Utilisation rate
- Cost of waste
- Lost sales ratio
- Dead stock/spoilage
- FTE productivity
- Line utilisation



### Traceability & Safety

- Percentage of products end-to-end tracked
- Number of suppliers that implement sustainability management systems
- Number of reported recall incidents
- Number of expired products prevented from being sold
- Time to recall



### Sustainability

- Percentage of circular inflow/outflow
- Supply chain waste
- Recycling rates



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# 3. Consider and define your KPI Framework



## WHY

Your prioritised use cases and drivers can influence several KPIs. Here are examples that can be impacted by implementing 2D barcodes:

- Operations KPIs
- **Consumer facing KPIs**



## CONSUMER FACING KPIs



### Consumer Engagement

- Conversion rate
- Net Promoter Score
- Engagement rate
- Brand perception
- Number of impressions
- Number of people who scan QR code
- Improved insights and analytics



### Revenue

- Sales growth
- Sales by new consumers
- Customer retention rate
- Average sales volume per consumers
- Consumer Return Rate



### Marketing Campaigns

- Return on Marketing Investment
- Click-through-rate
- Website traffic growth
- Sales margin
- Discount as a percentage of price
- Number of actions
- Revenue and cost per scan



### Transparency

- Decrease in unauthorized product sales
- Ratio of transparent products
- Ratio of validated authentic products

## 4. Establish your Benefit Logic



### ABOUT

The benefit logic establishes logical links between business goals, KPIs, value drivers and components of the solution.



### STEPS

1. Listing and mapping
  - Solutions
  - Value drivers
  - Results
2. Connecting elements if they are dependent



### WHY BENEFIT LOGIC

- The benefit logic defines the benefit areas to reach the ambition and KPIs set by the stakeholders.
- It also provides a framework for linking defined solutions to the benefit areas. By doing this, it automatically creates priorities of activities and states which activities to focus.
- Different stakeholders might have different priorities and the benefit logic is helpful in identifying those differences.
- Note that for every category the benefits can differ in size and set priorities in implementation accordingly.

### EXAMPLE



# 4. Benefit Logic Level 1

 SOLUTION

2D BARCODE 

 VALUE DRIVERS

 KPIs

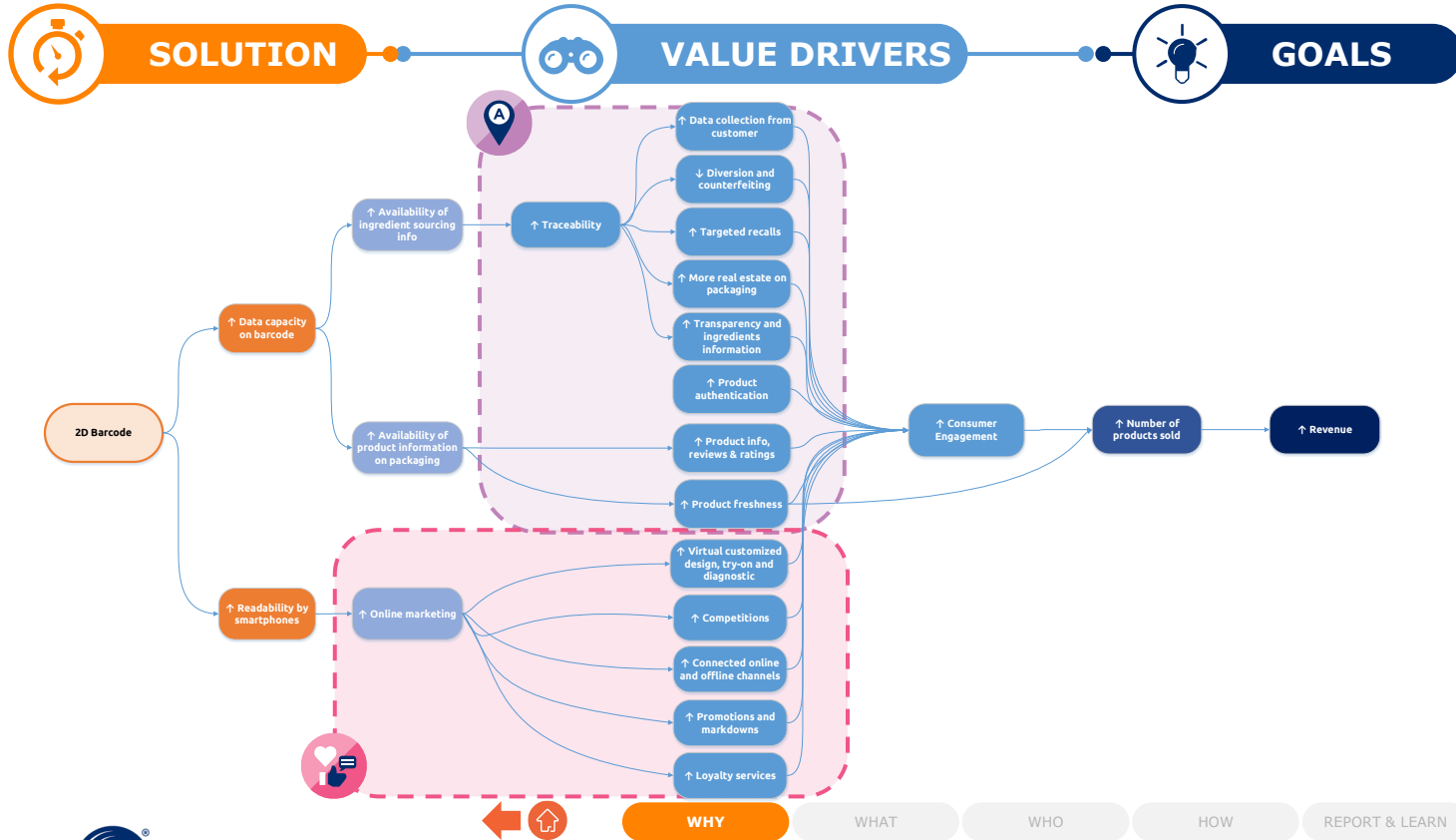
 BUSINESS GOALS

-  Customer Engagement
-  Sustainability
-  Traceability
-  Safety
-  Inventory Management
-  Improved Packaging

- Revenue increase
- Sustainability goals rate
- Cost decrease
- Regulatory compliance rate
- Working capital decrease
- Engagement rate

- Profitability
- Sustainability
- Consumer NPS
- Regulatory compliance

# 4. Brand Owner: Possible consumer benefits leading to increased revenue



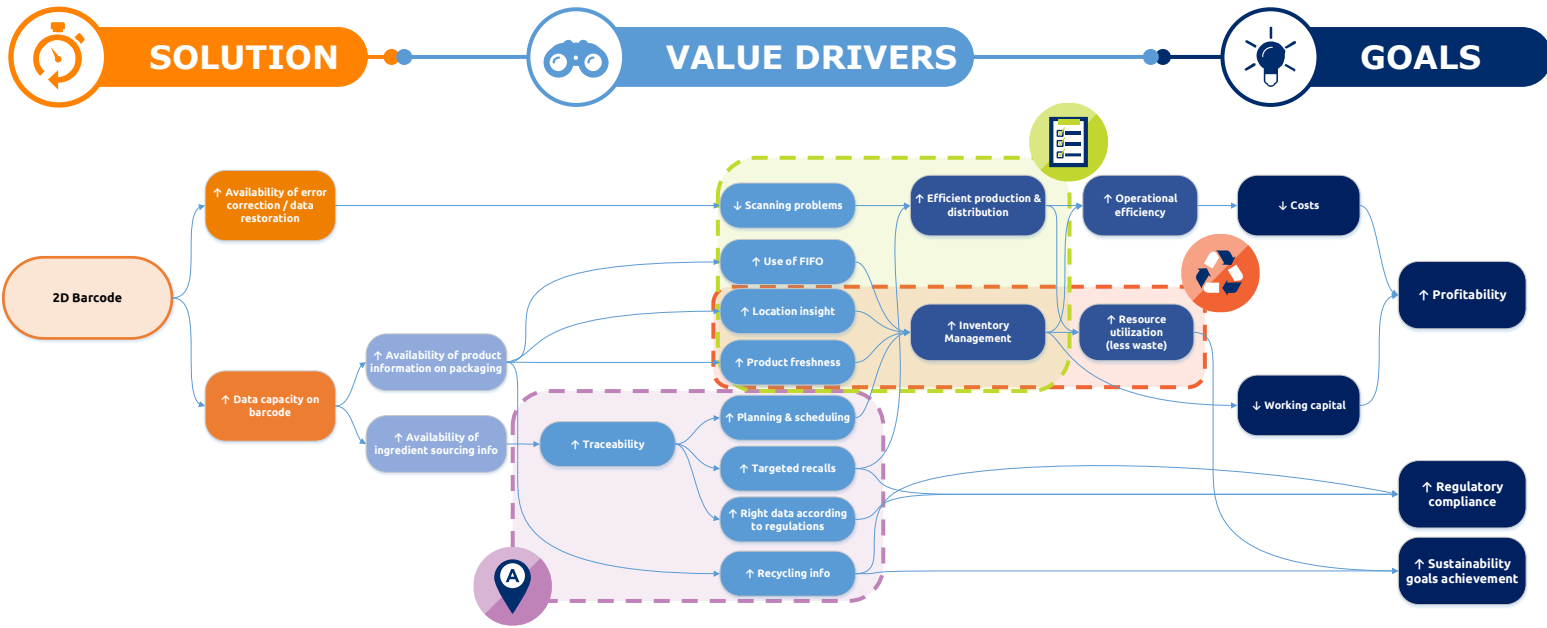
## KPIS

### Consumer Engagement & Transparency

- Average sales volume per consumers
- Consumer Return Rate
- Conversion rate
- Net Promoter Score
- Engagement rate
- Brand perception
- Number of people who scan QR code
- Click-through-rate
- Website traffic growth
- Sales margin
- Discount as a percentage of price
- Decrease in unauthorized product sales
- Ratio of transparent products
- Ratio of validated authentic products



# 4. Brand Owner: Possible operational benefits leading to cost and working capital reduction

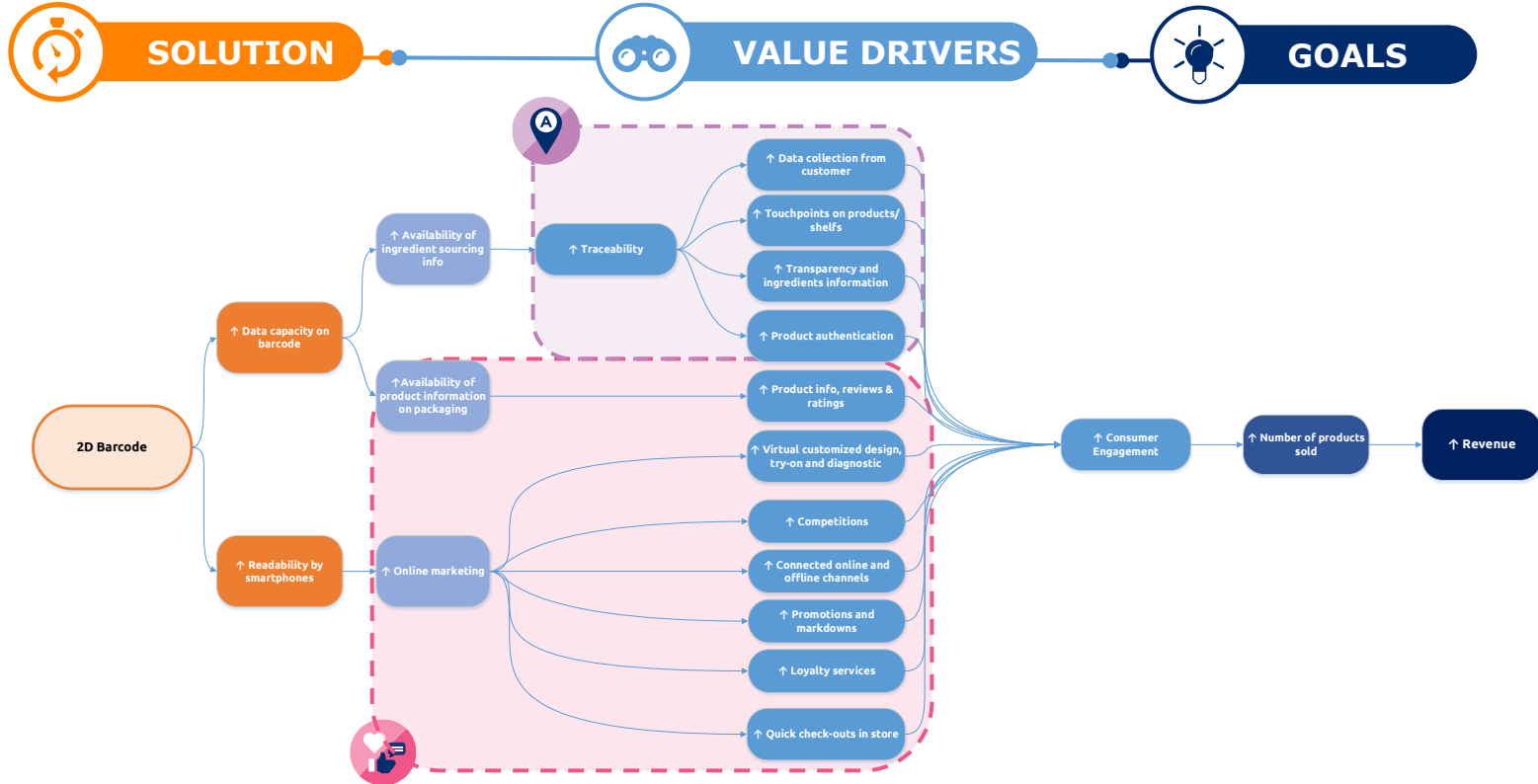


## KPIS

- Inventory Management, Sustainability & Transparency**
- Inventory accuracy
  - Number of scanning errors
  - Accuracy of forecast
  - Lead time
  - Safety stock levels
  - Utilization rate
  - Cost of waste
  - Lost sales ratio
  - FTE productivity
  - Time to recall
  - Recycling rates
  - Sell-through rate
  - Perfect order rate
  - Throughput



# 4. Retailer Benefits: Possible consumer benefits leading to increased revenue

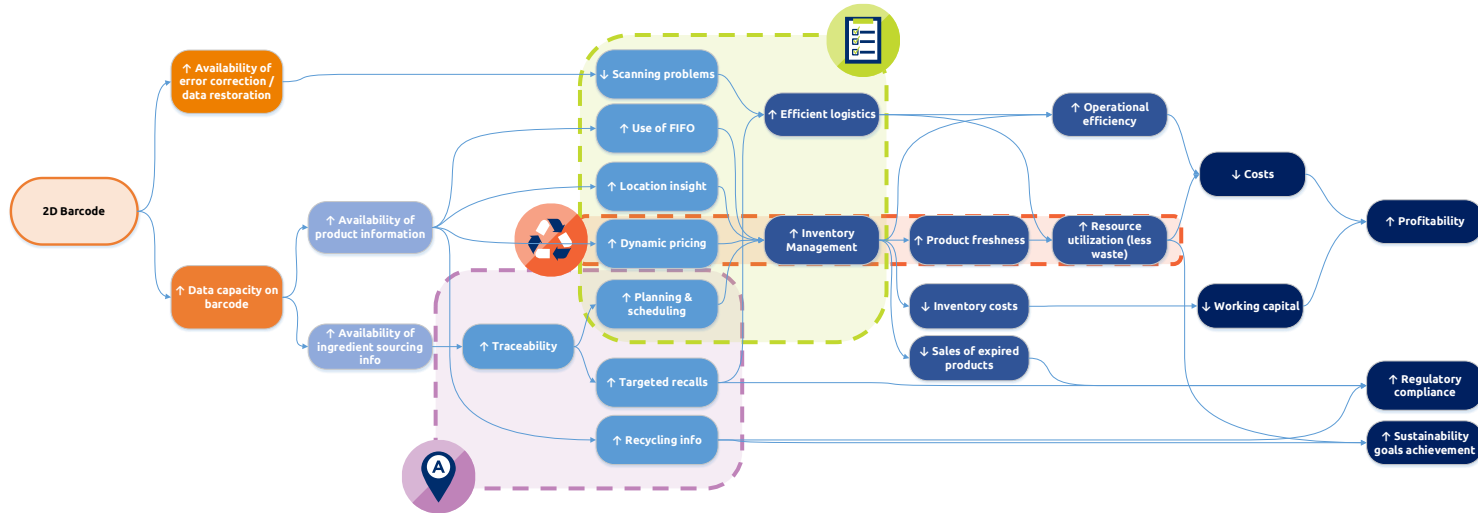


## KPIS

- Consumer Engagement & Transparency**
- Average sales volume per consumers
  - Consumer Return Rate
  - Conversion rate
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  - Brand perception
  - Number of people who scan QR code
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# 4. Retailer Benefits: Possible operational benefits leading to a reduction in cost and working capital



- Inventory Management, Sustainability & Transparency**
- Inventory accuracy
  - Number of scanning errors
  - Accuracy of forecast
  - Lead time
  - Safety stock levels
  - Utilization rate
  - Cost of waste
  - Lost sales ratio
  - FTE productivity
  - Time to recall
  - Recycling rates
  - Sell-through rate
  - Perfect order rate
  - Throughput



WHY WHAT WHO HOW REPORT & LEARN





## 5. Evaluate your Cost Logic



### ABOUT

The Cost Logic method (also called Cost Breakdown) identifies and divides costs into meaningful components.



### STEPS

1. Listing and mapping
  - Solutions
  - Cost drivers
  - Results
2. Connecting elements if they are in dependency



### WHY COST LOGIC

- The cost logic defines the cost areas to reach the ambition set by the stakeholders and calculate the Business Case.
- It also provides a framework for linking defined solutions to the cost areas. By doing this, it automatically creates insights into the cost of priorities activities.
- 2D introduction requires investments in technology, processes and people.
- Note that investments can differ depending on the category and brand label. Take this into account when setting priorities for implementation.

### EXAMPLE



# 5. Cost Logic Level 1

 SOLUTION

2D BARCODE 

 COST DRIVERS

 COSTS

One-time costs:  
Materials

One-time costs:  
Labor

Recurring costs:  
Materials

Recurring costs:  
Labor

IT hardware

IT infrastructure

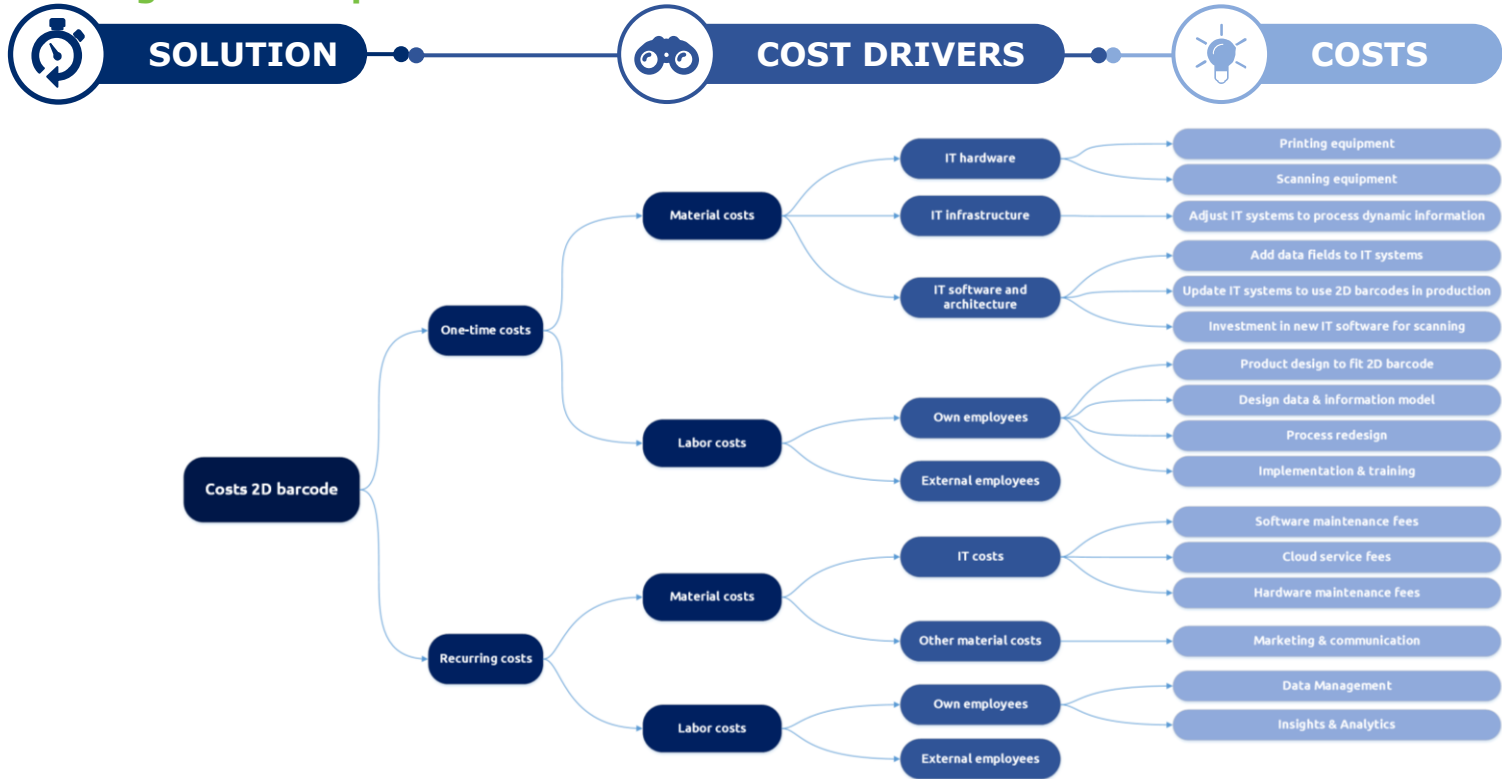
IT software &  
architecture

Own employees

External  
employees

# 5. Brand Owner Cost Logic

Introducing 2D can require investment in different areas



WHY

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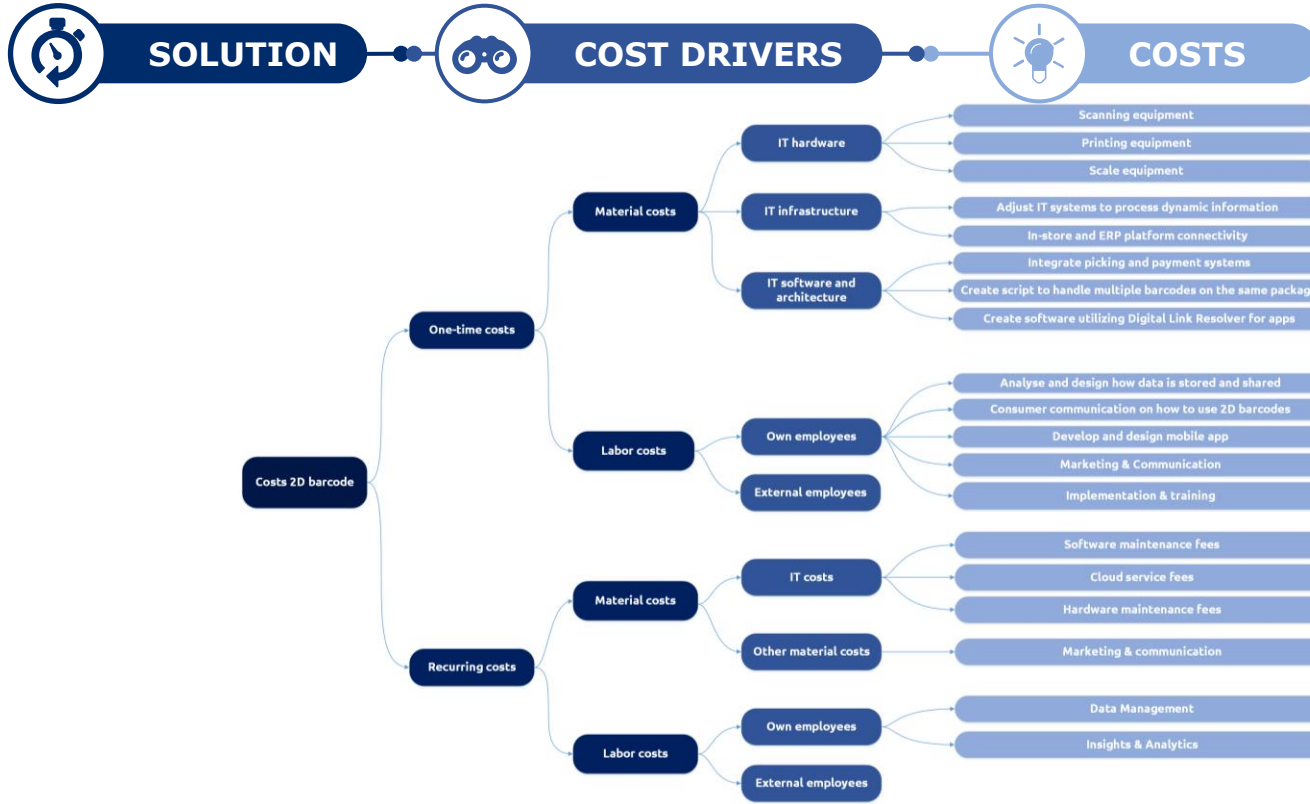
HOW

REPORT & LEARN



# 5. Retailer Cost Logic

Introducing 2D can require investment in different areas





## WHY

Review the key learnings and pitfalls from previous global 2D pilots to jump start your 2D pilot. You will find the learnings throughout the 2D pilot toolkit.



## Key learnings

### CONSUMER ENGAGEMENT (WHY)

- The content behind 2D barcodes is dynamic and can be changed instantly
- The biggest value for Consumer Products manufacturers lies in the direct contact with the end consumer
- For operational departments, engage with your brand marketing teams to align on goals and opportunities for 2D barcodes
- Using 2D barcodes can provide a competitive advantage for brand owners
- Enable real estate, not the package
- 2D barcode is interoperable and cross-platform
- Consider a call-to-action on pack to ensure your consumers are aware of 2D codes and what to use them for (e.g., at self check-out, to access product information)
- Measure the numbers of 2D scans by consumers to track consumer engagement
- Ensure consumers land on destination pages with one click (no menu)
- Ensure to start piloting with consumers before making any large changes to processes or system to ensure you get the desired results

# Deciding on the **WHAT**



What is the scope of the pilot and what variables to consider when setting up a pilot

# Summary: Decide the scope for your 2D pilot



## WHAT

Once you know why you want to conduct a pilot, what benefits can be realised and have selected use cases, it is time to set the scope for your pilot.



### 1. Geography & product scope

- Country/geographical area
- Number of stores for retail
- Product category
- Type of product (fixed/variable weight or fixed number)
- Brand of the product (private label or branded)
- Products (number of products impacted)



### 3. Value chain scope

- Identify the end-to-end value chain stakeholders involved
- Outline business processes impacted
- Map the Data & IT systems impacted

## SCOPE



### 2. Barcode & data scope

- Selection of 2D code
  - QR code with GS1 Digital Link
  - Data Matrix with GS1 Digital Link
  - GS1 DataMatrix with GS1 element strings
- The GTIN should be included in every 2D barcode
- Selection of additional data to include in 2D barcodes is based on use case(s)
- Assess method for connecting barcodes to related information if in scope



### 4. Pilot scope

- Type of ecosystem (closed or open)
- Type of project (research, proof of concept, pilot, implementation)
- Type of implementation (virtual, full, or hybrid)
- Time (start and duration of pilot)

# 1. Geography & Product Scope



## WHAT

First in scope is deciding in what country or geographical area to pilot. If you are in retail decide on how many stores to pilot in.

Next in scope is deciding what type of product to pilot with and how many different products to include in the pilot.



## ABOUT

- Starting with one country or region and a small number of stores will make the project more feasible and time-boxed.
- Choosing the type of product will have impact on the whole pilot set-up.
- It will have impact on the benefits and the barcode and data attributes that need to be chosen.

### A. **Type of product, for example:**

- Food or Non-Food
- Fixed number, Variable weight or Fixed weight
- Private label or Brand

### B. **Number of different products**



## 2. Barcode & Data Scope



### WHAT

Second in the scope is deciding which barcode to use and what data attributes to use for your pilot purpose.

GS1 standards create a common language to identify, capture and share product data, ensuring important information is accessible, accurate and easy to understand.

There are three types of 2D barcodes that enable a wide range of use cases:

- QR Code with GS1 Digital Link syntax
- Data Matrix with GS1 Digital Link syntax
- GS1 DataMatrix with element string syntax



### ABOUT

- Barcode and data selection is dependent on three key factors: who needs to scan the barcode, how will they scan the barcode and what data is needed for the desired use case.
- In some cases, you may want to start small by just using the GTIN in a 2D barcode and then scaling up to add other data as needed. In other cases, incorporating additional data will be needed.
- If your use case requires connecting the barcode to related data, it is important to determine your preferred method for this.
- Your local GS1 office can help with barcode and data selection.



### APPENDIX

[2D Barcode Explorer](#)

[2D Barcodes at Retail Point-of-Sale Implementation Guideline](#)

[Quick start guide for GS1 Digital Link](#)

[Connecting barcodes to related information](#)

# Barcode & Data Scope

Use cases including supporting data attributes

	Example data that could unlock the use cases						
	GTIN	Consumer Product Variant (CPV)	Net Weight + Price + Best Before Date (Variable Measure)	Batch/Lot Number	Expiration Date/ Best Before Date	Serial Number	Country of Origin
Consumer Engagement							
Sustainability							
Traceability							
Safety							
Inventory Management							
Improved Packaging							

**CRAWL**  
(2D + GTIN • in store printing)

**WALK**  
(Preprinted labels w/more data)

**RUN**  
(In-line printing)



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### 3. Value Chain Scope



#### WHAT

Third in scope is thoroughly looking at the end-to-end value chain to see who is impacted by the pilot and what adjustments need to be made in process, data and IT.



#### ABOUT

- Analysing the end-to-end value chain will ensure you will not overlook any players nor steps that may be impacted.
- It will give you an insight into the impact for the different stakeholders whether technically, operationally or organisationally.
- During the project planning decide what changes are necessary for the pilot and which are not (resolve through workarounds, e.g. virtual stock counting).



#### APPENDIX

[End-to End Value Chain](#)  
[High-level Value Chain process impact](#)  
[High-level Value Chain data & IT impact](#)

### 3. Value chain

Think about the E2E impact in the whole value chain and all process, data and IT touchpoints



# 3. Value Chain

## Possible process impact



### Manufacture and packaging of finished goods

#### Process impact

- Printing
- Packaging
- Labelling

#### Adjustments

- Redesign packaging and labels
- Adjust production lines (packaging & printing)
- On-demand 2D print solutions for item/case/pallet labelling



### Transport and receive

#### Process impact

- Scanning

#### Adjustments

- Scanning/reading hardware and software



### Replenish

#### Process impact

- Replenishment
- Inventory checking

#### Adjustments

- Adjust replenishment models
- Adjust replenishment processes (including picking)



### Sell

#### Process impact

- Scanning
- Weighing
- Consumer communication
- Processing payment

#### Adjustments

- Adjust in-store printing
- Adjust scales systems
- Adjust in-store processes
- Educate consumers
- Train in-store staff



### Return

#### Process impact

- Tracking returned goods
- Revalorisation

#### Adjustments

- Develop consumer communications
- Develop digital touchpoints (web/apps)
- Utilise GS1 Digital Link for apps



### Use

#### Process impact

- Engaging consumers
- Process post-purchase data

#### Adjustments

- Educate consumers

# 3. Value Chain

## Possible data and IT system impact



### Manufacture and packaging of finished goods

#### Data impact

- Product packaging
- Load carrier labels
- Product data
- Production data

#### IT system impact

- Factory ERP
- Manufacturing Execution systems
- Printing & scanning systems
- Quality Management Systems
- Material Sourcing systems
- Product Information Management systems



### Transport and receive

#### Data impact

- Load carrier labels
- Advanced Ship Notice messages
- Warehouse instructions

#### IT system impact

- Scanning systems
- Global IoT tracking systems
- Mobile apps, including scanning
- Warehouse management systems
- BI-systems



### Replenish

#### Data impact

- Inventory management data
- Warehouse instructions

#### IT system impact

- Mobile apps, including scanning
- Warehouse management systems
- Store Fulfillment Management systems
- BI-systems



### Sell

#### Data impact

- Production data
- Dynamic pricing
- Product info
- Product photos

#### IT system impact

- Point of sales system (POS)
- Weight systems
- Mobile consumer apps
- PIM/DAM systems



### Return

#### Data impact

- Returns and recycling instructions
- Returns data
- Repairs/refurb data
- Recalls

#### IT system impact

- Store Fulfillment Management system
- Recycling systems



### Use

#### Data impact

- Web links
- Consumer opt-in

#### IT system impact

- Consumer mobile platforms and apps
- Web shops



## WHAT

Review the key learnings and pitfalls from previous global 2D pilots to jump start your 2D pilot. You will find the learnings throughout the 2D pilot toolkit.



## Key learnings

### SCOPE (WHAT)

- Map the entire process
- Understand the entire IT changes needed, not just how back-end systems connect to POS
- Think through a roadmap of use cases & how to combine them to simplify codes on-pack
- Evaluate opportunities for your private label products
- Keep in mind that a logistical unit is not the same as a consumer unit during set-up
- Check if your back-end systems can accept a 14-digit GTIN, next to 12 or 13 digits
- Think carefully before choosing your data carrier
- Validate on-pack data with data available elsewhere
- Consider opportunities to connect 2D to more information at different stages
- Check the format of dates and other structures that are fully defined within [GS1 standards](#)
- Even if you are not starting a pilot yet, when making changes to your data environment, start preparing for more product data.
- Please note that 2D implementation (and sometimes even piloting) is often not easy with e.g. in grocery with over 30k SKUs and many suppliers. It is therefore key to start with the right scope and set-up to then use the results to decide on further roll-out.
- Understanding obstacles and thinking about them up front will increase your chances of success. Key obstacles can be limited upside for a category/SKUs, large print and system investments, complex value chains, limited consumer response, number of SKUs, difficult cooperation in the value chain.

# Involving the **WHO**



Which supply chain partners, solution providers and internal stakeholders will you engage to create success



# 1. Identify Stakeholders for Pilot



## WHO

Select your subject matter experts and other champions based on your pilot scope and use cases.

Each internal stakeholder should be aligned with their counterparts at external partners.

GS1 helps to provide:

- Guidance on the use of GS1 standards and solutions
- Expertise in 2D barcode and data selection
- Key learnings and other best practices for pilot implementation

## STAKEHOLDERS

### Internal

- IT
  - ERP systems
  - Point of sales systems
  - Web and app infrastructure
  - Reporting & analytics systems
  - Other systems
- Supply chain (incl. logistics)
- Marketing
- Finance
- Legal
- Operations (incl. in store employees)
- Purchasing department

### External

- Manufacturers / Brand owners
- Retailers
- Solution Providers
  - Scanning hardware & software
  - On demand barcode printing
  - Printing
  - Scales
  - POS software
  - Other
- Local GS1 office



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## WHO

Before selecting stakeholders for your 2D pilot, it is important to consider and achieve the following:



## Key learnings

### STAKEHOLDERS (WHO)

- Ensure top-management commitment
- Identify updates needed to data governance models
- Identify adjustments needs to product lifecycle management processes
- Ensure cross-functional teams are involved from IT, Supply Chain and marketing
- Consider partnering with a trading partner that has similar timelines and goals
- Involve applicable equipment system and IT solution providers
- Ensure retailers and manufacturers collaborate on the desired barcode and data attributes and outline the benefits for each stakeholder
- Set up a matrix to clarify roles and responsibilities within your organisation and between external partner organisations
- Partner with internal and regulatory compliance resources if regulatory requirements need to be met

# Set up the project, the **HOW**



How to set up and implement a 2D pilot;  
looking at different pilot building blocks,  
learnings and pitfalls

# Summary: Set Up the Pilot



## HOW

Now that you've explored the use cases, identified the scope and partners, it is time to set up and run your pilot. This section breaks down the key steps to not only prepare for a successful pilot but guides you in reporting on the results and capturing learnings.

### Pilot Steps



# 1. Discovery

## Project Phase Overview



### KEY OBJECTIVE

The key objective of the Discovery phase is to gather information and to enable a data-driven decision on the pilot



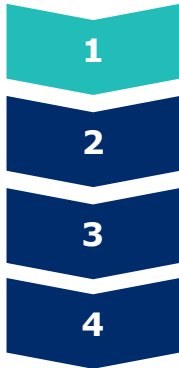
### OVERVIEW



### ELEMENT



### ELEMENT DESCRIPTION\*



Discovery

Prepare & Mobilise

Execute

Report & Learn

2D use cases

KPIs

Benefits

Costs

Impact/effort matrix

Determine [use cases](#) from based on business priorities

Determine objective/goal ([KPIs](#))

Determine expected [benefits](#) for business cases

Define possible [costs](#) for business cases

Create impact/effort matrix

\* Click links to access additional information



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# 2. Prepare & Mobilize

## Project Phase Overview



### KEY OBJECTIVE

The key objective of the Preparation & Mobilize phase is to set-up the pilot project and mobilize people

	 OVERVIEW	 ELEMENT	 ELEMENT DESCRIPTION*
1	Discovery	Stakeholders	Involve end-to-end <a href="#">stakeholders</a> along value chain
2	<b>Prepare &amp; Mobilise</b>	Collaboration model	Define collaboration model
3	Execute	Checklist	Validate <a href="#">checklists</a> for Brands/Manufacturers, Retailers and Solution Providers
4	Report & Learn	Scope	Define <a href="#">scope</a>
		Governance	Set up a governance model
		Project team	Set up (pilot) project team
		Project planning	Develop pilot/project planning
		Communication plan	Make communication plan for end-to-end stakeholders
		Kick-off	Kick-off pilot

\* Click links to access additional information



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# 3. Execute

## Project Phase Overview



### KEY OBJECTIVE

The key objective of the Execute phase is to put the plan into action



### OVERVIEW



### ELEMENT



### ELEMENT DESCRIPTION\*

- 1
- 2
- 3
- 4

Discovery

Process analysis & design

Define [process](#) impact along end-to-end value chain

Prepare & Mobilise

Data impact

Define [data](#) impact along end-to-end value chain

**Execute**

IT

Define [IT](#) Architecture, hardware, infrastructure & software impact

Report & Learn

Development cycle

Develop/Build/Test/Run/Run model support (e.g. consumer service)

Change management

People training or change management

Documentation

Document changed processes and share

Budget tracking

Coordinate with finance

Stakeholder management & communication

Coordinate frequent communication across all internal and external stakeholders

\* Click links to access additional information



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# 4. Report & Learn

## Project Phase Overview



### KEY OBJECTIVE

The key objective of the Report & Learn phase is to share your learnings with the wider GS1 community



### OVERVIEW



### ELEMENT



### ELEMENT DESCRIPTION\*

1

Discovery

2D Pilot tracker

A [tool](#) to document status during your 2D pilot (incl. KPIs)

2

Prepare & Mobilise

2D Pilot report

[Template](#) to document pilot details and facts

3

Execute

Storytelling template

Further build out via [2D pilot template storytelling](#)

4

Report & Learn

Scale-up

Consider next steps and process adjustments for scale-up to a full implementation

\* Click links to access additional information



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# Checklist: Brand Owners



## HOW

While the pilot toolkit includes a lot of information for discovery and planning for a pilot, this checklist can be valuable for Manufacturers/Brands to confirm all business, technical and partnership steps have been met.

Download a PDF checklist:

[https://www.gs1.org/docs/retail/Brand\\_and\\_Manufacturer\\_2D\\_barcodes\\_checklist.pdf](https://www.gs1.org/docs/retail/Brand_and_Manufacturer_2D_barcodes_checklist.pdf)



## Scope checklist

- Evaluate business use case opportunities.
- Pick a pilot product, line or category.
- Evaluate existing barcodes on-pack.
- Select 2D barcodes based on use cases and requirements.
- Identify additional data needs that need to be encoded with the GTIN.
- Understand data and GS1 standards before making decisions.



## Technical checklist

- Ensure technical capabilities for encoding dynamic data (where applicable).
- Assess print capabilities and print quality.
- Check for scanning compatibility with the new barcode.
- Ensure software, hardware and databases are up-to-date.



## Stakeholder checklist

- Align internal stakeholders, such as Supply Chain, IT dept, Marketing.
- Engage with your Solution providers.
- Collaborate with a retailer to test POS checkout feasibility for the new 2D code.
- Identify common goals and measures with collaboration partners.
- Involve authorities if required in your region.

# Checklist: Retailers



## HOW

While the pilot toolkit includes a lot of information for discovery and planning for a pilot, this checklist can be valuable for Retailers to confirm all technical and partnership steps have been met.

Download a PDF checklist:

[https://www.gs1.org/docs/retail/Retailer\\_2D\\_barcode\\_checklist.pdf](https://www.gs1.org/docs/retail/Retailer_2D_barcode_checklist.pdf)



## Technical checklist

- Partner with your scanner and POS solution providers for guidance on system readiness for 2D.
- Evaluate backend system upgrades required to leverage additional data.
- Ensure systems can ingest additional data to support new business use cases.
- Ensure your scanners are ready to read all 2D in Retail standard barcodes.



## Stakeholder checklist

- Collaborate with trading partners to align on business use case opportunities and additional data that you would like to capture.
- Evaluate opportunities for your private label products (see checklist for manufacturers).
- Collaborate closely with solution providers; make sure POS checkout is updated and configured for your business use cases.
- Identify common goals and measures with collaboration partners.
- Educate in-store associates.
- Educate consumers: self checkout, omni-channel and consumer engagement.

# Checklist: Solution Providers



## HOW

While the pilot toolkit includes a lot of information for discovery and planning for a pilot, this checklist can be valuable for solution providers to determine the right technical solution.

Download a PDF checklist:

<https://www.gs1.org/docs/retail/Solution Provider 2D barcodes checklist.pdf>



## Scope checklist

- ❑ Review products that will be used in the pilot, including evaluating the product substrate.
- ❑ Understand which static and dynamic data needs to be encoded in 2D barcodes, which are determined by the desired use case.
- ❑ Understand the GS1 data structure and quality standards.
- ❑ Evaluate the printing and scanning environment including print surface.



## Technical checklist

- ❑ Ensure technical capabilities for encoding dynamic data (where applicable).
- ❑ Assess print capabilities and print quality and adjust based on the print environment.
- ❑ Check for scanning compatibility with 2D barcodes.
- ❑ Ensure software, hardware and databases are up-to-date.
- ❑ Optimise how data is encoded in the 2D barcode.



## Stakeholder checklist

- ❑ Internal stakeholders to take on board include brand marketing/manufacturing, information technology, shop floor operations and maintenance departments.
- ❑ Engage with up and downstream solution providers (label software, printing, scanning, enterprise, etc.).
- ❑ Collaborate with brand and retailer to ensure POS checkout feasibility for the new code.
- ❑ Identify common goals and measures with collaboration partners to avoid conflicts later.
- ❑ Involve authorities if required in your region.



## HOW

Review the key learnings and pitfalls from previous global 2D pilots to jump start your 2D pilot. You will find the learnings throughout the 2D pilot toolkit.



## Key learnings

### IMPLEMENTATION (HOW)

- Evaluate all scanners and update hardware or software where needed: POS, flatbed scanners, fixed scanners, handheld scanners, in-store apps-including APIs, and warehouse scanners
- Understand the capabilities of 2D image scanners in collaboration with your solution providers (For example, can your scanners accommodate two barcodes with the same GTIN on the product? You may need a software upgrade to achieve this)
- Ensure mobile devices from consumers can interact with the 2D barcodes
- Train in-store employees and gain buy-in as part of the pilot planning
- Translate the improved (future) system capabilities into associate training (what to do when I see multiple barcodes?)
- Educate consumers: self checkout, omni-channel and consumer engagement
- Check the latest GS1 Standards guidelines for the human readable text under the 2D barcodes and review GS1's scanner testing outcomes

# Reporting & learnings



How to capture learnings and report back to the GS1 community

# Summary: Reporting & Learning



## REPORTING

- Reporting 2D pilots
  - Storytelling
  - Facts
- Share learnings



## ABOUT

- Reporting 2D pilots and sharing learnings will enable other Consumer Products and Retail organizations to recognize benefits as well as jump start their own 2D pilots; the power of the GS1 community!



## TOOLS

- Using templates provided by GS1 enables the set-up of a repository in the future, where other companies can look up similar pilots



## TEMPLATES

- [2D pilot tracker](#)
- [2D pilot report for repository](#)
- [2D pilot template storytelling](#)

# Report & Learn

## 2D Pilot tracker



On Schedule



Minor risk/~10% behind schedule



Significant risk/>10% behind schedule



Complete

Stage	Date/Status
Planning	
Pilot Duration	
Review/Report	

Pilot Scale		
Test Lab	In Store	Multi-location

Updated

Key Stakeholders	Company	Name
GS1 Lead		
Retailer Lead		
Brand/ Manufacturer/ Supplier Lead		
Solution Provider Lead		
Other Participants		

Key Learnings
<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>

KPIs	Baseline	New



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# Report & Learn

## 2D Pilot Report for repository

Business Use Case Definition			Organisation Details		
Description of business challenge and desired outcome:			GS1 Member Organisation:		
Key Drivers: (check all that apply)	<input type="checkbox"/> <i>Inventory Management</i>	<input type="checkbox"/> <i>Consumer Engagement</i>	Retailer, Brand / Manufacturer and Solution Provider Company Names involved in pilot:	<input type="checkbox"/>	
	<input type="checkbox"/> <i>Traceability</i>	<input type="checkbox"/> <i>Improved Packaging</i>		<input type="checkbox"/>	
	<input type="checkbox"/> <i>Safety</i>	<input type="checkbox"/> <i>Maintain POS efficiency</i>		<input type="checkbox"/>	
	<input type="checkbox"/> <i>Sustainability</i>	<input type="checkbox"/> <i>Other:</i>		<input type="checkbox"/>	
Pilot Scale & Product Details:	<i>Number of stores:</i>		Core Focus	<input type="checkbox"/> <i>Retailer</i>	<input type="checkbox"/> <i>Manufacturer</i>
	<i>Type of product:</i>				
	<i>Number of products:</i>				
Participants:	<input type="checkbox"/> <i>Supplier</i>	<input type="checkbox"/> <i>Solution Provider</i>			
	<input type="checkbox"/> <i>Retailer</i>	<input type="checkbox"/> <i>GS1 MO</i>			
Data encoded:	<input type="checkbox"/> <i>GTIN</i>	<input type="checkbox"/> <i>Serial Number</i>			
	<input type="checkbox"/> <i>Best Before Date</i>	<input type="checkbox"/> <i>Expiry Date</i>			
	<input type="checkbox"/> <i>Batch/Lot Number</i>	<input type="checkbox"/> <i>Other:</i>			
2D Barcode Selected:	<input type="checkbox"/> <i>QR Code</i>	<input type="checkbox"/> <i>GS1 DataMatrix</i>			
	<input type="checkbox"/> <i>Data Matrix</i>				
Key benefits / learnings					
Qualitative benefits/outcomes:					
Quantitative metrics:					

**Contact:**

**Email:**

**Date:**



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# Report & Learn

## Additional Template for Detailed Storytelling

Download online: [https://www.gs1.org/docs/retail/2D\\_pilot\\_storytelling\\_template.docx](https://www.gs1.org/docs/retail/2D_pilot_storytelling_template.docx)



The Global Language of Business

### 2D Barcodes case study template

[Author] | [Company] | [Country] | [Date]

#### TITLE

[Include name of company, country and catchy headline]

#### SUB-TITLE

[Introductory sentence highlighting the success or measurable outcome from the pilot]

#### Challenge

[Describe the challenge that motivated starting a 2D pilot]

#### Solution

[Describe the solution]

#### Benefits

[Outline the benefits realised by using 2D barcodes]

#### MAIN BODY OF TEXT

[DESCRIPTION OF THE PROJECT HERE]

#### YOU CAN TALK ABOUT:

1. Set-up of the pilot:
  - a. Involved stakeholders internal and external
  - b. Collaboration opportunities
  - c. Preparation for the pilot
  - d. Key activities of the pilot
2. Impact of the pilot:
  - a. Impact on business, consumers, operations
  - b. Impact on technology and processes
  - c. Benefits and value of the pilot
3. Key learnings from the pilot

#### QUOTES

[Include 1-3 quotes highlighting the business success and outcomes from the pilot]

[NAME]

[TITLE]

[COMPANY]

#### ABOUT

[Provide information about the retailer, brand and manufacturers highlighted in the case study – history, number of products/stores, global reach, etc.]

#### PICTURES

[Include relevant pictures from the pilot that help tell the story – photos of products with 2D barcodes, scanning of products, products on the shelf, etc.]



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