RIS SOFTWARE
LeaderBoard '15

- TOP 20 SOFTWARE VENDORS
- TOP TIER-ONE & MID-MARKET VENDORS
- TOP VENDORS IN GROCERY, APPAREL & SPECIALTY
- TOP VENDORS IN CUSTOMER SATISFACTION

PLUS:
COMPANIES TO WATCH

EDITOR'S NOTE

WISDOM OF THE CROWD

Smoothing out idiosyncrasies of individual judgement

By Joe Skorupa

BY THE NUMBERS

747	Vendor evaluations
332	Retail voters
189	Revenue < $1B voters
142	Revenue > $1B voters
102	Apparel voters
82	Grocery voters
66	Specialty voters
26	Dept. Store/Mass Merch. voters
37	C-level voters (except CIOs)
20	CIOs

Eight hundred people at a county fair in England entered a contest to estimate the weight of an ox in 1906. Statistician Francis Galton was there and studied the entries. He discovered the median guess was 1207 pounds, a figure that was accurate within 1% of the true weight of 1198 pounds. This phenomenon, Galton observed, was repeatable and has since given rise to the theory that by taking the average of a large number of responses the median response tends to cancel idiosyncrasies of individual judgement.

So what do county fairs and weight of oxen have to do with the *RIS* Software LeaderBoard? The common thread is the wisdom of the crowd, which is the underlying principal that animates the annual benchmark report, now in its 15th year.

The *RIS* Software LeaderBoard measures the wisdom of the crowd to cut through the noise of marketing messages, buzz and hype. It aggregates 747 evaluations made by 332 retailers about 50 retail technology vendors. The end result is a data set that is filtered, sorted and cross-tabbed to create 50 top-10 charts and one top-20 chart.

Customer Satisfaction is the signature element of the *RIS* Software LeaderBoard. It is what makes the LeaderBoard unique among other vendor landscapes compiled by experts at analyst or research firms. These types of vendor landscapes have value, too, but in order to cancel the idiosyncrasies of individual judgment it is advisable to augment their recommendations with the opinions of hundreds of retailers who use the software every day.

The Customer Satisfaction score in the LeaderBoard is based on retailer evaluations in 10 criteria. These 10 criteria range from return on investment (ROI) and total cost of operation (TCO) to quality of support and innovation. Each criterion has a maximum value of five points, so a perfect Customer Satisfaction score is 50.

The average Customer Satisfaction score for all 78 technology vendors who received votes this year was 38. Last year it was 37.8. This average (within a point) has remained steady throughout the 15-year history of the LeaderBoard.

Total votes cast have also maintained consistency. Since 2007 the average number of evaluations is 777. This year it is 747.

Customer Satisfaction scores are augmented by two other metrics, Retail Concentration and Revenue Factor. Together these three form a full data set, which is used in the Top 20 list and a few other top-10 lists, such as Large Vendor Leaders, Broad Suite Vendor Leaders and Apparel Vendor leaders.

Retail Recognition is a metric that has a maximum value of 50 points, which is achieved by counting dedicated retail software modules worth one point each. Revenue Factor is a metric with a value of one to five points based on revenue earned in the retail industry.

Although the Customer Satisfaction score is balanced by the Retail Recognition and Revenue Factor scores, it is clearly the decisive factor in the 51 charts in the LeaderBoard. This is by design.

As Francis Galton demonstrated, the wisdom of the crowd produces highly accurate results by removing individual idiosyncrasies, which we believe offers an excellent way to get insight into your next tech purchase. •

THE CUSTOMER IS YOU!

When we talk about customer satisfaction we are talking about your satisfaction

Retailers are uniquely qualified to appreciate the findings in the *RIS Software LeaderBoard* because they are experts in customer satisfaction, the defining characteristic in the LeaderBoard. Retailers, more than any other group of business professionals, know that customer satisfaction is difficult to achieve. And it is exponentially harder to achieve at the scale of a national chain.

It is one thing to find an exceptional store manager who is attentive to every detail of the business, but it is quite another to perform at the same level across hundreds of stores in dozens of states. Attention to detail at this scale becomes an exercise in managing averages — some high, some low and some in the middle. But one thing is certain — you will never be able to replicate the performance of that one exceptional manager at hundreds of locations.

A parallel to this conundrum is running a large technology company. Large tech companies have dozens of solutions that must be kept up-to-date (or ideally ahead of the curve) while at the same time serving the needs of many industries. A further complication is that giants of this size have hundreds of clients to serve (sometime thousands).

In companies like these retail is not the sole focus. In fact, it might not be one of their top three largest categories. The ability to deliver high levels of customer satisfaction in a company like this is similar to expecting a national retailer to deliver a perfect brand experience at every store. It's not going to happen.

Since small tech vendors (like small retailers) have more control to deliver outstanding service (and get higher Customer Satisfaction scores), the Leader-Board uses a "full data set" to offset this advantage.

FULL DATA SET

The full data set produces a number that is the sum of three parts: Customer Satisfaction score, Retail Concentration score and Revenue factor score. Although Customer Satisfaction is a big component in the full-data-set score, it is just one of three factors.

The full data set is used in the Top 20 list, the only top-20 chart in the Leader-Board. Vendors featured in this list are the best-of-the-best among the 50 companies evaluated in the 2015 survey.

This year the Top 20 list includes 22 vendors (with two ties). Of the 22 vendors, 10 are large companies with software revenue in the retail industry greater than $250 million. Four of these giants appear in the top 10 — SAP, MicroStrategy, Oracle and Aptos.

RIS SOFTWARE LEADERBOARD TOP 20

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	ECRS	47.0	46	2	95.0
2	Celerant Technology	45.5	44	2	91.5
3	SAP	37.1	48	5	90.1
4	Cegid	43.9	42	3	88.9
5	Manthan	43.7	42	2	87.7
6	PCMS Datafit	42.2	41	3	86.2
7	MicroStrategy	40.5	40	5	85.5
8	Oracle	32.9	47	5	84.9
9	Aptos (Epicor Retail)	34.1	45	5	84.1
10	MI9 Retail	42.9	38	2	82.9
11	JDA	36.9	37	5	78.9
12	Multidev Technologies	43.5	34	1	78.5
13	Jesta I.S.	42.8	32	2	76.8
14	Raymark	39.3	36	1	76.3
15	Magstar	44.0	28	1	73.0
15	Manhattan Associates	41.0	27	5	73.0
16	IBM	39.9	28	5	72.9
17	NCR	28.7	36	5	69.7
18	HP	41.6	23	5	69.6
19	Reflexis Systems	46.3	20	3	69.3
20	Microsoft	41.1	23	5	69.1
20	Logility	46.1	21	2	69.1

LARGE VENDOR LEADERS (FULL DATA SET)

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	SAP	37.1	48	5	90.1
2	MicroStrategy	40.5	40	5	85.5
3	Oracle	32.9	47	5	84.9
4	Aptos (Epicor Retail)	34.1	45	5	84.1
5	JDA	36.9	37	5	78.9
6	Manhattan Associates	41.0	27	5	73.0
7	IBM	39.9	28	5	72.9
8	NCR	28.7	36	5	69.7
9	HP	41.6	23	5	69.6
10	Microsoft	41.1	23	5	69.1

CUST. SAT. FOR LARGE VENDORS

RANK	COMPANY	CUST. SAT.
1	NetSuite	42.2
1	Lexmark	42.2
2	HP	41.6
3	Microsoft	41.1
4	Manhattan Associates	41.0
5	Kronos	40.8
5	Dell	40.8
6	First Data	40.6
7	MicroStrategy	40.5
8	IBM	39.9
9	Verifone	39.5
10	SAP	37.1

MID-SIZE VENDOR LEADERS (FULL DATA SET)

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	ECRS	47.0	46	2	95.0
2	Celerant Technology	45.5	44	2	91.5
3	Cegid	43.9	42	3	88.9
4	Manthan	43.7	42	2	87.7
5	PCMS Datafit	42.2	41	3	86.2
6	MI9 Retail	42.9	38	2	82.9
7	Multidev Technologies	43.5	34	1	78.5
8	Jesta I.S.	42.8	32	2	76.8
9	Raymark	39.3	36	1	76.3
10	Magstar	44.0	28	1	73.0

CUST. SAT. FOR MID-SIZE VENDORS

RANK	COMPANY	CUST. SAT.
1	Logile	48.7
2	NGC Software	47.8
3	RTC Group	47.4
4	ECRS	47.0
5	Reflexis Systems	46.3
6	Logility	46.1
7	360pi	45.6
8	Celerant Technology	45.5
9	Magstar	44.0
10	Cegid	43.9

BROAD SUITE VENDOR LEADERS (FULL DATA SET)

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	ECRS	47.0	46	2	95.0
2	Celerant Technology	45.5	44	2	91.5
3	SAP	37.1	48	5	90.1
4	Cegid	43.9	42	3	88.9
5	Manthan	43.7	42	2	87.7
6	PCMS Datafit	42.2	41	3	86.2
7	MicroStrategy	40.5	40	5	85.5
8	Oracle	32.9	47	5	84.9
9	Aptos (Epicor)	34.1	45	5	84.1
10	MI9 Retail	42.9	38	2	82.9

CUST. SAT. FOR BROAD SUITE VENDORS

RANK	COMPANY	CUST. SAT.
1	ECRS	47.0
2	Logility	46.1
3	Celerant Technology	45.5
4	Magstar	44.0
5	Cegid	43.9
6	Manthan	43.7
7	Multidev Technologies	43.5
8	MI9 Retail	42.9
9	Jesta I.S.	42.8
10	PCMS Datafit	42.2

TARGETED SOLUTION VENDOR LEADERS (FULL DATA SET)

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	Reflexis Systems	46.3	20	3	69.3
2	NetSuite	42.2	20	5	67.2
3	NGC Software	47.8	15	3	65.8
4	Kronos	40.8	19	5	64.8
5	RTC Group	47.4	13	1	61.4
6	First Data	40.6	15	5	60.6
7	Logile	48.7	10	1	59.7
8	SPS Commerce	38.5	18	3	57.5
9	Lexmark	42.2	9	5	56.2
10	Dell	40.8	10	5	55.8

CUST. SAT. FOR TARGETED SOLUTION VENDORS

RANK	COMPANY	CUST. SAT.
1	Logile	48.7
2	NGC Software	47.8
3	RTC Group	47.4
4	Reflexis Systems	46.3
5	360pi	45.6
6	NetSuite	42.2
6	Lexmark	42.2
7	Revionics	42.0
8	Starmount	41.1
9	Kronos	40.8
9	Dell	40.8
10	First Data	40.6

GROCERY VENDOR LEADERS (FULL DATA SET)

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	ECRS	49.5	46	2	97.5
2	Manthan	44.0	42	2	88.0
3	SAP	30.9	48	5	83.9
4	MicroStrategy	36.1	40	5	81.1
5	JDA	35.4	37	5	77.4
6	IBM	37.9	28	5	70.9
7	Microsoft	40.6	23	5	68.6
8	NCR	27.5	36	5	68.5
9	First Data	43.4	15	5	63.4
10	Kronos	36.1	19	5	60.1

CUSTOMER SATISFACTION FOR GROCERY VENDORS

RANK	COMPANY	CUST. SAT.
1	ECRS	49.5
2	Logile	45.7
3	Manthan	44.0
4	First Data	43.4
5	Lexmark	43.0
6	Microsoft	40.6
7	Dell	39.8
8	IBM	37.9
9	Verifone	37.5
10	MicroStrategy	36.1
10	Kronos	36.1

APPAREL VENDOR LEADERS (FULL DATA SET)

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	Celerant Technology	42.6	44	2	88.6
2	Cegid	42.0	42	3	87.0
3	MicroStrategy	40.7	40	5	85.7
4	Aptos (Epicor Retail)	34.3	45	5	84.3
5	SAP	30.9	48	5	83.9
6	Oracle	28.8	47	5	80.8
7	JDA	35.3	37	5	77.3
8	Jesta I.S.	42.3	32	2	76.3
9	Multidev Technologies	41.2	34	1	76.2
10	IBM	36.4	28	5	69.4

CUSTOMER SATISFACTION FOR APPAREL VENDORS

RANK	COMPANY	CUST. SAT.
1	Logility	46.1
2	NGC Software	44.8
3	Celerant Technology	42.6
4	Jesta I.S.	42.3
5	Cegid	42.0
6	Multidev Technologies	41.2
7	Kronos	40.9
8	MicroStrategy	40.7
9	Microsoft	37.5
10	HP	36.6

SPECIALTY VENDOR LEADERS (FULL DATA SET)

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	Celerant Technology	45.0	44	2	91.0
2	SAP	36.6	48	5	89.6
3	RTC Group	49.4	38	2	89.4
4	MicroStrategy	40.5	40	5	85.5
5	Oracle	33.2	47	5	85.2
6	Aptos (Epicor Retail)	32.4	45	5	82.4
7	MI9 Retail	41.2	38	2	81.2
8	Multidev Technologies	44.3	34	1	79.3
9	Raymark	40.5	36	1	77.5
10	JDA	33.4	37	5	75.4

CUSTOMER SATISFACTION FOR SPECIALTY VENDORS

RANK	COMPANY	CUST. SAT.
1	RTC Group	49.4
2	Reflexis Systems	48.1
3	360pi	45.5
4	Celerant Technology	45.0
5	Multidev Technologies	44.3
6	Dell	41.6
7	Manhattan Associates	41.3
8	MI9 Retail	41.2
9	Kronos	40.8
10	SPS Commerce	40.8

So, even though it is theoretically easier for a small, retail-focused tech company to deliver outstanding customer service (just as it is easier for a small retailer to find an exceptional store manager) the truth is that large companies are capable of doing it, too.

There are nine other full-data-set charts in the LeaderBoard and each one is based on a unique cross-tab cut of the data. In the chart for Large Vendor Leaders, the applied filter is revenue in the retail vertical — it must be $125 million or greater. In the chart for Mid-Size Vendor Leaders the sorting factor is revenue less than $125 million.

In the chart for Broad Suite Vendor Leaders the sorting factor is Retail Concentration and vendors must have 21 or more retail software modules or applications in their solution set (each one counts for one point). In the chart for Targeted Solution Vendor Leaders, the sorting factor is possessing less than 21 software modules or applications.

There are also three retail verticals (Grocery, Apparel and Specialty) repre-

TOP VENDORS FOR MID-SIZE RETAILERS [FULL DATA SET]

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	ECRS	45.6	46	2	93.6
2	Celerant Technology	44.5	44	2	90.5
3	Cegid	42.7	42	3	87.7
4	SAP	33.5	48	5	86.5
5	MicroStrategy	39.6	40	5	84.6
6	Aptos (Epicor Retail)	32.1	45	5	82.1
7	MI9 Retail	41.2	38	2	81.2
8	Oracle	26.7	47	5	78.7
9	Multidev Technologies	42.5	34	1	77.5
10	JDA	35.0	37	5	77.0

CUSTOMER SATISFACTION BY MID-SIZE RETAILERS

RANK	COMPANY	CUST. SAT.
1	RTC Group	47.4
2	ECRS	45.6
3	NGC Software	45.5
4	360pi	44.7
5	Celerant Technology	44.5
6	Magstar	44.0
7	Cegid	42.7
8	Multidev Technologies	42.5
9	MI9 Retail	41.2
10	Manhattan Associates	39.7

TOP VENDORS FOR TIER ONE RETAILERS [FULL DATA SET]

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	Manthan	44.0	42	2	88.0
2	SAP	34.6	48	5	87.6
3	Oracle	32.1	47	5	84.1
4	MicroStrategy	37.6	40	5	82.6
5	JDA	33.2	37	5	75.2
6	Jesta I.S.	40.7	32	2	74.7
7	Manhattan Associates	40.4	27	5	72.4
8	NCR	31.3	36	5	72.3
9	HP	42.0	23	5	70.0
10	IBM	36.2	28	5	69.2

CUSTOMER SATISFACTION BY TIER ONE RETAILERS

RANK	COMPANY	CUST. SAT.
1	Logile	45.6
2	Reflexis Systems	45.2
3	Manthan	44.0
4	NGC Software	43.0
5	Lexmark	42.8
6	HP	42.0
7	Jesta I.S.	40.7
8	First Data	40.5
9	Manhattan Associates	40.4
10	Dell	39.0

TOP VENDORS IN CUSTOMER SATISFACTION

RANK	COMPANY	CUST. SAT.
1	Logile	48.7
2	NGC Software	47.8
3	RTC Group	47.4
4	ECRS	47.0
5	Reflexis Systems	46.3
6	Logility	46.0
7	360pi	45.6
8	Celerant Technology	45.5
9	Magstar	44.0
10	Cegid	43.9

TOP VENDORS IN RETAIL CONCENTRATION

RANK	COMPANY	CUST. SAT.
1	SAP	48
2	Oracle	47
3	ECRS	46
4	Aptos (Epicor Retail)	45
5	Celerant Technology	44
6	Cegid	42
6	Manthan	42
7	PCMS Datafit	41
8	MicroStrategy	40
9	MI9 Retail	38
10	JDA	37

sented in the report with full-data-set charts. The sorting factor in each of these charts is retail voters — retailers who identify themselves as belonging in one of the three niches. So, in the grocery chart only votes by grocers are counted. Note that this means a vendor's overall Customer Satisfaction score, which appears in the Top 20 list (and other places) will not be the same as it appears in the Grocery Vendor Leader's chart, because the voting pools are different — one includes every voter and one only grocers.

In addition to congratulating the large vendors previously singled out for achieving high positions in the Top 20 list, special congratulations should go to ECRS for its number-one ranking (three years in a row) and Celerant Technology for coming in second (two years in a row). And, of course, every retailer that makes any of the lists. All are best-of-the-best retail tech vendors. •

BREAKING AWAY

Digging deeper into Customer Satisfaction and hearing from retailers in their own words

The first chapter in the LeaderBoard report is focused on top-10 lists that feature full-data-sets. These charts include data collected in three areas — Customer Satisfaction, Retail Recognition and Revenue Factor. Add the numerical value for each of these together and you get a total score that is used to determine placement in each of the top-10 lists.

In this chapter the focus shifts to just one of the three major data elements in the LeaderBoard — Customer Satisfaction. In full-data-set charts the score for Customer Satisfaction is actually an aggregate number created by the sum of 10 individual evaluations. A perfect Customer Satisfaction score of 50 means the vendor achieved a top score of 5 in each of the 10 criteria. This year no vendor achieved a perfect score in the overall Customer Satisfaction score or in any of the 10 criteria.

The 10 Customer Satisfaction criteria are worth a maximum of five points each and they include: Overall Performance (ease of use, logical workflows, speed, etc.), Total Cost of Operation, Return on Investment, Technology Innovation, Software Reliability, Ease of Installation & Integration, Ease of Administration, Quality of Support, Quality of Service, and Recommendation (how strongly would you recommend this company to others).

Vendors that post high Customer Satisfaction scores in full-data-set charts inevitably score well in the 10 criteria breakouts. The following vendors should be singled out for achieving high scores in the following Customer Satisfaction breakouts: RTC Group (Software Reliability, Ease of Administration, Quality of Service and Recommendation), Logility (Overall Performance and Return on

LEADERS IN OVERALL PERFORMANCE

RANK	COMPANY	CUST. SAT.
1	Logility	4.9
1	RTC Group	4.9
2	Celerant Technology	4.7
3	Logile	4.6
3	Manthan	4.6
3	NGC Software	4.6
4	360pi	4.5
5	Reflexis Systems	4.4
5	NetSuite	4.4
5	Multidev Technologies	4.4

LEADERS IN TOTAL COST OF OPERATION

RANK	COMPANY	CUST. SAT.
1	ECRS	4.7
2	RTC Group	4.6
2	Logile	4.6
3	Cegid	4.4
3	Celerant Technology	4.4
3	Logility	4.4
3	Multidev Technologies	4.4
4	360pi	4.3
4	Reflexis Systems	4.3
5	NGC Software	4.2
5	Lexmark	4.2
5	LOC Software	4.2

LEADERS IN RETURN ON INVESTMENT

RANK	COMPANY	CUST. SAT.
1	Logility	4.8
2	ECRS	4.7
3	PCMS Datafit	4.6
3	RTC Group	4.6
3	Logile	4.6
4	Celerant Technology	4.5
4	Revionics	4.5
5	NGC Software	4.4
5	MI9 Retail	4.4
6	Reflexis Systems	4.3
6	Cegid	4.3

Investment), ECRS (Total Cost of Operation), Celerant Technology (Technology Innovation), 360pi (Ease of Installation & Integration) and NGC Software (Quality of Support). While each of these vendors scored impressive number ones in select criteria they also achieved high scores across the spectrum of Customer Satisfaction breakouts.

NATURAL LANGUAGE INSIGHT

In addition to numerical data collected for the LeaderBoard we also ask retailers to tell us why they voted for vendors the way they did. For anyone wishing to gain insight into LeaderBoard scoring these comments provide an invaluable resource. Here are select comments that offer a peek into the best vendors in retail technology:

• ECR Software's **Catapult POS** system is dynamic and easy to use. The installation process is well thought out from start to finish and tech support is the best I've seen in the industry.

• I've been very impressed with Logile's desire to understand our needs, prepare a plan, execute on the plan, and provide quality deliverables in an efficient manner. They were thorough in their investigations and asked the right questions. It is refreshing to work with individuals that take pride in work.

• I've implemented Reflexis Systems Task Management at three separate companies over the past 10 years. Reflexis' level of service and support has been stellar. I would recommend their solution to anyone looking to improve store tasking, communication and workload planning.

• We have been using Celerant since 2006 and just updated to their latest version in January of this year. They are easy to work with and continually update their software with today's technology.

• Kronos actually listens to their business partners and provides insight, support and development tied directly to driving business performance.

• Manthan Systems has been our solution provider for analytics since 2007. In the past eight years of partnership they have provided quality products that helped

LEADERS IN TECHNOLOGY INNOVATION

RANK	COMPANY	CUST. SAT.
1	Celerant Technology	4.8
2	RTC Group	4.7
3	Logile	4.5
3	Reflexis Systems	4.5
3	Revionics	4.5
3	Cegid	4.5
3	ECRS	4.5
4	LOC Software	4.4
4	PCMS Datafit	4.4
4	Manthan	4.4

LEADERS IN SOFTWARE RELIABILITY

RANK	COMPANY	CUST. SAT.
1	RTC Group	4.7
1	ECRS	4.7
2	Logility	4.6
2	PCMS Datafit	4.6
2	Reflexis Systems	4.6
2	Magstar	4.6
3	360pi	4.5
3	Jesta I.S.	4.5
3	Celerant Technology	4.5
4	MI9 Retail	4.4

LEADERS IN EASE OF INSTALLATION & INTEGRATION

RANK	COMPANY	CUST. SAT.
1	360pi	4.8
1	Logility	4.8
2	RTC Group	4.7
3	ECRS	4.5
3	Logile	4.5
4	Magstar	4.4
4	NetSuite	4.4
4	NGC Software	4.4
4	Cegid	4.4
4	Manthan	4.4
4	Reflexis Systems	4.4

LEADERS IN EASE OF ADMINISTRATION

RANK	COMPANY	CUST. SAT.
1	RTC Group	4.7
2	Logility	4.6
2	Logile	4.6
2	LOC Software	4.6
2	NetSuite	4.6
3	ECRS	4.5
3	360pi	4.5
4	MI9 Retail	4.4
5	NGC Software	4.3
5	Cegid	4.3
5	Jesta I.S.	4.3

LEADERS IN QUALITY OF SUPPORT

RANK	COMPANY	CUST. SAT.
1	NGC Software	4.9
1	RTC Group	4.9
2	Logile	4.8
3	Magstar	4.7
3	Jesta I.S.	4.7
4	360pi	4.6
4	ECRS	4.6
4	Manhattan Associates	4.6
4	Multidev Technologies	4.6
5	Manthan	4.5
5	Reflexis Systems	4.5

LEADERS IN QUALITY OF SERVICE

RANK	COMPANY	CUST. SAT.
1	RTC Group	4.9
2	NGC Software	4.8
3	ECRS	4.7
4	360pi	4.6
4	Logile	4.6
4	Logility	4.6
4	Magstar	4.6
5	Reflexis Systems	4.5
5	Jesta I.S.	4.5
6	Revionics	4.4
6	PCMS Datafit	4.4

LEADERS IN RECOMMENDATION

RANK	COMPANY	CUST. SAT.
1	RTC Group	4.9
2	ECRS	4.8
3	NGC Software	4.7
3	Logility	4.7
4	Logile	4.6
4	Reflexis Systems	4.6
4	Celerant Technology	4.6
4	NetSuite	4.6
4	Magstar	4.6
5	Cegid	4.5
5	Manthan	4.5
5	Revionics	4.5

our business grow in terms of revenues and profitability. We have implemented merchandise analytics, supplier portal and analytics, customer analytics and human resources analytics across our retail format.

• **NetSuite** provides a robust cloud-based ERP with provisions for various verticals. Integrations with various outboard systems are facilitated by the underlying platform, which is unique in the industry.

• **NGC Software** suite is comprehensive for our manufacturing business. Fully integrated PLM, ERP and SCM provide us with the opportunity to eliminate redundant tasks. We have the visibility and ability to add reporting software and mine the data with ease.

• **360pi** continues to impress our merchandising and marketing teams with ease of use and quick turnaround times on any requested features and bug fixes. They are a true pleasure to deal with from start to finish. •

Methodology

Customer Satisfaction in RIS Software LeaderBoard rankings is based on retailer evaluations using a 1-5 point scale in 10 criteria. Invitations to fill out evaluation forms are sent by Litchfield Research using a one-time, non-forwarding web link. Evaluations were collected in September and October, 2015, and the final aggregated data was sent by Litchfield to RIS for publication.

The 10 criteria that comprise the Customer Satisfaction score are: Overall Performance, ROI, TCO, Innovation, Reliability, Installation/Integration, Administration/Maintenance, Support, Service and Recommendation.

A second area that plays a big part in the rankings is Retail Concentration, a measurement of the footprint a vendor has in retail technology. RIS creates a list of 50 core retail applications and researches vendor websites to ensure they are generally available for purchase and deployment. Each of the 50 core modules counts for one point toward the Retail Concentration score.

The final area that plays a part in the rankings is Revenue Factor. This is a range from one to five points and it is broken out as follows: one point for revenue in the retail vertical for $20 million or less; two points for revenue $20-$50 million; three points for revenue $50-$125 million; four points for revenue $125-$250 million; and five points for revenue above $250 million. A default of one point is assigned if the vendor cannot select one of the revenue plateaus due to corporate restrictions.

RIGHT SIZING

Highlighting top vendors for tier-one retailers, mid-size retailers and both

Why is it that so few software vendors appear in both top-10 lists when the voting pool is divided into two revenue groups — votes by tier-one retailers with revenue greater than $1 billion and votes by mid-size retailers with revenue less than $1 billion? After all, if the application works for one group, for example a merchandise planning application or POS, then why wouldn't it work equally well for the other revenue group?

As a point of clarification, note that we are not talking about mom-and-pop retailers when we refer to mid-size retailers. No voter in the LeaderBoard is small. Very few have revenue that dips below the $100 million mark. The majority of "small" retailers in the LeaderBoard have revenue between $500 million and $1 billion, which is pretty large by most business standards.

So, why can't software work equally well for both groups?

The challenge is that generally available software used by retailers today is the result of a series of compromises. These involve features and functions, user interface designs, scalability of speed, workload or data, pre-written integration schemas, and more. Decisions are made to include or exclude functions, deliver with full horsepower or with limitations. When the balance is struck and the price point is set, the vendor typically targets one of the two revenue groups highlighted here.

In this chapter we show side-by-side rankings of vendors as voted by retailers in our two revenue groups — above and below $1 billion in revenue. Proving the point that leaders in these groups do not cross over into both groups we see Logile, NGC Software,

LEADERS IN OVERALL PERFORMANCE BY TIER ONE & MID-SIZE RETAILERS

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	COMPANY	CUST. SAT.	RANK	COMPANY	CUST. SAT.
1	Logile	4.7	1	RTC Group	4.9
2	Manthan	4.6	2	Celerant Technology	4.7
3	Reflexis Systems	4.5	3	NGC Software	4.6
3	NGC Software	4.5	4	360pi	4.4
4	HP	4.4	4	Multidev Technologies	4.4
5	Manhattan Associates	4.2	5	Magstar	4.3
5	First Data	4.2	5	Cegid	4.3
6	MicroStrategy	4.0	6	ECRS	4.2
6	Jesta I.S.	4.0	7	MicroStrategy	4.1
6	Lexmark	4.0	7	Kronos	4.1

LEADERS IN RETURN ON INVESTMENT BY TIER ONE & MID-SIZE RETAILERS

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	COMPANY	CUST. SAT.	RANK	COMPANY	CUST. SAT.
1	Logile	4.6	1	ECRS	4.6
2	NGC Software	4.5	1	RTC Group	4.6
3	Reflexis Systems	4.4	2	Celerant Technology	4.5
3	Manthan	4.4	3	NGC Software	4.4
3	HP	4.4	4	Magstar	4.3
4	Manhattan Associates	4.2	4	Multidev Technologies	4.3
5	Lexmark	4.1	4	Cegid	4.3
6	First Data	4.0	4	UTC Retail	4.3
7	Jesta I.S.	3.9	4	MI9 Retail	4.3
8	Verifone	3.8	5	SPS Commerce	4.2

LEADERS IN TOTAL COST OF OPERATIONS BY TIER ONE & MID-SIZE RETAILERS

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	COMPANY	CUST. SAT.	RANK	COMPANY	CUST. SAT.
1	NGC Software	4.8	1	ECRS	4.6
2	Logile	4.6	1	RTC Group	4.6
3	Lexmark	4.4	2	Celerant Technology	4.4
4	Reflexis Systems	4.3	2	Multidev Technologies	4.4
4	HP	4.3	3	Cegid	4.3
5	Manthan	4.1	3	360pi	4.3
6	Manhattan Associates	4.0	4	SPS Commerce	4.2
7	Jesta I.S.	3.9	5	UTC Retail	4.1
8	First Data	3.8	6	NGC Software	4.0
9	Microsoft	3.5	6	Magstar	4.0
			6	Raymark	4.0

Reflexis Systems and Manthan lead the pack in lists where tier-one retailers vote. When smaller retailers vote we see that RTC Group, Celerant, ECRS and 360pi are tops in the lists.

However, there are several exceptions to this general rule and their singular achievement is worth calling out. The following vendors appear in a few charts on both sides of the revenue divide and should be lauded for their unique achievement: MicroStrategy, NGC Software, Kronos and Manhattan Associates.

Clearly these vendors have solved a challenge that others have not yet figured out and deserve special recognition for it.

BEHIND THE VOTE

In the last chapter we highlighted several retailer comments that showed why they voted the way they did. In this section we will present a few more but focus on comments that explain why low Customer Satisfaction scores were given. In most cases, the vendors discussed here did not make it onto any top-10 lists, so the names of the vendors have been removed because there is no public data to refer to. However, the comments reveal important insight into retailer expectations and vendor deliverables:

• This system is a joke. They experienced a catastrophic systems failure in August impacting thousands of retailers and millions of transactions. They have yet to fix the underlying issues and their systems have not worked correctly since. We have spent thousands of hours trying to make customers whole.

• They have poor customer service and long wait times for support. They were not able to provide us with what they had promised initially.

• What should be intuitive upgrades are not provided. We have to push hard to get results and manage the process and then they charge us for it! Also maintenance seems a mystery to

LEADERS IN TECHNOLOGY INNOVATION BY TIER ONE & MID-SIZE RETAILERS

	BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS	
RANK	COMPANY	CUST. SAT.	RANK	COMPANY	CUST. SAT.
1	Reflexis Systems	4.6	1	Celerant Technology	4.8
2	Logile	4.5	2	RTC Group	4.7
3	Manthan	4.4	3	Cegid	4.5
3	Lexmark	4.4	3	ECRS	4.5
4	HP	4.3	4	NGC Software	4.4
5	First Data	4.2	5	Magstar	4.3
6	Kronos	3.9	5	MicroStrategy	4.3
6	Dell	3.9	6	360pi	4.2
7	NGC Software	3.8	6	Multidev Technologies	4.2
7	MicroStrategy	3.8	7	MI9 Retail	4.1
7	SAP	3.8	8	Raymark	4.0
7	Manhattan Associates	3.8			

LEADERS IN SOFTWARE RELIABILITY BY TIER ONE & MID-SIZE RETAILERS

	BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS	
RANK	COMPANY	CUST. SAT.	RANK	COMPANY	CUST. SAT.
1	Reflexis Systems	4.7	1	RTC Group	4.7
2	Lexmark	4.5	2	ECRS	4.6
2	Manthan	4.4	2	Magstar	4.6
2	HP	4.4	2	360pi	4.6
2	Jesta I.S.	4.4	3	NGC Software	4.5
3	Logile	4.2	3	Celerant Technology	4.5
3	First Data	4.2	4	MI9 Retail	4.4
4	MicroStrategy	4.1	5	Raymark	4.3
5	SAP	4.0	5	Cegid	4.3
5	Kronos	4.0	5	UTC Retail	4.3
6	Verifone	3.9	5	MicroStrategy	4.3

LEADERS IN EASE OF INSTALLATION & INTEGRATION BY TIER ONE & MID-SIZE RETAILERS

	BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS	
RANK	COMPANY	CUST. SAT.	RANK	COMPANY	CUST. SAT.
1	Logile	4.4	1	360pi	4.8
1	Reflexis Systems	4.4	2	RTC Group	4.7
1	Manthan	4.4	3	ECRS	4.5
1	Lexmark	4.4	3	NGC Software	4.5
2	Dell	4.2	4	Magstar	4.4
2	NGC Software	4.2	5	Cegid	4.3
3	HP	4.0	5	Celerant Technology	4.3
4	Microsoft	3.9	6	Microsoft	4.1
5	MicroStrategy	3.8	6	Dell	4.1
5	Jesta I.S.	3.8	7	HP	4.0
			7	MI9 Retail	4.0

LEADERS IN EASE OF ADMINISTRATION & MAINTENANCE BY TIER ONE & MID-SIZE RETAILERS

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	COMPANY	CUST. SAT.	RANK	COMPANY	CUST. SAT.
1	Logile	4.6	1	RTC Group	4.7
2	NGC Software	4.3	2	360pi	4.6
2	Manthan	4.3	3	MI9 Retail	4.5
2	Reflexis Systems	4.3	4	ECRS	4.4
2	HP	4.3	5	NGC Software	4.3
2	Lexmark	4.3	5	Cegid	4.3
3	Jesta I.S.	4.1	5	Magstar	4.3
3	Verifone	4.1	6	Celerant Technology	4.2
4	Dell	4.0	7	Multidev Technologies	4.1
4	Ceridian (Dayforce)	4.0	8	Microsoft	4.0
			8	Raymark	4.0

LEADERS IN QUALITY OF SUPPORT BY TIER ONE & MID-SIZE RETAILERS

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	COMPANY	CUST. SAT.	RANK	COMPANY	CUST. SAT.
1	Logile	4.7	1	NGC Software	5.0
2	Jesta I.S.	4.6	2	RTC Group	4.9
2	Reflexis Systems	4.6	3	Magstar	4.7
3	NGC Software	4.5	3	360pi	4.7
4	Manthan	4.4	3	Manhattan Associates	4.7
4	Manhattan Associates	4.4	4	ECRS	4.6
5	Dell	4.3	4	Multidev Technologies	4.6
6	First Data	4.2	5	Celerant Technology	4.2
7	Lexmark	4.1	6	MI9 Retail	4.0
8	HP	3.9	6	MicroStrategy	4.0

LEADERS IN QUALITY OF SERVICE BY TIER ONE & MID-SIZE RETAILERS

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	COMPANY	CUST. SAT.	RANK	COMPANY	CUST. SAT.
1	Reflexis Systems	4.6	1	NGC Software	5.0
1	Logile	4.6	2	RTC Group	4.9
2	Manthan	4.4	3	ECRS	4.8
2	Manhattan Associates	4.4	4	360pi	4.7
2	Jesta I.S.	4.4	5	Magstar	4.6
3	NGC Software	4.2	6	Celerant Technology	4.4
4	Lexmark	4.1	6	UTC Retail	4.4
5	Dell	4.0	6	Multidev Technologies	4.4
5	First Data	4.0	7	Manhattan Associates	4.2
6	Kronos	3.9	8	Raymark	4.1
			8	MI9 Retail	4.1

LEADERS IN RECOMMENDATION BY TIER ONE & MID-SIZE RETAILERS

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	COMPANY	CUST. SAT.	RANK	COMPANY	CUST. SAT.
1	Reflexis Systems	4.7	1	NGC Software	4.9
1	Logile	4.7	1	RTC Group	4.9
2	Lexmark	4.5	2	ECRS	4.8
2	First Data	4.5	3	Celerant Technology	4.6
3	Manthan	4.4	3	Magstar	4.6
3	Manhattan Associates	4.4	4	Cegid	4.5
3	HP	4.4	5	360pi	4.3
4	NGC Software	4.3	5	Manhattan Associates	4.3
5	Jesta I.S.	4.1	5	IBM	4.3
5	MicroStrategy	4.1	5	Multidev Technologies	4.3
6	Dell	4.0	5	MicroStrategy	4.3

them. When we want to clean up files they falter during the process. It always becomes a big deal to research the procedure because the original instructions do not work.

• Very disappointed with product and company. They have not spent the money and time required to integrate various purchased and outsourced vendors and products. A Frankenstein of a product. The company moves on to the next release before stabilizing the current one. Lack of strong implementation and integration managers.

• Too many promises about out-of-the-box capabilities.

• The implementation was very difficult. The vendor's implementation team was not familiar enough with the product and we had many issues with the software. The software continues to have issues requiring vendor support and involvement, as well as the need for internal IT.

• They are more focused on generating consulting revenue and fees for incremental improvements that should already be a part of their scope.

• The offline system is poorly designed and unreliable. They are slow with critical updates, such as support for EMV. They have known bugs that never get fixed. They say the POS is hardware agnostic, but it is misleading.

• Before the recent acquisition this vendor used to be reliable. Since the acquisition implementations have been stalled and there is endless bureaucracy of paperwork. They spend more time getting sign offs than they do trying to solve problems.

Many of the negative comments focused on problems caused by a recent merger (a common problem throughout the history of retail technology) and the high cost of everything (getting "nickeled and dimed" was a frequent complaint). Still, many companies avoid these pitfalls and deliver what they promise, which is the essential element in earning Customer Satisfaction. •

VENDORS TO WATCH IN 2016 AND BEYOND

Six companies poised to climb the Leaderboard rankings in years to come

While the major LeaderBoard kudos go to those companies that finish in the coveted Top 20 list, there are still many accolades to go around for vendors that turn in top performances in the numerous other rankings. Below are six vendors that scored high marks throughout the LeaderBoard and are in position to make an even bigger splash in future rankings.

CERIDIAN

Ceridian has built its reputation on enabling thousands of companies around the world to manage their workforce for maximum efficiency. The company's cloud-based human capital management technology helps retailers effectively manage payroll, benefits and human resources, and does so with ease, evidenced by its #4 finish in the Leaders in Ease of Administration & Maintenance by Tier One Retailers category. Other noteworthy finishes in this year's LeaderBoard ranking include: #14 in Customer Satisfaction for Targeted Solution Vendors; #11 in Leaders in Technology Innovation; #13 in Leaders in Overall Performance; #12 in Leaders in Ease of Administration; and #12 in Leaders in Recommendation.

DEMANDWARE

Earlier this year Demandware acquired POS solutions provider Tomax, creating a unified commerce platform that empowers retailers to deliver seamless experiences across all consumer touch points, including POS. Demandware can be found up and down the LeaderBoard ranking including: #12 in Customer Satisfaction for Large Vendors; #13 in Targeted Solution Vendor Leaders (Full Data Set); #14 in Customer Satisfaction for Targeted Solution Vendors; #11 in Leaders in Overall Performance; #10 in

Leaders in Ease of Installation & Integration; #8 in Leaders in Software Reliability; #11 in Leaders in Overall Performance; #10 in Leaders in Total Cost of Operation; and #10 in Leaders in Recommendation.

INFOR

Infor offers machine learning, cloud flexibility, holistic supply chain insights, and a nimble interface that changes based on context. With the recent acquisition of GT Nexus, Infor has increased its capabilities to provide a global commerce cloud solution providing end-to-end visibility and control across physical and financial supply chains. Infor just missed out on making the Top 20 list using the full LeaderBoard data set with a 26th place finish. Other notable finishes include: #13 in Large Vendor Leaders (Full Data Set) and #15 Top Vendors in Retail Concentration.

RGIS

With decades of experience, RGIS helps companies of all sizes streamline and leverage their inventory data collection processes, providing the data necessary to identify opportunities. RGIS takes clients beyond the count with integrated inventory services that include store surveys, space management, store remodels and resets, RFID solutions and asset optimization. RGIS had several noteworthy rankings in this year's LeaderBoard including: #11 in Targeted Solution Vendor Leaders (Full Data Set); #15 in Customer Satisfaction for Targeted Solution

Vendors; #12 in Leaders in Ease of Installation & Integration; #14 in Leaders in Quality of Service; and #11 in Leaders in Total Cost of Operation.

SHOPPERTRAK

Since 1993, ShopperTrak has been helping retailers learn who is coming in their doors, where they're going, and how to make the most of that information. The company's solutions increase traffic, conversion rates and transaction size, which is why it landed at #13 in Customer Satisfaction for Targeted Solution Vendors. Other notable honors on the LeaderBoard include: #12 in Leaders in Technology Innovation; #13 in Leaders in Return on Investment; #13 in Leaders in Quality of Support; #13 in Leaders in Quality of Service; and #10 in Leaders in Recommendation.

STARMOUNT

Retailers look to Starmount solutions to help them engage with customers in fundamentally new ways — regardless of channel. The company had a strong performance in this year's LeaderBoard: ranking #5 for Leaders in Software Reliability; #8 in Customer Satisfaction for Targeted Solution Vendors; #8 in Leaders in Administration; #8 in Leaders in Ease of Installation & Integration; #9 in Leaders in Total Cost of Operation; #13 in Leaders in Return on Investment; #7 in Leaders in Recommendation; and #10 in Leaders in Quality of Service. •

> **While major LeaderBoard kudos go to those companies that finish in the coveted Top 20 list, there are many accolades to go around.**

Cegid
Cloud Services & Software

Cegid is an international provider of enterprise and vertical software solutions with more than 2,000 employees and annual sales of over $300 million. More than 1,000 retailers and 30,000 stores in more than 75 countries use Yourcegid Retail solutions to optimize their retail chain. www.cegid.us/more

CELERANT
TECHNOLOGY CORP
R@tail Redefined™

Celerant Technology's Omni-Channel solutions expertly manage all aspects of a retail operation and are designed to ensure that your business runs smoothly and efficiently. Celerant software provides Point of Sale, Inventory Management, Warehousing, CRM, Analytics, Accounting, E-Commerce, Mobile Commerce, and Mail Order/Catalog all in one real-time system. www.celerant.com

CERIDIAN

Ceridian is a leader in human capital management serving over 25 million users in more than 50 countries. We help customers save time, control costs, optimize operations, increase engagement and productivity. Our offering includes the award-winning Dayforce HCM, Global Solutions, LifeWorks and Small Business Payroll. For more information, call 1-800-729-7655. www.ceridian.com

IBM

At IBM, we help retailers leverage analytics to all types of data from multiple sources to improve effectiveness of critical retail processes — generating new insights and creating new capabilities that drive profitable business growth. Through our global capabilities, we enable a more personalized shopping experience, optimized merchandising and operational excellence. http://www.ibm.com/analytics/us/en/industry/retail/index.html

PCMS

PCMS specializes in delivering proven enterprise and store level software solutions to the retail sector. PCMS' VISION Commerce Suite portfolio is the retail industry's most comprehensive platform offering a full range of integrated solutions across selling touch points including POS, Mobile, BYOD, eCommerce and more. For additional information visit www.pcmsdatafit.com.

REFLEXIS

Reflexis real-time execution and workforce management solutions enable retailers to execute strategy flawlessly and uncover profit. The Reflexis platform of real-time execution, task management, compliance, time and attendance, and labor scheduling enables retailers to align store labor & activities to corporate goals and institutionalize best practices. www.reflexisinc.com