RIS SOFTWARE
LeaderBoard '14

- TOP 20 SOFTWARE LEADERS
- TOP TIER ONE & MID-MARKET VENDORS
- TOP VENDORS IN GROCERY, APPAREL & SPECIALTY
- 51 CHARTS AND BREAKOUTS

PLUS:
COMPANIES TO WATCH

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EDITOR'S NOTE

POWER OF PEER TO PEER

Consistency can be boring except when maintaining high standards

By Joe Skorupa

THE MISSION of the *RIS* Software LeaderBoard, now in its 14th year, is to be a fact-based guide to the best technology vendors operating in retail. The rankings are determined by adding together scores for Customer Satisfaction (as noted by retailers) and publicly available information from vendor websites. The result is one of the most widely anticipated reports in the retail industry, which ultimately influences tens of millions of dollars in annual technology purchases.

Customer Satisfaction is the signature feature of the Software Leader-Board and what makes the LeaderBoard unique among other vendor reports compiled by analyst firms. Unlike other vendor landscape reports, the Leader-Board gives voice to hundreds of user opinions — a peer-to-peer exchange of vital information.

The Customer Satisfaction score used in the LeaderBoard is based on retailer reviews of 10 criteria that range from return on investment to innovation to quality of support or service. Each of the 10 criteria is worth a maximum of five points, so a perfect score is 50.

Many of the top vendors in the Lead-erBoard have outstanding Customer Satisfaction scores that climb well into the upper 40s. It is not impossible to get a perfect score of 50, but few do. None did this year.

For a point of reference, the average Customer Satisfaction score for all 90 vendors that received votes in 2014 is 37.8. In a good sign of validation that demonstrates year-over-year consistency and reliability, the 12-year running average for Customer Satisfaction for all vendors is 37.1, which indicates that this year's results fit into a trustworthy pattern.

Another area of consistency is found in the total number of retailer votes cast, which provides a reliable foundation on which Customer Satisfaction scores are built. The deeper the voting pool the more trustworthy the scores. Since 2007, the total number of votes cast has averaged 778. This year it is 869.

Another area of methodology that has shown reassuring consistency is Retail Recognition, a metric worth 50 points that is achieved by counting software modules worth one point each (one point for POS, workforce management, assortment planning, and so forth). Finally, the Revenue Factor category has also remained the same. Vendors get one to five points for revenue earned in the retail industry (one point for less than $20 million and five for more than $250 million).

So, what has changed? Every year we delete several software modules from the list of 50 in Retail Recognition. We make the deletions based on analysis of vendor offerings. Modules that are offered by the fewest vendors are candidates for replacement by modules that are becoming increasingly important and popular.

Consistency is the last refuge of the unimaginative, according to Oscar Wilde, except when it is applied to methodology for annual benchmark studies, where it becomes a virtue. •

BY THE NUMBERS

869	Vendor evaluations
373	Retail voters
238	Voters <$1B in revenue
140	Specialty retail voters
135	Voters >$1B in revenue
114	Apparel voters
66	Fast-moving consumer goods voters (grocery, convenience, drug)
45	Department, mass, big box voters
41	CIO voters
33	CEO or president voters
33	IT exec (VP, SVP, EVP, etc.)
21	VP level voters (except IT)
18	Other C-level (except CIO and CEO)

LEADERS OF THE PACK

From a big-picture perspective, versatility and multi-dimensional strength dominate

THERE ISN'T A LARGE QUANTITY of running text in the *RIS* Software LeaderBoard, but there is one thing in abundance — tables and lists. Lots of them. There are 51 lists to pore over in this report. Each one features a ranking of software vendors based on data collected from three sources — retailer evaluations, vendor-submitted forms, and information found on vendor websites.

This chapter focuses on showing how retail software vendors rank when their full set of data is formatted in horizontal rows for each vendor and the columns are added to create a total score. Other parts of the study feature data that is sliced and diced in logical ways, but here the focus is on rankings based on the sum of points awarded for Customer Satisfaction, Revenue Factor and Retail Concentration. (See page 18 for a detailed explanation of methodology and point scoring. Also note that when Customer Satisfaction, Revenue Factor and Retail Concentration are capitalized it is meant to specifically refer to LeaderBoard scoring.)

In the top-20 master list (the only list that is longer than 10), we see software vendors ranked by scores that are produced using the full data set. The list begins by pulling datapoints together from all 52 vendors that surpassed the minimum number of retailer votes or evaluations required. The minimum number of votes is five, although the vast majority of vendors have 10 or more evaluations in their voting pools. Only 18 vendors had less than 10 and only a few of these appear in any lists.

Every vendor that appears in the top-20 master list is either a well-rounded software provider that has an above-

RIS SOFTWARE LEADERBOARD TOP 20

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	ECRS	49.1	43	2	94.1
2	Celerant Technology	47.9	44	2	93.9
3	JDS Solutions	47.6	41	1	89.6
3	Oracle	37.6	47	5	89.6
4	PCMS	41.7	44	3	88.7
5	MicroStrategy	42.2	40	5	87.2
6	SAP	33.9	48	5	86.9
7	NCR	36.6	45	5	86.6
8	MI9	47.1	38	1	86.1
9	Epicor	37.6	42	5	84.6
10	Manthan Systems	42.5	40	2	84.5
11	QuantiSense	46.2	37	1	84.2
11	JDA	38.2	41	5	84.2
12	Cegid	44.8	35	3	82.8
13	Raymark	44.4	36	1	81.4
13	Micros Retail	30.4	46	5	81.4
14	Jesta I.S.	45.1	28	2	75.1
15	MultiDev Technologies	35.8	36	1	72.8
16	UTC Retail	42.5	26	3	71.5
17	Magstar	44.2	26	1	71.2
18	Logility	45.4	23	2	70.4
19	Toshiba GCS (IBM RSS)	40.0	25	5	70.0
20	Manhattan Associates	41.2	23	5	69.2

TOP 5 SOFTWARE VENDORS WHO RECEIVED THE MOST RETAILER VOTES

1	Microsoft
2	Oracle
3	IBM
4	Epicor
5	Dell
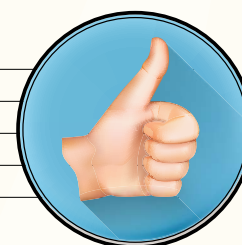
CUST. SAT. FOR LARGE VENDORS

RANK	COMPANY	CUST. SAT.
1	Lexmark	45.4
2	AirWatch (VMware)	43.0
3	MicroStrategy	42.2
4	Dell	41.5
5	Manhattan Associates	41.2
6	Verifone	40.7
7	Akamai	40.5
8	Microsoft	40.3
9	Toshiba GCS (IBM RSS)	40.0
10	IBM	39.7

LARGE VENDOR LEADERS

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	Oracle	37.6	47	5	89.6
2	MicroStrategy	42.2	40	5	87.2
3	SAP	33.9	48	5	86.9
4	NCR	36.6	45	5	86.6
5	Epicor	37.6	42	5	84.6
6	JDA	38.2	41	5	84.2
7	Micros Retail	30.4	46	5	81.4
8	Toshiba GCS (IBM RSS)	40.0	25	5	70.0
9	Manhattan Associates	41.2	23	5	69.2
10	IBM	39.7	23	5	67.7

CUST. SAT. FOR MID-SIZE VENDOR LEADERS

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	49.9
2	ECRS	49.1
3	RTC Quaterion Group	48.9
4	Celerant Technology	47.9
5	JDS Solutions	47.6
6	MI9	47.1
7	TradeStone Software	46.6
8	QuantiSense	46.2
8	Reflexis Systems	46.2
9	NGC Software	46.0
10	Logility	45.4

MID-SIZE VENDOR LEADERS

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	ECRS	49.1	43	2	94.1
2	Celerant Technology	47.9	44	2	93.9
3	JDS Solutions	47.6	41	1	89.6
4	PCMS	41.7	44	3	88.7
5	MI9	47.1	38	1	86.1
6	Manthan Systems	42.5	40	2	84.5
7	QuantiSense	46.2	37	1	84.2
8	Cegid	44.8	35	3	82.8
9	Raymark	44.4	36	1	81.4
10	Jesta I.S.	45.1	28	2	75.1

CUST. SAT. FOR BROAD SUITE VENDORS

RANK	COMPANY	CUST. SAT.
1	ECRS	49.1
2	Celerant Technology	47.9
3	JDS Solutions	47.6
4	MI9	47.1
5	QuantiSense	46.2
6	Logility (MID Retail)	45.4
7	Jesta I.S.	45.1
8	Cegid	44.8
9	Raymark	44.4
10	Magstar	44.2

BROAD SUITE VENDOR LEADERS

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	ECRS	49.1	43	2	94.1
2	Celerant Technology	47.9	44	2	93.9
3	Oracle	37.6	47	5	89.6
3	JDS Solutions	47.6	41	1	89.6
4	PCMS	41.7	44	3	88.7
5	MicroStrategy	42.2	40	5	87.2
6	SAP	33.9	48	5	86.9
7	NCR	36.6	45	5	86.6
8	MI9	47.1	38	1	86.1
9	Epicor	37.6	42	5	84.6
10	Manthan Systems	42.5	40	2	84.5

CUST. SAT. FOR TARGETED SOLUTION VENDORS

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	49.9
2	RTC Quaterion Group	48.9
3	TradeStone Software	46.6
4	Reflexis Systems	46.2
5	NGC Software	46.0
6	Lexmark	45.4
7	Starmount	43.8
8	360pi	43.4
9	AirWatch (VMware)	43.0
10	Dell	41.5

TARGETED SOLUTION VENDOR LEADERS

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	Reflexis Systems	46.2	19	2	67.2
2	Cornell-Mayo	49.9	13	1	63.9
3	HP	39.4	19	5	63.4
4	RTC Quaterion Group	48.9	13	1	62.9
5	NGC Software	46.0	13	3	62.0
6	TradeStone Software	46.6	13	2	61.6
7	Kronos	36.3	20	5	61.3
7	Microsoft	40.3	16	5	61.3
8	AirWatch (VMware)	43.0	12	5	60.0
9	First Data	38.4	16	5	59.4
10	Dell	41.5	11	5	57.5

GROCERY CUSTOMER SATISFACTION LEADERS

RANK	COMPANY	CUST. SAT.
1	ECRS	47.1
2	Manthan Systems	46.2
2	Lexmark	46.2
3	Magstar	43.7
4	Ceridian	41.3
5	Manhattan Associates	40.2
6	Dell	39.5
7	Verifone	38.9
8	Reflexis Systems	38.7
8	AT&T	38.7
9	Microsoft	37.8
10	HP	36.9

LEADERS IN GROCERY

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	ECRS	47.1	43	2	92.1
2	Manthan Systems	46.2	40	2	88.2
3	Oracle	33.8	47	5	85.8
4	Micros Retail	32.7	46	5	83.7
5	SAP	29.0	48	5	82.0
6	NCR	31.4	45	5	81.4
7	MicroStrategy	36.0	40	5	81.0
8	JDA	33.5	41	5	79.5
9	Magstar	43.7	26	1	70.7
10	Manhattan Associates	40.2	23	5	68.2

APPAREL CUSTOMER SATISFACTION LEADERS

RANK	COMPANY	CUST. SAT.
1	Reflexis Systems	48.7
2	RTC Quaterion Group	47.3
3	QuantiSense	46.0
4	NGC Software	45.4
5	Jesta I.S.	45.1
6	TradeStone Software	44.9
7	Celerant Technology	44.7
8	Starmount	44.6
9	Raymark	44.5
10	Logility (MID Retail)	43.8

LEADERS IN APPAREL

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	Celerant Technology	44.7	44	2	90.7
2	Oracle	36.7	47	5	88.7
3	SAP	33.6	48	5	86.6
4	MicroStrategy	40.5	40	5	85.5
5	Dell	39.4	44	2	85.4
6	QuantiSense	46.0	37	1	84.0
7	Micros Retail	31.3	46	5	82.3
8	Raymark	44.5	36	1	81.5
9	Cegid	41.9	35	3	79.9
10	Epicor	30.4	42	5	77.4

SPECIALTY CUSTOMER SATISFACTION LEADERS

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	49.6
2	Lexmark	47.0
3	JDS Solutions	46.9
4	Celerant Technology	46.5
4	RTC Quaterion Group	45.5
5	MI9	45.4
6	PCMS Datafit	45.0
7	Reflexis Systems	44.3
7	AirWatch (VMware)	44.3
8	Cegid	43.0
9	360pi	42.6
10	Akamai	42.3

LEADERS IN SPECIALTY

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	Celerant Technology	46.5	44	2	92.5
2	PCMS	45.0	44	3	92.0
3	NCR	40.3	45	5	90.3
4	JDS Solutions	46.9	41	1	88.9
5	MicroStrategy	40.4	40	5	85.4
6	MI9	45.4	38	1	84.4
7	Oracle	31.3	47	5	83.3
8	Epicor	35.1	42	5	82.1
9	Cegid	43.0	35	3	81.0
10	SAP	27.7	48	5	80.7

CUSTOMER SATISFACTION BY TIER ONE RETAILERS

RANK	COMPANY	CUST. SAT.
1	NGC Software	48.5
2	Cornell-Mayo	48.3
3	QuantiSense	47.1
4	Starmount	45.6
5	Logility	45.0
6	TradeStone Software	44.8
7	Reflexis Systems	43.8
8	Raymark	43.7
9	Lexmark	43.4
10	MicroStrategy	42.6

TOP VENDORS FOR TIER ONE RETAILERS

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	MicroStrategy	42.6	40	5	87.6
1	PCMS	40.6	44	3	87.6
2	Oracle	34.3	47	5	86.3
3	QuantiSense	47.1	37	1	85.1
4	NCR	34.7	45	5	84.7
5	SAP	30.5	48	5	83.5
6	Manthan Systems	40.5	40	2	82.5
7	Raymark	43.7	36	1	80.7
8	Epicor	32.2	42	5	79.2
9	Cegid	39.8	35	3	77.8
10	Micros Retail	24.1	46	5	75.1

CUSTOMER SATISFACTION BY MID-SIZE RETAILERS

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	49.7
2	RTC Quaterion Group	47.4
3	ECRS	47.3
4	JDS Solutions	46.7
5	Celerant Technology	45.9
5	MI9	45.9
6	Akamai	45.5
7	QuantiSense	45.3
8	AirWatch (VMware)	45.2
9	Jesta I.S.	44.8
10	Magstar	44.2

LEADERS FOR MID-SIZE RETAILERS

RANK	COMPANY	CUST. SAT.	RET. CON.	REV. FAC.	TOTAL
1	ECRS	47.3	43	2	92.3
2	Celerant Technology	45.9	44	2	91.9
3	JDS Solutions	46.7	41	1	88.7
4	Oracle	34.8	47	5	86.8
5	MI9	45.9	38	1	84.9
6	SAP	31.3	48	5	84.3
7	NCR	34.1	45	5	84.1
8	MicroStrategy	38.7	40	5	83.7
9	QuantiSense	45.3	37	1	83.3
10	Micros Retail	31.3	46	5	82.3

(Continued from page 4.)

average score in all three areas or it is extremely strong in one of the two areas where most points are awarded — Customer Satisfaction or Retail Recognition.

ECRS, Celerant Technology and JDS Solutions, for example, are a trio of vendors that lead the pack in the top-20 master list in 2014. They are examples of software providers who not only deliver high levels of Customer Satisfaction but also offer a broad range of retail modules or applications to score well in Retail Concentration. This combination of strengths is the winning formula for success in the top-20 master list.

Beyond the top-20 master list there are other lists in this section that use the complete data set, but the difference is that these lists use cross-tab analysis.

> "MICROSTRATEGY HAS A VERY ROBUST BI REPORTING CAPABILITY AND STARMOUNT HAS BEEN A VERY FEXIBLE SUPPORT PARTNER THAT HELPED US DELIVER A GREAT MOBILE POS SOLUTION."
>
> — RETAILER VOTER

For example, we split vendors into two groups based on the amount of software revenue they generate in the retail vertical. The Large Vendor Leaders top-10 list, which singles out MicroStrategy and SAP as stellar performers, exclusively features vendors that have $125 million or more in software revenue in the retail vertical. The Mid-Size Vendors Leaders list, which singles out ECRS, Celerant, JDS Solutions and PCMS, exclusively features vendors with revenue less than $125 million.

The same sort of cross-tab methodology is found in others lists, including: Broad Suite Vendor Leaders (featuring vendors with Retail Concentration scores of 21 or higher), Targeted Solution Vendor Suites (featuring Retail Concentration scores of 20 or lower), Leaders in Grocery (featuring Customer Satisfaction scores exclusively from grocery retailers), Leaders in Apparel (featuring Customer Satisfaction scores exclusively from apparel retailers), Leaders in Specialty (featuring Customer

TOP VENDORS IN CUSTOMER SATISFACTION

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	49.9
2	ECRS	49.1
3	RTC Quaterion Group	48.9
4	Celerant Technology	47.9
5	JDS Solutions	47.6
6	MI9	47.1
7	TradeStone Software	46.6
8	QuantiSense	46.2
8	Reflexis Systems	46.2
9	NGC Software	46.0
10	Logility	45.4
10	Lexmark	45.4

TOP VENDORS IN RETAIL CONCENTRATION

RANK	COMPANY	CUST. SAT.
1	SAP	48
2	Oracle	47
3	Micros Retail	46
4	NCR	45
5	Celerant Technology	44
5	PCMS	44
6	ECRS	43
7	Epicor	42
8	JDA	41
8	JDS Solutions	41
9	MicroStrategy	40
9	Manthan Systems	40
10	MI9	38

Sneak Peek at Leaders for Mass Merchandise Retailers

Although there are 51 lists in the RIS Software LeaderBoard (50 top-10 lists and one top-20 list), there are many other possible lists that could be included.

One such list could be Leaders for Mass Merchandise Retailers. The total number of votes cast in this category was 82 and just 10 vendors received enough votes to record a reliable score. So, the data pool was not quite deep enough nor the vendor count long enough to provide a trustworthy top-10 list.

However, this voting pool may grow large enough in future editions of the LeaderBoard to publish. If it does we will probably see the following vendors achieving top scores from Mass Merchandise Retailers: RTC Quaterion, Cornell-Mayo, TradeStone, Reflexis, Manhattan Associates and 360pi.

> "REFLEXIS IS A GREAT ORGANIZATION. THE LEADERSHIP IS VERY HANDS ON AND UNDERSTANDS THE RETAIL ENVIRONMENT. THE ENTIRE TEAM IS FOCUSED 100% ON THE NEEDS OF THE CUSTOMER."
>
> — RETAILER VOTER

Satisfaction scores exclusively from specialty retailers), Top Vendors for Tier One Retailers (featuring Customer Satisfaction scores exclusively from retailers with more than $1 billion in revenue), and Top Vendors for Mid-Size Retailers (featuring Customer Satisfaction scores from retailers with less than $1 billion in revenue.

To round out the chapter we also highlight several top-10 lists that do not use complete data sets and instead focus on single category breakouts. However, these single category breakouts are logically linked to the top-10 lists that feature full data sets.

For example, we include three top-10 lists that are companions to the grocery, apparel and specialty lists that use complete data sets. In these more narrowly focused cross-tab lists we only show leaders in Customer Satisfaction scores voted on exclusively by grocery, apparel and specialty retailers respectively.

We also feature narrowly focused lists that are companions to the following lists that use full data sets: Customer Satisfaction for Broad Suite Vendors (highlighting Customer Satisfaction scores for vendors with Retail Concentration scores of 21 or higher), Targeted Solution Customer Satisfaction (highlighting Customer Satisfaction scores for vendors with Retail Concentration scores of 20 or lower), Large Vendors Customer Satisfaction (highlighting Customer Satisfaction scores for vendors with $125 million in retail revenue),

Customer Satisfaction for Mid-Size Vendors (highlighting Customer Satisfaction scores for vendors with less than $125 million in retail revenue), Customer Satisfaction by Tier One Retailers (featuring Customer Satisfaction scores exclusively from retailers with more than $1 billion in revenue), and Mid-Size Vendor Customer Satisfaction (featuring Customer Satisfaction scores exclusively from retailers with less than $1 billion in revenue).

Finally, we round out the chapter with two unfiltered top-10 lists that highlight leaders in our two most important categories Customer Satisfaction, which includes votes by all retailers in the data pool, and Leaders in Retail Concentration, which focuses exclusively on the number of software modules each vendor offers in the retail vertical. •

PEEKING UNDER THE HOOD

Straight talk about meeting the expectations of retailers in 10 specific areas

When you remove Retail Recognition and Revenue Factor from the set of data collected for the Software LeaderBoard you are left with Customer Satisfaction, the signature element in the report. In this chapter, the focus is on Customer Satisfaction in two different formats.

The first format is familiar — vendors are ranked in top-10 lists. What is different about this chapter is that the rankings are cross-tabbed by the 10 Criteria that comprise the aggregated Customer Satisfaction score. As previously noted in other sections of the report, each Criterion is worth a maximum of 5 points, which means a perfect Customer Satisfaction score is 50. Although some vendors achieved perfect scores in individual Criteria, no one received perfect scores in all 10.

The 10 Criteria that comprise the Customer Satisfaction score are: Overall Performance, Cost of Operations, Return on Investment, Technology Innovation, Product Reliability, Installation & Integration, Administration & Maintenance, Support, Service and Recommendation. There is a top-10 list for each of these and the results throw a spotlight on vendors that succeed at highly specific aspects of technology deployment and meeting expectations.

The second format highlighted in this chapter was introduced in last year's report — opinions about software vendors from retailers who contributed evaluations to the study. These opinions offer a unique peek under the hood of numerical evaluations and reveal the thinking that went into retailer votes.

UNDER THE HOOD

Finding out why retailers voted the way they did when evaluating vendors is a

LEADERS IN OVERALL PERFORMANCE

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	5.0
2	Celerant Technology	4.9
2	Jesta I.S.	4.9
3	Magstar	4.8
3	TradeStone Software	4.8
4	RTC Quaterion Group	4.7
4	JDS Solutions	4.7
4	Starmount	4.7
4	NGC Software	4.7
4	Logility	4.7
4	QuantiSense	4.7
5	ECRS	4.6

LEADERS IN TOTAL COST OF OPERATION

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	4.9
2	QuantiSense	4.8
3	Celerant Technology	4.7
3	Logility	4.7
4	RTC Quaterion Group	4.6
5	JDS Solutions	4.5
5	NGC Software	4.5
5	ECRS	4.5
5	Manthan Systems	4.5
6	Starmount	4.4
6	Jesta I.S.	4.4
6	Reflexis Systems	4.4

LEADERS IN RETURN ON INVESTMENT

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	4.9
2	JDS Solutions	4.7
2	NGC Software	4.7
2	QuantiSense	4.7
3	ECRS	4.6
3	Jesta I.S.	4.6
4	RTC Quaterion Group	4.5
4	Celerant Technology	4.5
4	TradeStone Software	4.5
4	Logility	4.5
5	Raymark	4.4

gold mine of insight. In this chapter and again in the following chapter, ("The Right Tools for the Job") the focus will be on letting retailers speak in their own words.

• **TradeStone** has been a great partner to work with. They deliver a quality product that is very flexible in terms of configuration to fit our brand's processes. I would highly recommend TradeStone based on vendor support, ease of use and extremely functional product.

• **Cornell-Mayo** is and has been an excellent business partner. The quality of code is reliable, our customer service experience is superb, and the technological innovation is "cutting edge." We wish all of our vendors were as receptive to our needs.

• Probably the single most important aspect of a software vendor is the quality of their tech support. **ECRS** has by far the best support of any of the vendors I deal with. The quality of their software and hardware is such that I don't have to contact them very often, but when I do, I can expect a prompt response from a knowledgeable representative who, almost always, can solve my problem with one phone call. They integrate seamlessly into our workflow and ordering.

• **NGC** provided an outstanding package of functionality and service. Any failure to deliver against expectations is because we did not implement as well as we should have, not because NGC's offering was less than promised.

• From the very beginning, the **Lexmark** team was very easy to work with. Whenever we faced challenges/issues during the project they were always willing to make themselves available (even nights and weekends) to assist with the resolution. The integration of their system was virtually seamless and the users adapted to the new process very quickly.

• **JDS Solutions** is a great company to work with and their level of support is fantastic. They are always willing to accommodate our needs through additional support or integration of new features. Their platform is highly flexible

LEADERS IN TECHNOLOGY INNOVATION

RANK	COMPANY	CUST. SAT.
1	ECRS	4.9
2	Cornell-Mayo	4.8
3	Celerant Technology	4.7
4	Starmount	4.6
5	TradeStone Software	4.5
5	MI9	4.5
5	NGC Software	4.5
5	QuantiSense	4.5
5	RTC Quaterion Group	4.5
5	JDS Solutions	4.5
6	Akamai	4.4

LEADERS IN SOFTWARE RELIABILITY

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	4.9
2	Logility	4.8
2	QuantiSense	4.8
2	MI9	4.8
2	Akamai	4.8
3	RTC Quaterion Group	4.7
3	ECRS	4.7
3	Jesta I.S.	4.7
3	JDS Solutions	4.7
3	Magstar	4.7

LEADERS IN EASE OF INSTALLATION & INTEGRATION

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	4.9
2	MI9	4.7
2	NGC Software	4.7
3	JDS Solutions	4.6
3	QuantiSense	4.6
3	ECRS	4.6
3	RTC Quaterion Group	4.6
3	360pi	4.6
4	Magstar	4.5
4	Logility	4.5

and allows us to manage our business efficiently on a daily basis.

• **MicroStrategy** is a good reporting tool that allows easy access and manipulation of data.

• **Multidev Technologies** has created a very robust system with boundless capabilities. Integration, flexibility and options are excellent.

• All technology systems or software applications are just commodities, but it is the value-add that **Manthan Systems** brings with them, the industry know-how and the ability and willingness to share knowledge, which is most important to us.

• **Starmount** is a tremendous partner. They genuinely care and are invested in our success.

LEADERS IN EASE OF ADMINISTRATION

RANK	COMPANY	CUST. SAT.
1	MI9	4.8
1	Cornell-Mayo	4.8
1	JDS Solutions	4.8
2	ECRS	4.7
3	RTC Quaterion Group	4.6
3	Raymark	4.6
4	Magstar	4.5
4	NGC Software	4.5
4	Logility	4.5
4	QuantiSense	4.5
4	Reflexis Systems	4.5

LEADERS IN QUALITY OF SUPPORT

RANK	COMPANY	CUST. SAT.
1	ECRS	4.9
1	Cornell-Mayo	4.9
1	RTC Quaterion Group	4.9
1	Jesta I.S.	4.9
2	JDS Solutions	4.8
3	MI9	4.7
3	Magstar	4.7
3	NGC Software	4.7
3	Logility	4.7
4	Reflexis Systems	4.6
4	360pi	4.6

LEADERS IN QUALITY OF SERVICE

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	4.9
1	RTC Quaterion Group	4.9
2	ECRS	4.8
2	JDS Solutions	4.8
3	Jesta I.S.	4.7
3	MI9	4.7
3	NGC Software	4.7
4	Celerant Technology	4.6
4	360pi	4.6
5	Reflexis Systems	4.5
5	Magstar	4.5

LEADERS IN RECOMMENDATION

RANK	COMPANY	CUST. SAT.
1	MI9	4.9
1	Cornell-Mayo	4.9
1	RTC Quaterion Group	4.9
2	NGC Software	4.8
2	PCMS	4.8
2	QuantiSense	4.8
2	ECRS	4.8
3	Jesta I.S.	4.7
3	JDS Solutions	4.7
3	Celerant Technology	4.7
3	Logility	4.7

Methodology

RIS Software LeaderBoard rankings are based on retailer evaluations that are aggregated online using a form that rates vendors on a 1-5 scale in 10 Criteria. One stands for the lowest satisfaction and five the highest. The 10 Criteria are: Overall Performance, ROI, TCO, Innovation, Reliability, Installation/Integration, Administration/Maintenance, Support, Service and Recommendation. The aggregate score (a maximum of 50 points) is called Customer Satisfaction.

Retailers are invited to vote by an e-mail message with a link that can only be used once and cannot be transferred to another computer. All invitations are sent out by the independent firm Litchfield Research in September and early October. After the survey closes, Litchfield Research creates an aggregated report and sends it to RIS to publish in the Software LeaderBoard. This year 373 retailers voted.

Retail Concentration is a measurement of the footprint a vendor has in retail technology. RIS creates a list of 50 core retail applications. The data published in the Retail Concentration score (a maximum of 50 points — one point per module) is based on vendor-submitted information and independent research.

Revenue Factor is broken out into five revenue ranges 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. •

THE RIGHT TOOLS FOR THE JOB

Highlighting vendors that have specific strengths for large retailers or small retailers or both

In the world of business you quickly learn not to use an elephant gun to kill a fly. No one doubts the elephant gun will do the job. The problem is that it is difficult to aim a big gun at a small target and it is equally difficult to manage the collateral damage that will inevitably occur. The point is a smart person is advised to use the right tool for the job and bigger is not always better. This same principle applies to using retail software.

For example, big data calls for the implementation of powerful, expensive analytic tools, but not every retailer needs big data capabilities nor can they comfortably afford the cost of acquiring them, especially mid-size retailers. We see evidence of a big-versus-small approach to software deployment in this chapter of the LeaderBoard, where we cross-tab Customer Satisfaction scores by dividing them into two revenue groups — Tier One Retailers, which have revenue of more than a billion dollars, and Mid-Size Retailers, which have revenue less than a billion dollars.

In this chapter we put these rankings in side-by-side charts that spotlight each of the 10 Criteria that comprise the combined Customer Satisfaction score. On the left side of each chart we show leaders among Tier One Retailers and on the right side we show leaders among Mid-Size Retailers.

What emerges is an interesting picture that digs beneath the surface of a software vendor's reputation. By comparing the side-by-side charts we see which vendors have specific strengths that appeal to either large retailers or mid-size retailers or both.

In the large retailer category, we see outstanding Customer Satisfaction scores achieved by: NGC Software, Trade-

Stone, Starmount, MicroStrategy, Reflexis, Logility, PCMS and Demandware.

In the mid-size retailer category, we see outstanding scores in Customer Satisfaction achieved by: Celerant, Jesta I.S., RTC Quaterion, JDS Solutions, ECRS, UTC Retail, Cegid, NetSuite, MI9, Ceridian, AirWatch and Magstar.

Interestingly, several vendors achieved outstanding scores in both the large and mid-sized revenue categories.

These include: Cornell-Mayo, Lexmark, Manthan Systems, 360pi, QuantiSense, Raymark, Akamai and Toshiba GSC.

As previously noted, no vendor had a perfect score across all 10 Customer Satisfaction Criteria when votes by all retailers were totaled. The same is true when we split the vote into large and mid-size retailer voting pools — no vendor achieved a perfect score across all categories.

However, Cornell-Mayo should be

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	Cornell-Mayo	5.0	1	Cornell-Mayo	5.0
1	NGC Software	5.0	2	Celerant Technology	4.9
1	QuantiSense	5.0	3	Magstar	4.8
2	TradeStone Software	4.8	3	Jesta I.S.	4.8
2	Starmount	4.8	3	RTC Quaterion Group	4.8
3	Raymark	4.6	3	Akamai	4.8
3	MicroStrategy	4.6	4	JDS Solutions	4.7
4	Lexmark	4.5	5	ECRS	4.6
4	Logility	4.5	6	AirWatch (VMware)	4.5
5	Demandware	4.3	6	Lexmark	4.5
5	360pi	4.3	7	Manthan Systems	4.4
5	Manthan Systems	4.3	7	Cegid	4.4

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	5.0	1	Cornell-Mayo	5.0
2	Cornell-Mayo	4.8	2	JDS Solutions	4.7
2	Logility	4.8	2	NetSuite	4.7
3	QuantiSense	4.7	2	QuantiSense	4.7
4	Tradestone Software	4.5	3	Jesta I.S.	4.6
4	Starmount	4.5	3	RTC Quaterion Group	4.6
5	Raymark	4.4	3	ECRS	4.6
6	MicroStrategy	4.3	4	Celerant Technology	4.5
6	Lexmark	4.3	4	Raymark	4.5
6	Reflexis Systems	4.3	4	Akamai	4.5
6	Ceridian	4.3	5	AirWatch (VMware)	4.4
6	Manthan Systems	4.3	6	Cegid	4.3

singled out for racking up a long string of perfect scores. Cornell-Mayo achieved 11 perfect scores out of the 20 top-10 lists that appear in this chapter. Other vendors that deserve special notice for achieving one or more perfect scores include: NGC Software, QuantiSense, Akamai, Jesta I.S., Dell and AT&T.

BENEATH THE HOOD PART II

In this chapter we conclude the Leader-Board analysis with more of the vendor-specific comments that retailers provided to offer some insight into why they voted the way they did.

• **UTC Retail** is a great vendor and partner. The products work. Development/customization services are very high quality. Great people to work with.

• **Epicor** has a very robust system in the Eagle product that allows us to be productive in our business.

• **Reflexis** offers an excellent level of service both during implementation and after.

• **Starmount** is a tremendous partner. They genuinely care and are invested in our success.

• **TradeStone** has been a great partner to work with. They deliver a quality product that is very flexible in terms of configuration to fit our brand's process. I would highly recommend TradeStone based on vendor support, ease of use, and extremely functional product.

• **360pi** continues to give us a competitive edge in the market with great insight and support. They are always adapting our portal based on our needs and suggesting and introducing new value to the products they offer.

• The **Microsoft** platform is good and reliable. They are great with communication and resolving issues.

• **AirWatch** has helped solve the MDM issue. Overall they have a good product that does what we need it to do in the near term.

• **ECRS** has been a huge part of the growth in our business. Their innovation and support have allowed us to easily

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	NGC Software	5.0	1	Cornell-Mayo	5.0
1	QuantiSense	5.0	2	RTC Quaterion Group	4.7
2	Cornell-Mayo	4.8	2	Celerant Technology	4.7
2	Logility	4.8	2	NetSuite	4.7
2	Manthan Systems	4.8	2	QuantiSense	4.7
3	Starmount	4.6	3	JDS Solutions	4.5
4	Raymark	4.4	4	ECRS	4.4
5	Reflexis Systems	4.3	4	Jesta I.S.	4.4
5	Ceridian	4.3	5	AirWatch (VMware)	4.3
6	TradeStone Software	4.2	5	Lexmark	4.3
6	MicroStrategy	4.2	5	UTC Retail	4.3
7	Lexmark	4.1	5	Manthan Systems	4.3

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	Cornell-Mayo	4.8	1	ECRS	4.9
1	Starmount	4.8	2	Cornell-Mayo	4.8
2	TradeStone Software	4.5	3	Celerant Technology	4.7
2	NGC Software	4.5	3	QuantiSense	4.7
3	Akamai	4.3	4	AirWatch (VMware)	4.6
3	Demandware	4.3	4	RTC Quaterion Group	4.6
3	QuantiSense	4.3	4	MI9	4.6
3	Reflexis Systems	4.3	5	Akamai	4.5
3	Raymark	4.3	5	JDS Solutions	4.5
4	PCMS	4.2	6	Toshiba GCS (IBM RSS)	4.3

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	QuantiSense	5.0	1	Akamai	5.0
2	Cornell-Mayo	4.8	1	Cornell-Mayo	5.0
2	Logility	4.8	2	Jesta I.S.	4.8
3	Reflexis Systems	4.6	2	RTC Quaterion Group	4.8
3	Raymark	4.6	2	ECRS	4.8
3	TradeStone Software	4.6	3	MI9	4.7
4	Starmount	4.5	3	JDS Solutions	4.7
4	Ceridian	4.5	3	Magstar	4.7
4	NGC Software	4.5	3	QuantiSense	4.7
4	Akamai	4.5	4	Celerant Technology	4.6
5	Lexmark	4.4	4	AirWatch (VMware)	4.6

keep up with the growth of our business. They are a progressive, innovative company.

- **Oracle** has helped to transform our organization. Oracle is a great partner and has stepped up to support our toughest issues.

- **Cegid** has a totally user-oriented interface that is innovative and easy to deploy in stores. I would strongly recommend it for any retailer.

- **Celerant** has been a key part of the growth of our business. There is no way we would be the size we are today if we did not have an integrated POS and web platform.

- Clearly **QuantiSense** is our best business partner.

- **Cornell-Mayo** is and has been an excellent business partner. The quality of code is reliable, our customer service experience is superb, and the technological innovation is "cutting edge." We wish all of our vendors were as receptive to our needs.

- **ECRS** has been a great company to work with. They understand the needs of retailers in the health food industry and the software reflects it. Support issues are taken care of in a timely manner. Overall, they have been a great company to work with so far.

- I have been working with **Magstar** for over 25 years. This length of partnership speaks volumes about the service they provide.

- I have been in the IT industry for 34 years and **RTC Quaterion** has taken service, support and innovation to a new level. In my opinion, RTC is the company others will be measured against.

- I have worked with many other companies and have found **JDS Solutions** to be extremely easy to work with. They are always available, honest and reliable.

- **Logility** offered a very flexible solution for our financial planning and allocation needs. Additionally, they have a very experienced planning and allocation support team, which made the rollout of the system very easy for us because they assisted us in developing allocation methodology for each of our diverse businesses.

- We use two software solutions from **Manhattan Associates** and

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	NGC Software	5.0	1	Cornell-Mayo	5.0
1	QuantiSense	5.0	2	AirWatch (VMware)	4.8
2	Cornell-Mayo	4.8	2	Akamai	4.8
2	Cegid	4.8	3	360pi	4.7
3	Starmount	4.5	4	MI9	4.6
3	Ceridian	4.5	4	ECRS	4.6
3	Logility	4.5	4	JDS Solutions	4.6
4	TradeStone Software	4.4	4	RTC Quaterion Group	4.6
5	360pi	4.3	5	Magstar	4.5
5	Reflexis Systems	4.3	5	Raymark	4.5

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	Logility	4.8	1	Cornell-Mayo	5.0
1	NGC Software	4.8	2	MI9	4.8
2	Cornell-Mayo	4.7	2	JDS Solutions	4.8
3	Reflexis Systems	4.4	2	Raymark	4.8
3	Raymark	4.4	3	ECRS	4.7
3	TradeStone Software	4.4	3	QuantiSense	4.7
3	Starmount	4.4	4	RTC Quaterion Group	4.6
4	MicroStrategy	4.3	4	AirWatch (VMware)	4.6
4	Demandware	4.3	5	Magstar	4.5
4	QuantiSense	4.3	5	Akamai	4.5
4	Ceridian	4.3	5	Lexmark	4.5

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	Cornell-Mayo	4.8	1	Jesta I.S.	5.0
1	NGC Software	4.8	1	Cornell-Mayo	5.0
2	Starmount	4.6	2	RTC Quaterion Group	4.9
2	Reflexis Systems	4.6	2	ECRS	4.9
3	Lexmark	4.5	3	JDS Solutions	4.8
3	Logility	4.5	4	MI9	4.7
4	TradeStone Software	4.4	4	360pi	4.7
4	PCMS	4.4	4	Magstar	4.7
5	MicroStrategy	4.3	5	Raymark	4.5
5	360pi	4.3	5	Lexmark	4.5
5	QuantiSense	4.3	5	Celerant Technology	4.5
5	Ceridian	4.3	6	AirWatch (VMware)	4.4

will likely add new software applications in the future that can support our business. So far they have been steady for us.

• We have worked with **Manthan Systems** for the past seven years and we are very happy with their solution. Their ARC business intelligence solution has helped us grow our business with readily available reports which aid key people in our organization for day-to-day business decisions. Their supplier portal solution has helped us streamline a lot of internal processes and strengthened our collaboration with our suppliers.

• **MI9, Demandware and Micros Retail** have provided our business with excellent support and collaboration over the past seven plus years. On many occasions they have gone out of their way to assist us. I strongly recommend each of these vendors.

• **Magstar** has always provided support and service that is unmatched by any other vendor I have worked with in my 15-year career in IT.

• I've been using **ECRS** for seven years now. They are constantly coming up with innovative, state-of-the-art software and equipment to stay ahead of the game. They have always provided excellent service when needed.

• **JDS Solutions** has been very helpful in developing solutions for some of the unique sales processes we have challenged them with. They have taken the time and expedited the requests we have submitted. Their service and tech support stand head and shoulders above other companies I have dealt with in the past.

• **MicroStrategy** is a good reporting tool that allows easy access and manipulation of data.

• **Multidev Technologies** has created a very robust system with boundless capabilities. Integration, flexibility and options are excellent.

• **NetSuite** has allowed us to do more work with less people. During the economic downturn it was one of the main reasons we were able to stay in business. Always improving and hosting in the

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

BY TIER ONE RETAILERS		
RANK	COMPANY	CUST. SAT.
1	NGC Software	5.0
2	Cornell-Mayo	4.8
3	QuantiSense	4.7
4	Reflexis Systems	4.5
4	Lexmark	4.5
5	TradeStone Software	4.4
6	360pi	4.3
6	Starmount	4.3
6	Ceridian	4.3
6	Logility	4.3
6	Toshiba GCS (IBM RSS)	4.3

BY MID-SIZE RETAILERS		
RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	5.0
2	RTC Quaterion Group	4.9
2	ECRS	4.9
3	JDS Solutions	4.8
4	360pi	4.7
5	MI9	4.6
5	Celerant Technology	4.6
5	Jesta I.S.	4.6
6	Magstar	4.5
6	Raymark	4.5
6	Lexmark	4.5

LEADERS IN RECOMMENDATION BY TIER ONE & MID-SIZE RETAILERS

BY TIER ONE RETAILERS		
RANK	COMPANY	CUST. SAT.
1	NGC Software	5.0
1	QuantiSense	5.0
2	Cornell-Mayo	4.8
2	PCMS	4.8
3	Starmount	4.7
4	TradeStone Software	4.6
4	Cegid	4.6
5	Reflexis Systems	4.5
5	Lexmark	4.5
5	MicroStrategy	4.5
5	Logility	4.5

BY MID-SIZE RETAILERS		
RANK	COMPANY	CUST. SAT.
1	Dell	5.0
1	AT&T	5.0
1	Celerant Technology	5.0
1	Akamai	5.0
1	Cornell-Mayo	5.0
2	NetSuite	4.9
2	Manhattan Associates	4.9
3	Magstar	4.7
3	Microsoft	4.7
3	Cegid	4.7
4	Epicor	4.6

cloud will allow us to grow into one of the best Internet retailers.

• **NGC** is an exceptional software partner in the apparel industry. They have proven to be extremely innovative, versatile, and supportive in analyzing and developing solutions for the constant business and application challenges faced by global apparel companies.

• Our organization has been a customer of **Manthan Systems** for a long time and we have continuously benefited from their products and solutions. These are the same solutions that we have implemented across the different retail formats within the company. They have been a very reliable partner and solution provider.

• Partnering with **Cornell-Mayo** was

the best decision we made when moving to a new POS application. They are understanding and flexible with the many unique needs for our business.

• **QuantiSense** is a top-notch application. The ease of installation, immediate use of the application and support from the QuantiSense team all these years later remains paramount in my mind.

• **RTC Quaterion** consistently provides excellent support and always maintains a sense of urgency in responding to any issues or problems. They are a true "partner" in participating in discussions and recommending cost-effective business solutions.

• **First Data** manages a great team to innovate new solutions for safe and smart payment options. •

SIX SOFTWARE VENDORS ON THE RISE

Insider's look at six companies that deserve to be called out for special recognition

A great deal of the *RIS* Software Leader-Board is devoted to lists and numbers. This is a good thing because the LeaderBoard process generates mountains of data to work with. But some interesting things are overlooked amid the blizzard of tables, charts and rankings. For example, in this chapter we highlight six Companies to Watch who are noteworthy for what they have achieved inside and outside the charts.

AT&T
One of the world's largest telecommunications companies, AT&T has developed a network of services to help customers mobilize business solutions. The company continues to spearhead the mobile revolution, offering a suite of services from WiFi to cloud, mobile devices to communications services. AT&T had several noteworthy rankings in this year's LeaderBoard, such as #12 in both Targeted Solution Vendor Leaders and Large Vendor Customer Satisfaction Leaders, #15 in Targeted Solution Vendor Leaders in Customer Satisfaction and #19 in Large Vendor Leaders.

Demandware
As a leading provider of cloud-based e-commerce solutions, Demandware has a significant presence in retail technology. It also has a significant presence in the Software LeaderBoard that is worth calling out. For example, it ranked #3 in Leaders in Technology Innovation by Tier One Retailers, #4 in Leaders in Ease of Administration & Maintenance by Tier One Retailers, #5 in Leaders in Overall Performance by Tier One Retailers, #6 in Leaders in Software Reliability, #6 in Leaders in Ease of Administration, #10 in Leaders in Technology Innovation, #10 in

Leaders in Return on Investment, #10 in Leaders in Ease of Installation & Integration, and #12 in Apparel Vendor Leaders in Customer Satisfaction.

Logility
As a provider of supply chain solutions for small, medium and large companies, Logility is dedicated to delivering substantial bottom-line results in record time to its more than 1,250 customers worldwide. The company had a strong performance in this year's Software LeaderBoard — ranking #5 in Customer Satisfaction Leaders for Tier One Retailers, #6 in Broad Suite Vendor Customer Satisfaction Leaders, #10 in both Mid-Size Vendor Customer Satisfaction Leaders and Apparel Vendor Leaders in Customer Satisfaction, and #18 in the Top 20 Master List. However, other

significant rankings that just missed the charts, include #11 in Top Vendors for Tier One Retailers and #14 in Mid-Size Vendor Leaders.

Manhattan Associates
For over 20 years Manhattan Associates has been a leader in supply chain optimization. The company is dedicated to helping retailers manage accelerating and fluctuating market demands, as well as master the increasing complexity and volatility of local and global supply chains. Manhattan achieved top scores in a number of categories, includ-

ing: #5 Grocery Vendors by Customer Satisfaction, #5 Large Vendor Customer Satisfaction Leaders, #10 Leaders in Grocery, and #20 in the prestigious Top 20 Master List, which is difficult to do for a non-ERP or end-to-end suite vendor.

Symphony EYC
Formed in late 2012 through a merger between EYC, a customer engagement specialist, and Aldata, a retail and distribution optimization solution provider, Symphony EYC is simultaneously a pedigreed software company and a new kid on the block. Under its newly merged name this is the first time Symphony EYC qualified for inclusion in the LeaderBoard. Among its top rankings are #16 Leaders in Recommendation, #17 in Leaders in Quality of Support, and #17 in Large Vendor Leaders.

Some compelling insights are overlooked amid the blizzard of tables, charts and rankings. This section focuses on vendors that deserve special recognition heading into 2015.

Toshiba GSC (IBM RSS)
Toshiba Global Commerce Solutions (IBM RSS) is dedicated to delivering innovative solutions that transform checkout, provide seamless customer interactions and optimize retail operations. This year the company ranked #8 in Large Vendor Leaders and #9 in Large Vendor Customer Satisfaction Leaders, as well as #19 in the Top 20 Master List. These rankings represent the company's dedication to not only its business partners, but also to providing end-to-end solutions, and supporting clients in their retail technology needs. •

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Cornell-Mayo Associates, part of NCR, has been a leader in developing retail software solutions since 1981. With tools that create superior shopper engagements across every touchpoint and every channel in the retail journey, we customize the right platform to help retailers outclass and outperform the competition. **For more information: www.ncr.com/retail   www.cornell-mayo.com**

Kronos® for Retail is the most widely adopted and deployed workforce management solution available. And with over 50 years of combined retail specific experience, our solution is designed to meet the unique needs and challenges of retail organizations. In fact, more than 1,000 retail organizations use Kronos to foster growth and promote continuous improvement. **Learn more about Kronos and our retail–specific suite of solutions at www.kronos.com/retail. Kronos: Workforce Innovation That Works™.**

Lexmark International (AccessVia)
Lexmark Solutions for Retail empower retailers to enhance customer service and increase profits from the back office to the point of sale. With greater visibility and control over processes and information, keep your stores in plain sight and your customers in sharp focus. **For more information: www.lexmark.com/retail**

Leading retailers across the globe use MicroStrategy's enterprise analytics and mobile software platforms for enabling informed decisions and rapid action – offered either on premises or in the cloud. Retailers deploy MicroStrategy to analyze vast amounts of data, distribute actionable business insight, improve operating efficiency, and transform the customer shopping experience. **For more information: www.microstrategy.com**

Multidev Technologies Inc. is an industry leader in the development of Fully-Integrated ERP and Omnichannel Software for retail, e-tail and wholesale. Dedicated to delivering advanced innovation and technology, Multidev's revolutionary software allows retailers to manage all channels of their business with one complete unified real-time system. **For more information: www.multidev.com**

NGC Software is a leading provider of Product Lifecycle Management (PLM) and Supply Chain Management software and services for retailers, brands and consumer products companies. NGC solutions help increase profitability, reduce costs, improve speed to market and manage product integrity and vendor compliance. For more information: www.ngcsoftware.com

PCMS specializes in delivering proven enterprise and store level software solutions to the retail sector. PCMS' VISION BeanStore 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 is the pioneer in Real-Time Execution and Workforce Management solutions that enable retailers to execute their customer engagement strategy flawlessly. 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 last-minute customer demand. **For more information: www.reflexisinc.com**

Starmount solutions power the store as the center of the omnichannel retail experience, creating a data-rich commerce platform to engage shoppers, streamline operations, and support seamless cross-channel customer interactions. Combining the best of in-store, online, and mobile shopping, Starmount empowers associates, drives more sales, and accesses/fulfills inventory from any location. **For more information: www.starmount.com**

TradeStone Software helps retailers, brand manufacturers and suppliers increase market share and improve margins through the use of Merchandise Lifecycle Management (MLM) solutions. MLM is the holistic, informed, and efficient retail process of inspiring, designing, sourcing, buying, and selling private label and branded goods. **For more information: www.tradestonesoftware.com**

WinRetail provides retailers with the knowledge they need to improve their business with software that includes Mobile and Traditional POS, E-Commerce, Merchandise Planning, Inventory Control, Business Intelligence, CRM, Loss Prevention and much more. **For more information: www.WinRetail.com**