

Software LEADERBOARD '09

THE ALL STARS OF RETAIL TECH

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

PLUS: COMPANIES TO WATCH





The Oscars of Retailing?

The RIS Software LeaderBoard is often called the Oscars of retail technology, and I am always a little surprised by this. However, there are similarities. Voting is done by invited professionals and handled by an independent research firm. Top scores add luster throughout the year. And millions of dollars could be at stake for winning vendors.

But, geez, where's the glitz and glamour? Where are the celebrities, swag bags, and swanky parties? Maybe next year.

For this year, LeaderBoard methodology pretty much stays the course, especially in the 10 criteria making up the all-important Customer Satisfaction category. The same is true for the Revenue Factor category, which converts annual revenue in the retail vertical into a numerical figure.

The one big change this year is adding 10 points to the Retail Concentration score, which is now worth 50 points, one for each retail module offered. As vendors mature they continue to add new capabilities in a rush to create end-to-end solutions. The new Retail Concentration total reflects this trend and also recognizes ongoing consolidation through mergers and acquisitions.

So, what do you think? Gold statuettes next year? Nah. Winning is its own reward.

BY THE NUMBERS

479	Votes cast
156	Individual retail voters
77	Vendors that received votes
50	CIOs or VP ITs who voted
17	CEOs/presidents who voted

RIS

RETAIL INFO SYSTEMS NEWS

PUBLISHER
David Weinand
dweinand@edgellmail.com

GROUP EDITOR-IN-CHIEF
Joe Skorupa
jskorupa@edgellmail.com

ASSISTANT EDITOR
Christina Zarrello
czarrello@edgellmail.com

SALES ASSOCIATE PUBLISHER
Catherine J. Marder
cmarder@edgellmail.com

ACCOUNT EXECUTIVE
Andy Pieri
apieri@edgellmail.com

ASSISTANT TO THE PUBLISHER
Jen Johnson
jjohnson@edgellmail.com

ONLINE VP OF ONLINE MEDIA
Robert Keenan
rkeenan@edgellmail.com

WEB DEVELOPMENT MANAGER
Scott Ernst
sernst@edgellmail.com

ONLINE EVENT PRODUCER
Stephanie Gannon
sgannon@edgellmail.com

**ART/PRODUCTION
CREATIVE DIRECTOR**
Colette Magliaro
cmagliaro@edgellmail.com

ART DIRECTOR
Lauren Cloos
lcloos@edgellmail.com

SENIOR PRODUCTION MANAGER
Maggie Hall
mhall@edgellmail.com

CORPORATE OFFICE
Edgell Communications
4 Middlebury Blvd.
Randolph, NJ 07869
973.607.1300 FAX: 973.607.1395

CEO/CHAIRMAN Gabriele A. Edgell

PRESIDENT Gerald. C. Ryerson

VICE PRESIDENT John Chiengo

Contents >>

4 **MVPS: MOST VALUABLE VENDORS**
Unveiling the Top 20 list and Top 10 breakouts
in broad-based categories

12 **SOFTWARE ALL STARS**
Playing the software tech game well means hitting
home runs in customer satisfaction

18 **DIVISION CHAMPIONS**
Tracking vendor winners among Tier One
and Mid-Size retailers

22 **COMPANIES TO WATCH**
Six outstanding technology companies expand their
footprint in retailing

Overall Leaders >>

09 RIS SOFTWARE LEADERBOARD



MVPs: Most Valuable Vendors

Unveiling the Top 20 list and Top 10 breakouts in broad-based categories

BY JOE SKORUPA

Hard to believe it was little more than a year ago that Wall Street had its epic melt down. Much has changed since then, some good, some bad. But one thing is certain: Retailing is a different place than it was before.

For one thing it looks a lot like 2006, at least in terms of consumer market basket sizes and spending levels. For another a “new normal” has taken hold. After a half dozen years of success and

excess the new normal is all about frugality. Both shoppers and retailers are making do with less.

Despite continuing challenges some retailers have thrived in 2009 by rapidly down-sizing to meet current demand. For these merchants, sales are low but profits are high. Armed with healthy balance sheets, these agile retailers are making plans to invest in new opportunities and technologies in 2010.

SOFTWARE LEADERBOARD 2009

RANK	COMPANY	RETAIL CONCENTRATION	REVENUE FACTOR	CUSTOMER SATISFACTION	TOTAL SCORE
1	SAP	46	5	37.0	88.0
2	Micros Retail	43	5	39.4	87.4
3	Oracle	46	5	35.5	86.5
3	IBM	43	5	38.5	86.5
4	PCMS Datafit	36	3	46.9	85.9
5	Celerant Technology	39	1	45.1	85.1
6	Microsoft	41	5	37.7	83.7
7	Microstrategy	37	1	40.4	78.4
8	Jesta I.S.	29	5	42.3	76.3
9	ECR Software	31	1	42.3	74.3
10	RedPrairie	35	5	33.2	73.2
11	Epicor	39	5	28.7	72.7
12	Escalate Retail	39	3	29.4	71.4
13	Manhattan Associates	26	5	39.7	70.7
14	Radiant Systems	32	3	35.6	70.6
15	Reflexis	19	2	48.8	69.8
16	Fujitsu	24	5	40.0	69
17	Retailx	31	4	32.6	67.6
18	Raymark	30	1	35.7	66.7
19	JDA	26	5	34.5	65.5

Overall Leaders >>

09 RIS
SOFTWARE
LEADERBOARD



And when they do, the 2009 *Software LeaderBoard* can provide them with insight into the top software vendors in retailing. The best way to use this study is to take a holistic view of the data and not place an over emphasis on the top-most names in the rankings.

For one thing, all vendors that make the lists are the best-of-the-best, from top to bottom. What do I mean by this? First of all, we provided retailers with the opportunity to evaluate a total of 99 soft-

ware vendors. Of these, 77 were evaluated by retailers. Of these, 44 actually made at least one of our ranking lists. This means that any name that appears in these pages made a cut that less than half were capable of making.

Another reason retailers should look beyond the top names on a ranking list is to gain a deeper understanding of the numbers that produce the ranking. For example, the Top 20 list is actually some-

TOP 10 FOR TIER ONE RETAILERS

RANK	COMPANY	RET. CON.	REV FAC.	CUST SAT.	TOTAL
1	SAP	46	5	39.2	90.2
2	PCMS Datafit	36	3	46.7	85.7
3	Oracle	46	5	34.4	85.4
4	IBM	43	5	36.6	84.6
5	Microsoft	41	5	36.9	82.9
6	Micros Retail	43	5	34.2	82.2
7	Jesta I.S.	29	5	44.3	78.3
8	Microstrategy	37	1	38.7	76.7
9	Sterling Commerce	32	4	37.3	73.3
10	Epicor	39	5	26.8	70.8

TOP 10 FOR MID-MARKET RETAILERS

RANK	COMPANY	RET. CON.	REV FAC.	CUST SAT.	TOTAL
1	IBM	43	5	38.1	86.1
2	Micros Retail	43	5	37.9	85.9
3	Oracle	46	5	34.1	85.1
3	PCMS Datafit	36	3	46.1	85.1
4	SAP	46	5	33.0	84
5	Celerant Technology	39	1	43.1	83.1
6	Microstrategy	37	1	44.3	82.3
7	Microsoft	41	5	35.4	81.4
8	RedPrairie	35	5	35.8	75.8
9	ECR Software	31	1	43.3	75.3

LEADERS IN BROAD SUITES

RANK	COMPANY	RET. CON.	REV FAC.	CUST SAT.	TOTAL
1	SAP	46	5	37.0	88.0
2	Micros Retail	43	5	39.4	87.4
3	Oracle	46	5	35.5	86.5
3	IBM	43	5	38.5	86.5
4	PCMS Datafit	36	3	46.9	85.9
5	Celerant Technology	39	1	45.1	85.1
6	Microsoft	41	5	37.7	83.7
7	Microstrategy	37	1	40.4	78.4
8	RedPrairie	35	5	33.2	73.2
9	Epicor	39	5	28.7	72.7

LEADERS IN TARGETED SOLUTIONS

RANK	COMPANY	RET. CON.	REV FAC.	CUST SAT.	TOTAL
1	Reflexis	19	2	48.8	69.8
2	Cornell-Mayo	14	1	45.0	60.0
3	Island Pacific	19	2	36.8	57.8
4	Akamai	10	5	40.0	55.0
5	NCR	14	5	32.4	51.4
6	Inovis	7	1	42.7	50.7
7	SofTechnics	12	2	36.3	50.3
8	Verifone	13	1	36.0	50.0
9	Retail Pro	19	4	25.8	48.8
10	ATG	13	3	32.7	48.7

Overall Leaders >>

09 RIS
SOFTWARE
LEADERBOARD



thing of an apples and oranges ranking. All the heavy hitters are here as you would expect, with the top four being SAP, Micros Retail, Oracle and IBM. Microsoft is right up there, too, coming in at number six.

Diving deeper we see that Celerant Technology, which shows a low Revenue Factor score (meaning its annual revenue is less than \$20 million), places a lofty number five, right up there among the biggest companies in retailing.

The reason Celerant is able to rank so high is its Customer Satisfaction score, which is among the highest in the LeaderBoard. Customer Satisfaction accounts for just under half of the total score. Most of the other half comes from Retail Concentration, where retailers earn one point for each software module and the top score is 50 points. The rest of the score is made up of Revenue Factor points, where five is the top score.

For a software firm to make the Top 20 list you would expect it to have a balance of a high Customer Satisfaction score and a high Retail Concentration score. This is generally the case, and examples of this include such companies as PCMS Datafit, RedPrairie and Epicor, to name a few.

But it is also possible to make the list by scoring extraordinarily well in just one of the two major categories — either Retail Concentration or Customer Satisfaction. Vendors that score extremely high in Retail Concentration, for example, are SAP, Micros Retail, Oracle, IBM and Microsoft. These companies are renowned for their industry leading end-to-end solutions.

On the other end of the spectrum is Reflexis, which is more of a targeted solution vendor, focused strongly in the task management

category. Reflexis had the lowest point total in Retail Concentration, but the highest in Customer Satisfaction, a near perfect 48.8. In total, the combined score for Reflexis placed it number 15 on the list, well ahead of many companies that had far higher Retail Concentration scores.

This same methodology extends to the Top 10 list of software vendors for Tier One Retailers, where Jesta and Sterling Commerce, which do not have extraordinarily high Retail

LEADERS IN GROCERY

RANK	COMPANY	RET. CON	REV FAC.	CUST SAT.	TOTAL
1	SAP	46	5	41.5	92.5
2	Oracle	46	5	35.5	86.5
3	IBM	43	5	38.2	86.2
4	Microsoft	41	5	36.8	82.8
5	Microstrategy	37	1	36.5	74.5
6	RedPrairie	35	5	29.5	69.5
7	Fujitsu	24	5	39.5	68.5
8	Retalix	31	4	32.6	67.6
9	NCR	14	5	31.7	50.7
10	Kronos	8	3	34.5	45.5

LEADERS IN APPAREL/FOOTWEAR

RANK	COMPANY	RET. CON	REV FAC.	CUST SAT.	TOTAL
1	Micros Retail	43	5	43.9	91.9
2	SAP	46	5	40.4	91.4
3	Oracle	46	5	36.6	87.6
4	Microsoft	41	5	38.5	84.5
5	IBM	43	5	35.3	83.3
6	Celerant Technology	39	1	43.0	83.0
7	Microstrategy	37	1	42.3	80.3
8	Jesta I.S.	29	5	42.3	76.3
9	Manhattan Associates	29	5	39.6	73.6
10	Raymark	30	1	40.2	71.2

LEADERS IN SPECIALTY RETAILING

RANK	COMPANY	RET. CON	REV FAC.	CUST SAT.	TOTAL
1	Oracle	46	5	38.4	89.4
2	Celerant Technology	39	1	48.5	88.5
3	IBM	43	5	39.7	87.7
4	PCMS Datafit	36	3	45.6	84.6
5	SAP	46	5	32.7	83.7
6	Microsoft	41	5	37.6	83.6
7	Micros Retail	43	5	33.3	81.3
8	Microstrategy	37	1	42.7	80.7
9	Manhattan Associates	29	5	39.7	73.7
10	Epicor	39	5	29.1	73.1

Overall Leaders >>

09 RIS
SOFTWARE
LEADERBOARD



Concentration scores, appear on a list dominated by vendors with end-to-end suites.

Digging into the list for Top 10 software vendors for Mid-Market retailers we see that smaller companies like Celerant and ECR Software, with revenue less than \$20 million, score well against much larger competitors.

TOP 10 MID-SIZE VENDOR LEADERS

RANK	COMPANY	RET. CON	REV FAC.	CUST SAT.	TOTAL
1	PCMS Datafit	36	3	46.9	85.9
2	Celerant Technology	39	1	45.1	85.1
3	Microstrategy	37	1	40.4	78.4
4	ECR Software	31	1	42.3	74.3
5	Escalate Retail	39	3	29.4	71.4
6	Radiant Systems	32	3	35.6	70.6
7	Reflexis	19	2	48.8	69.8
8	Raymark	30	1	35.7	66.7
9	Magstar	26	1	36.7	63.7
10	Cornell-Mayo	14	1	45.0	60.0

TOP 10 LARGE VENDOR LEADERS

RANK	COMPANY	RET. CON	REV FAC.	CUST SAT.	TOTAL
1	SAP	46	5	37.0	88.0
2	Micros Retail	43	5	39.4	87.4
3	IBM	43	5	38.6	86.6
3	Oracle	46	5	35.6	86.6
4	Microsoft	41	5	37.7	83.7
5	Jesta I.S.	29	5	42.3	76.3
6	Manhattan Associates	29	5	39.7	73.7
7	RedPrairie	35	5	33.2	73.2
8	Epicor	39	5	28.7	72.7
9	Fujitsu	24	5	40.0	69.0

As you go through the LeaderBoard you can use this same methodology to analyze breakouts for Leaders in Grocery, Leaders in Apparel/Footwear and Leaders in Specialty Retailing. What distinguishes these lists is that only evaluations by retailers in each of these categories is counted.

Although this methodology can be applied to some other lists in the LeaderBoard, for the most part the rest are actually breakouts in themselves and are best taken at face value.

However, it is interesting to see that in Leaders in Targeted Solutions, a list that spotlights companies with a relatively narrow focus, there are some incredibly large companies when measured by revenue, like Akamai and NCR. Although specialists, they must be doing something right to generate such high volumes of revenue.

What does a breakout list look like when you only list the major heavy weights? This can be found in the Top 10 Large Vendors list, which looks a great deal like the main Top 20 list. The reason is that large companies typically score maximum points for Revenue Factor, because they are large, and high scores in Retail Concentration, because they tend to be providers of end-to-end retail suites.

On the other end of the spectrum is the Top 10 Mid-Size Vendor list, which shows a different cast of characters. PCMS Datafit came out on top here, and such companies as Radiant Systems, Magstar and Cornell-Mayo get a chance to shine. **LB**

LEADERS IN RETAIL CONCENTRATION

RANK	COMPANY	RET. CON
1	Oracle	46
1	SAP	46
2	Micros Retail	43
2	IBM	43
3	Microsoft	41
4	Celerant Technology	39
4	Escalate Retail	39
4	Epicor	39
5	Microstrategy	37
6	PCMS Datafit	36

LEADERS IN CUSTOMER SATISFACTION

RANK	COMPANY	RET. CON
1	Reflexis	48.8
2	PCMS Datafit	46.9
3	Celerant Technology	45.1
4	Cornell-Mayo	45.0
5	Netezza	43.8
6	Inovis	42.7
7	Jesta I.S.	42.3
7	ECR Software	42.3
8	Microstrategy	40.4
9	Bazaarvoice	40.3



Software All Stars

Playing the software tech game well means hitting home runs in customer satisfaction

With every new slice of LeaderBoard data that produces a unique Top 10 list we get a clearer look beneath the hood of the master list, which consists of the broadest possible combination of factors. In this section we focus exclusively on the 10 criteria that are added together to create the total score for Customer Satisfaction.

Each of the 10 criteria represents a single component held to be of high value to retailers when they are working with software technology and software providers. These criteria have evolved over time, but have remained stable for the past few years

to ensure year-over-year consistency.

Retailers are asked to evaluate each vendor they have worked with in the past 12 months and rate them on a one-to-five scale: one is least favorable and five is most favorable. So, the highest possible score a vendor can achieve in each criterion is five. When you add the 10 criteria together the highest possible score a vendor can get for a comprehensive Customer Satisfaction score is 50.

The 10 criteria are as follows: Overall Performance, Technology Innovation, Total Cost of Ownership, Return on Investment,

With every new slice of LeaderBoard data that produces a unique Top 10 list we get a clearer look beneath the hood of the master list.

LEADERS IN OVERALL PERFORMANCE

RANK	COMPANY	RET. CON
1	Reflexis	4.90
2	PCMS Datafit	4.71
3	Cornell-Mayo	4.53
3	Celerant Technology	4.53
4	Inovis	4.50
5	Bazaarvoice	4.47
6	ECR Software	4.40
6	Netezza	4.40
6	Manhattan Associates	4.40
7	SAS	4.20

LEADERS IN TECHNOLOGY INNOVATION

RANK	COMPANY	RET. CON
1	Netezza	4.90
2	Reflexis	4.65
3	PCMS Datafit	4.46
4	ECR Software	4.40
4	Fujitsu	4.40
5	Cornell-Mayo	4.39
5	Jesta I.S.	4.39
6	Celerant Technology	4.37
7	Akamai	4.33
8	Endeca	4.13

LEADERS IN TCO

RANK	COMPANY	RET. CON
1	Reflexis	4.90
2	Celerant Technology	4.64
3	Cornell-Mayo	4.53
4	AccessVia	4.47
5	PCMS Datafit	4.35
6	Inovis	4.33
7	Netezza	4.23
8	Bazaarvoice	4.13
9	Micros Retail	3.99
10	Microstrategy	3.91

LEADERS IN ROI

RANK	COMPANY	RET. CON
1	Reflexis	4.90
2	PCMS Datafit	4.60
3	Netezza	4.57
4	Celerant Technology	4.53
4	Cornell-Mayo	4.53
5	Jesta I.S.	4.24
6	Fujitsu	4.20
7	Inovis	4.17
8	Island Pacific	4.10
9	Micros Retail	4.01



Ease of Installation/Integration, Ease of Administration/Maintenance, Quality of Support, Quality of Service, Product Reliability and Recommendation. The latter criterion is the answer to the question: Would you recommend this software vendor to others?

Customer-Centricity Rules

For software vendors or retailers, what is the value of listening to the voice of the customer? For retailers, it is the name of the game, the cornerstone for success. There is a clear financial link between customer satisfaction and bottom-line performance. And, especially in retailing, the response time for measuring the link is as fast as the rollout of each promotional campaign.

The dynamic is completely different for software providers. They have fewer products to offer, fewer customers, higher prices, requirements for board of director approval, and a slower timeline to refresh offerings.

And yet, like car companies with their multi-year development lifecycles, software vendors understand that customer

LeaderBoard methodology includes using an independent, third-party research firm, Litchfield Research, to aggregate retailer evaluations and reach out to both vendor references and non-references alike.

satisfaction is the key to future success. As a result, they pay careful attention to tracking and measuring it.

What's different about the LeaderBoard approach is that we use an independent, third-party research firm, Litchfield Research, to aggregate retailer evaluations. We reach out to both vendor references and non-references alike. The RIS mailing list covers the entire North American retail industry focusing on technology decision makers at national chains as well as large regional and local chains. Essentially, every retail executive with experience using a retail software vendor's solutions gets an opportunity to submit an evaluation.

Another difference is that the LeaderBoard is not focused exclusively on

the performance of technology. Instead, it is focused on customer satisfaction and meeting expectations. While we include such technology criteria as Ease of Installation/Integration, Ease of Administration/Maintenance and others, we balance this with the addition of such critical satisfaction elements as Return on Investment (ROI), Total Cost of Ownership (TCO), and Recommendation.

As a result, LeaderBoard analysis, especially in the sections that deal with Customer Satisfaction, is more akin to the methodology used by the Zagat Survey, Consumer Reports, and J.D. Power and Associates than it is to satisfaction metrics done by software vendors for internal consumption.

EASE OF INSTALLATION /INTEGRATION

RANK	COMPANY	RET. CON
1	Reflexis	4.90
2	Cornell-Mayo	4.53
2	PCMS Datafit	4.53
3	AccessVia	4.5
4	Inovis	4.47
5	Celerant Technology	4.44
6	ECR Software	4.40
7	Akamai	4.33
8	Fujitsu	4.24
9	Jesta I.S.	4.23

EASE OF ADMINISTRATION/MAINTENANCE

RANK	COMPANY	RET. CON
1	Reflexis	4.90
2	AccessVia	4.80
3	PCMS Datafit	4.66
4	Celerant Technology	4.53
5	Inovis	4.50
6	Jesta I.S.	4.43
7	Cornell-Mayo	4.39
8	Akamai	4.17
9	ECR Software	4.15
10	Bazaarvoice	4.13

LEADERS IN QUALITY OF SUPPORT

RANK	COMPANY	RET. CON
1	PCMS Datafit	5.00
2	Reflexis	4.90
3	Netezza	4.57
4	Cornell-Mayo	4.53
4	Celerant Technology	4.53
5	ECR Software	4.40
6	Jesta I.S.	4.27
7	Inovis	4.17
8	Akamai	4.00
8	Fujitsu	4.00



Inside Look at Satisfaction Leaders

Several trends emerge when analyzing the individual Top 10 criteria lists in this section. One is that several software firms appear on all 10 lists, such as Reflexis, PCMS Datafit, Cornell-Mayo and Celerant.

The reason for this is simple: These providers not only have high combined Customer Satisfaction scores, they also have consistently high individual scores across all 10 criteria.

As a result, these companies are a fearsome foursome that other vendors have to break through to get into the Top 10. Reflexis, for example, tops eight of the criteria lists, in a dramatic showing of customer satisfaction prowess. The two companies that manage to nip Reflexis at the top are Netezza in Technology Innovation and PCMS Datafit in Quality of Support. The PCMS win is worth calling out because it won with the only perfect score in this section.

Bazaarvoice, Akamai and Endeca also deserve to be called out because they are online vendors that do not have any store-systems or enterprise applications.

Reflexis, PCMS Datafit, Cornell-Mayo and Celerant appear on all 10 criteria lists, as a result they are a fearsome foursome that other vendors have to break through to get into the Top 10.

However, it is clear that even though they focus exclusively on e-commerce they do it extremely well, according to retailer satisfaction scores.

Since all but one of the criteria lists include satisfaction scores higher than 4.0, this means that vendors making these lists must have gotten one or more perfect scores to pull up their average score above the 4.0 mark. So, congratulations are due to all vendors who appear on these lists for doing an outstanding job of meeting customer expectations at the highest level.

The one criterion that dips below the 4.0 mark is Total Cost of Ownership (TCO), which measures retailer satisfaction with vendors for accurately meeting expectations for sticking to the agreed-

upon budget over an extended period of time. Unlike the other criteria, this one dips to a 3.91 score at the bottom end.

This is still a high score, but since it is below the level of the others it indicates retailers have issues with software vendors over meeting TCO projections. Although it is not shown here, a look at vendor scores below the Top 10 mark shows it dropping rapidly.

So, one important insight vendors should takeaway from reading this section is that they have an opportunity to improve customer relations and ultimately win clients from competitors if they establish a strategy of communicating realistic TCO estimates to retailers and then making sure they stick. **LB**

LEADERS IN QUALITY OF SERVICE

RANK	COMPANY	RET. CON
1	PCMS Datafit	4.96
2	Reflexis	4.90
3	Jesta I.S.	4.77
4	Cornell-Mayo	4.53
5	Celerant Technology	4.48
6	Netezza	4.23
7	Fujitsu	4.20
8	ECR Software	4.15
9	Magstar	4.13
9	Microstrategy	4.13

LEADERS IN RELIABILITY

RANK	COMPANY	RET. CON
1	Reflexis	4.90
2	PCMS Datafit	4.81
3	Bazaarvoice	4.80
4	Cornell-Mayo	4.53
5	Inovis	4.50
5	Manhattan Associates	4.50
6	Celerant Technology	4.44
7	ECR Software	4.40
8	Microstrategy	4.34
9	Akamai	4.33

LEADERS IN RECOMMENDATION

RANK	COMPANY	RET. CON
1	Reflexis	4.90
2	PCMS Datafit	4.80
3	Celerant Technology	4.64
4	Netezza	4.57
5	Cornell-Mayo	4.53
6	ECR Software	4.40
6	Manhattan Associates	4.40
7	Akamai	4.33
8	Jesta I.S.	4.24
9	Inovis	4.17



do not feel ignored by some giant software providers. Large vendors that score well among mid-size retailers include SAS, IBM and Manhattan Associates.

Stellar results throughout this section are posted by Reflexis,

which achieves seven number one placements among Tier One Retailers. Also noteworthy is that Reflexis ties with another vendor by appearing in all 10 criteria for Tier One Retailers.

The tie goes to PCMS, which takes this distinction one step

LEADERS IN ROI BY TIER ONE AND MID-SIZE RETAILERS

TIER ONE			MID-SIZE		
RANK	COMPANY	RET. CON	RANK	COMPANY	RET. CON
1	Reflexis	4.90	1	Microstrategy	4.87
2	PCMS Datafit	4.77	2	Celerant Technology	4.53
3	SAP	4.60	3	PCMS Datafit	4.50
4	Island Pacific	4.43	4	SAS	4.33
5	Inovis	4.33	5	Micros Retail	4.12
6	Cornell-Mayo	4.30	6	Jesta I.S.	4.10
7	Fujitsu	4.25	6	Kronos	4.10
8	Manhattan Associates	3.91	7	IBM	4.07
9	Microstrategy	3.75	8	Verifone	4.03
10	SofTechnics	3.65	9	Inovis	4.00

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

TIER ONE			MID-SIZE		
RANK	COMPANY	RET. CON	RANK	COMPANY	RET. CON
1	Reflexis	4.65	1	Microstrategy	4.87
2	PCMS Datafit	4.43	2	PCMS Datafit	4.50
3	Akamai	4.25	3	ECR Software	4.40
3	Fujitsu	4.25	4	IBM	4.38
4	Cornell-Mayo	4.10	5	Celerant Technology	4.37
5	Microsoft	4.01	5	Verifone	4.37
6	Inovis	4.00	6	Jesta I.S.	4.30
6	SAP	4.00	7	Endeca	4.13
7	Oracle	3.85	8	Kronos	4.10
8	IBM	3.77	9	Micros Retail	4.07

LEADERS IN PRODUCT RELIABILITY BY TIER ONE AND MID-SIZE RETAILER

TIER ONE			MID-SIZE		
RANK	COMPANY	RET. CON	RANK	COMPANY	RET. CON
1	Reflexis	4.90	1	PCMS Datafit	5.00
2	IBM	4.77	2	Microstrategy	4.87
3	Inovis	4.67	3	Celerant Technology	4.44
4	Manhattan Associates	4.64	4	ECR Software	4.40
5	Akamai	4.50	4	NCR	4.40
6	PCMS Datafit	4.43	5	Inovis	4.33
7	Sterling Commerce	4.33	5	SAS	4.33
8	Cornell-Mayo	4.30	6	Micros Retail	4.30
9	Microstrategy	4.20	6	IBM	4.30
10	Kronos	4.10	7	Manhattan Associates	4.20

LEADERS IN INSTALLATION/INTEGRATION BY TIER ONE AND MID-SIZE RETAILERS

TIER ONE			MID-SIZE		
RANK	COMPANY	RET. CON	RANK	COMPANY	RET. CON
1	Inovis	5.00	1	PCMS Datafit	4.85
2	Reflexis	4.90	2	Microstrategy	4.53
3	Cornell-Mayo	4.30	3	Celerant Technology	4.42
4	Akamai	4.25	4	ECR Software	4.40
4	Fujitsu	4.25	5	Jesta I.S.	4.30
5	Manhattan Associates	4.20	6	Microsoft	4.21
6	Kronos	4.10	7	Manhattan Associates	4.20
6	PCMS Datafit	4.10	8	Verifone	4.03
7	SAP	4.00	9	Inovis	4.00
8	Microsoft	3.95	9	SAS	4.00

Criteria Leaders >>



further by also appearing on all 10 criteria lists for Mid-Size retailers. Even better, PCMS achieves a combination of eight number one rankings, two among Tier One Retailers and six among Mid-Size Retailers.

The final distinction for PCMS is four perfect scores, which is unmatched in this section. The only other vendor to notch a hard-to-come-by perfect score is Inovis, which came out on top in the Installation/Integration criteria for Tier One Retailers. **LB**

LEADERS IN ADMINISTRATION/MAINTENANCE BY TIER ONE AND MID-SIZE RETAILERS

TIER ONE			MID-SIZE		
RANK	COMPANY	RET. CON	RANK	COMPANY	RET. CON
1	Reflexis	4.90	1	PCMS Datafit	4.85
2	Inovis	4.67	2	Jesta I.S.	4.60
3	PCMS Datafit	4.43	3	Celerant Technology	4.53
4	Akamai	4.25	4	Verifone	4.37
5	Cornell-Mayo	4.10	5	Inovis	4.33
6	Fujitsu	4.00	6	Microstrategy	4.20
6	Sterling Commerce	4.00	7	ECR Software	4.15
6	SAP	4.00	8	JDA	4.03
7	Microstrategy	3.84	9	Micros Retail	3.97
8	Manhattan Associates	3.77	10	Oracle	3.93

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

TIER ONE			MID-SIZE		
RANK	COMPANY	RET. CON	RANK	COMPANY	RET. CON
1	PCMS Datafit	5.00	1	PCMS Datafit	5.00
2	Reflexis	4.90	2	Celerant Technology	4.53
3	Inovis	4.33	3	ECR Software	4.40
4	Cornell-Mayo	4.30	4	SAS	4.33
5	Akamai	4.00	5	IBM	4.30
6	Manhattan Associates	3.91	6	JDA	4.20
7	Island Pacific	3.77	6	Microstrategy	4.20
7	Microstrategy	3.77	7	Jesta I.S.	4.10
8	Fujitsu	3.75	8	Micros Retail	4.01
9	IBM	3.71	9	Inovis	4.00

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

TIER ONE			MID-SIZE		
RANK	COMPANY	RET. CON	RANK	COMPANY	RET. CON
1	Reflexis	4.90	1	PCMS Datafit	5.00
2	PCMS Datafit	4.77	2	Microstrategy	4.87
3	Inovis	4.33	3	Jesta I.S.	4.85
4	Cornell-Mayo	4.30	4	Celerant Technology	4.48
5	Fujitsu	4.00	5	Manhattan Associates	4.20
6	Microstrategy	3.93	6	ECR Software	4.15
7	Island Pacific	3.77	7	Micros Retail	4.11
7	Kronos	3.77	8	SAS	4.00
8	Sterling Commerce	3.67	9	JDA	3.87
9	SofTechnics	3.65	9	Verifone	3.87

LEADERS IN RECOMMENDATION BY TIER ONE AND MID-SIZE RETAILER

TIER ONE			MID-SIZE		
RANK	COMPANY	RET. CON	RANK	COMPANY	RET. CON
1	Reflexis	4.90	1	PCMS Datafit	4.85
2	PCMS Datafit	4.77	2	Celerant Technology	4.64
3	Jesta I.S.	4.60	3	Manhattan Associates	4.53
4	Akamai	4.50	3	Microstrategy	4.53
5	Netezza	4.40	4	ECR Software	4.40
6	Manhattan Associates	4.34	5	IBM	4.38
7	Inovis	4.33	6	Micros Retail	4.16
8	Bazaarvoice	4.30	7	Jesta I.S.	4.10
8	Cornell-Mayo	4.30	8	Verifone	4.03
9	SAP	4.20	9	Microsoft	4.01



Major Leaguers

Six outstanding companies expand their footprint in retailing

BY CHRISTINA ZARRELLO

While more than 75 vendors were evaluated by retailers in this year's Software LeaderBoard, only about 40 made an appearance on the breakout lists. This means there were many software vendors either did not achieve the minimum voting pool to be included, or who just missed making one or more of the top-10 breakout charts.

Which is too bad, because many of these vendors work hard all year long to make an appearance in the Software LeaderBoard. Some of these vendors are veteran names in retail technology and some are much newer. However, one thing they have in common is a basis for singling them out for special recognition due to their achievements in developing retail-specific software products and providing services to retailers that produce exceptional satisfaction levels in their customers. Here are this year's selections for Companies to Watch in 2009.

iCongo

An innovator in cross-channel retailing software, iCongo is a specialist in helping companies run mission critical e-business operations. iCongo offers an expansive assortment of cross-channel solutions and a comprehensive suite of Internet marketing systems. In 2009, iCongo released an enhanced version of its e-commerce and cross-channel platform, which includes dynamic merchandising, personalization tools and catalog creation. It is also a versatile platform that handles Web 2.0 widgets, e-mail marketing and a promotions engine. The company also released a "Virtual Marketer" tool that lets businesses stage 2-way communication events on their e-commerce Web sites for B2B enablement. Marquis customers include Lord & Taylor, Aldo Shoes and Select Comfort.

JDS Solutions

Since 1990, JDS has provided mid-market retailers with integrated Retail Merchandising Software and POS Systems that provide enhanced visibility into retail processes and operations. Advanced reporting features include easy-to-use graphical interfaces and time saving wizards. The company serves retailers across such verticals as apparel, footwear, sporting goods and toys. It offers a wide suite of products for such functions as back office, POS, business intelligence, CRM, loss prevention and warehousing. Marquis retail customers include Callaway Golf, North Face, New Balance and Volcom.

KWI

Kliger-Weiss Infosystems (KWI) is a leader in outsourced retail solutions to an impressive list of specialty retailers including

Kenneth Cole, QVC, Kate Spade, United Colors of Benetton, Liz Claiborne, Michael Kors and Swatch to name a few. The company provides scalable, Web-based retail solutions and has been committed to technological innovation and service since 1985. Today, the company offers a wide array of solutions for merchandising, point-of-sale, planning, CRM and loss prevention.

QuantiSense

Launched in 2001 by a team of experienced data warehousing professionals, QuantiSense is a leading provider of business intelligence and data warehousing applications exclusively for specialty retailers. From the beginning, QuantiSense has provided retail-specific data warehousing and BI solutions that are low risk, cost effective and quickly implemented. In 2009, the company announced several key client wins including Restoration Hardware which turned to QuantiSense to provide specialized business intelligence and analytics to help reduce stock-outs and overstocks, and Canada's Hudson Bay Company, which gains enhanced analytics for action-oriented reporting across its many retail banners.

Quantum

Quantum Retail has experience explosive growth and has reportedly grown 976.4 percent over the past three years. Founded by a team of retail industry experts, technologists and scientists, Quantum Retail offers technologies that help improve sales and margin by localizing inventory, reducing unproductive and excess inventory, bringing together disparate processes and providing real-time BI. Quantum's mission is to provide innovative, yet practical, software solutions that help retailers succeed. Its world-class inventory optimization solution, Q, is a retail management system that optimizes distribution, allocation, replenishment and assortment, while helping supply chains increase margin and reduce stock-outs. Other marquis clients include Burlington Coat Factory, Guitar Center and Hallmark.

Torex

Torex has 20 years of experience in working with some of the world's most forward-thinking retail brands. Retail customers include Nike, Carrefour, Edeka and dozens of other retailers located around the globe. The company's retail software portfolio includes a wide range of enterprise and POS solutions. In 2009, UK-based retailer, TJ Hughes selected Torex Retail POS for its 52 department stores. Other marquis clients include Furniture Brands, Limited Stores and French Connection. **LB**

Software LEADERBOARD '09



CELERANT[®]
TECHNOLOGY CORP
Real-time Retail

E ECRS[™]
RETAIL AUTOMATION SOLUTIONS

IP Island
Pacific

 **JESTA I.S.**[®]
Solutions Designed with Your Business in Mind

 **KRONOS**[®]

 **NETEZZA**

REFLEXIS
REFLEXIS

SAP[®]

SOFTECHNICS
Solutions for the Retail Enterprise