

# RIS SOFTWARE LEADERBOARD '12

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

**PLUS:**  
COMPANIES TO WATCH





## ON BEING RESPONSIVE

**Elevating the retailer-vendor relationship from product-centricity to customer-centricity**

**By Joe Skorupa**

**THE QUESTION** isn't who is responsible for customer satisfaction in retail, it is who is responsive. And the answer is the entire organization.

The difference between responsible and responsive is an important distinction, because it changes the focus of the conversation. It elevates it from focusing on organizational structure to something more far reaching – the enterprise's core mission.

Thanks to the proliferation of smartphones and tablets the center of power has shifted away from retailers toward consumers. To achieve success today retailers need to discover new ways to listen and learn from shoppers, solve their problems, and make the shopping experience faster, better and cheaper.

And the customer dynamics that are producing this effect on retailers are also impacting software vendors, but with a big difference – the customers of software vendors are retailers.

But the distinction between responsible and responsive is just as important for vendors as it is for retailers.

The *RIS News Software LeaderBoard*

is one way retailers can learn who within the vendor community is listening and learning from retailers, solving their problems and making the tools they use faster, better and cheaper.

Now in its 12th year, the Software LeaderBoard gives voice to retailers to express their opinions about technology companies that are essential to their business. This year it reflects the aggregated opinions of more than 300 retailers, all of whom are headquarters level executives.

The methodology, which has been honed to a bullet-proof standard thanks to the feedback of both retailers and vendors, has remained virtually consistent for the past four years. Small adjustments have been made to account for the rise of mobility, m-commerce and social retailing, for example, but these are small incremental changes and have minimal impact on scores.

As always, the trustworthiness of the LeaderBoard rankings is built on the large number of qualified retail voters participating, rigorous maintenance of high standards, transparency of methodology and reliance on

## BY THE NUMBERS

757	Vendor Evaluations
305	Retail Voters
158	Voters w/Less Than \$1B in Revenue
144	Voters w/More Than \$1B in Revenue
105	Specialty Retail Voters
101	Director/Manager IT Voters
83	Apparel/Footwear Voters
79	Non-IT Director Manager Voters
71	Fast-Moving Consumer Goods Voters
32	C-Level (Excluding CEO) CIO Voters
21	CEO or President Voters
20	V-Level (VP, SVP, EVP) IT Voters
20	Non-IT V-Level Voters

a third-party research firm – Litchfield Research – to ensure objectivity.

Although the Software LeaderBoard has evolved over the years it has never wavered from its original mission: to elevate the retailer-vendor relationship from product-centricity to customer-centricity. •

**PUBLISHER**  
David Weinand  
904.374.8590  
dweinand@edgellmail.com

**SALES**  
**Associate Publisher**  
Catherine J. Marder  
603.672.2796  
cmarder@edgellmail.com

**Account Executive**  
Lisa Wallace  
904.217.3489  
lwallace@edgellmail.com

**Account Executive**  
Ashley Ramirez  
904-834-2248  
aramirez@edgellmail.com

**Assistant to the Publisher**  
Jen Johnson  
jjohnson@edgellmail.com

**EDITORIAL**  
**Group Editor-in-Chief**  
Joe Skorupa  
jskorupa@edgellmail.com

**Executive Editor**  
Adam Blair  
ablair@edgellmail.com

**Associate Editor**  
Nicole Giannopoulos  
ngiannopoulos@edgellmail.com

**ART/PRODUCTION**  
**Creative Director**  
Colette Magliaro  
cmagliaro@edgellmail.com

**Art Director**  
Lauren DiMeo  
lclous@edgellmail.com

**ONLINE**  
**VP of Online Media**  
Robert Keenan  
rkeenan@edgellmail.com

**Web Development Manager**  
Scott Ernst  
sernst@edgellmail.com

**Director of Lead Generation**  
Jason Ward  
jward@edgellmail.com

**Online Event Producer**  
Sara Gould  
sgould@edgellmail.com

**MARKETING/**  
**EVENTS/CIRCULATION**  
**Director, Event Planning**  
Pat Benkner  
pbenkner@edgellmail.com

**Director, Event Content**  
John Hall  
jhall@edgellmail.com

**Circulation Manager**  
Jeffrey Zabe  
jzabe@edgellmail.com

**PRODUCTION**  
**Senior Production Manager**  
Pat Wisser  
pwisser@edgellmail.com

Subscriptions 978.671.0449  
Reprints: edgellreprints@parsiintl.com  
212.221.9595

**CORPORATE**  
**CEO/Chairman**  
Gabriele A. Edgell  
gedgell@edgellmail.com

**President**  
Gerald. C. Ryerson  
gryerson@edgellmail.com

**Vice President**  
John Chiego  
jchiego@edgellmail.com

**FOUNDER**  
DOUGLAS C. EDGELL  
1951-1998

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







## SUPER ACHIEVERS 2012

Examining retail software vendors that do just about everything extremely well

**THERE IS SOMETHING** to be said about a software company that has a focused business model and executes it extremely well. This approach can produce solutions that are things of beauty in innovation, ease of use, value and customer satisfaction. It is much harder to adopt an end-to-end approach, which requires a larger vision, greater resources, and mastery over a wide range of tech-

nical and business functions.

Both types of software companies are highlighted in the LeaderBoard and each one deserves special recognition regardless of their placement on a top-10 list. This is a point sometimes forgotten but it shouldn't be. In fact, it is crucial to understanding LeaderBoard rankings.

This year 82 software vendors re-

ceived votes – retailer evaluations. Of these, 48 received the minimum number required to make a legitimate voting pool, which is five. Most companies had many more than the minimum requirement, but the number is kept at five because of the retail specialists who often have 10 or fewer clients. Getting 50 percent of your client base to vote in the LeaderBoard study (or

### OVERALL & CATEGORY SOFTWARE LEADERBOARD TOP 20

RANK	COMPANY	RET. CON.	REV. FAC.	CUST. SAT.	TOTAL
1	QuantiSense	41	1	49.7	91.7
2	PCMS Datafit	41	3	47.4	91.4
3	SAP	48	5	38.2	91.2
4	ECR Software	41	1	49.1	91.1
5	MicroStrategy	47	5	38.6	90.6
6	Oracle	48	5	35.9	88.9
7	Celerant Technology	39	1	46.9	86.9
8	IBM	42	5	39.1	86.1
9	JDA	42	5	39.0	86.0
10	Micros Retail	45	5	35.1	85.1
11	Retalix	41	4	39.8	84.8
12	NCR	39	5	38.3	82.3
13	Epicor	42	5	33.1	80.1
14	RedPrairie	41	4	34.9	79.9
15	Jesta I.S.	34	5	40.0	79.0
16	JDS Solutions	25	1	47.0	73.0
17	Fujitsu	27	5	39.0	71.0
18	Raymark	26	1	42.8	69.8
19	Manhattan Associates	27	5	37.3	69.3
20	UTC Retail	23	2	43.8	68.8



# RIS SOFTWARE LEADERBOARD '12

## OVERALL & CATEGORY LEADERS

doing anything) is no easy feat.

So, any time you see a top-10 list in the LeaderBoard make a mental note that 38 companies had lower scores, in many cases much lower. The companies that appear on any list and in any position are the retail industry's superior performers.

In many ways the Software LeaderBoard Top 20 list, which appears on the opening page in this chapter, is the master list in the report. It can be thought of this way for several reasons.

Many remarkable achievements appear in the pages of the 2012 Software LeaderBoard, which salutes the best of the best.

First, it is the only list that features 20 companies. All other lists feature 10. Second, it includes all Criteria (10 individual components that comprise

the Customer Satisfaction score) and all Categories (column headers that appear in multi-column charts). Third, there are no narrow cross tabbed

LARGE VENDOR LEADERS						MID-SIZE VENDOR LEADERS					
RANK	COMPANY	RET. CON.	REV. FAC.	CUST. SAT.	TOTAL	RANK	COMPANY	RET. CON.	REV. FAC.	CUST. SAT.	TOTAL
1	SAP	48	5	38.2	91.2	1	QuantiSense	41	1	49.7	91.7
2	MicroStrategy	47	5	38.6	90.6	2	PCMS Datafit	41	3	47.4	91.4
3	Oracle	48	5	35.9	88.9	3	ECR Software	41	1	49.1	91.1
4	IBM	42	5	39.1	86.1	4	Celerant Technology	39	1	46.9	86.9
5	JDA	42	5	39.0	86.0	5	JDS Solutions	25	1	47.0	73.0
6	Micros Retail	45	5	35.1	85.1	6	Raymark	26	1	42.8	69.8
7	Retalix	41	4	39.8	84.8	7	UTC Retail	23	2	43.8	68.8
8	NCR	39	5	38.3	82.3	8	Manthan Systems	22	1	44.8	67.8
9	Epicor	42	5	33.1	80.1	9	Reflexis	20	2	45.0	67.0
10	RedPrairie	41	4	34.9	79.9	10	RTC Quaterion	15	1	49.7	65.7

  

TARGETED SOLUTION VENDOR LEADERS						BROAD SUITE VENDOR LEADERS					
RANK	COMPANY	RET. CON.	REV. FAC.	CUST. SAT.	TOTAL	RANK	COMPANY	RET. CON.	REV. FAC.	CUST. SAT.	TOTAL
1	Reflexis	20	2	45.0	67.0	1	QuantiSense	41	1	49.7	91.7
2	RTC Quaterion	15	1	49.7	65.7	2	PCMS Datafit	41	3	47.4	91.4
3	Microsoft	21	5	38.6	64.6	3	SAP	48	5	38.2	91.2
4	Tradestone Software	15	2	45.5	62.5	4	ECR Software	41	1	49.1	91.1
5	Cornell-Mayo	9	1	48.1	58.1	5	MicroStrategy	47	5	38.6	90.6
6	NGC	14	3	39.8	56.8	6	Oracle	48	5	35.9	88.9
7	First Data	11	5	40.3	56.3	7	Celerant Technology	39	1	46.9	86.9
8	Infor	18	1	36.1	55.1	8	IBM	42	5	39.1	86.1
9	VeriFone (GlobalBay)	11	5	38.9	54.9	9	JDA	42	5	39.0	86.0
10	TXT Maple Lake	10	1	43.6	54.6	10	Micros Retail	45	5	35.1	85.1



# RIS SOFTWARE LEADERBOARD '12

## OVERALL & CATEGORY LEADERS

### CUSTOMER SATISFACTION LEADERS BY GROCERY RETAILERS

RANK	COMPANY	CUST. SAT.
1	ECR Software	47.1
2	AccessVia	42.4
3	Teradata	39.8
4	NCR	38.6
5	First Data	38.2
6	IBM	37.8
7	Retalix	36.9
8	Toshiba Tec (IBM POS)	36.8
8	Reflexis	36.8
9	SAP	37.7
10	MicroStrategy	36.3

### LEADERS IN GROCERY

RANK	COMPANY	RET. CON.	REV. FAC.	CUST. SAT.	TOTAL
1	SAP	48	5	36.7	89.7
2	ECR Software	41	1	47.1	89.1
3	MicroStrategy	47	5	36.3	88.3
4	IBM	42	5	37.8	84.8
4	Micros Retail	45	5	34.8	84.8
5	NCR	39	5	38.6	82.6
6	JDA	42	5	35.0	82.0
7	Retalix	41	4	36.9	81.9
8	RedPrairie	41	4	31.3	76.3
9	Teradata	24	5	39.8	68.8
10	Fujitsu	27	5	35.5	67.5

### CUSTOMER SATISFACTION LEADERS BY APPAREL RETAILERS

RANK	COMPANY	CUST. SAT.
1	QuantiSense	49.0
2	Tradestone Software	43.3
3	UTC Retail	42.1
4	Celerant Technology	41.6
5	Jesta I.S.	39.0
6	JDA	38.4
7	VeriFone (GlobalBay)	38.1
8	Manhattan Associates	37.8
9	Demandware	37.6
10	Dell	37.5

### LEADERS IN APPAREL/FOOTWEAR

RANK	COMPANY	RET. CON.	REV. FAC.	CUST. SAT.	TOTAL
1	QuantiSense	41	1	49.0	91.0
2	MicroStrategy	47	5	36.3	88.3
3	JDA	42	5	38.4	85.4
4	SAP	48	5	31.0	84.0
5	Celerant Technology	39	1	41.6	81.6
6	Jesta I.S.	34	5	39.0	78.0
7	Epicor	42	5	30.1	77.1
8	Manhattan Associates	27	5	37.8	69.8
9	UTC Retail	23	2	42.1	67.1
10	Island Pacific	26	2	36.8	64.8

### CUSTOMER SATISFACTION LEADERS BY SPECIALTY RETAILERS

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	48.8
2	QuantiSense	48.0
3	RTC Quaterion	47.3
4	JDS Solutions	45.4
5	Celerant Technology	45.2
6	AccessVia	44.3
7	PCMS Datafit	44.1
8	Starmount	44.0
9	Reflexis	43.2
10	UTC Retail	41.2

### LEADERS IN SPECIALTY RETAILING

RANK	COMPANY	RET. CON.	REV. FAC.	CUST. SAT.	TOTAL
1	QuantiSense	41	1	48.0	90.0
2	PCMS Datafit	41	3	44.1	88.1
3	SAP	48	5	34.7	87.7
4	MicroStrategy	47	5	34.5	86.5
5	Celerant Technology	39	1	45.2	85.2
6	Oracle	48	5	30.1	83.1
7	JDA	42	5	35.1	82.1
8	Micros Retail	45	5	30.3	80.3
9	Epicor	42	5	33.1	80.1
10	NCR	39	5	34.3	78.3



# RIS SOFTWARE LEADERBOARD '12

## OVERALL & CATEGORY LEADERS

breakouts. The breakouts that do appear feature large categories. And fourth, the Top 20 list sets the stage for all additional charts and breakouts. It is an aggregated score at the top of the pyramid and all other charts flow downstream from it.

This year's Top 20 list features a remarkable leap by QuantiSense, one

of the smallest companies ranked by revenue size on the list. QuantiSense jumped from 15th a year ago to number one this year. The huge leap is the result of it rolling out a significant number of new functionalities in 2012, which sharply raised its Retail Concentration score. Also, from receiving a nearly perfect score in Customer

Satisfaction – 49.7 – which is by far the highest score on the list and a truly remarkable achievement.

Many other remarkable achievements appear in the following pages of the 2012 Software LeaderBoard, which salutes great companies serving the retail industry and recognizes their outstanding achievements. •

### LEADERS IN RETAIL CONCENTRATION

RANK	COMPANY	CUST. SAT.
1	SAP	48
1	Oracle	48
2	MicroStrategy	47
3	Micros Retail	45
4	IBM	42
4	JDA	42
4	Epicor	42
5	QuantiSense	41
5	PCMS Datafit	41
5	ECR Software	41
5	Retalix	41
5	RedPrairie	41

### TOP VENDORS FOR TIER ONE RETAILERS

RANK	COMPANY	RET. CON.	REV. FAC.	CUST. SAT.	TOTAL
1	SAP	48	5	37.0	90.0
1	QuantiSense	41	1	48.0	90.0
2	PCMS Datafit	41	3	45.9	89.9
3	Oracle	48	5	36.6	89.6
4	MicroStrategy	47	5	36.2	88.2
5	JDA	42	5	36.3	83.3
6	IBM	42	5	35.9	82.9
7	NCR	39	5	38.2	82.2
8	Retalix	41	4	36.1	81.1
9	Micros Retail	45	5	29.1	79.1
10	Epicor	42	5	30.3	77.3

### LEADERS IN CUSTOMER SATISFACTION

RANK	COMPANY	CUST. SAT.
1	QuantiSense	49.7
1	RTC Quaterion	49.7
2	ECR Software	49.1
3	Cornell-Mayo	48.1
4	PCMS Datafit	47.4
5	JDS Solutions	47.0
6	Celerant Technology	46.9
7	Tradestone Software	45.5
8	Starmount	45.2
8	AccessVia	45.2
9	Reflexis	45.0
10	Manthan Systems	44.8

### LEADERS FOR MID-SIZE RETAILERS

RANK	COMPANY	RET. CON.	REV. FAC.	CUST. SAT.	TOTAL
1	QuantiSense	41	1	49.2	91.2
2	ECR Software	41	1	47.1	89.1
3	MicroStrategy	47	5	34.6	86.6
4	Micros Retail	45	5	34.1	84.1
4	Retalix	41	4	39.1	84.1
5	Celerant Technology	39	1	43.9	83.9
6	JDA	42	5	35.6	82.6
7	SAP	48	5	29.4	82.4
8	Oracle	48	5	29.2	82.2
9	NCR	39	5	34.8	78.8
9	Epicor	42	5	31.8	78.8
10	RedPrairie	41	4	32.1	77.1



# RIS SOFTWARE LEADERBOARD '12

## CUSTOMER SATISFACTION LEADERS

## MAKING SATISFACTION A MISSION

Spotlighting vendors that rise to the top when all retail votes are counted without filtering

**CUSTOMER SATISFACTION** refers to a score based on retailer evaluations. It has a maximum point total of 50.

Another LeaderBoard term used consistently is Category. It refers to breakouts like Large Retailers (annual revenue of greater than a billion dol-

lars) and Mid-Size Retailers (annual revenue less than a billion dollars). Another set of Category breakouts is Broad Suite Vendors (20 or more retail software applications) and Targeted Solutions Vendors (less than 20 applications). The final Category shown in

this section is Large Vendors (greater than \$125 million in retail revenue) and Mid-Size Vendors (less than \$125 million in annual retail revenue).

All of the charts in this section feature the evaluations of all retail voters. •

CUSTOMER SATISFACTION BY TIER ONE RETAILERS		
RANK	COMPANY	CUST. SAT.
1	QuantiSense	48.0
2	Cornell-Mayo	47.0
3	Starmount	46.0
4	PCMS Datafit	45.9
5	AccessVia	43.0
6	Tradestone Software	42.9
7	Reflexis	41.8
8	Akamai	40.6
9	Agilysys	39.6
10	NCR	38.2

LARGE VENDOR LEADERS IN CUSTOMER SATISFACTION		
RANK	COMPANY	CUST. SAT.
1	Air-Watch	40.6
2	First Data	40.3
3	Jesta I.S.	40.0
4	Retalix	39.8
5	Toshiba Tec (IBM POS)	39.2
6	IBM	39.1
6	Teradata	39.1
7	JDA	39.0
7	Fujitsu	39.0
8	VeriFone (GlobalBay)	38.9
9	Dell	38.8
10	MicroStrategy	38.6
10	Microsoft	38.6

CUSTOMER SATISFACTION BY MID-SIZE RETAILERS		
RANK	COMPANY	CUST. SAT.
1	QuantiSense	49.2
2	RTC Quaterion	47.6
3	ECR Software	47.1
4	JDS Solutions	46.0
5	Air-Watch	44.0
6	Celerant Technology	43.9
7	TXT Maple Lake	43.8
8	UTC Retail	41.8
9	Tradestone Software	40.8
10	VeriFone (GlobalBay)	39.9

MID-SIZE VENDOR LEADERS IN CUSTOMER SATISFACTION		
RANK	COMPANY	CUST. SAT.
1	QuantiSense	49.7
1	RTC Quaterion	49.7
2	ECR Software	49.1
3	Cornell-Mayo	48.1
4	PCMS Datafit	47.4
5	JDS Solutions	47.0
6	Celerant Technology	46.9
7	Tradestone Software	45.5
8	Starmount	45.2
8	AccessVia	45.2
9	Reflexis	45.0
10	Manthan Systems	44.8

BROAD SUITE VENDOR LEADERS IN CUSTOMER SATISFACTION		
RANK	COMPANY	CUST. SAT.
1	QuantiSense	49.7
2	ECR Software	49.1
3	PCMS Datafit	47.4
4	JDS Solutions	47.0
5	Celerant Technology	46.9
6	Manthan Systems	44.8
7	UTC Retail	43.8
8	Raymark	42.8
9	Jesta I.S.	40.0
10	Retalix	39.8

TARGETED SOLUTION VENDOR LEADERS IN CUSTOMER SATISFACTION		
RANK	COMPANY	CUST. SAT.
1	RTC Quaterion	49.7
2	Cornell-Mayo	48.1
3	Tradestone Software	45.5
4	Starmount	45.2
4	AccessVia	45.2
5	Reflexis	45.0
6	TXT Maple Lake	43.6
7	Air-Watch	40.6
7	Agilysys	40.6
8	First Data	40.3
9	NGC	39.8
10	Toshiba Tec (IBM POS)	39.2



## VOICE OF THE CUSTOMER

Breaking out Customer Satisfaction into 10 essential Criteria

AS PREVIOUSLY noted the Software Leaderboard uses several unique terms consistently throughout the report. The two principal ones are Customer Satisfaction and Retail Concentration, both of which are called Categories in LeaderBoard terminology. Each of these terms is described in detail in separate sidebars in this chapter.

The third Category is Revenue Factor. These three Categories, which are converted into point totals, are added together to create the overall scores for many Top 10 lists that appear throughout the LeaderBoard.

But not all lists feature multiple categories. The lists in this chapter feature the top 10 vendors in the 10 Criteria that comprise the overall Customer Satisfaction score. Dividing the Customer Satisfaction score into 10 individual elements and adding them together to create an overall score removes it from being a broad generalization.

Instead of forcing retail evaluators to merge all elements of software usage into a single rating, the Software LeaderBoard breaks out Customer Satisfaction into 10 specific Criteria, each of which carries its own unique score and weight within the overall total.

Many software vendors track customer satisfaction through internal survey methods, but few, if any, break it out in the same depth as the LeaderBoard study. Fewer still ask the most critical question of all: How strongly would you recommend this software vendor to others?

Most internal customer satisfaction

### LEADERS IN OVERALL PERFORMANCE

RANK	COMPANY	CUST. SAT.
1	JDS Solutions	5.00
1	QuantiSense	5.00
2	RTC Quaterion	4.86
3	ECR Software	4.82
4	Manthan Systems	4.75
5	TXT Maple Lake	4.60
6	PCMS Datafit	4.56
7	Celerant Technology	4.50
7	Raymark	4.50
7	Starmount	4.50
8	Tradestone Software	4.48
9	Cornell-Mayo	4.29
10	AccessVia	4.15

### LEADERS IN TOTAL COST OF OPERATIONS

RANK	COMPANY	CUST. SAT.
1	RTC Quaterion	4.86
2	ECR Software	4.71
3	QuantiSense	4.67
4	PCMS Datafit	4.50
4	Raymark	4.50
5	JDS Solutions	4.44
6	Reflexis	4.40
7	Starmount	4.38
8	Celerant Technology	4.30
9	Cornell-Mayo	4.29
10	Manthan Systems	4.25

## Customer Satisfaction

Of the big three Categories, which are explained in detail in this chapter, Customer Satisfaction is the one that gives the Software LeaderBoard its distinctive identity. Essentially, the Customer Satisfaction score is the voice of retailers weighing in on their experiences using solutions from software vendors.

The Customer Satisfaction Category counts for a maximum of 50 points out of a possible 105 points that are used to rank software vendors in the Top 20 master list and several other lists throughout the study. The other Categories that comprise the remaining 55 points are explained in this chapter.

The Customer Satisfaction score is an aggregate of the sum of 10 individual Criteria, each of which is worth a maximum of five points. One point is awarded for the lowest level of satisfaction and five for the highest level. The points are recorded by qualified retailers who evaluate software vendors they have experience using within the past 12 months.

The 10 Criteria are: Overall Performance (a measure of ease of use, speed, convenience, etc.), Return on Investment, Total Cost of Ownership, Technology Innovation, Product Reliability, Ease of Installation/Integration, Ease of Administration/Maintenance, Quality of Support, Quality of Service, and Status of Recommendation (a measure of how strongly retailers would recommend vendors to their colleagues).

The LeaderBoard methodology, especially its emphasis on Customer Satisfaction, is based on models currently in use by the Zagat Survey, J.D. Power and Associates and Consumer Reports. The LeaderBoard owes a great debt to these outstanding research firms and strives to live up to their high standards.





# RIS SOFTWARE LEADERBOARD '12

## CRITERIA LEADERS

studies produced by software vendors are product focused – did it work, how well did it work, would you buy more software from us? The 10 Criteria that comprise the Customer Satisfaction rating for the LeaderBoard are a mix of technical and experiential ratings, and all are focused on customer concerns as opposed to product concerns.

One final point about Customer Satisfaction scores in the LeaderBoard,

notably in the Top 20 master list that kicks off the LeaderBoard report: a small weighting is given in this Customer Satisfaction score and nowhere else in the LeaderBoard.

The weighting is based on the size of the retailer client base and it ranges from one to three points. The reason it appears in the Top 20 Master list is that this is the one list that spotlights large, end-to-end solution providers.

### LEADERS IN RETURN ON INVESTMENT

RANK	COMPANY	CUST. SAT.
1	ECR Software	4.82
2	QuantiSense	4.78
3	RTC Quaterion	4.71
4	JDS Solutions	4.67
5	PCMS Datafit	4.63
6	TXT Maple Lake	4.60
7	Starmount	4.57
8	NGC	4.50
8	Raymark	4.50
9	Celerant Technology	4.40
10	Air-Watch	4.33

### LEADERS IN TECHNOLOGY INNOVATION

RANK	COMPANY	CUST. SAT.
1	Manthan Systems	5.00
2	QuantiSense	4.89
3	Starmount	4.86
4	PCMS Datafit	4.75
5	RTC Quaterion	4.71
5	Cornell-Mayo	4.71
6	JDS Solutions	4.56
7	ECR Software	4.53
8	Celerant Technology	4.45
9	Reflexis	4.29
9	Air-Watch	4.29
10	NGC	4.25

### LEADERS IN PRODUCT RELIABILITY

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	5.00
1	Manthan Systems	5.00
2	TXT Maple Lake	4.80
3	QuantiSense	4.78
4	ECR Software	4.65
5	PCMS Datafit	4.63
6	JDS Solutions	4.56
7	RTC Quaterion	4.50
8	Tradestone Software	4.39
9	Reflexis	4.36
10	Celerant Technology	4.30

### LEADERS IN INSTALLATION & INTEGRATION

RANK	COMPANY	CUST. SAT.
1	QuantiSense	4.89
2	Cornell-Mayo	4.86
3	RTC Quaterion	4.79
4	JDS Solutions	4.56
5	ECR Software	4.53
6	PCMS Datafit	4.50
7	Reflexis	4.36
8	Celerant Technology	4.35
9	UTC Retail	4.29
10	AccessVia	4.27

## Retail Concentration

While Customer Satisfaction is a measurement derived from retailer feedback, Retail Concentration is derived from information submitted by vendors and independent research.

Each year *RIS News* hosts a webinar about Software LeaderBoard methodology that is attended by scores of software vendors. The webinar explains in detail the LeaderBoard process and methodology, especially areas that may have had minor modifications, such as Retail Concentration, which awards one point for each retail application or module the vendor offers for general availability from a list created by *RIS News*.

In small ways each year, Retail Concentration is modified to reflect the evolution of the retail technology environment. While the maximum Retail Concentration score of 50 has remained the same for the past four years, the individual applications that comprise the total have changed.

Many applications have been core elements of the retail tech stack for years, such as work-force management, merchandising, POS and payment processing. But priorities shift and innovations continually emerge. Five years ago mobility, mobile commerce and social selling were insignificant factors in retailing and today they are among the hottest growth areas in the industry.

Most vendors go to a secure LeaderBoard website to record the applications they offer to retailers, the total of which becomes their Retail Concentration score. However, not all vendors do this and it is not a requirement to appear in the LeaderBoard rankings.

*RIS News* does independent research into all vendors that appear in the rankings by going to their websites to determine their Retail Concentration score. As any retailer who has visited vendor websites can confirm, this is no easy task. Many vendor websites are confusing (possibly intentionally), outdated and filled with information that is short on specifics. Researchers cut through the confusion to ensure applications are generally available and not vaporware.



# RIS SOFTWARE LEADERBOARD '12

## CRITERIA LEADERS

Vendors like these have grown large through a long history of organic growth or through acquisition. As a result, they tend to have large client bases. There are exceptions to this rule, but this has been a consistent trendline over the years.

To more accurately reflect what it means to be an end-to-end solution provider, which is the heavyweight

category in the software industry, the LeaderBoard gives a slight weighting to reflect their large client bases and it is reflected in the Customer Satisfaction score.

All Customer Satisfaction scores in this chapter and all other chapters, with the exception of the Top 20 list, have no weighting and purely reflect the evaluations of retailers. •

### LEADERS IN ADMINISTRATION & MAINTENANCE

RANK	COMPANY	CUST. SAT.
1	Cornell-Mayo	4.71
2	QuantiSense	4.67
3	PCMS Datafit	4.63
4	ECR Software	4.59
5	RTC Quaterion	4.57
6	JDS Solutions	4.56
7	Celerant Technology	4.55
8	Manthan Systems	4.50
8	Raymark	4.50
9	Agilysys	4.40
10	Reflexis	4.29

### LEADERS IN QUALITY OF SERVICE

RANK	COMPANY	CUST. SAT.
1	QuantiSense	5.00
1	Cornell-Mayo	5.00
2	RTC Quaterion	4.86
3	ECR Software	4.76
4	Starmount	4.71
5	TXT Maple Lake	4.60
6	JDS Solutions	4.56
7	UTC Retail	4.50
7	PCMS Datafit	4.50
7	Manthan Systems	4.50
8	Tradestone Software	4.36
9	Celerant Technology	4.30
10	Reflexis	4.29

### LEADERS IN QUALITY OF SUPPORT

RANK	COMPANY	CUST. SAT.
1	QuantiSense	5.00
1	Cornell-Mayo	5.00
2	PCMS Datafit	4.88
3	RTC Quaterion	4.86
4	ECR Software	4.82
5	Manthan Systems	4.75
6	UTC Retail	4.71
7	JDS Solutions	4.56
8	Starmount	4.43
9	Reflexis	4.29
10	Raymark	4.25

### LEADERS IN RECOMMENDATION STATUS

RANK	COMPANY	CUST. SAT.
1	RTC Quaterion	5.00
1	QuantiSense	5.00
1	Cornell-Mayo	5.00
2	ECR Software	4.88
2	PCMS Datafit	4.88
3	Manthan Systems	4.75
4	Starmount	4.71
5	JDS Solutions	4.56
6	Celerant Technology	4.55
7	Raymark	4.50
8	Reflexis	4.43
9	Tradestone Software	4.41
10	TXT Maple Lake	4.40

## Revenue Factor

Of the three Categories that comprise all multi-Category lists the one that has the smallest impact on the total score is Revenue Factor, which accounts for five points out of a possible 105.

Many software vendors do not like to publish their retail-specific revenue for several reasons. One is if they are a private company and do not report revenue. Another is if they are a large, multi-industry company and do not break out retail revenue in publicly available financial disclosures.

As a result, the LeaderBoard does not provide specific revenue figures. Instead, a Revenue Factor is used that is broken out into five ranges that are assigned points. The ranges are as follows: vendors that have less than \$20 million in retail revenue get one point; vendors with retail revenue between \$20 million and \$50 million get two points; vendors with retail revenue between \$50 million and \$125 million get three points, vendors with retail revenue between \$125 million and \$250 million get four points; and vendors with retail revenue of more than \$250 million get five points.

Vendors that do not reveal their retail revenue get one point unless RIS can make an independent determination based on publicly available sources.

The reason for a weighting factor that favors large companies is based on the benefits that come with size. These benefits include the advantages of financial stability, large client bases to acquire domain expertise, and the ability to build scalable software that can handle the huge data loads generated by mega-retailers. Vendors like these deserve some extra credit for the benefits that go with size.

However, it must be noted that size works the other way as well and small vendors also have their own distinct advantages. Their smaller size enables them to be more nimble and able to focus on delivering outstanding customer service to a limited roster of clients. This phenomenon is borne out in many charts that appear in the LeaderBoard where smaller companies can be seen outscoring larger companies in the rankings.



## REVENUE OPTIMIZATION

Retail revenue is a decisive factor for software solutions and vendors

**IN THIS CHAPTER REVENUE** is the essential differentiator. The 10 Criteria that comprise the aggregated Customer Satisfaction score are featured in charts divided neatly into two halves based on retailer revenue: on the left side are vendors with the highest scores in a single Criterion as voted by Tier One retailers, and on the right side are vendors with the highest scores in the same Criterion as voted by Mid-Size retailers.

Tier One retailers are defined as those with revenue greater than one billion dollars and Mid-Size retailers as those with revenue less than a billion dollars. In both cases a minimum voting pool of five retailers is required.

This type of breakout makes for interesting analysis on many levels. For one thing the voting pool of retailers is distinctly different on each side of the chart with zero overlap. In many other charts in the study retailers of all sizes are grouped together to create one score.

The charts in this chapter indicate that size clearly matters. Retailers vote for distinctly different vendors based on factors that are influenced by amount of annual revenue they generate and software vendors cannot easily satisfy both ends of the spectrum. Software solutions and the vendors that produce them are essentially size specific, at least as far as Customer Satisfaction is concerned.

Evidence of this is found by noting the small number of vendors that appear on both sides of the ledger. These

do-it-all performers include QuantiSense, Tradestone Software and AccessVia. This analysis is noteworthy because many software vendors often

claim their solutions serve large and small retailers alike. Evidence in this chapter argues otherwise.

Another reason few vendors appear

### 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	QuantiSense	5.00	1	JDS Solutions	5.00
2	Starmount	4.67	1	QuantiSense	5.00
3	Tradestone Software	4.53	2	ECR Software	4.87
4	PCMS Datafit	4.43	3	RTC Quaterion	4.85
5	AccessVia	4.23	4	TXT Maple Lake	4.75
6	Cornell-Mayo	4.17	5	Celerant Technology	4.50
7	Akamai	4.14	6	Tradestone Software	4.25
8	Toshiba Tec (IBM POS)	4.00	7	UTC Retail	4.14
9	First Data	3.91	8	VeriFone (GlobalBay)	4.00
10	SAP	3.88	8	Air-Watch	4.00

### 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	QuantiSense	4.75	1	RTC Quaterion	4.85
2	PCMS Datafit	4.50	2	ECR Software	4.73
2	Starmount	4.50	3	QuantiSense	4.60
3	AccessVia	4.35	4	Air-Watch	4.50
4	Reflexis	4.25	5	JDS Solutions	4.44
5	Tradestone Software	4.21	6	Celerant Technology	4.30
6	Cornell-Mayo	4.17	7	TXT Maple Lake	4.25
7	Jesta I.S.	4.00	8	UTC Retail	4.14
8	Island Pacific	3.80	9	Revionics	4.00
9	Dell	3.79	10	AccessVia	3.86



# RIS SOFTWARE LEADERBOARD '12

## TIER ONE & MID-SIZE LEADERS

on both sides of the charts is the need to have large client bases in both revenue breakouts. Some software vendors are relatively small and have small client bases. As a result, they have difficulty in getting 10 clients evenly divided into Tier One and Mid-Size

groupings to vote for them.

An additional point to note in these charts is the achievement of the perfect Customer Satisfaction score, a rare feat in retail software considering how judgmental CIOs can be. Stellar vendors that achieve perfec-

tion in several Criteria in this chapter include QuantiSense, JDS Solutions, Air-Watch, Starmount and Cornell-Mayo. This is the ultimate short list in the LeaderBoard and a feat that speaks highly of the vendors that have achieved it.

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	Starmount	4.80	1	QuantiSense	5.00
2	PCMS Datafit	4.50	1	Air-Watch	5.00
2	QuantiSense	4.50	2	ECR Software	4.80
3	AccessVia	4.31	3	TXT Maple Lake	4.75
4	Cornell-Mayo	4.17	4	RTC Quaterion	4.69
5	Tradestone Software	4.11	5	JDS Solutions	4.67
6	Reflexis	4.09	6	Celerant Technology	4.40
7	Akamai	3.86	7	Tradestone Software	4.25
8	SAS	3.80	8	UTC Retail	4.00
9	Fujitsu	3.78	8	Retalix	4.00

LEADERS IN PRODUCT RELIABILITY 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	5.00	1	TXT Maple Lake	4.75
1	QuantiSense	5.00	2	ECR Software	4.67
2	PCMS Datafit	4.67	3	QuantiSense	4.60
3	Akamai	4.43	4	JDS Solutions	4.56
4	Tradestone Software	4.42	5	RTC Quaterion	4.46
5	Island Pacific	4.40	6	Fujitsu	4.43
6	AccessVia	4.35	7	Toshiba Tec (IBM POS)	4.40
7	Reflexis	4.27	8	Celerant Technology	4.30
8	Agilysys	4.20	9	Air-Watch	4.25
9	Teradata	4.17	9	Tradestone Software	4.25

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	Starmount	5.00	1	QuantiSense	5.00
2	Cornell-Mayo	4.83	2	Air-Watch	4.75
3	QuantiSense	4.75	3	RTC Quaterion	4.69
4	PCMS Datafit	4.67	4	JDS Solutions	4.56
5	Tradestone Software	4.21	5	ECR Software	4.53
6	Reflexis	4.18	6	Celerant Technology	4.45
7	KSS Retail	4.17	7	Tradestone Software	4.25
8	AccessVia	4.15	7	Revionics	4.25
9	Akamai	4.14	8	Toshiba Tec (IBM POS)	4.20
10	SAS	4.00	9	Retalix	4.14

LEADERS IN 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	Cornell-Mayo	4.83	1	QuantiSense	5.00
2	QuantiSense	4.75	2	RTC Quaterion	4.77
3	PCMS Datafit	4.33	3	JDS Solutions	4.56
4	AccessVia	4.31	4	Air-Watch	4.50
5	Reflexis	4.27	5	ECR Software	4.47
6	NCR	4.25	6	Celerant Technology	4.35
7	Tradestone Software	4.21	7	UTC Retail	4.29
8	Starmount	4.20	8	Revionics	4.25
9	Akamai	4.00	9	AccessVia	4.14
9	Island Pacific	4.00	10	HP	4.08





# RIS SOFTWARE LEADERBOARD '12

## TIER ONE AND MID-SIZE LEADERS

One final point of interest about the charts in this chapter pertains to the range of scores from top to bottom in each of the lists. For Product Reliability and Recommendation Status, for example, all vendors in the top 10 on both sides of the chart scored well

above the 4.0 mark in Customer Satisfaction. Other charts that had high scores include Technology Innovation, Ease of Installation/integration, Ease of Administration/Maintenance, Quality of Support and Quality of Service.

However, for several Criteria the

range of scores was lower, indicating that Customer Satisfaction is harder to achieve in Overall Performance, Total Cost of Operation and Return on Investment. Vendors that score well in these Criteria are doing so in a challenging environment. •

LEADERS IN 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	Cornell-Mayo	4.83	1	QuantiSense	5.00
2	PCMS Datafit	4.67	2	RTC Quaterion	4.62
3	Agilysys	4.40	3	ECR Software	4.60
4	AccessVia	4.31	4	JDS Solutions	4.56
5	QuantiSense	4.25	5	Celerant Technology	4.55
6	Reflexis	4.18	6	Air-Watch	4.50
7	Akamai	4.14	7	TXT Maple Lake	4.25
8	Tradestone Software	4.11	8	UTC Retail	4.21
9	Starmount	4.00	9	Toshiba Tec (IBM POS)	4.20
9	Aldata	4.00	10	VeriFone (GlobalBay)	4.13

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	5.00	1	QuantiSense	5.00
1	QuantiSense	5.00	2	RTC Quaterion	4.85
2	PCMS Datafit	4.83	3	ECR Software	4.80
3	Starmount	4.80	4	UTC Retail	4.71
4	Tradestone Software	4.28	5	JDS Solutions	4.56
5	AccessVia	4.27	6	TXT Maple Lake	4.50
5	Reflexis	4.27	7	VeriFone (GlobalBay)	4.25
6	Agilysys	4.20	8	Celerant Technology	4.20
7	Akamai	4.17	9	AccessVia	4.14
8	Teradata	4.00	10	Air-Watch	4.00

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	Cornell-Mayo	5.00	1	QuantiSense	5.00
1	Starmount	5.00	2	RTC Quaterion	4.85
1	QuantiSense	5.00	3	ECR Software	4.80
2	PCMS Datafit	4.50	4	JDS Solutions	4.56
3	Tradestone Software	4.39	5	UTC Retail	4.50
4	AccessVia	4.35	5	TXT Maple Lake	4.50
5	Agilysys	4.20	6	Celerant Technology	4.30
6	Reflexis	4.18	7	Tradestone Software	4.25
7	Akamai	4.00	8	VeriFone (GlobalBay)	4.13
7	Teradata	4.00	9	AccessVia	4.00

LEADERS IN RECOMMENDATION STATUS 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	5.00	1	QuantiSense	5.00
1	Starmount	5.00	1	RTC Quaterion	5.00
1	QuantiSense	5.00	2	ECR Software	4.87
2	PCMS Datafit	4.83	3	JDS Solutions	4.56
3	Tradestone Software	4.44	4	Celerant Technology	4.55
4	AccessVia	4.42	5	Air-Watch	4.50
5	Akamai	4.29	6	Retalix	4.29
6	Reflexis	4.27	7	HP	4.25
7	Agilysys	4.20	7	VeriFone (GlobalBay)	4.25
8	NCR	4.14	7	Tradestone Software	4.25



## TAKING A CLOSER LOOK

Five software companies that stand apart from the top-10 lists and point totals

**IN MANY WAYS** the Software LeaderBoard is a collection of lists, so in this section we break free of the point totals and focus on a few companies that deserve special recognition for their technology achievements in 2012.

Many of these companies are featured in one or more of the LeaderBoard lists, while others just missed appearing by a couple of decimal points. All are near the top of the rankings in many of the more than 40 charts.

### DEMANDWARE

Demandware's on-demand e-commerce platform combines leading-edge functionality and flexibility delivered with the operational and TCO benefits of the on-demand model. LeaderBoard voters recognized the company's strengths in the apparel/footwear category, where Demandware ranked ninth in Customer Satisfaction. Recent retail deployments at Pacific Sunwear, Deckers Outdoor, Browns Shoes, Quiksilver and Finish Line showcase solutions that operate across channels and in multiple countries.

### EPICOR

Offering an end-to-end retail suite that includes planning, sourcing, mer-

chandising, stores, mobility, cross-channel selling, CRM, loss prevention and business intelligence, Epicor serves hundreds of retailers in multiple verticals across the globe. The company's 2011 merger with Activant gave the combined company additional domain expertise in automotive, hardlines, lumber and specialty retailing. LeaderBoard voters recognized Epicor's breadth and its presence in the retail industry: in addition to ranking #13 in the overall rankings, Epicor came in fourth in the retail concentration rankings, at #9 among specialty retail leaders and at #10 among top vendors serving Tier 1 retailers.

### REDPRAIRIE

Over the last several years, RedPrairie has enhanced its retail portfolio with a number of strategic acquisitions that provided it with solutions in mobility, e-commerce and workforce management. The most recent (and biggest) combination came in November 2012 when RedPrairie and JDA Software announced they would merge in a deal valued at \$1.9 billion, creating a combined company with more than \$1 billion in revenues. RedPrairie's wide range of retail offerings was reflected

by LeaderBoard voters, who gave the company the #8 spot among grocery leaders, the #10 ranking in mid-size retail leaders, and placed the company at #14 overall.

### KRONOS

Kronos has left its mark this year in the LeaderBoard by placing highly in the Recommendation Criteria portion of the overall Customer Satisfaction Category and finishing just out of the top 10. The company recently launched a Workforce Tablet and Workforce Task Management application to expand its technology portfolio. These applications simplify store operations with a streamlined approach to create, approve, execute and verify tasks at any time and anywhere. Kronos applications are designed for a new era of innovation at work that enables organizations to manage in the moment.

### REVIONICS

Revionics' predictive analytics and demand-based optimization solutions help retailers maximize profitability through merchandising. The company recently acquired SkuLoop, a provider of a suite of tools that allows retailers to build digital promotions quickly and effectively, and Retail Optimization. The acquisitions extend Revionics' end-to-end Merchandise Optimization solutions with the addition of Social Commerce, Life Cycle Price Optimization Solutions, cloud-based Assortment, and Micro and Macro Space Optimization Solutions. •

---

All are near the top of the rankings  
in the more than 40 charts  
in the Software LeaderBoard

# RIS SOFTWARE LEADERBOARD '12

THANK YOU TO OUR SPONSORS



**ACCESSVIA**

**CELERANT**  
TECHNOLOGY CORP  
*Real-time Retail*

**E<sup>TM</sup> ECRS**  
RETAIL AUTOMATION SOLUTIONS

**iP**  
**Island Pacific**  
The one that works

**JDS**SOLUTIONS

**ETA** I.S.  
YOUR VISION, OUR SOLUTION

 **KRONOS**<sup>®</sup>

**MicroStrategy**<sup>®</sup>

 **QUANTISENSE**  
RETAIL **INSIGHT**. PROFITABLE PLAYS.

**REFLEXIS**  
**REFLEXIS**

**STARMOUNT**  
we make shopping sense

 **TradeStone**  
SOFTWARE