POI
PROMOTION OPTIMIZATION INSTITUTE

Promotion Optimization Institute, LLC

Vendor Panorama for Retail Execution and Monitoring in Consumer Goods 2017

Table of Contents

Introduction

Regardless of the route to market, consumer goods companies and their distribution partners must be able to execute at the individual store level because if the product is not available, merchandized correctly, and promoted effectively, the consumer will likely purchase from a competitor. Despite efforts to improve in-store execution over many decades, success remains rather elusive. Consumer goods companies themselves continue to tell us that they are not satisfied with their ability to execute at the store level. In the 2016 Promotion Optimization Institute TPx and Retail Execution Survey, we found that only 20% of respondents said that they were satisfied with their ability to execute at the store level, with another 48% saying that they were only somewhat satisfied. In 2017, however, the percentage that are satisfied dropped by 1 percentage point while those that are somewhat satisfied dropped by 3. This is not necessarily alarming, but we are always working towards improvement as an industry, though we have not yet watched it broaden significantly.

Scope of this Analysis

The 2017 survey questioned 77 consumer goods companies of varying sizes and geographic presences around the world. These responses included 22 individuals and 42 companies that responded to our 2016 survey for a total of 110 unique consumer goods companies surveyed across the two years. This provides us with a longitudinal view of these results, which helps POI as an industry advocate and a best practices forum to help its members improve in-store execution through various methods, including this evaluation.

Key Insights

- Change management continues to be a big industry challenge, as evidenced by survey data. The vast majority of vendors that we reviewed offer an approach to change management. However, we have found that it is either not adequately utilized or overlooked completely due to a desire to get the Retail Execution solution launched. 87% of 2017 survey respondents still have issues with change management, which is 11 percentage points worse than in 2016.

- The Retail Execution space is making strides in providing greater off-line capabilities to enable more analytics and complex pricing approaches.

- Having a single, global solution for retail execution and monitoring is still much closer to aspiration than reality due to disparities in solution cost, underlying business process, and ability to provide localized support.

- The quality of the user experience (UX) in Retail Execution has benefitted from strong development and configuration tools. We have never seen so many quality solutions from a usability perspective.

Only 20% of respondents said that they were satisfied with their ability to execute at the store level, with another 48% saying that they were only somewhat satisfied.

Recommendations

- Prioritize functionality above delivery method. The lines between SaaS, managed services, hosted private cloud, and public cloud are blurrier than ever and highly dependent on where the deployment(s) will take place. On-premises is still as popular as cloud (when combining public and private cloud). We also still see companies doing customization to the actual code base. Hence, don't be lead to believe that you have to take less functionality or flexibility because everybody is moving to the cloud, because this is simply not the case.

- Continue to prioritize capabilities that will help users be more effective, i.e. to "sell more." Otherwise, why spend the money? These capabilities include retail activity optimization (RAO), image recognition, guided selling, social selling, gamification, voice recognition, and in-flight analytics. Each of these is described in the Product Assessment section below. Our 2017 survey showed that about 75% of respondents do not have the "sell more" capabilities, so they give a significant competitive advantage to those who attain them.

- Recognize that a single solution is not likely to meet your global needs. There is just too much disparity in price, suitability to local requirements, and availability of support to be able to do so. We find that 3-5 solutions are typical for truly global companies.

- Continue to focus on the requirements of non-field users, meaning managers and office-based personnel who support the field. We find that some solutions are quite mature for field users but can have significant limitations for those who have other roles. The same can be said for system administration tools and related personnel. It is highly advantageous to you to be able to manage the configuration of your retail execution, create reports, add users, add fields, or perform other such tasks without involving the IT organization or the vendor.

- Ask for best practices from your vendor. The POI 2017 Survey found that only 26% felt that they received best practices in accordance to their solution. You often have to ask for them. You should find out the background(s) of those who are expected to deliver them. Then, document precisely the sorts of best practices you are looking for and make this part of the scope of work.

> *Prioritize capabilities that will help users be more effective, i.e. to "sell more." … These capabilities include retail activity optimization (RAO), image recognition, guided selling, social selling, gamification, voice recognition, and in-flight analytics.*

Market Overview

Market requirements have not changed significantly in the last 3 years. However, we note the following market trends:

- Lack of a small set of dominant players. There are several small players with Retail Execution revenues of less than $20 Million USD that rival the global or enterprise players. More solution options exist than ever before. There has not been any significant consolidation among vendors in the last year. In this Panorama, we will be evaluating 20+ solutions from 19 vendors

- We still do not see any efforts around developing home-grown solutions and have not for several years. The market is relatively mature and the various vendors offer: solutions-plus-services such as asset management, monthly pay-by-user arrangements as opposed to lump sums up front, best practices baked in from years of experience with multiple manufacturers, and more attractive upgrade paths.

- Analytics and the ability to help a salesperson make informed decisions at the point of sale continue to be key differentiators.

- Retailers are not responding to Retail Execution efforts. Our 2017 survey shows that retailers who gave access to their stores declined by 15 percentage points. Several retailers are considering, or have launched, programs whereby they provide their own retail execution force and charge manufacturers for this service.

Evaluation Criteria

Company Assessment:

Our 2017 survey shows that retailers who gave access to their stores declined by 15 percentage points.

Company Viability

An assessment of the overall organization's growth and growth prospects, practical success of the business unit, the likelihood that the individual business unit will continue investing in the product, will continue offering the product, and will advance the state of the art within the organization's portfolio of products. Given the number of privately held companies that will not disclose financials and the inability of others to disclose financial information specific to the Retail Execution space, we no longer include any financial analysis in this assessment.

Geographic Strategy

The vendor's strategy to direct resources, skills, and offerings to meet the specific needs of the geographies that it is targeting, either directly or through partners, channels, and subsidiaries, as appropriate for that geography and market. Also, a vendor's ability to support these companies on many continents and in multiple languages and the vendor's quantity and quality of clients available to provide references from all three tiers of CG companies. Note: Tier 1 is revenues greater than $1 billion. Tier 2 is revenues of between $250 million and $1 billion. Tier 3 is less than $250 million. The application of tiering can apply at the corporate level for global deployments or at the regional/national level. This is because Tier 1 companies don't necessarily act as such when selecting and deploying solutions at the micro level or for a business segment/geography that is relatively small compared to the overall organization.

Market Responsiveness and Track Record

The ability to respond, change direction, be flexible, and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Deployment Capabilities

A vendor's demonstrated ability to implement on its own and through external service partners to deliver retail execution and monitoring solutions for CG companies as they may require. Also, the ability to facilitate effective change management before, during, and after deployment.

Market Understanding

The ability of the vendor to understand buyers' wants and needs and to translate those into products and services as a set of capabilities as well as best practices. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision. This also includes an in-depth understanding of the CG industry and the needs of companies in this market segment coupled with the ability to act in time to remain relevant. They translate this market understanding into comprehensive functionality and meet a customer's needs within its geographic scope worldwide.

Vertical/Industry Strategy

The vendor's approach to product development and delivery that recognizes unique requirements in the geographies and types of consumer goods companies that it serves. Examples include varied types of manufacturers from food and beverage to tobacco to hard lines to footwear and apparel. Other examples include fully covering the functional footprint within the geography where the vendor operates.

Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

This is not to say that a vendor can cover the globe, but that it can accommodate variations within its targeted geographies. It includes the vendor's strategy to direct resources, skills, and offerings to meet the specific needs of individual market segments, including vertical markets.

Partner Leverage

The demonstrated ability to form and execute meaningful partnering relationships across the breadth of the offering. Such additions to the product offering are ideally embedded, typically transparent to users, and are included in a single contract. Examples include underlying technology, hosting, analytics and data visualization, GPS integration, data cleansing/management, and hardware. Not included in this category is delivery of deployment services.

Company Vision

The ability to attract and retain personnel who will keep the company relevant and growing. Also, the ability to articulate and deliver against a vision of where the retail execution and monitoring space is going in the 2-5 year time horizon and beyond.

Product Assessment

Product Aptness and Flexibility

The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology, and feature sets as they map to current and future requirements that will enhance the competitive advantage of users. Web and mobile technology that is scalable and can support internal sales agents and partner sales agents. The data model can support appropriate hierarchies of customers and products — for example, product family, brand, and stock-keeping unit. The product also supports multiple platforms, such as laptops, tablets, and current forms of handheld devices. The vendor's technology can be expanded to integrate with other companies' legacy solutions, best-of-breed offerings, or syndicated data sources. This criterion also includes important enablers, such as order and data management, mobile printing, barcode scanning, content management, contract management, reporting and analysis, and full on/offline capabilities.

The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology, and feature sets as they map to current and future requirements that will enhance the competitive advantage of users.

Also relevant is how a vendor approaches Retail Execution Optimization, which utilizes point of sale and other internal/external data sets to direct a field sales person to the venues where the greatest impact can be achieved. This not only includes the activities to be executed, but also the optimal routing between venues.

Delivery Flexibility

The vendor's ability to provide its solutions in multiple fashions: on-premises, hosted, public cloud, and multitenant SaaS. Also, the willingness to customize by writing code that would take the solution out of the upgrade path and effectively make it a separate instance.

Solution Completeness

The vendor's ability to enable the key processes for the various types of retail execution and monitoring in which it competes:

- Merchandising
    - Call planning/execution/reporting cycle
    - Image capture
    - Analytics
    - GPS/mapping integration
- Distributor management
    - Call planning/execution/reporting cycle
    - Channel partner visibility
    - Analytics
    - Product/payment integration
    - Order entry
    - Sales collateral management

- Van sales
    - Pre-sales/route sales
    - Order entry
    - Price data management
    - Mobile invoicing
    - Product/payment reconciliation
    - Analytics
    - Price data management while disconnected
- Direct store delivery
    - DEX Integration
    - Call planning/execution/reporting cycle
    - GPS/mapping integration
    - Mobile invoicing
    - Product/Invoice reconciliation

Offline Capabilities

Full ability to handle complex pricing, manage collateral, take orders, and do analytics during disconnected mode.

User Experience

This includes user interface, navigation, and ergonomics throughout the in-store execution cycle as well as the rendering of analytical elements in an appealing/insightful way.

Analytical Capabilities

Analytical abilities involve the ability to derive insights through:

- **Graphics** - Integration of graphical representations, ability to obtain additional information through hovers or drill downs.
- **Dashboards** - User configurable lenses that allow for monitoring multiple dimensions of the business (like KPIs) and provide access to the underlying functionality.
- **Alerts** - Ability for users to specify conditions that will result in a notification within the retail execution solution or through email or text message as appropriate.
- **Reporting** - Predefined reports or embedded report writers.
- **Query** - Embedded technologies such as OLAP to enable data analysis. Also, the ability to export to Excel, manipulate the data, and bring the results back into the application.

Product Vision

The ability to articulate future product needs and have them included in the product as early adopters in the market are prepared to embrace them. Special consideration will be given to capabilities, whether proprietary or embedded through a partnership, which enhance user productivity and enable decision making while at the retail outlet. We refer to these as the "sell more" capabilities and they are as follow:

- **Retail Activity Optimization (RAO)** - This uses recent (daily or more frequent) point of sale (POS) data to determine which stores to visit, what to do while there to drive the greatest return on resources, and the best sequence for reducing drive time. RAO not only optimizes in-store execution, but also reduces cost factors, such as fuel and the personnel costs associated with visiting locations where there is low or no need.

- **Image recognition** - This captures an image of the store shelf and transmits it into the cloud where images of manufacturers' and competitors' brands are analyzed to determine compliance to approved schematics, compliance to some promotional agreement, key performance indicators (KPIs) such as share-of-shelf, and so forth. This drives the activities the salesperson will engage in at that store after the few minutes it takes for the results to come back to that person's mobile device.

- **Guided selling** - This utilizes branching logic, store-specific data, fact-based selling, and graphical delivery to direct activities and maximize impact at the individual store level.

- **Social capabilities** - This harnesses the power of social networks between peers and from managers to peers to give immediate feedback, solve problems, and share best practices from within the retail execution solution without having to resort to a separate tool.

- **Gamification** - This utilizes leader boards, compensation simulation, embedded games, as well as daily/weekly contests as motivators for the field force.

- **Voice recognition** - This enables a field salesperson to speak into a Bluetooth headset for taking orders or entering observations about the store shelf, rather than keying the information into a mobile device.

- **In-flight analytics** - These are capabilities that provide insights that can be harnessed immediately by a field salesperson to improve results. We refer to this area as "in-flight analytics" because it provides a stream of insight about performance and opportunities. Surprisingly, many solutions we have evaluated cannot do this because they cannot work offline or must send transactional data to the central server and back to the device to provide these insights.

- **Virtual reality** - This allows the visualization of an image such as a display module or cooler within the context of an individual retail outlet to provide the best possible understanding of appearance and fit.

Configurability

This refers to the ability to accommodate nuances at various user levels without having to write code. Special consideration is given to solutions that allow non-technical personnel to manage various levels of configuration without involving the vendor. Also, this is where individual users can configure their own solution based on how they like to work or view information.

POI 2017 Best-in-Class Award Recipients

We are pleased to highlight these distinctions to draw attention to how critical these capabilities are, both to CG manufacturers and solution providers. However, we caution users against assuming that "Best-in-Class" is automatically the best fit for them. In a world of good-better-best, the "good" may be good enough, but it is always instructive to know what the "best" has to offer in order to evaluate how it can create competitive advantage.

Note that recipient names in black text indicate second year-in-a-row winners. Those in **blue text** indicate a first-time recipient. Also in blue text is a new functional area, Interactive Customer Presentations.

Functional area	Recipient(s)	Why critical to retail execution?
Mobile UX	eLeader, **MC1** StayinFront, **Univera**	Increased adoption, usability, and engagement.
Desktop UX	Kantar Retail, **SAP**	Addresses the *often overlooked* needs of office-based personnel to analyze and direct field efforts.
Gamification	Accenture CAS, **Asseco, GreatVines,** Kantar Retail	Encourages effort and provides constant feedback through all manner of incentives and programs.
Data Visualization	Accenture CAS, **Klee**	Turns data into insight with meaningful and quickly understood graphics and/or dashboards.
Analytical Insights	**Coheris, Ivy Solutions, SAP, Spring Mobile,** StayinFront	Provides KPIs in unique and innovative ways.
Merchandising	**AFS, eLeader,** SAP	Fully enables this vital function with all necessary roles and analytical requirements.
Distributor Management	Accenture NewsPage **EdgeVerve (back-end)**	Ability to execute with a channel partner – particularly critical in emerging markets, which is a vast opportunity today.
Retail Activity Optimization (RAO)	**Accenture NewsPage,** Asseco	New frontier of being able to use POS data to drive where to go, what to do, and in what sequence to derive the greatest return on resources.
Guided Selling	**AFS, Spring Mobile,** StayinFront	Addresses the issue of sales personnel "not having the information to make decisions while in the store" that has consistently been identified in our POI survey research.
Social Selling	**Klee,** Pitcher, Spring Mobile	Harnesses the power of the team to improve outcomes.
Coaching	**Accenture NewsPage** Asseco, **StayinFront**	Provides formalized feedback loops to address the human element.
Interactive Customer Presentations	**Coheris, Pitcher, StayinFront**	**Maximizes impact at the point of decision. Uses branching logic and interactive capabilities to automatically determine what to show next based on previous input(s).**

Vendor Assessments

Figures 1 through 6 are company and product assessments for the vendors covered in this research. Note that the ratings do not comprise a normal distribution (i.e. as many Above Average as Below Average ratings) because there are many solutions in the marketplace that are not included in this report for various reasons. Hence, ratings are absolute versus the market, and not relative versus other vendors featured in this report. The source for all figures is POI's primary analysis conducted in 2017.

We recommend that this "Harvey Ball" analysis be utilized in concert with the narrative analysis of each vendor as the former only looks at certain criteria. The two in concert will provide a better, more thorough sense for the best fit for your Retail Execution requirements.

Figures 1 – 3: Company Assessments

Company Assessment

Vendor/Category	Company Viability	Geographic Strategy	Responsiveness & Track Record	Deployment Capabilities	Market Understanding	Vertical/Industry Strategy	Partner Leverage	Company Vision
Accenture CAS and Accenture Cloud	●	●	◐	◐	●	●	◐	●
Accenture Newspage	●	●	●	●	●	●	◐	●
AFS Technologies	●	●	◐	●	●	●	●	●
Asseco Bus. Solutions	●	●	●	○	●	●	●	●
Coheris	◐	○	●	●	●	◐	●	○
Comarch	○	●	◐	◐	◐	●	○	◐
EdgeVerve	●	●	●	◐	●	●	○	●

● = Good to very good   ◐ = Average or fair   ○ = Below average

Company Assessment

Vendor/Category	Company Viability	Geographic Strategy	Responsiveness & Track Record	Deployment Capabilities	Market Understanding	Vertical/Industry Strategy	Partner Leverage	Company Vision
eLeader	●	●	●	●	●	●	●	◐
GreatVines	◐	◐	●	●	●	●	●	●
ITC Infotech	◐	●	○	◐	◐	◐	●	◐
Ivy Mobility	●	◐	●	●	●	●	●	●
Kantar Retail	◐	●	◐	●	●	●	◐	●
Klee	●	○	◐	●	●	◐	○	◐
MC1	●	●	◐	◐	●	●	●	◐

● = Good to very good   ◐ = Average or fair   ○ = Below average

Company Assessment

Vendor/Category	Company Viability	Geographic Strategy	Responsiveness & Track Record	Deployment Capabilities	Market Understanding	Vertical/Industry Strategy	Partner Leverage	Company Vision
Pitcher	●	◐	●	◐	●	◐	◐	◐
SAP	●	●	◐	●	●	●	◐	●
Spring Mobile	●	●	●	●	●	●	●	●
StayInFront	●	●	●	●	●	●	●	●
Univera	●	●	●	◐	●	●	●	●
Zaptic	◐	◐	Insufficient data	○	○	◐	●	●

● = Good to very good ◐ = Average or fair ○ = Below average

Figures 4 – 6: Product Assessments

Product Assessment

Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	Solution Completeness	"Seel More" Capabilities	User Experience	Analytical Capabilities	Product Vision	Configurability
Accenture CAS and Accenture Cloud	●	●	● On-premise / ◐ Cloud	●	●	●	●	●
Accenture Newspage	●	●	●	●	●	●	●	●
AFS Technologies	●	●	●	◐	●	●	●	●
Asseco Bus. Solutions	●	●	●	●	●	●	●	●
Coheris	●	●	●	○	●	●	○	●
Comarch	●	◐	●	○	◐	◐	○	●
EdgeVerve	●	○	●	○	◐	●	●	●

● = Good to very good ◐ = Average or fair ○ = Below average

Product Assessment

Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	Solution Completeness	"Seel More" Capabilities	User Experience	Analytical Capabilities	Product Vision	Configurability
eLeader	●	●	●	◐	●	◐	●	●
GreatVines	●	◐	●	●	◐	●	●	●
ITC Infotech	◐	●	◐	○	○	●	◐	◐
Ivy Mobility	●	◐	●	●	●	●	●	●
Kantar Retail	●	●	●	●	●	●	●	●
Klee	●	●	●	●	●	●	◐	●
MC1	●	●	●	◐	●	●	◐	●

● = Good to very good   ◐ = Average or fair   ○ = Below average

Product Assessment

Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	Solution Completeness	"Seel More" Capabilities	User Experience	Analytical Capabilities	Product Vision	Configurability
Pitcher	●	◐	●	●	●	●	◐	●
SAP	●	●	●	●	●	●	●	◐
Spring Mobile	●	●	●	●	●	●	●	●
StayInFront	●	●	●	●	●	●	●	●
Univera	●	●	●	●	●	●	●	●
Zaptic	●	●	○*	●	●	○*	○*	●

*Not a totally valid comparison based on "out-of-the-box" capabilities, whereas the Zaptic approach is for the user organization to define what is in the box and configure accordingly.

● = Good to very good   ◐ = Average or fair   ○ = Below average

Analysis of Representative Vendors

Accenture Cloud, Accenture CAS, and Accenture NewsPage accenture.com/cpgsolutions

Profile: All are part of the Accenture Products & Platforms group as a result of the acquisition of CAS and NewsPage. The latter is still a separate offering for distributor management and salesforce automation centered in Kuala Lumpur. The new cloud offering based on Salesforce.com makes for 3 separate solutions: Accenture CAS, Accenture Cloud, and Accenture NewsPage, although the two former are part of a single development effort, so we will treat them as two sides of a single coin.

Accenture is the largest implementation partner of Salesforce.com globally. This relationship includes most industries outside of consumer goods as well as most geographies.

We will evaluate the two offerings separately.

Accenture CAS and Accenture Cloud

Geographic presence: North America (27%), Latin America (12%), Europe (50%), and Asia/Pacific (11%).

Total consumer goods users (seats): 32,050.

Tiers represented: All.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: Semi-durables (footwear, apparel, furnishings, etc.).

Analytics: Embedded analytical capabilities include continuous tracking of KPIs in the "sales cockpit" even when offline, suggested order quantities, and more management insights for coaching subordinates. Analytics is fully embedded into all solutions. Additionally, it has full reporting and analytics, including OLAP with a single back-end across all retail execution functions except for distributor management. The dashboard U.I. is outstanding for all formats. The future roadmap includes game changing elements such as combining optimization and gamification in one capability so users can see outcomes of their efforts such as badges or even commissions earned. Also, a recommendation engine with natural language ability to ask the system for an explanation. RAO is based on filters for certain in-store circumstances. This gives the user the ability to choose which stores with which issues to address. Thus, the POS data helps to identify the issues and the user can filter or choose which ones to visit and address. Future predictive analytics will provide further insight in the form of possible outcomes.

We rate analytics as Above Average.

Technology architecture/delivery options: The Accenture CAS on-premises solution using Silverlight and SQL databases will be supported into the foreseeable future and will continue to be migrated to HTML 5. The solutions are available as managed services, hosted in the cloud, or on-premises. The Accenture Cloud solution is being built out now on the Salesforce.com platform as a multi-tenant SaaS model. There are not specific timelines for when the Accenture Cloud offering will be on par with the on-premises solution with respect to perfect store, sales rep cockpit, asset management, performance management, or optimization.

Configuration/Customization: The Accenture Cloud offering will utilize the open APIs in Salesforce.com to enable client-specific customizations. Since the core Salesforce.com application is not impacted by customization there will be no impediment to upgrading. Thus, the Accenture Cloud offering offers both configuration and customization.

Service partners that have deployed in the past: 4Brands Reply (Europe), Accenture (Global).

Service partners that are able to deploy but have not yet done so: NEC, Rural Sourcing.

Technology partners: Salesforce.com, Amazon Web Services (cloud hosting), Accenture Cloud Platform (hosting), Microsoft (hosting as well as technology), Zebra (hardware), Honeywell (hardware), Bicocca University, PTV Group (route optimization), Accenture.

User experience: Accenture CAS and Accenture Cloud: Above Average. Both are highly engaging, modern interfaces which continue to benefit from improvement. Some of the aspects we like include how well the layout changes to really accommodate various devices, the ease with which a user can adjust a visit route for new information (such as road construction), the use of corridor search to find an alternate visit nearby, the use of filters to find stores with a certain condition such as out-of-stock, non-compliance, and so forth.

We see the future concept of perfect plan, which brings together all relevant data to provide insight at the store level – and includes voice recognition to interact with the system – as a real game changer.

Vendor trend: 2017 will be a pivotal year for Accenture Cloud with the current version, R4, being released as it is a complete product for merchandising. DSD will not be fully mature until the R5 release in November, 2017. At that time, Accenture CAS and Accenture Cloud will be able to debut side-by-side to meet Retail Execution needs both in concert as well as separately. Accenture CAS has arguably never been able to capture its fair share of users with on-premises alone. The new strategy will now take some time to build momentum around cloud flexibility, but provide more options as a lower price offering with a faster deployment.

Strengths: The Accenture network and depth of global expertise is vast and can help with best practices in most geographies. The user experience is exceptional across the board. Development of key product requirements, such as perfect store, continues to be very strong. Strong analytics and technology that enhance performance with integrated image recognition, gamification, camera-based barcode scanning, more social capabilities to leverage the power of the extended team, support for full-service vending, target setting and commissions, and a strong roadmap for the next 18 months, make for a strong offering.

Challenges: Partnering with Salesforce.com has been a challenge for other retail execution vendors as it often competes with them despite the partnering relationship. Nevertheless, we have seen a greater degree of partnering and discipline over the last year, which bodes well for both parties.

Going forward, we see four key challenges:

1. Building the sales pipeline and getting back into opportunities after being discounted as "not yet fully ready" for close to 2 years.

2. Rationalizing the tendency of Accenture as a services firm to be more motivated to do a custom build on the Salesforce platform than it will be to offer just the services component of an Accenture Cloud deployment.

3. Creating a value perception for Tier 2 and 3 prospects so that they can get a highly innovative solution based on Salesforce and possibly implemented by Accenture at an attractive price.

4. Attracting global services partners, and even more regional ones, to help with deployments.

Adjacent offerings: Data-cleansing services; TPM/optimization; food services; shelf management, including smart image; outsourcing of analytical functions; basic call center and field service capabilities.

Key differentiators: All products offer an exceptional user experience. The Accenture offerings have the advantage of its scale and presence, which is unrivaled. Finally, there is the proven ability to innovate, whether it is RAO, virtual reality, or being able to perform mystery shopper functions on an Apple Watch.

Outlook & prognosis: The key is to build momentum in 2018 and move down market with Tier 2 opportunities as many Tier 1s have already chosen solutions from competitors during the last couple of years while Accenture Cloud has been under development. We believe this will take well beyond 2018 because the perception of Accenture CAS has always been that anything under the Accenture logo must be expensive for a global or local deployment. This, coupled with the belief that it would also involve a protracted timeframe, will impede it catching up in the next 3-5 years to global competitors, many of which already have 2-3 times as many users.

Consider Accenture CAS and Accenture Cloud when: You seek global capabilities for proven solutions that have global reach, but local expertise. Also, when you seek a superior user experience. In addition, if you have designs on Salesforce.com for omnichannel capabilities that extend beyond just Retail Execution.

Avoid Accenture CAS and Accenture Cloud if: You need an experienced global deployment partner other than Accenture, or just want a basic, transactional solution at a low price.

Distinctions: POI Best-in-Class awards for Data Visualization and Gamification.

Accenture NewsPage

Geographic presence: North America (.4%), Latin America (5%), Europe (3%), Asia/Pacific (80%), and Africa (12%).

Total consumer goods users (seats): 102,290.

Tiers represented: All.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: Semi-durables (footwear, apparel, furnishings, etc.).

Analytics: The offering is robust beyond what is required for emerging markets, including: coaching and the ability to look at sales person ratings over time, outlet specific upselling opportunities, and guided selling through branching logic within the visit. The analytical dashboard is quite nice for handheld devices so that graphics render well on a smartphone.

We rate analytics as Above Average, even for use beyond emerging markets.

Technology architecture/delivery options:

A web application delivery framework from either SaaS or on-premises. It can communicate between the mobile device and host through multiple networks, which enhances reliability in spotty markets or infrastructure.

Configuration/Customization: The solutions are highly configurable and offer customization for the on-premises solution if desired. Modules can be enabled or disabled using configuration tools as well as adapted at the business process level.

Service partners that have deployed in the past:

RES (Malaysia), WestPac (Philippines), Accenture (Global), VeriSmart (Thailand), 5 Stars (Vietnam), DWP Group (Pakistan), PT Duta Kalingga Pratama (Indonesia).

Service partners that are able to deploy but have not yet done so: Wireless Dynamics.

Technology partners: Amazon Web Services (cloud hosting), Microsoft (hosting as well as technology), Hosting.com.

User experience: Has an impressive UX that is on par with what we see selling in developed countries. It has a rich, menu-driven functionality and more performance metrics than other solutions of this type, including Playbook for media files and video, perfect store linked to gamification, team selling with leaderboards, ergonomic buttons for entering order quantities, and eLearning to help with onboarding and ongoing training. In particular, we like the ability to take a picture of the shelf and then lasso your brands so that the tool can automatically calculate share-of-shelf. We rate it as Above Average.

Vendor trend: Accenture NewsPage is on a very positive trajectory in new client acquisition and product development in the emerging markets, which we believe to be the key to the global consumer goods marketplace. Its ability to acquire and retain not only multinational, but also local, CG companies is unrivaled.

Strengths: The background of NewsPage in emerging markets coupled with Accenture global resources and influence. The user experience is exceptional. The list of name-brand clients is impressive.

Challenges: Building out a more multi-regional or global deployment partner network will be critical as it builds more momentum across regions. LatAm is coming along nicely, which we actually thought would be more of a challenge. Nevertheless, markets such as Brazil and Argentina are never easy due to the taxation issues as products are sold. We do see the issue of possible transition to the Salesforce platform as still looming out there, although there are no current plans to do so. It is our belief that such a move would not be positive due to its impact on cost structure of the NewsPage product and time required to move functionality to the new platform.

Adjacent offerings: Analytics services, mobile commerce/payments, mobile device testing, social services, various Accenture business services.

Key differentiators: Depth of presence across Asia, the Middle East, and Africa. Advanced functionalities mentioned under User Experience but brought to bear in a solution for emerging markets. Also, dynamic routing and branching logit/guided selling within the sales visit.

Outlook & prognosis: The Accenture NewsPage solution will continue to be a global leader in the emerging markets. Given the chance it could also become a player in developed markets.

Consider Accenture NewsPage when: You want deep expertise in emerging markets, the ability to execute globally, and have no need to settle for a solution that looks like it was built for emerging markets.

Avoid Accenture NewsPage if: You need a global deployment partner other than Accenture.

Distinctions: POI Best-in-Class awards for Distributor Management, Retail Activity Optimization, and Coaching.

AFS Technologies afsi.com

Profile: AFS has grown from its legacy in the foodservice industry to an end-to-end consumer goods platform that includes ERP, TPM, analytics, and retail execution and monitoring through the acquisition of the former Ross Computer Systems, Quofore, Visicom, and, most recently, the POP Company to deepen its presence in Asia. It is now one of 5 vendors with a global presence. For this evaluation, we will view POP as part of the product line because it has one product management structure. Next time around we will evaluate it as a separate AFS product, but with a migration path to the "Enterprise Solutions."

Geographic presence: North America (41%), Latin America (12%), Europe (25%), and Asia/ Pacific (22%).

Total consumer goods users (seats): 169,000.

Tiers represented: All.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: Semi-durables, Tobacco. However, it does cover automotive aftermarket products.

Analytics: The addition of analytics through Microsoft Power BI is a big plus as it offers more authored reporting capabilities, and works well on the smartphone form factor as well. We would like to see it completely embedded as opposed to a separate offering. Nevertheless, being able to have Power BI for deep analytics and the G2 product for data visualization are nice options. The addition of natural language query is very cool and favors both field and office-based users. The customer Fact Sheet is a useful tool for understanding a sales outlet in a single, insightful format. It has some gamification, but we would like to see more in this area to facilitate more comparisons, make it fun, and perform analysis of how to improve versus peers.

For what you get in the base product we rate it as Average for analytics. With the addition of Power BI, which will be integrated into the Enterprise addition in a matter of weeks, we rate it as Above Average.

Configuration/Customization: The solution has Above Average configurability. Customizations unique to a client, while possible, are not preferred by AFS. Instead, their model is to develop the requested functionality and provide it to the entire client base.

Technology architecture/delivery options: A multi-tiered architecture across application services, reporting services, sync/data exchange. All components are proprietary developments by AFS and can be delivered as on-premises, hosted/private cloud, public cloud, or multitenant SaaS.

Service partners: Infosys (Global), Microsoft Consulting Services (Global) Senior Software (Romania), MD Profy (Serbia), ScanMex (Mexico), KronIT (Mexico), IQ (Hungary), Pivotal Polska (Poland), Logicode (Romania), Systems Group (Russia).

Technology partners: Microsoft, Google, Planorama, CACI, Lab4Motion, Nielsen, Rackspace, Zebra, Motorola, Trax, Intermec, Amazon.

User experience: Focus on perfect store is more based on improving the components instead of the overall score, which we like. Having the "campaigns calendar" is very useful for organizing collateral and activities. The Android and Windows versions are the most mature and we rate them as Above Average as they are quite attractive, intuitive, and often guide the user with exceptions-based actions. The only slight exceptions are the Android Mobile and IOS solutions, which require a lot of scrolling up/down and side/side, which may be a personal preference feature that we aren't fond of. The iOS version is a work in progress and needs more esthetics and graphics. We have every expectation that in a couple of release cycles it will be as strong as the other two, but for now we rate it as Average. The tile-based landing page continues to be a strength. It is very ergonomic for functions such as order entry; definitely among the best we have seen. We also like how products are cleverly and ergonomically visualized in the order entry process and how easy it is to set up and manage exceptions to process flows.

The new DSD product that succeeds the Mojo version has a few functional gaps (transfers, settlement, DEX, returns) that are being filled between now and December of this year to bring this product on par. We have every expectation that they will, so if you view the solution between now and then, you may need to make allowance for how these few gaps, either by viewing the prototypes or seeing previous versions (Mojo).

Vendor trend: The company has vastly improved both client acquisition and retention since our report last year. Existing customers are also migrating from the Mojo legacy platform as a vote of confidence. Thus, the trend is positive and promising. This includes a strong roadmap focused on the "sell more" capabilities plus some predictive modeling around sales outcomes at the store level. More than doubling the investment in the Retail Execution solutions also bodes very well for the future.

Strengths: Having an enterprise as well as emerging markets offering that are both proven and growing. The emerging markets offering, POP, is full multitenant SaaS and can be deployed in days. Rather than keep this product only to the emerging markets, it is going to be offered everywhere, which gives users more options globally. Also noteworthy is the global client base with significant percentages of users in all the major regions. Additionally, an end-to-end set of offerings from ERP to business intelligence (BI) to retail execution.

Challenges: The primary challenge continues to lie in integrating the solutions to form a cohesive whole across all the mobility platforms.

Adjacent offerings: Food services, rebate management, ERP, warehouse management, BI, and TPM.

Key differentiators: The depth of the relationship with Microsoft across development, technology and platform, services, and existing software solutions. We don't see Microsoft partnering like this elsewhere. Also, the deep local expertise in key markets like China. On the functionality side, we are impressed with how the solution provides visibility into promotional plans for better alignment of activities, collateral, and for expediting orders that are part of a promotion as opposed to having to wade through the entire pick list.

Outlook & prognosis: Both are positive. AFS is aware of the few product and services that it needs to address to remain a global leader and is actively working on them.

Evaluate AFS when: You seek strong solutions for global, local, or anything in between. Also, if you would like to download the POP Retail Execution solution from the Microsoft AppStore on a "try and buy" basis. If you want trade promotion management capabilities as well from a single vendor.

Avoid AFS if: You want your own customized solution or a single back-end solution across all markets and channels.

Distinctions: POI Best-in-Class awards for Merchandising and Guided selling.

Asseco Business Solutions mobiletouch-fmcg.com, **also** connector-fmcg.com

Profile: A visionary, Europe-headquartered player that is catching on in Asia and North America with a mature offering that is currently deployed across 40 countries. It is a subsidiary of the broader Asseco Group, which has 22,000 employees in various technology and services areas.

Geographic presence: Europe (95%) and AsiaPac/Middle East (5%).

Total consumer goods users (seats): 31,500.

Tiers represented: All. Can also handle all go-to-market modes such as on-trade, off-trade, pharma OTC, and HoReCA (hotel/restaurant/catering).

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: Semi-durables.

Analytics: Excellent mobile analytics and dashboards that include target attainment, incentives, and perfect store scores. Back office reporting is based on Oracle BI for office-based users. Additional analytics to support managers in coaching subordinates are highly differentiated. The triangulation between perfect store, gamification and the field sales fundamentals is exceptional. We rate it as Above Average.

Configuration/Customization: Highly configurable. Custom code is not preferred, but it is an option.

Technology architecture/delivery options: On-premises is still supported but not actively marketed. Hosted/private cloud is the primary delivery option in EMEA. Public cloud through IBM Bluemix is the primary delivery option for APAC and the Americas. An agile development process offers monthly releases to adapt to new customer or market requirements.

Service partners: Because of its size and geographic presence, Asseco performs its own implementations and helps its clients to build out Centers of Excellence to be self-supporting.

Technology partners: Microsoft, Oracle, Sybase, Citrix, Google, Apple, Trax, Planorama, Lab4Motion, CACI (territory optimization), PTV territory optimization), Exceedra, Augment (augmented reality).

User experience: Above Average for field and office-based users; one of the best we've seen. Exceptional gamification for all sorts of incentives, both financial and non-financial. The selling orientation is based on motivating the field force to sell and giving them the tools to effectively do so by helping them to see what they need to do to win. The scope of both gamification and social is unprecedented based on how they help field sales people to succeed. Exceptional use of hovers instead of having to drill down.

Vendor trend: Continued strong positive trend in Europe and now moving into North America and the Middle East en route to becoming a truly global player. Strong focus on innovation. Very strong roadmap and demonstrated ability to deliver against it.

Strengths: The solutions are exceptionally user friendly and offer a single platform for all routes to market. Optimizing field-based activities continues to be a strength with enablers such as leader boards and the first retail activity optimization (RAO) solution that we have seen move beyond prototype capabilities. Asseco has an excellent vision and strong product roadmap in areas such as augmented reality and machine learning to enhance selling processes. It benefits from not having the baggage of legacy solutions or having made acquisitions.

Challenges: We do not see significant challenges for Asseco because it is growing, innovating, and expanding globally.

Adjacent offerings: B2B e-commerce platform for Omnichannel/going digital, a service for receiving and managing channel partner data (Demand Signal Repository), data cleansing, vendor managed inventory (VMI), HRM and coaching, loyalty management offering linked to collecting points from quick response (QR) codes, and an ERP solution.

Key differentiators: Very strong orientation towards user experience and actually making it fun to use. Strong client references, excellent functionality for helping managers coach their subordinates, mobile device management, and expertise with channel partner data. Unique functionality for understanding and leveraging influencer and key opinion leader relationships for brands. This includes understanding affiliations, making relevant invitations, scoring advocacy relationships, and coordinating sampling. Also has contract management capabilities for alcohol/tobacco and southern European requirements.

Outlook & prognosis: We see Asseco as a continued innovator in "sell more" capabilities and ultimately a global leader.

Evaluate Asseco when: You seek tools to sell more and enable a great user experience, specifically if you place high value on perfect store, coaching, motivation, and retail activity optimization (RAO).

Avoid Asseco if: You want to deploy through a third party or are keen to use Microsoft devices right away; the Mobile Touch product is compatible with Android and iOS. MS platform option is not yet available.

Distinctions: POI Best-in-Class awards for Gamification, Retail Activity Optimization and Coaching, gamification.

Coheris coheris.com

Profile: A Europe-centric vendor with a robust field sales automation offering and a focus on the intersection of merchandising, shelf management, and simulation. It has a couple of larger customers but its sweet spot is a field force of less than 300 users that is much more analytical and far less transactional than most. This lends itself to specialty foods, adult beverages, nutraceuticals, confectionary, personal care, and even household products. The presence outside of Europe is due to subsidiaries of European companies that are using the same solutions.

Geographic presence: Latin America (1%), Europe (98%), and Asia/Pacific (1%).

Total consumer goods users (seats): 4,442.

Tiers represented: All tiers.

Solution offerings: Merchandising and distributor management.

Major product sub-segments not covered: Tobacco.

Analytics: Has enhanced KPIs and data sharing capabilities, including integration of ePOS data. The Liberty Insights BI tool is fully integrated and offers "dataviz" for enhanced visualization. Also, it offers pre-built OLAP cubes and data mining and predictive modeling. Usability of analytics is ergonomic and graphical representation is extensive for identifying void items and opportunities. In particular, we like how the analytics are oriented on preparing for a store visit, checking wins and losses after the visit, and preparing for the next visit. It also has an exceptional level of segmentation and prioritization of stores as part of the planning process.

Overall, we rate it as Above Average. In particular, we found the report builder in the "Liberty" BI tool to be very intuitive and easy to use. The Liberty Reporting is actually context aware at the store level. It even has the ability to suggest the best way to visually represent the data based on what is selected. We also like the approach to measuring share-of-shelf, linear feet, and comparing it to objective. The tool is not at all complex, but rather rich in functionality for a salesperson who can and wants to do some analysis.

Configuration/Customization: Coheris offers both configuration and customization if required to create a unique instance of the solution. Configuration is achieved through Microsoft system administration tools.

Technology architecture/delivery options: On-premises and hosted/private cloud. No plans yet disclosed for multi-tenant SaaS.

Service partners: Everis Italy, Business & Decision.

Technology partners: Microsoft (Gold Partner), Trax, Tilbury, and Nowledge (sales book capabilities), Mapquest.

User experience: We rate it as Above Average because of features like building gamification into the order entry process for contests among reps as well as retailers, outstanding plan-o-gram visualization, a very strong store-level dashboard, a multidimensional dashboard based on aspects selected on the left and displayed on the right, an extraordinary mapping capability that provides insight into the territory and store status, and general usability. Noteworthy are the shelf and store simulation tools, which are very rich and engaging. We also like the tile-based home page with graphical KPIs embedded in each tile. The desktop version is also very strong. We rate it as Above Average for all of UX.

Vendor trend: Coheris has improved its focus on more off-the-shelf software by de-emphasizing custom deployments. The corresponding decrease in personnel and lower margin revenue has improved financial results in 2016 and paved the way for more UX improvements and increased innovation. Nevertheless, growth in user count has been very modest.

Strengths: The depth and insightfulness of the analytics, embedded shelf visualization, and a high degree of usability.

Challenges: Reliance on Windows devices without offering solutions for iOS and Android causes prospects to exclude them from consideration. It has relatively few services partners for referrals and relatedly low visibility in the global marketplace, which we believe have inhibited growth. It is a very French-centric company and the bulk of its multinational users are affiliates of French companies. Hence, it can follow these companies and meet their needs well, but struggles to get toeholds elsewhere.

Adjacent offerings: Selling to pharmacies, automatic planogram creation, call center integration, POS data cleansing and management, shelf visualization, and predictive modeling through its Spad solution.

Key differentiators: Very strong user analytics, shelf visualization in 3D, predictive modeling, integration of high quality images for selling point of sales concepts such as display modules, strong guided selling based on individual store needs. Also, it has some requirements unique to the French market such as the "rest period law" related to sales rep work scheduling.

Outlook & prognosis: Coheris has been a player for 20 years, and will continue to be in Europe, but will continue to struggle to establish a global presence.

Evaluate Coheris when: You seek excellent retail execution capabilities in Europe, when a focus on shelf visualization and management through analytics are key, and when you want deep industry expertise that combines technology and business practice.

Avoid Coheris if: You are seeking DSD, a low-cost solution for developing countries, or a global footprint from a single vendor. Also, if you are looking to deploy on Android or iOS platforms.

Distinctions: POI Best-in-Class awards Analytical Insights and Interactive Customer Presentations.

Comarch sfa.comarch.com

Profile: A field sales offering from a division of a European-diversified IT vendor with more than 200 million Euros in revenue.

Geographic presence: Europe (100%).

Total consumer goods users (seats): 4,618.

Tiers represented: Tier 2 and Tier 3.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: Tobacco and consumer semi-durables.

Analytics: Includes a complete analytics offering consisting of predefined tables, KPIs, OLAP cubes, subscription-based push reports, and dashboards. Analytics are highly interactive and have some innovative KPIs. New functionality around suggesting which products to promote, at what price, and where, takes it deeper into "sell more" capabilities. The sales funnel metaphor is useful for showing how leads move to contracts and closed deals in the HoReCa channel. However, they could be more graphically oriented and visually engaging. It has matured but is still not on par with best-of-breed. The lack of a customer dashboard in iOS is an issue. There is a customer dashboard in Android, but it is not graphical in nature. Overall, we rate it as Average.

Configuration/Customization: Both are possible. Comarch is moving toward more multi-tenant and away from separate instances, but a customized solution is still possible.

Technology architecture/delivery options: On-premises, hosted/private cloud, and public cloud. The newly released cloud solution is multi-tenant on the back end, but with a separate database for each user organization. This solution is intended for smaller customers based on the belief that larger ones will still want to customize.

Service partners: Comarch has done its own deployments to date, but it is partnering with the following services organizations going forward:

Russia – Korus Consulting

Turkey – Bizofis

Hungary – Synergon

Bulgaria – Eltrade

Romania – Expert Software SRL

Serbia – Saga

Croatia – CS Computer

Technology partners: Microsoft, Google, Samsung, HTC, Apple, Trax (integrated), Planorama (yet to integrate), Lab4motion.

User experience: It has improved from last year with task management and basic coaching. There are also more guidelines baked in to help users with store-level promotions or validating promotional compliance. We also like the ability to choose which dashboard elements to feature. It has nice product visualization for product pick lists. The UX in iOS is better than in Android. They both cover the bases, but neither is impressive. Overall, we rate the UX as Average.

Vendor trend: Comarch is a competent technical organization and has added some personnel, but still needs some help with elements of design. It grew its user base by only 111 seats since our report last year as it got a couple of deals but had some user defections as well.

Strengths: It has the company backing and resources to invest for growth. It also has deep capabilities across omnichannel and capabilities in HoReCa (hotel/restaurant/catering). Also, there is a roadmap for RAO and gamification.

Challenges: Showing product differentiation and "sell more" capabilities in a highly competitive market. This will be critical to growing beyond Europe.

Adjacent offerings: TPM, ERP, mobile device management, image recognition, POS data management/cleansing.

Key differentiators: Has unique functionality for selling based on recipes and a cool drag-and-drop workflow engine with the ability to add conditions to initiate an alert. One of a very few small companies to offer integrated TPM, Retail Execution, and eCommerce.

Outlook & prognosis: Comarch needs to commit to differentiating and becoming a leader. It has the resources and personnel, but lacks a compelling story that will propel it to grow and to extend beyond its roots in Eastern Europe.

Evaluate Comarch when: You seek a partner with end-to-end capabilities, extensive services, and deep expertise in Eastern Europe. Also, if you are quite involved in the HoReCa channel.

Avoid Comarch if: You seek a global solution, highly evolved user experience, or differentiation through the "sell more" capabilities.

EdgeVerve, an Infosys Company edgeverve.com

Profile: A subsidiary of Infosys that focuses on distributor management back-end solutions and some van sales in APAC through a product line called Trade Edge. This includes a lite duty retail distributor management solution. The real sweet spot is the management of the distributor and POS data, which is actually complementary to many of the vendors in this report, but somewhat out of scope except to the degree that such data is visualized and utilized within the solution to drive greater sales effectiveness.

Geographic presence: AsiaPac (99%), Africa (1%).

Total consumer goods users (seats): 1,250.

Tiers represented: All.

Solution offerings: Distributor management and van sales.

Major product sub-segments not covered: Tobacco, Personal care/health and beauty/pharma OTC.

Analytics: Tableau is the more powerful option and Pentaho the more cost effective. The distributor data quality scorecard is very powerful. It is also nicely focused on the key issues of the multi-tiered distribution market: product movement, indirect trade spend by program and geography, pass through of funds to consumers, impact on category and brand, and ROI. This it does through some out-of-the box BI capabilities, the two common options or something else. For analytics, we rate the distributor management capability as Above Average because of the depth and uniqueness of the insights. For the van sales solution, we rate it as Below Average, which is not entirely fair because it is designed to be a lite-duty, cost effective selling tool with a mini-ERP and not rich in analytical features.

Configuration/Customization: Only configuration. Any customization would have to become part of the broader roadmap.

Technology architecture/delivery options: Multi-tenant SaaS.

Service partners: It is a SaaS offering. Any other services are provided by EdgeVerve.

Technology partners: Red Hat, Linux, Apache Software, Microsoft, Pentaho, PostgreSQL from Tableau, Amazon Web Services, Arvato Services China.

User experience: It features a tile-based entry point with drag and drop attributes and a dashboard for incoming data. It has good usability because it is HTML5 and ergonomic. For DMS, we rate it as Average in usability as it is powerful and the wow factor is in the insights, not the rendering. The van sales module, once again, is a victim of its own attempt to be basic and cost effective. It lacks many "sell more" capabilities such as social, gamification, and image recognition. Instead, it enables selling more by reducing cost to serve and getting out to as many venues as possible in the emerging markets.

Vendor trend: The DMS complementary data management offering has more momentum than van sales, but this is to be expected. Nevertheless, EdgeVerve has a stable of blue chip multinational clients as well as some locals.

Strengths: Data management, harmonization, rapid onboarding of distributors and supporting them across the traditional and modern trade channels.

Challenges: Getting mind share among companies where the people in the head office in some place like Germany, England, or the U.S. don't fully understand the dynamics of the emerging markets and yet are responsible for procuring enabling technology for them. Also, Infosys is very capable at performing consulting work, but we don't see it really excelling as a product company, whether it is this, or some of the other ancillary technologies such as remote asset monitoring. As an example, it is hard to articulate a CG message in an EdgeVerve website dedicated to financial services, B2B financial transaction processing, or procurement. TradeEdge is quite unique and very relevant but it has benefitted from marketing support.

Adjacent offerings: Distributor/wholesaler/retailer data management. Data harmonization through machine learning.

Key differentiators: Much of the differentiation lies out of scope but it is worth mentioning: the ability to enable some retailers to order product from a product graphic oriented storefront, other retailers to be served through van sales, parse the orders to the appropriate distributor for fulfillment, rapidly onboard new distributors in days to constantly expand distribution, and manage the flow and quality of distributor data to provide insights.

Outlook & prognosis: TradeEdge is compelling. It offers a low cost-to-serve way to penetrate the emerging markets. There is also a play for developed countries with certain products from venues such as kiosks, but this product is essential to any company trying to grow in the emerging markets. Given the right marketing and messaging it will be a critical capability for years to come.

Evaluate EdgeVerve when: You need a lite-duty van sales solution with mini ERP in the cloud. And, more particularly, when you need a DMS back-end system. You may even choose to combine some of the more feature rich Retail Execution solutions from this report to have the best of both worlds.

Avoid EdgeVerve if: You want merchandising.

Distinctions: POI Best-in-Class award for Distributor Management.

eLeader eleader.biz

Profile: An innovative mobility company that primarily enables field sales automation in the area of merchandizing, but also has mobile banking and commerce capabilities.

Geographic presence: North America (3%), Latin America (11%), Europe (39%), and Asia/Pacific and Middle East and Asia (47%).

Total consumer goods users (seats): 15,400.

Tiers represented: All tiers. Expertise in consumables, consumer durables, footwear and apparel, and consumer electronics.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: None.

Analytics: Highly engaging graphically across all platforms. Average in insightfulness because it is Microsoft OLAP and Analysis Services with some canned reports, but not much in the way of out-of-the box delivery of insights. Report creation was previously done through a team of SQL developers, but now can be done by eLeader partners or clients through a wizard. The analytical dashboard for desktop/web version can be configured at the individual user level by specifying and organizing various widgets in the same application interface. Overall, we rate analytics as Average.

Configuration/Customization: The server components are based on Microsoft software, but eLeader positions itself as doing each deployment "from scratch." Customization is an option, but is not common. To date, it has only been done twice to where customization resulted in a separate instance of the solution that were outside of the routine upgrade path.

Technology architecture/delivery options: On-premises, hosted/managed services, or cloud. Multitenant SaaS is not offered. Customers still use various versions and have separate databases. Partners do 70% of product support. The rest is provided from Poland.

Service partners: Partner relationships exist for: Morocco, Poland, Colombia, Russia, Turkey, Malaysia, United Arab Emirates, Nigeria, Netherlands, Portugal, South Africa, and Germany. eLeader has asked that we not publish the names of partner companies to avoid them begin solicited by competitors.

Technology partners: Lenovo, Microsoft, Samsung, Dell, HP, Cisco, HERE (mapping), Google.

User experience: UX is very good, particularly in how it renders on a mobile device. Android has now been enhanced to look more like iPhone. Gamification is through earning icons and points, but it lacks the ability to simulate results and see what it will take to win. It has a good stepwise approach to the store visit to ensure compliance. In particular we like the ability that each user has to create a visit dashboard that is suited to how they like to work. We rate it as Above Average. The UX for the desktop version is also Above Average.

There are some unique functionalities, such as performing a credit check before beginning a new order, selecting a distributor that will actually deliver an order, and collecting stock information from the distributor to make sure the product is available for an order. We also like the ease with which it can create a plan-o-gram from the actual picture taken in the store.

Vendor trend: Moderate growth, good vision, and attracting more food and household customers in addition to the relative strength in the electronics sector. Nevertheless, the last year or so has seen user uptake almost exclusively in Poland. Development of a CRM tool called Productive 24, which organizes back office processes, provides fleet management internal communication, and even coordinates conference rooms is interesting, but combined with proprietary image recognition capabilities, is diverting focus away from analytics and some of the "sell more" capabilities like social and deep gamification.

Strengths: The company has a surprisingly global footprint across 80 countries and a demonstrated ability to provide its own implementation and services to those customers. It has also extended way beyond the typical food and beverage to include a large number of consumer electronics companies. It is able to serve China without being behind the local firewall due to Polish roots. It also is getting access to countries like Iran and Pakistan which other vendors avoid or are not welcome.

Challenges: Needs to move beyond a mobility play by adding deeper analytics and "sell more" capabilities in addition to good usability. It is also going to need a strategy for the North American market because of the high concentration of CG companies there.

Adjacent offerings: Barcode scanning, mobile device management, POS data management, field service management, image recognition, CRM/process/document management, and field service management.

Key differentiators: The main differentiator is the quality of the user experience. The eLeader twist on image recognition in that they have their own custom camera with quality control built in to improve image quality. Offers a free trial pilot with the ability to make configuration changes during the pilot.

Outlook & prognosis: We find that eLeader has global potential because it can handle all commercial models and is very flexible. However, it will need to move into the consumer goods global mainstream with the multinational food/beverage/personal care companies to really grow. The diversity of the user base is a real plus, but the moving nature of these aforementioned sectors creates much more demand for retail execution solutions. We believe that it will also need to marshal its resources around enabling more sales and analytics instead of CRM and image recognition, both of which are already highly competitive for any sort of late entry.

Evaluate eLeader when: You seek excellent usability and experience in sectors such as electronics and household goods. Also if you seek to be able to create account-specific plan-o-grams.

Avoid eLeader if: You seek deep analytical capabilities or a single, third-party services partner to support a global deployment.

Distinctions: POI Best-in-class for Mobile User Experience and Merchandising.

GreatVines greatvines.com

Profile: A retail execution solution focused primarily on the wine/beer/spirits segment where the route to market can be both three and two tiered.

Geographic presence: North America (94%), Europe (3%), and Asia/Pacific (3%).

Total consumer goods users (seats): 11,670.

Tiers represented: All.

Solution offerings: Distributor management, retail merchandising.

Major product sub-segments not covered: Small presence in tobacco marketing with an agency and one food client. Otherwise, the focus is on the adult beverage sector.

Analytics: The sweet spot is the focus on:

- **"Leading" indicators** - Activities which, if executed timely and correctly, will drive revenue, such as checking that the product is served by the glass, highlighting any objectives left open from the prior visit, executing staff training, ensuring the product is featured on the menu, getting a display or on a tap handle, getting the product authorized for distribution, and so forth.

- **"Lagging" indicators** - This includes shipments, on-shelf availability, or wholesales sales (depletions) to correlate the activities that were executed with the results, e.g. how an activity such as staff training yielded a 6+ lift in Territory X.

This causality in leading and lagging indicators is very compelling, and the ability to motivate the sales force through attainment of objectives for points or cash effectively closes the cycle. This is done through gamification/incentives based on attainment of points for completing activities. The reality is that no other solution enables this cause and effect relationship quite like GreatVines.

The overall analytics are based on GoodData as standard Salesforce.com components were not found to be suitable. Nevertheless, this is still an option if a user organization so desires. Overall, analytics are highly suited to the adult beverage space requirements such as depletion reporting, location information through Nielsen TD Linx, and a complete selling dashboard.

The solution comes with a data warehouse, GoodData analytics, topline score carding, and the ability to handle two as well as three tiered distribution (i.e. through a distributor).

Because it is so tailored for the analytical requirements of the adult beverage subsegment, it is literally in a class by itself. Few, if any, other retail execution tools we have seen have this level of functionality. It isn't particularly engaging in how it renders graphically, but it is extremely deep on insights. We rate it as Above Average.

Configuration/Customization: It is highly configurable because it is based on Salesforce.com. However, this architecture does not allow for any custom code that would take the solution out of the upgrade path and make it a "one off." All clients receive all upgrades as they come, but are in "turned off" mode until the organization chooses to expose them.

Technology architecture/delivery options: Private cloud and multitenant SaaS.

Offline capabilities are delivered on the GreatVines Mobile solution for iPad and Windows devices. Support for Android Tablet is contingent upon the manifestation of adequate demand in the North American market.

The other option, GreatVines on Salesforce1, uses the Salesforce Lightning Experience to enable in-store capabilities on any device supported by Salesforce1, which means nearly all Android, iOS, and Windows phones and tablets. However, this solution only works on-line, which can be a significant limitation, and it is less and less popular within the portfolio.

Service partners: Bain & Co., The Revolution Group, Equinox Tech Partners, Deloitte, Accenture, Appirio.

Technology partners: Salesforce.com, GoodData.com (analytics), Amazon (hosting).

User experience: The solution is highly ergonomic, but mostly it is efficient and designed to enable users to sell more across modern trade, specialty wine and spirit stores, and the on-trade (pubs, clubs, and restaurants). It has seen some improvements in UX, but we still rate it as Average.

The browser-based solution (based on Lightning) is richer in graphics, has more score carding visualization, and gamification that shows the components of success by aspect. It is overall a better UX than the mobile version and has benefitted from development work, but we still rate it as Average.

Vendor trend: The enhancement of the Pricing application to a hosted, Java-based tool is a real plus for what-if analysis and expanded planning. In particular, it is attractive because it can cache data and work off-line. GreatVines is very well suited to the adult beverage space. Despite being self-financed and without debt, it continues to grow profitably. Offering the product on the Microsoft Store for Windows 10 PC and Tablet devices should drive trial among the myriad of small distillers and vintners who run so lean that they don't take time to look much at such technologies.

Strengths: The level of expertise and delivered functionality for this space is unrivaled. It also has an extensive change management approach from before, during, and after implementation including suggestions for measuring results. Working with a couple of very large distributors/marketing companies helps them to stay on top of emerging requirements as though they have many more than 80 clients.

Challenges: Client acquisition is a challenge because prospects are typically on spreadsheets or something bootstrapped on Microsoft Outlook. There are some large adult beverage companies but they are often linked to their ERP vendor. Thus, GreatVines has to win over the hundreds of small brewers/vintners/distillers that don't tend to be very sophisticated and their high margins often compensate for their selling inefficiencies. Additionally, there is the challenge of being part of the Salesforce.com network where GreatVines has to contend with what it offers in the face of what Salesforce or related service partners promise they can deliver as a custom build.

Adjacent offerings: A basic TPM solution for managing funds and executing promotions, location-based tracking through Geopointe.

Key differentiators: Depth of functionality for adult beverage sub-segment. Expertise in multi-tiered distribution, including depletion data integration, and deep functionality for gamification across multiple functions that is way beyond leaderboards. We liked the ability to click and see nearby stores at any point in time, or to see stores near to a specific venue. The ability and ease of tagging photos within a store visit is really cool.

Outlook & prognosis: Thus far it has been able to be a leader in the US market because of the government-imposed artifice of multi-tiered distribution. Additionally, it has been able to follow some US brands abroad. The key lies in executing abroad where the distribution is typically two tiered and hence a more level playing field with competitors. We don't see GreatVines making significant inroads outside of adult beverage but it is very compelling within its space. It will continue to be the standard in the US and offer solid potential

elsewhere. We would actually like to see this approach of leading and lagging indicators applied to the food/beverage/personal products world with its corresponding gamification because it has a lot to offer.

Evaluate GreatVines when: You are an adult beverage company in the US market and don't have the patience or resources to adapt the functionality of a traditional retail execution to suit your unique requirements. Also, if you value the experience of a partner with a high level of expertise. It is definitely worth a look outside of the US if you feel you can get the local support you require. The product has been translated into Portuguese, French, Spanish, Chinese, Russian, Japanese, and Czech.

Avoid GreatVines if: You have simple, generic retail execution needs such as retail audit on a smartphone.

Distinctions: POI Best-in-class award for Gamification.

ITC Infotech itcinfotech.com

Profile: ITC Infotech is the IT services subsidiary of ITC Ltd, an Indian conglomerate that includes many key consumer goods subsectors: tobacco, food, apparel, stationery, and personal care products. As such, it not only has created a retail execution and monitoring offering for its parent company, but has a solution offering for other companies.

Geographic presence: Latin America (10%), Europe (15%), Middle East and Africa (10%), and Asia/Pacific (65%).

Total consumer goods users (seats): 10,500.

Tiers represented: All. Primarily focused on food and beverage, tobacco, and personal care/beauty/pharma OTC.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: Consumer semi-durables and durables.

Analytics: Because of new development on MS Dynamics framework (the first one we have seen in Retail Execution), ITC Infotech has added Microsoft Power BI to its analytical options. We find this to be very powerful but not particularly pretty, as currently constituted. Nevertheless, some analytical features that impress us include: some unique drill down features on the left and the results revealed on the right, as opposed to drilling within the application; ability to calculate drive times between outlets based on Bing Maps for better visit planning; priority pin-mapping based on a rules based engine; an outlet-level dashboard that includes loyalty program data; and, a matrix for when outlets are open/closed for better route planning. This analytical solution we rate as Average.

Alternatively, ITC Infotech also continues to support Oracle solutions through the Siebel Open UI, with some analytics included. However, they are not particularly deep or insightful because they are highly bespoke analytics for a relatively small number of CG clients. It does have some interesting metrics such as showing the opportunity cost of not stocking an item as compared to peer stores. Nevertheless, we rate analytics as Below Average because there just isn't enough beyond a dashboard and some drill downs to provide insight, and it requires the client to develop too much based on its own specifications.

Configuration/Customization: ITC Infotech offers both options and can perform and maintain significant customizations. It is one of the best-suited vendors we know of in this space for co-development or customization on an existing application, such as Siebel or MS Dynamics. ITC Infotech has also developed an Oracle Sales Cloud-based Retail Execution offering that leverages Oracle's PaaS (platform as a service) capability to add delivery options as well as functionality.

Technology architecture/delivery options:

The mobile client is Siebel Open UI, COM framework on Siebel, Microsoft .Net, Native (iOS, Android or Windows), or Java stack. It is offered as on-premises, hosted/private cloud, or on a public cloud. Their two preferred methods are the Oracle Sales Cloud and Microsoft Azure.

Service partners: ITC Infotech does all of its own services work.

Technology partners: Oracle, Microsoft, GoDB, Kinvey.

User experience: Ergonomically laid out but we rate it Below Average in appeal and visualization. This is perhaps more driven by the bespoke development process than ITC Infotech's lack of vision/expertise. We believe that more clients would translate into more demands for more and deeper functionality offered. What we do see from a UX perspective that impresses us includes: additional gamification with tie-in to retailer loyalty programs, tile-based navigation within the order entry process, and a very ergonomic order entry module that remind us of buying a product on the Web.

Vendor trend: It continues to have a user base concentrated on a small number of customer organizations in tobacco, personal care, beverages, and household products. Nevertheless, it has grown significantly through expansion through existing customers in the last year. There are still no users in North America.

Strengths: We see the strengths as three-fold:

1. The willingness and ability to localize based on client requirements.

2. Leading with consulting and having software to complement it. There are substantial resources available in a company with 6,500 employees and a large services team. When they win, it is because of the implementation and ongoing support more so than the product itself.

3. Having multiple solutions with varying price points: cloud (most economical), MS Dynamics (mid-price), and on-premises (relatively more expensive Siebel-based solution) to meet industry requirements.

Challenges: ITC Infotech does not market itself well and has not yet achieved critical mass in terms of number of clients or total consumer goods users. Service firms are highly unlikely to bring the vendor into a deal because it is self-supporting. User experience will have to be improved to penetrate North America, some Asian markets, or Europe. DSD is currently available on Android Mobile platform and Windows Mobile 6.5 (typically on ruggedized devices), but not iOS. We see this as an issue in many markets. The roadmap is just beginning to include key industry requirements and "sell more" capabilities such as image recognition (which they will build themselves) and suggested order.

Adjacent offerings: TPM/trade promotion optimization (TPO) and related service offerings, telesales.

Key differentiators: Experience as a consumer goods company and a software vendor. It is the only software company we know of that is owned by a consumer goods manufacturer, which gives it a captive market for understanding the market and testing new capabilities. Very strong configuration tools for use by nontechnical personnel. Ability to totally outsource support for your application, whether a unique version or a standard solution. Multiple offerings across multiple technology platforms and price points to choose from.

Outlook & prognosis: We see the company as interesting because of its ability to create a bespoke solution, add industry context because it has industry experience, and provide a menu of support services. Nevertheless, it will remain a largely hidden company in the marketplace with a very small set of clients.

Evaluate ITC Infotech when: You seek deep expertise in the Asian market, and emerging markets in general. Also, if you seek proven experience in the tobacco industry because the majority of vendors we have evaluated do not have it. But mostly where you want Oracle or Microsoft as an underlying platform and a custom solution with a broad menu of support services.

Avoid ITC Infotech if: You need proven capabilities in North America, deep analytics, or really advanced UX.

Ivy Mobility ivymobility.com

Profile: A Singaporean company with a significant user footprint in 34 markets across Southeast Asia, India, Middle East, and Africa that is making a global play with its recent expansion into China, Japan, Korea, Mexico, Europe, and North America. It also has a significant presence in pharmaceuticals, which gives it expertise in visiting pharmacies and helping them understand features and benefits of over-the-counter (OTC) products.

Geographic presence: Africa (24%), Europe (1%), Asia/Pacific (53%), Latin America (3%), and Middle East (18%), and North America (1%).

Total consumer goods users (seats): 62,400.

Tiers represented: Tier 2 and 3, including affiliates of Tier 1 and 2 in emerging markets. User base is primarily in personal care, food and beverage, beer/spirits, household products, consumer electronics, and lubricants.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: Consumer semi-durables.

Analytics: The analytics are very performance focused, with good delivery that ties to incentive management and achievement. The share-of-shelf calculator is very nice because it is graphical rather than numerical. There are also some predictive analytical capabilities, which opens up a whole new horizon for analytics with a focus on outcomes. In-flight analytics are still some of the best we have seen. Ivy Insights is friendly, logical, and easy to drill from for more detail. We like the performance metrics versus peer stores. Using machine learning to find appropriate peers and cluster them will make it even more insightful. It is powerful, but needs to be presented in a way that is not a grid. We also like the ability to print out some of the data on current initiatives, distribution opportunities, out-of-stocks, display performance, and share-of-shelf so that it can be left behind with the store to add a more lasting influence.

Overall, we rate it is above average for the depth and quality of the insights. For how the insights and analytics render, it is still only Average.

Configuration/Customization: It is very configurable. All modules are based on one underlying platform, which allows for easy creation of hybrid roles, each with specific process steps, KPIs, and inventive dashboards. The field execution processes can be configured based on channel and outlet type, to ensure execution of the required steps. Multiple markets with different localized configurations can coexist in the same tenant. The demo of system administrative tools we saw that included such activities such as changing a survey was remarkably easy. Customizations that would take a solution out of the upgrade path and away from being multitenant SaaS are also an option, but not actively recommended by Ivy Mobility. All customization requests are evaluated based on reusability across other clients/markets for inclusion into the common core as part of the quarterly release cycle.

Technology architecture/delivery options: All cloud-based, multitenant SaaS based on Amazon Cloud (including Amazon China). In the markets where cloud hosting is bound by restrictive legislation, Ivy Mobility utilizes local hosting providers, typically major telecom providers.

Service partners: Tata Consulting Services (global), Tech Mahindra (global), Intergrupo (Latin America & Spain), Technocrat IT (Africa), Vinthoughts (Indonesia, ASEAN), Technosoft IT (Indonesia, ASEAN), Lead Systems (Hungary) Kft, Tectura (Europe), GDS Services (China), C3l (China), HPT (Vietnam), Naviworld (Vietnam, Thailand, Middle ZEast), ProV International (North America, Europe, Middle East, AsiaPac), Tiaraq Consulting Services Inc. (North America, AsiaPac), Brandt International (ASEAN), Lenovo (China).

Technology partners: SAP, Oracle, Salesforce.com, Tally (Accounting), Qlikview

User experience: The newly launched UX provides great functionality like hovers that show you what you need to see without taking the time to drill in and out. We also like the tile-based approach to navigation. Other strong UX elements include gamification with the "gold/bronze/silver" metaphor and the ability to see how a sales person rates relative to the leaders based on underlying achievements, the ability to use the cursor to "box" a group of stores and then have the solution route-optimize the best sequence for visiting them, time and motion tracking versus what is average/normal to help people be more efficient, a novel chat functionality that allows a user to annotate photographs with captions that enable a discussion, and the tile-based architecture that drills to the dashboard. Overall, we rate it Above Average for navigation and deep functionality. Data and graphical rendering still need work. On the handheld, the letters are often very small, despite having adequate space to render them. To keep this rating, something will have to be done with the overall rendering and visualization as many competitors are making significant strides.

Vendor trend: Strong growth, penetrated into all key markets, and a strong roadmap going forward.

Strengths: It is effectively a single solution that can be deployed globally with a modular approach and ability to create hybrid functions. The emerging markets, and in particular Asia, Africa, and the Middle East continue to be strong markets for Ivy. It also has a deep partner network that can execute nearly anywhere. Expertise in pharma OTC distribution and hybrid processes related to selling (a.k.a. "detailing") physicians is interesting to some sectors.

Challenges: Managing rapid global expansion and the expectations of new investors, penetrating the highly competitive European and U.S. markets, stepping up the visualization

despite several attempts at a more advanced UX. Managing through the new Salesforce.com relationship for back office functionality while possibly competing elsewhere, or against more strategic partnerships, will be tricky. Also, basing the Web portal on Salesforce Lightning where other vendors have found it to be only moderately attractive, will add challenges. Having no on-premises offering will keep it out of some opportunities in developed countries, where the preference for this approach runs close to 40% based on survey data.

Adjacent offerings: Shelf visualization as a tool for capturing share-of-shelf. Vending machine management, counter sales/beauty advisor application, mobile payments, QR-code based loyalty management.

Key differentiators: Despite some challenges, the relationship with Salesforce.com provides visibility with IT people as well as access to the entire omnichannel Salesforce network. We also think the payment gateway concept (IvyPay) is very interesting for emerging markets and facilitates payments while reducing dependence on distributors to do collections. Ability to create hybrid business processes across modules with a single back-end. Outstanding analytics, including predictive modeling, extremely low TCO, and relatively rare expertise in Asia/Africa and the Middle East.

Outlook & prognosis: Ivy will enhance its position as a global player in the next couple of years.

Evaluate Ivy when: You prefer multitenant SaaS with innovation through quarterly releases, a single product that can be utilized globally, excellent value for the money, proven capabilities in the emerging markets, and a product that is also suited to the life sciences industry.

Avoid Ivy if: If you wish to customize and create a one-off solution that is incongruent with multitenant SaaS. Also, if you are really keen to use Windows devices. Ivy has a Windows offering, but has not yet deployed it due to lack of demand.

Distinctions: POI Best-in-Class award for Analytical Insights.

Kantar Retail kantarretail.com

Profile: A global vendor that is a Kantar company (the data investment management division of WPP plc.) and offers an extensive analytics, insights, and execution portfolio. In this case we are evaluating the Kantar Retail offerings formerly known as XTEL.

Geographic presence: Asia/Pacific (3%), Europe (96%), and Latin America (1%).

Total consumer goods users (seats): 16,200.

Tiers represented: All.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: Tobacco.

Analytics: The analytical capabilities are very strong across both the field and office-based solutions. We rate them as Above Average. This includes both insights as well as how they render visually. Specific examples include: a deep understanding of underperforming stores in a 2X2 matrix based on a perfect store index, the ability to quantify the impact of lost sales due to some condition or executional shortfall, guided selling activities based on detected anomalies, gamification that compares a user to the top three peers and allows for drill down and understanding how to close various gaps, and the ability to optimize assortments at the store level.

Configuration/Customization: Both are offered, as well as a pre-configured, rapid deployment version.

Technology architecture/delivery options: On-premises or hosted on Amazon Cloud (AWS). The Amazon Cloud Data Lake extends across all of the Kantar Retail product offerings to feed all of the analytical and executional offerings, including Retail Execution.

Service partners: Capgemini/iGate, HCL, ICB Works, NTT Data/Everis.

Technology partners: Microsoft, Oracle Database Management Systems, Qlikview, PTV territory management, and route optimization.

User experience: We rate it Above Average. Moving to HTML 5 has been a real plus. It is intuitive, innovative, and fun to use.

Vendor trend: Recent focus on unifying all of the capabilities and solidifying them as a single back-end and more consistent UX has preceded a lot of go-to-market activity. As a result, client acquisition in Retail Execution has waned. Nevertheless, the offerings are mature and compelling while the roadmap continues to press into key areas such as coaching, voice recognition, and retail activity optimization.

Strengths: High client retention and excellent user references. Credibility and extended insights of being part of Kantar Retail organization. Consistent ability to deliver a superior user experience that has a strong sense of business flow as opposed to a "series of tabs that do things."

Challenges: Penetrating the Americas has been relatively slow, even with Kantar Retail's consulting presence and strong industry insights reputation. We believe that they have all the right offerings, but need to execute.

Adjacent offerings: Sales quota and incentive management, TPM/TPO, sales volume planning, portfolio optimization, assortment optimization, virtual store/merchandising visualization, POS data cleansing, image recognition, retail and shopper insights.

Key differentiators: Expanded use of HTML5 has made for a richer experience, particularly for office-based users. Excellent product visualization from within product lists. Has compelling virtual reality capabilities to aid in selling assets such as display modules or coolers. Gamification is exceptional because it specifically tells a user the areas that must be improved in order to make it into the "top three" without the need to drill or consult various screens. Also, taking perfect store to a new level by using Kantar Retail iQ to deliver the right shopper and retail insights, SKURAT/RichMix assets to determine the right product mix and planogram, XTEL retail execution solutions to execute it, Planorama image recognition capabilities to capture it, and XTEL retail execution solutions to track performance/incentives. It is an unrivaled set of capabilities in the marketplace. The combination of strong analytics and usability in a single offering with a single back-end. Deep industry expertise of the Kantar family of solutions/services.

Outlook & prognosis: Kantar Retail will epitomize the balance between insightful and usable for a subset of the market that is looking to enable a mobile workforce to do more with less.

Evaluate Kantar Retail when: You favor a strong user experience, excellent analytics, and European expertise with the potential to expand most everywhere. Also, evaluate when you seek retail execution as part of a larger, end-to-end store visualization/shelf management/assortment/image recognition/in-store execution solution with best practices consulting

and eLearning for total business support. Also, when you seek the ability to execute with a physician or other health practitioner as well as at stores.

Avoid Kantar Retail if: You seek something transactional, cheap, and simple for Retail Execution.

Distinctions: POI Best-in-Class for Desktop User Experience and Gamification.

Klee Commerce kleecommerce.com

Profile: A Europe-centric vendor with complete offerings in the four key functional areas of retail execution and monitoring as a single solution, with a focus on product visualization and shelf management. Has retailer as well as manufacturer clients.

Geographic presence: North America (4%), Latin America (2%), Europe (92%), and Asia/Pacific (2%).

Total consumer goods users (seats): 13,000.

Tiers represented: All. Clients include food and beverage, personal care, and household appliances.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: Tobacco.

Analytics: Has improved dramatically in the last year or so. We now rate it as Above Average due to features such as segmentation based on store type and social factors from sources such as Nielsen, KPI scoring based on factor weightings, and quantification/visualization of perfect store. The Klee preferred option for a BI solution is embedded SAP Business Objects, but Microsoft is also an option.

Configuration/Customization: Fully configurable as a single solution across all functions. Users simply turn on and off the functionality that they want, thus enabling hybrid processes. No customization.

Technology architecture/delivery options: On-premises, hosted/private cloud, and public cloud based on Microsoft Azure. All cloud clients have their own instance of both the front end and database. Addition of Android Tablet in 2016 means that Klee supports the 3 key platforms (Microsoft, iOS, and Android).

Service partners: Klee does its own deployments through its Klee Consulting and Integration arm. Training and support are done through Peppy-Tools (France) and the Retail Factory (Latin America).

Technology partners: SAP, Oracle, Microsoft.

User experience: The transition to HTML5 has improved what was an already compelling UX. In particular, it is extremely graphically oriented, which we prefer to mere numbers or a grid. Some of these graphics actually correlate to the client's product line. For example, the bottle for the beverage company becomes more or less "full" graphically based on the size of the opportunity. The store-specific dashboard is also graphically oriented with photos of the assets deployed or the micro venue, such as a perfume counter. At first blush, it looks like a high-end field sales tool for high margin products like beauty, but the ability to easily

use "skins" and configure makes it relevant to pretty much any subsector. We also like the ease with which gamification can be done from set up of rules, specifying leader boards, and providing transparency to the various levels. Document sharing and facilitation of social selling are also enhanced. We also like the integration of Google Street View to help a user identify a store/shop. We rate this as Above Average for UX.

Vendor trend: This is a boutique company that is owned by the 3 founders and the employees. It is more focused on innovation than growth. It is profitable, but favors investing in adjacent businesses such as virtual store/visualization over geographic expansion. Those users that are outside of Europe are the result of supporting user organizations abroad rather than expanding abroad.

Strengths: Analytics and shelf visualization/simulation. Strong functionality for retailer-specific contracts at the store level. Expertise in consumer durables. Extension to the Klee Commerce platform through web services in V8 offers omnichannel capabilities. Willingness to create and service a custom solution.

Challenges: The inability to expand beyond a toe-hold in Asia/Pacific, North America, and Latin America, which, combined, are only 6% of total consumer goods users. This percentage has remained constant over the last few years. The biggest challenge lies in getting visibility in the market place for solutions that are highly engaging and evolved. Klee needs to market itself better.

Adjacent offerings: Storage of digital assets, omnichannel selling, TPM, coupon generation that can be used by partners through Web interface, media asset publication, and distribution. The in-store simulation that can build out shelves and fixtures from bare walls and floors is very unique. Once the shelf/fixture is assembled it provides rich visualization, including the ability take a product off the shelf and handle or manipulate it in 3D as if it were in a human hand.

Key differentiators: The quality and extent of the graphics throughout the solution. Also, a relatively large consulting organization that is about 3 times the size of the product team and all focused on this industry. Deep levels of complex pricing, which is often more the norm in France than other markets. Store-shelf visualization, analytics, and expertise in the European market.

Outlook & prognosis: Klee will continue to be highly innovative and appeal to consumer goods. In particular it will appeal to high-end consumer goods companies in Europe.

Evaluate Klee when: You seek robust visualization and in-store simulation capabilities for the Western European market, particularly France. Also, if you want additional capabilities for omnichannel selling.

Avoid Klee if: You seek multitenant SaaS, deep functionality on smartphones beyond being an executional companion to a Windows or iPad devices. Also, if you seek a global solution.

Distinctions: POI Best-in-Class for Data Visualization and Social Selling.

MC1 mc1.com.br

Profile: A Latin-America-centric vendor with complete offerings for all routes to market.

Geographic presence: Latin America (100%).

Total consumer goods users (seats): 35,609.

Tiers represented: All. Includes food and beverage, personal care, household products, clothing, and consumer durables.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: Tobacco.

Analytics: The latest release, Win the Market 3.0, contains significantly more embedded direction for the rep on what to do and what to do next. The analytics are delivered in a much more visually engaging way across all form factors. We find the graphical KPI tracking to be very appealing. Also, it has the ability to click on a location and see the exact status of most everything, as opposed to abbreviated information in a hover. Mobile analytics and optimization are based on proprietary capabilities. The solutions have full offline capabilities for in-flight analytics. We rate it Above Average for insightfulness as well as for visual rendering.

Configuration/Customization: The solutions are highly configurable based on business process requirements. They will also fully customize a solution and run it for a client as a one-off or unique version if the client desires.

Technology architecture/delivery options: On-premises, hosted/private cloud, multi-tenant SAS.

Service partners:

Services are provided through re-seller channel providers across LatAm and the Caribbean. Recent focus on training, support, and documentation has improved MC1's ability to support future deployments through its partner network consisting of:

DXC (formerly HPE), Smart Logistics (Caribbean), NEXTECH (Andean), POPA Sistemas Abiertos (Central America), ResourceIT (Pan-Latam).

Technology partners: SAP, HP, Microsoft, Amazon, Zebra, Samsung, and Salesforce.com.

Key integration with Tecware for Brazilian federal invoicing and taxation settlement.

User experience: The UX has vastly improved, in particular on the handheld. It is tile-based and includes all the key elements packaged in an ergonomic way: messaging, KPIs, gamification, and order entry where appropriate. It now features enhanced tools for configuring once and deploying across the various form factors.

Vendor trend: Changes in ownership have allowed for more focus and investment in the product. With several economies in South America in real dire straits, there have been difficulties with client acquisition. Nevertheless, MC1 has recently won a key Pan-LatAm deal that will double its use count over the next couple of years. Partnering with Salesforce.com for back office functionality will also give it more appeal for omnichannel capabilities. Enhanced data integration capabilities through its MDCS tool will help with analytics to glean insights through external data sources such as POS.

Strengths: First and foremost, there is a deep understanding of the LatAm market. Then, there are the peculiarities such as pricing and tax rules for countries like Brazil, Argentina, Colombia, and Ecuador. Moving to more of a platform allows for faster deployments and adaption to multiple mobile devices.

Challenges: Given recent pan-regional deployments, MC1 needs to find at least one partner that can deploy concurrently across all of LatAm. Currently, execution through re-seller partners is not a model that we have found to work, let alone work well.

Adjacent offerings: Many aspects of ERP that facilitate order to cash within MC1 and do not require integration.

Key differentiators: Has a proprietary SAP integration wizard to enable integration from within SAP ECC. Also, the ability to operate with multiple, regional, separate business rules, but a single database. Excellent guided selling tools for field personnel. Can handle color, size, and style characteristics associated with clothing business, including the ability to visualize each permutation. Offers an asset rental service and telecom management for mobile devices as part of the monthly user fee. They partner with SAP to leverage SMP where appropriate and to add functionality to SAP DSD.

As an interesting twist on image recognition, they have a function that recognizes products on the shelf and pops up a data entry screen for taking orders or performing audits. It is very fast and simple to use, while keeping the user from searching through a pick list of products.

Outlook & prognosis: Continued leadership in Latin America. Possibility to expand into additional geographies by hiring local personnel, but not through re-sellers. The 3.0 release is a really positive thing and addresses many deficiencies that were holding MC1 back.

Evaluate MC1 when: You seek deep retail execution and monitoring expertise in Latin America with a demonstrated ability to scale up to 5,000+ users in a single client instance. Also, if you seek a partner with demonstrated ability to handle complex taxation situations or like bundling of devices and services.

Avoid MC1: If you have an immediate need for a global solution.

Distinctions: POI Best-in-Class award for Mobile User Experience.

Pitcher pitcher.com

Profile: A Europe-centric technology player that has leveraged expertise in pharma and pharma OTC to enter retail execution with a SaaS-based offering.

Geographic presence: Europe (50%), North America (30%), Latin America (5%), Asia Pacific (15%).

Total consumer goods users: 2,850.

Tiers represented: Smaller affiliates of tier 1 companies as well as several tier 2 and 3.

Solution offerings: Distributor management, merchandising, and van sales.

Major product sub-segments not covered: None.

Analytics: It has an exceptional store level dashboard called Field Review, which is the gateway for store level execution. The mapping based on color coded characteristics is insightful and drives segmentation and visit schedule. It also includes traffic information, which we have not previously seen embedded in this way. This then segues to a set of "to do's." Also, some unique radar charts and spider diagrams that offer insight into retail activities. We rate analytics as Above Average, particularly for the smooth way that it transitions between insightful views.

Configuration/Customization: Highly configurable. Customization is an option but not preferred.

Technology architecture/delivery options: Cloud and multi-tenant SaaS. No plans for on-premises.

Service partners: NTT Data, Deloitte Digital.

Technology partners: Amazon (hosting), Salesforce.com, Apple, Microsoft, Google.

User experience: The user experience continues to be very strong on all form factors. Has more functionality for profiles and follow-up activities than solutions that have their origins in retail audit. Home screen is totally configurable. Social interactions can be searched and archived as a best practice until a certain date – like in conjunction with a campaign. This is a fresh and modern UX from a company that has brought some best practices from life sciences, manufacturing, and financial services for embedded social for collaboration and team selling, coaching, and gamification. We rate it as Above Average.

Vendor trend: This is a very new vendor in this space, but it is very creative and has been able to get a foothold on all continents (with the exception Australia and Africa) in a relatively short time. It has already secured several deals with broker/sales agencies, which always help in adding functionality because of the breadth of principals that they serve. We see it as "one to watch" in the merchandising area.

Strengths: Configurability and the ability to leverage interactive selling capabilities that are prominent in the pharma space. In particular, the capability to do interactive presentations that have branching logic based on data and context, track the clickstream, and can expose collateral as well as show presentations. Has coaching capabilities for viewing open action items, following up on prior coaching, and dashboards for managers to spot training opportunities. Good in-flight analytics to provide real-time insight.

Challenges: Being a small company and dividing resources across multiple industries while being late to the CG space.

Adjacent offerings: Some TPM functionality for managing back-end requirements of programs.

Key differentiators: It has the ability to do real-time discussions for immediate collaboration. Also, it has a virtual reality version of gamification that not only includes badges and leaderboards, but utilizes scenes and animations similar to a contemporary video game with a virtual reality mission/objective for the users.

Outlook & prognosis: We expect them to flourish because of the level of innovation, demonstrated ability to expand across geographies, and the high degree of usability. We do not see them becoming a player in DSD or van sales due to the late entry and need to build out functionality over multiple years.

Evaluate Pitcher if: You are a pharma OTC company, have an interactive selling approach to interacting with retailers, place a high value on collaboration amongst your sales personnel, or seek a vendor that will co-innovate with you.

Avoid Pitcher if: You need global reach and support or expertise in subsectors beyond the more common food, beverage, and personal care. Also, if you want a single vendor approach to your system and data integration requirements.

Distinctions: POI Best-in-Class awards for Social Selling and Interactive Customer Presentations.

SAP SAP.com

Profile: A global, enterprise software vendor with a large ERP install base in the CG industry. Retail execution and monitoring solutions are basically separate and distinct across DSD, retail execution, and distributor management and span various delivery options, from on-premises to cloud.

Geographic presence: North America (21%), Latin America (24%), Europe (41%), and Asia/ Pacific (14%).

Total consumer goods users: 175,000.

Tiers represented: All.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: None.

Analytics: There are varying levels of sophistication depending on the product. All are proprietary. Hybris Cloud for Customer (C4C) offers configurable dashboards with a tile-based drill down to reports and KPIs. These are now more visual and appealing for making the insights clear. Across the board we saw more insights and KPIs that lead to value at the store level. We rate all platforms as Above Average.

Configuration/Customization: SAP is moving away from customization. Obviously, the on-premises REX and DSD solutions are still customizable. The Hybris C4C product is highly configurable, but also offers a very easy key user tool to customize the solution for those customers that need it to extend the solution as well. SAP has a formal policy for allowing customization, unlike other vendors that tend to be opportunistic.

Technology architecture/delivery options: DSD is delivered on-premises. Hybris C4C and distributor management can be delivered in private or public cloud as well as Multi-tenant SaaS.

Service partners:

    C4C: Ecenta, Maihiro, SAP Consulting, TCS, Deloitte, TPC, Baseliner, IBM, EY.

    DSD: SAP Consulting, CapGemini, IBM, Intelligence, Consulting4U, Value Pass, NexTech, GorBitGmbH, Rocket Consulting, Acron.

    Distributor Management: SAP Consulting.

Technology partners:

    C4C: Ricoh Innovations, Honeywell/Intermec, Mediafly, Invisible Solutions.

    DSD: Honeywell Scanning and Mobility: Honeywell, Intermec, Datamax-O'Neil, Zebra/ Motorola.

    Distributor management: None yet.

User experience: The big news in UX is that the DSD solution has been totally updated. C4C has made great progress as well, but DSD was seriously lagging, so the change is more appreciated. While the old REX solution is still supported, we will not speak to it in this report because C4C is the go-forward platform. For the first time, we rate all three solutions as Above Average.

Some positive and unique elements of the UX include:

- DSD: Deep functionality, like being able to reserve stock; three different ways to order, including proposed order, order from scratch, and based on historical; large and ergonomic number buttons for easy ordering; ability to take partial payments across payment types; and functionality for reconciling empty bottle returns. We really like the use of pink shaded spaces throughout the app to guide the user to the place where an entry is expected.

- C4C: Real-time, pre-packaged integration allows for dynamic pricing, checking inventory on the fly, and reserving stock. It is also ergonomic. The Ricoh Innovations image recognition features a simple, easy to use image capture (green ball) interface that lets the user know when the image is optimal and ensures all products are captured on a shelf. The Responsive User Design also adjusts the form factor on the fly for the best viewing experience. The Executive Insights Dashboard is also very strong and is both insightful and renders well. Also, it has the ability to be routed an urgent opportunity by a dispatcher; RAO precursor functionality for allowing time to conduct various types of activities; Google map pins with details about each location; team selling functionality to coordinate efforts of various people who touch a particular account; and the ability to push activities to groups or people based on geography, roll, or other attributes.

- Distributor management: More analytics and sales effectiveness functionality than other purely transactional solutions we have seen. Rather than making the distributor build out the functionality and just providing the transparency to the manufacturer, it has more in the way of CRM functionality for managing relationships, suggested order, and shelf management, and the ability to extend access to an exclusive distributor to the manufacturer's ERP for sharing data and process to manage the relationship, selling activities, and the order to cash process. However, the distributor has to be exclusive within that product category.

Some things that we would like to see include more out-of-the-box gamification, a provision for human intervention when images are not recognized correctly, and more of a coaching cycle with follow-up as opposed to merely analyzing and some sharing of view with subordinates.

Vendor trend: SAP continues to show more focus in retail execution than ever before and the momentum has followed with an additional 25,000 users since our last report. We have not previously found SAP offerings to be on par with best-of-breed, but can honestly say that such is now the case with the improvements to C4C and revamping of DSD. Additionally, it has a strong roadmap through 2018 that consists of capabilities such as voice recognition, RAO, perfect store, augmented reality, chat bots, planogram creation editor, promotional simulation, and predictive ordering. In the past, the SAP roadmap was focused on many elements of "catching up" to the pack. Thus, 2017 is a pivotal year for beginning to lead out.

Strengths: Install base in the CG industry, resources to get things done, and momentum in the marketplace. One of the few vendors with DEX integration, which is central to the DSD channel. Unique approach to Distributor Management with an end-to-end solution. Demonstrated ability to support an organization with 20,000+ users.

Challenges: Inability to approach a multinational CG company with a single product and back-end to cover all routes to market. Inability to sell outside of the SAP ecosystem.

Key differentiators: The ultimate combination of integration plus deep functionality and usability. Global footprint with unrivaled support.

Outlook & prognosis: The multi-platform problem will persist for some time to come, but SAP will exert leadership across all the go-to-market formats.

Evaluate SAP when: You use SAP for ERP. We have not seen it integrated elsewhere and are not confident about the ease of doing so. You seek a vendor with a proven ability to scale. You want an end-to-end solution from a single vendor leveraging SAP systems. Also, when you work with distributors that are exclusive to you.

Avoid SAP if: You want a single back-end for all routes to market, want something cheap and simple, or your distributors carry other products than just yours.

Distinctions: POI Best-in-Class awards for Desktop User Experience, Analytical Insights and Merchandising.

Spring Mobile Solutions springglobal.com

Profile: A global player that has doubled its number of users in the last 2 years. It was an early entrant into SaaS-based solutions and has a global footprint. SAP has a minority ownership position in Spring Mobile.

Geographic presence: North America (50%), Europe (10%), Latin America (38%), AsiaPac (2%), and Africa (1%).

Total consumer goods users (seats): 33,400.

Tiers represented: All.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: None.

Analytics: Combines out-of-the-box functionality through dashboards and views plus reports and third-party analytics tools. All are fully embedded. We found the upgraded analytics to be extremely insightful and action oriented through branching logic. It is known as MobileSellingStories and is focused on customer-specific analytics for product sell-in, secondary displays, and promotions to store managers. It includes simulation capabilities that describe scenarios for a store manager (like what will happen if they take a display program based on peer stores). The suggested order capability rolls up to the packing quantities for the entire truck.

We also like the use of Tableau reporting to generate reports and push them to users on a daily basis without having to purchase a license for each user. This offering comes with the service personnel required, if desired, to perform this function. This is further enhanced by the Nielsen relationship to provide additional data elements/insights that are combined with analytics and collateral to deliver a compelling interaction at the store level. Our review of this analytical offering for both field and office-based users found it to be unsurpassed in the industry for the level of insights, actionability, and how they render visually. We rate it as Above Average.

Configuration/Customization: Primarily configuration. Customization is an option but not recommended.

Technology architecture/delivery options: Cloud-based multitenant SaaS. On-premises is an option if the customer insists.

Service partners: Infosys and Gapgemini (Global strategic partners), YKP (LatAm), Mindtree, Tectura, K2, Unisys (Customer Support in LatAm).

Also, AT&T, Amazon, and Microsoft Azure for hosting.

Technology partners: SAP for data model alignment, Nielsen for in-store data, Salesforce.com for offline mobile chatter and CRM integration, Trax and Planorama for image recognition, Qlikview and Tableau for data visualization, Microsoft for several elements of technology.

User experience: The dashboard is tile-based on the left with dial-based KPIs on the right based on what is selected on the left and the role for which they are configured. It is graphically rich, ergonomic, and quite pleasing. Gamification standings for the top 3 participants as well as the user are nicely embedded as a dashboard element. Action items based on observations or data feeds make for more of a flow than a series of tiles. One can create action items for a peer, and even a manager, to visit a store for a specified task.

On the desktop version, it has extensive tracking of field sales activities that are precise enough to do mileage reporting. It can even remotely monitor battery levels in a sales person's mobile device. We also like the branching logic approach to assembling a survey, which leads to a more action item fulfillment approach to a store visit. The UX has vastly improved over the last 2 years and is now very strong. We rate it as Above Average.

Vendor trend: The trend is very positive with high growth and strong client retention. The roadmap through 2019 is highly focused on the "sell more" and advanced analytical capabilities.

Strengths: The approach to gamification, known as "Top 3 and Me," offers the ability to view the leaderboard and understand what is needed to close the distance to them and is one of the best we have seen. The Chatter-based social capability is highly evolved. It can do keyword searches to better share best practices. It also works in off-line mode and the tasking of a peer is an extension of the social, so the insight can lead to an action.

Another strength is the ability to embed itself into its prospects and clients. The company is very high touch in its approach to the sales cycle and subsequent follow up, more so than most vendors we have seen. This service level drives loyalty and retention. Having two global deployment partners as well as some locals is a real plus compared to many peers that only offer a patchwork of local service providers.

Challenges: We don't see any significant challenges except for those associated with managing very high growth. The high-touch approach to managing clients, along with high-end analytics and UX, will make it very hard to compete with some of the very low-cost solutions.

Adjacent offerings: Device management and field service (Latin America only). The distributorInsight product for automating the gathering, cleansing, and reporting of distributor sales and customer data.

Key differentiators: It has matured to the point where it offers specific order entry configurations: basic, beverage, and semi-durables, with color and size permutations and combinations. This facilitates a starting point for more rapid deployments. The analytics and depth of what we would call a "mobile business review" are beyond anything we have seen. It also has deep expertise in LatAm, including the demonstrated ability to handle the complex taxation schemes in countries like Argentina and Brazil. The strength of the partnership with

SAP for integration is also a big plus. It also has embedded FSMA lot tracking, which is a legal requirement for product recalls. A rapid three-week implementation at a beer company to support Carnival in Brazil is pretty impressive.

Outlook & prognosis: A global leadership role where "sell more" capabilities are required.

Evaluate Spring Mobile when: You want a partner that will take the time to understand your processes and work with you to optimize them rather than just sell you software and show you how to use the configuration tools. Also, if you want a global footprint with a single back-end system for all routes to market and ability to create hybrid business processes.

Avoid Spring Mobile if: You seek an on-premises solution, are prone to customizing, or just want something inexpensive to meet transactional requirements.

Distinctions: POI Best-in-Class awards for Analytical Insights, Guided Selling and Social Selling.

StayinFront stayinfront.com

Profile: Global player that entered the CG space years ago by leveraging its expertise in life sciences field sales automation, which helped it to demonstrate scalability early on. In 2000, two companies, one in New Zealand and one in the U.S., combined to form what is now StayinFront. This explains the strong presence in Australia and New Zealand.

Geographic presence: North America (54%), Europe/Middle East/Africa (17%), Latin America (9%), and AsiaPac (20%).

Total consumer goods users (seats): 65,000.

Tiers represented: All.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: None.

Analytics: Continues to be a strong analytical product and the new StayinFront Insights product builds upon this to harness the power of POS data and other causal factors through both a front end and data warehouse. It has very strong performance graphics and the ability to smart map stores with up to 7 color indicators based on segmentation. This segues to action by swiping left to add stores to the schedule. The addition of correlative relationships in causality will make it even more powerful. Also has some great simulation capabilities such as removing a competitor and replacing it with your products and seeing the impact, benchmarking versus similar stores, and suggested orders through algorithms as opposed to basic. Because of the depth of the insights and how they render graphically, we continue to rate it Above Average.

Configuration/Customization: On-premises solutions are still supported but have not been sold in nearly 3 years. The vast majority of recent deployments have been multi-tenant SaaS. The solution is among the most configurable that we have reviewed. Enhancements in functionality are introduced in a way that allows user organizations to choose whether to activate those features or not through the administration module. They can do so at any time.

Technology architecture/delivery options: Multitenant SaaS or private cloud on the front end with every company having its own database on the back end. On-premises is an option, but not common.

Service partners: IBM, Infosys, Wipro, Comtec.

Technology partners: Lab4motion and Planorama (image recognition), Augment (virtual reality), Amazon (hosting).

User experience: Very oriented towards sales effectiveness in a stepwise and guided fashion. The graphics and screen layouts continue to be outstanding. Gamification parses out the components and weightings. It is very nice, but could provide more in the way of "what to do to raise your score." Linking documents to tasks as a means of helping users understand how to perform them is a real plus. The integrated coaching capability is also strong as it draws on past performance evaluations, utilized reports and insights on how to improve performance, and pushes the results to all the relevant parties for follow up and as a beginning point next time around. The Pitchbook tool is now enhanced with workflow to help in gathering the appropriate data, performing the calculation, or showing the results. The "Augment" tool then helps provide a compelling virtual reality view of what the merchandising could/should look like. Together, they are quite powerful. StayinFront has been a leader in integrating augmented reality for simulating how displays and other assets will look in the store context. Additionally, the solution provides a community for sharing photos and best practices. Because of the innovative nature and quality of the UX, we rate it as Above Average.

Vendor trend: Strong growth trend with a double digit increase in user base and no customer defections. StayinFront has a knack for the "global deal" with some of the largest deployments (seats and geographies) that we have seen. But it can also scale down very well to a single country for a local manufacturer. Its momentum has attracted a strong stable of global and local implementation partners. It is a very stable company with a solid roadmap through 2018.

Strengths: Strong client retention. Excellent deployment partner network. Its Australasian roots also make it particularly able to attract clients in that region.

Challenges: No significant challenges that we are aware of.

Adjacent offerings: Direct mail/fulfillment capabilities.

Key differentiators: We see the key differentiators as:

- Demonstrated ability to handle thousands of users across multiple geographies with a single instance of the solution.
- Having a very broad assortment of "sell more" capabilities in one solution, as well as being an early mover in obtaining them.
- Offering a Lite version called "LT," which allows the user organization 8 standard functionalities plus a menu of up to 7 more from a list of 15, based on requirements. It runs on a single pane interface and carries a reduced price compared to the fully loaded solution.
- Optimal combination of strong analytics while still having excellent usability.

Outlook & prognosis: Continued global presence and innovation into the foreseeable future. Being private/closely held and not having any venture backing keeps it focused on the long term.

Evaluate StayinFront when: You want a superior user experience and abundance of "sell more" capabilities most anywhere in the world. Also, if you want multiple global deployment partner options.

Avoid StayinFront if: You want a basic and low-cost point solution.

Distinctions: POI Best-in-Class awards for Mobile User Experience, Analytical Insights, Guided Selling, Coaching, and Interactive Customer Presentations.

Univera Computer Systems univera.com.tr

Profile: A 140 person Turkish company with a strong presence in Southeastern Europe, Central Asia, Western Asia, and the Caucuses. It is a very mature technology vendor dating back to 1992 and featuring such capabilities as support services, project management, and 4 new releases per year.

Geographic presence: Asia (13%) and Europe (87%).

Total consumer goods users (seats): 25,200.

Tiers represented: All. As many as 2,000 users at a single company.

Solution offerings: Distributor management, DSD sans DEX integration, merchandising, and van sales.

Major product sub-segments not covered: None.

Analytics: All dashboards are role-based and can be configured at the individual user level. This alone can deliver insights beyond a standard approach. The product has Qlik embedded as the standard for analytics with both Qlikview and Qliksense. Graphically, it is a superior product. It has full offline capabilities through a mobile database for complex pricing and in-flight analytics. It features the ability to highlight a section of a map and see attributes, such as the sales amounts and trends, for all those accounts. Also, it features some unique views of upsell and cross sell opportunities. The desktop version is equally robust. It has a full Information Services component to automate who gets which reports and how often.

The predictive "Fortune Teller" capability for data analytics is also very promising as it uses machine learning to highlight potential outcomes and suggest what the field force should be doing – even down to forecasting at the outlet level. This puts Univera on par with some of the most forward-looking vendors in the space.

We rate Univera as Above Average for Analytics.

Configuration/Customization: Full set of menu-drive configuration tools based on ASP.net on the backend site and C++ for the business code. Customization is possible based on the size and strategic importance of the project.

Technology architecture/delivery options: On-premises or hosted/cloud. Also, as multi-tenant SaaS. Supports Android 4.1+, Windows 10, Windows Mobile 6.5, and iOS 10+.

Service partners: System Group, Teymurlu, MBIS Group, Parla Team, Aktau Software.

Technology partners: Qlik, Microsoft, Google, Zebra, Honeywell, Samsung, Apple. Microsoft Azure for hosting.

User experience: The UX has improved in the V7 release and 50% of customers have already seen the value and upgraded. This version includes a very advanced social media messaging capability for various user types and enhanced notifications. This is not an emerging markets-

centric solution. It has all the features and benefits you would expect to see in the most modern markets. The mobile device has a tile-based orientation that is highly appealing and graphically rich on all form factors. It has full planogram integration throughout. Overall, we rate the user experience as Above Average.

Vendor trend: The company is one of a very few that grew user count by more than 20%. The two owners are among senior management, which adds stability. It continues to expand geographically and into areas such as enabling broker field sales organizations and HoReCa.

Strengths: The quality of the user experience and breadth of offerings for a CG company. Also, experience in the tobacco business, which most vendors don't have.

Challenges: The primary challenge is to leverage existing deployments with venerable global companies in its sweet-spot geographies and move into the rest of Europe, Asia, and ultimately North America. It has to fight the tendency to be stereotyped as a viable solution for non-key markets when it has all the potential to operate globally.

Adjacent offerings: POS data management, shelf management/visualization, location-based IoT asset tracking, warehouse management, eCommerce portals, MRP, and procurement.

Key differentiators: It is more of an end-to-end solution than most that we reviewed. Specifically, it has specific analytical capabilities for more senior executives rather than lumping them in with sales supervisors. Also, the warehouse team has its own role-based view of how it supports the sales function. Although many Univera customers claim "global" deployments with some other vendor, or perhaps two, when it comes to Turkey, Kazakhstan, Azerbaijan, Georgia, Moldova, Cyprus, Iran, Uzbekistan, Ukraine, Belarus, and a few others, they use Univera for field sales. We attribute this to a combination of local market knowledge, fully developed market functionality/UX, and a willingness to operate in relatively uncommon languages/scripts such as Georgian, Persian, Azerbaijani, as well as the slightly more common Russian, Arabic, and Turkish.

Outlook & prognosis: Univera has global potential due to its strong UX and analytics in addition to a broad portfolio of offerings for consumer goods that are beyond just field sales.

Evaluate Univera when: You want a really good solution that has been proven in diverse areas within the emerging markets. Also, if you want a partner with a combination of advanced product and deep services. Finally, if you need proven capabilities in Central Asia or the Caucuses, where most vendors we cover have no presence or ability to handle the diverse cultures and languages.

Avoid Univera if: You seek something that is just basic or have an immediate need to deploy in East Asia or the Western hemisphere.

Distinctions: POI Best-in-Class award for Mobile User Experience.

Zaptic zaptic.com

Profile: Offers "digital transformation for deskless workers." In this case, it is the merchandising function. We would describe it as a configurable mobility framework. The company is based in the U.K.

Geographic presence: Europe (100%).

Total consumer goods users (seats): 1,000.

Tiers represented: All.

Solution offerings: Merchandising, van sales.

Major product sub-segments not covered: Tobacco.

Analytics: Basic sales analytics are embedded in the application. For more detailed analytics, they provide a back-end that can be configured and deployed broadly. For example, it has branching logic framework for in-store activities, but the user organization has to specify the specifics.

Configuration/Customization: Configuration is key to meeting business needs. Customization is an option on a private cloud.

Technology architecture/delivery options: On-premises is possible, but not common. It is cloud-based delivery and possibly multitenant. It supports iOS, Android, and Windows Mobile, Windows and MacOSx.

Service partners: Advantage Smollan for in-field change management support. Amazon AWS for hosting.

Technology partners: Planorama, Roamler, Retail Solutions, Inc. (RSi).

User experience: UX has the potential to be anything that you want it to be based on how you chose to configure it, while remaining consistent across functions. Thus, it is not possible to rate it. If we were to rate it on a feature/function basis it would be Below Average, but the objective of Zaptic is to be an "art of possible" platform with some preconfigured call history data, call planning, and route optimization. The rest is up to the client. Hence, no rating.

Vendor trend: It has garnered interest from companies in many sectors and various sizes in a short amount of time. The same for investors. Nevertheless, it is too soon to have much of a trend beyond saying that that initial growth and interest are high.

Strengths: Flexibility and appealing to "the art of possible" at a low price per user that is on par with solutions coming out of Asia or other very low cost regions.

Challenges: Not having expertise or deep industry best practices to share with manufacturers is a sizable obstacle due to lack of context and credibility. Most vendor selections are more of a feature/function contest with the solution having the most for the least being the winner. What Zaptic is advocating will require a new mindset. In the past, purchasing a development platform meant lots of money and time. This perception still lingers and Zaptic will need to work to change it.

Adjacent offerings: Store Operations Cloud for Retailers.

Key differentiators: It is a fresh and innovative "millennial-oriented" approach that allows for a more tailored fit based on ability to configure rapidly. Because it is a relatively new entrant to the space, it is not encumbered by archaic past versions or stereotypes.

Outlook & prognosis: There will always be a market for solutions that are unique and highly tailored. The tradeoff is the need for consultants to provide the best practices and assist with making it happen. Broker/sales agencies can really get the benefit from this offering because of their deep subject matter expertise and desire to offer something that is unique and very easy to use. We can also see retailers using Zaptic to audit their own stores.

Evaluate Zaptic when: You want something cool and unique and willing to make it happen from writing the specifications to doing the configuration.

Avoid Zaptic if: You seek deep best practices, help with integration, or services after go live such as data loading. Also, if you seek the out-of-the-box, "sell more" capabilities such as in-flight analytics, or guided selling.

Vendors not featured this time around:

- **Zenput** – has focused its efforts on selling Retail Execution solutions to retailers for situations where they audit their own stores. As their footprint in the space is very small and has shifted, we mutually decided not to feature them this time around.

- **VisitBasis** – Declined to participate or to respond to us in any way. We find them interesting as a low price-point solution that can be purchased on-line and implemented in a do-it-yourself fashion. We hope that they will reconsider.

- **RW3** – Declined to participate due to some time constraints. We consider them to be best-of-breed in merchandizing and hope to be able to include them next year.

Other Enablers

Once again we feature a capability that we see as adjunct to Retail Execution solutions featured above and having potential to dramatically improve executional outcomes. In this case, we believe that the announcement made by Trax and Nielsen on June 22, 2017 represents a game changer for the industry. This caught our interest because our 2017 POI State of TPx and Retail Execution Survey data shows that only 15% of organizations surveyed say that they have "the analytical capabilities required for field-based users to make appropriate decisions at the store level." This statistic sets the stage for the magnitude of the opportunity to do more at the store level through accurate and timely insights.

The upshot of the new Trax/Nielsen offering, Shelf Intelligence Suite, is that it will create a new syndicated, digital offering to provide greater and more frequent visibility into what is happening at the shelf. This takes retail activity optimization (RAO) to totally new levels because basing RAO on POS data is limited to checking price points as a proxy for a promotion actually taking place. Also, checking for product availability through "no scans" has limitations as well. The richer, more accurate, digital image allows for visibility into secondary displays, planogram compliance, competitive activity, and other KPIs. This will allow CG companies to better allocate resources to go to the stores and perform the activities or make the decisions that will have the greatest impact. This can be done through RAO and result in a complete set optimized daily activities, or insight through simply integrating the shelf-level data for use at the individual store level.

In particular, we like the two-fold offerings within the Shelf Intelligence Suite, one tactical and one more strategic as follow:

- Shelf Pulse provides ongoing digitized measurement of in-store shelving conditions for both own brands and competitors, shelf compliance vs plan and visual proof of in-store activities.

- Shelf Blueprint provides predictive analytics to help FMCG manufacturers set the best strategy for key aspects of store merchandising (facings, adjacencies, shelf placement, flow, etc.)

In the same way that field-based sales people say they don't have what they need to make decisions, the same survey indicated that only 22% of office-based personnel have "analytical capabilities required to make appropriate decisions." Hence the need to empower both constituencies on a tactical and strategic level.

The mechanics of the offering are that the combination of Nielsen's purchase data in concert with image capture and analytics from Trax is able to quickly and accurately identify opportunities for both short and longer term improvement of retail execution. Additionally, they will introduce a new metric called Shelf Quality Index to simplify the measurement and management of improvement in key areas such as shelf share, promotional compliance, pricing execution, planogram compliance and more.

This enabler, we believe to be complementary to current Retail Execution capabilities, and look forward to the incremental insights that it will bring to bear at the shelf.

Conclusion

Retail execution in its various forms is a relatively mature space that offers relatively low risk for CG companies that are looking to adopt it. The options vary from solution-only to having all sorts of services options and architectures from on-premises to cloud. And, they are available from vendors with local expertise and presence. Our overarching recommendation continues to be that CG companies seek out the solution(s) that will move their field sales personnel beyond transactional and enable them to "sell more," thus creating a competitive advantage.

About the Author

Dale Hagemeyer leads the research, best practices, and advisory function at POI and has been active on the POI Board since its inception. Previously, he was a research vice president and managing vice president at Gartner for 15 years. There, he did research in the application of technology to the business processes of trade promotion and field sales automation for consumer goods manufacturers.

Prior to Gartner he spent 14 years in management positions related to the promotion and distribution of products at Sunbeam Corporation, The Quaker Oats Company, PepsiCo, Kraft Foods, and Kroger. He also fulfilled an international assignment in Mexico from 1995 to 1996.

He has served on various industry advisory boards for trade associations and industry periodicals. He holds an undergraduate degree in finance from the University of Utah and an MBA from the University of Chicago.

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About the Promotion Optimization Institute

POI brings together manufacturers, retailers, solution providers, analysts, academics, and other industry leaders with the specific objective of collaboratively improving the promotion and distribution of consumer goods. Members of POI share cross-functional best practices in both structured and informal settings.

Additionally, members benefit through our industry alliances, the Certified Collaborative Marketer (CCM)™ program, and industry-leading summits around the globe.

POI aims to instill a financial and metrics-based discipline not typically found with other trade groups. The goal of our innovative approach is collaborative promotion optimization. The focus is on the customer/shopper through sales, marketing, and merchandising strategies.

Executive advisory boards keep us apprised of industry needs and help us provide desired outcomes for members, sponsors, and academia.

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