

Promotion Optimization Institute, LLC

POI Retail Execution Vendor Panorama 2016

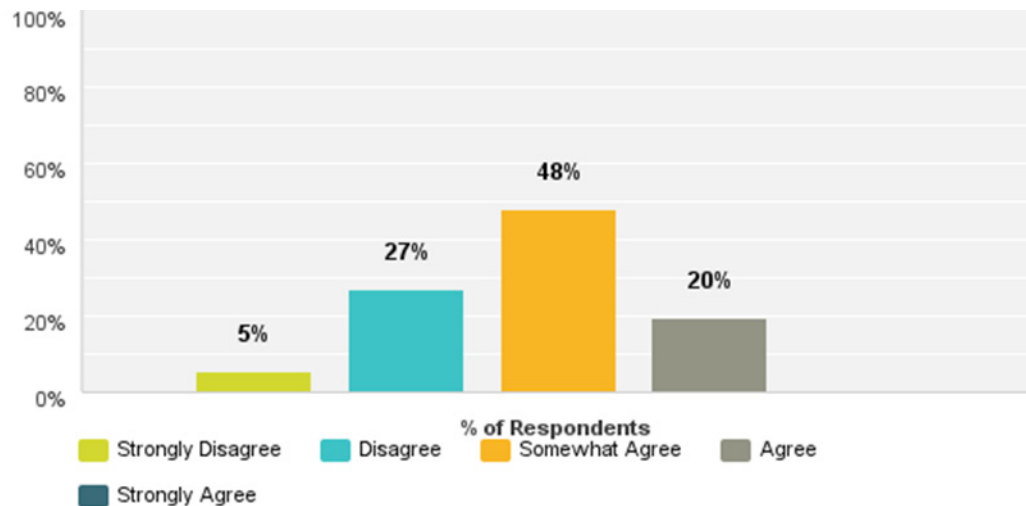
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Introduction

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 tell us at POI that they are not satisfied with their ability to execute at the store level. Specifically, responses to the Promotion Optimization Institute 2015 TPx and Retail Execution Survey published in January of 2016 made this very clear.

Chart 1: Responses to the statement, “(you) are satisfied with your ability to execute at the store level.”



Source: 2015 POI TPx and Retail Execution Survey (a link to the full text of this survey and report is located at the end of this paper).

The survey questioned 75 consumer goods companies of varying sizes and noticeably absent from the responses is a single assertion that they “strongly agree” with the above statement. Thus, a full third of respondents don’t feel they execute well, while half are only ‘so-so.’ Given these results, POI seeks to improve in-store execution through various methods, including this evaluation.

Scope of this Analysis

This document is a first-of-its-kind analysis by the Promotion Optimization Institute (POI) designed to help its members improve their in-store execution through the use of enabling technology. Not only do we evaluate the market and some of the vendors that play in it, but we will also continue to perform the analysis each year, so as to track changes over time through both this analysis and related surveys.

Key Insights

- Planning the right product assortment and a strong lineup of promotions means little if plans don't get executed correctly and field sales personnel don't have the right tools to understand what the issues are and to address them appropriately.
- "Winning at the shelf" is not just relevant in the modern trade. Execution with the traditional trade is a significant opportunity in emerging markets because of the amount of growth therein.
- Technology is only one component of addressing opportunities around promotion and distribution of consumer goods. Other factors include change management, providing best practices, and having appropriate support available in local markets.
- Having a single, global solution for retail execution and monitoring is much more aspiration than reality due to disparities in solution cost, underlying business process, and ability to provide localized support.

Recommendations

- Prioritize functionality above delivery method. The lines between SaaS, managed services, hosted private cloud, and public cloud are blurrier than ever. Your first decision is whether you will want to do customization to a solution that will take it out of the upgrade path. In the POI 2015 TPx and Retail Execution Survey, we were surprised that only 21% of respondents said that the "ability/willingness to do customization (write code) that would make a solution very tailored but turn it into a unique instance that would be out of the upgrade path" is not an important option. The question made it quite clear what customization entails, but the overwhelming majority felt that customization was important. You can customize your solution and run it on premises, or in some sort of cloud, but if you customize, then multitenant SaaS is, in the vast majority of cases, not an option. You just need to decide where the solution will reside.
- Prioritize capabilities that will help users to 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 2015 survey showed that about 80% 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.
- Don't neglect the needs of non-field users. This means managers and office-based personnel. We find that some solutions are quite mature for field users but can have

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

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 2015 Survey found a wide disparity between expectations for best practices and what was actually delivered. Don't just ask for best practices, also 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.

Market Overview

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

- More solution options exist than ever before. There has not been any significant consolidation among vendors in the last year. In this inaugural Panorama we will be evaluating 21 solutions from 20 vendors¹. Other solutions that are largely development or mobile platforms are discussed at the end of the document.
- There are no efforts around developing home-grown solutions. 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, more attractive upgrade paths.
- Analytics, user experience, and data visualization continue to be points of differentiation.

Evaluation Criteria

Company Assessment:

Company Viability

An assessment of the overall organization's financial health, the financial and practical success of the business unit, and 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. It also includes a vendor's ability to generate sustainable revenue and profits, and its commitment to continued success in this Retail Execution marketplace. We also emphasize financial transparency, regardless of vendor size.

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

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between \$250 million and \$1 billion. Tier 3 is less than \$250 million. Application of tiering can apply at the corporate level for global deployments or at the regional/national level. This is because Tier 1 companies often operate in smaller markets very differently — including both business process and technology — compared to the overall organization. Thus, a large multinational company may operate like a Tier 1 in some markets and a Tier 2 or 3 in others.

Market Responsiveness and Track Record

Ability to respond, change direction, be flexible, and achieve competitive success as opportunities develop, competitors act, and 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

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. 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 customer 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.

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 breath 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, tablet/slate devices, and current forms of handheld devices. The vendor's technology can be expanded to integrate with other company 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.

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-premise, 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 while 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.

“Analytics” is a rather vague and often abused term. The POI defines analytics as the ability to derive insights through a combination of: graphics, dashboards, alerts, reporting and query.

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 e-mail or text message as appropriate.

Reporting: Predefined reports or embedded report writers.

Query: Embedded technologies such as OLAP to enable data analysis. Also 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 that 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.

Retail Activity Optimization (RAO) uses point of sale 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.

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, where individual users can configure their own solution based on how they like to work or view information.

Promotion Optimization Institute Best-in-Class Distinctions

Within the functional set described above, we believe there are a set of significant differentiators that merit being mentioned as a group. We have touched on some of them already, but as we work to strengthen this market by encouraging their adoption, we wish to highlight the following vendors as being “Promotion Optimization Institute Best-in-Class.”

POI Best-in-Class Recipients

Functional area	Recipient(s)	Why critical to retail execution?
Mobile UX	eLeader, StayinFront	Increased adoption, usability and engagement.
Desktop UX	Kantar Retail Xtel	Addresses the often overlooked needs of office-based personnel to analyze and direct field efforts.
Gamification	Kantar Retail Xtel Accenture CAS Ivy Solutions	Encourages effort and provides constant feedback through all manner of incentives and programs.
Data Visualization	Accenture CAS	Turns data into insight with meaningful and quickly understood graphics and/or dashboards.
Analytical Insights	StayinFront	Provides KPIs in in unique and innovative ways.
Merchandising	RW3 SAP	Fully enables this vital function with all necessary roles and analytical requirements.
Distributor Management	Accenture NewsPage	Ability to execute with a channel partner — particularly critical in emerging markets, which is a vast opportunity today.
Retail Activity Optimization (RAO)	Asseco, RW3	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	StayinFront	Addresses the issue of sales personnel “not having the information to make decisions while in the store” that was identified in the 2015 POI Survey.
Social Selling	Pitcher Spring Mobile	Harnesses the power of the team to improve outcomes.
Coaching	Asseco	Provides formalized feedback loops to address the human element.

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 “best” has to offer in order to evaluate how it can create competitive advantage by improving results at retail.

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 market place that are not included 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 2016.

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	●	●	●	◐	●	●	◐	●
Accenture Cloud								
Accenture Newspaper	●	●	●	●	●	●	◐	●
AFS Technologies	◐*	●	○	●	◐	●	◐	◐
Asseco Bus. Solutions	●	●	●	○	●	●	●	●
Cohervis	○	○	◐	◐	●	◐	●	○
Comarch	●	●	◐	◐	◐	●	○	◐
eLeader	◐	●	●	●	●	●	◐	●

= good to very good
 = average to fair
 = below average

* Indicates a rating that has been modified based on additional information released by AFS after the initial publication date.

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

= good to very good
 = average to 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
RW3								
SAP								
Spring Mobile								
StayInFront								
Univera								
VisitBasis								
Zenput								

= good to very good = average to fair = below average

Figures 4 – 6: Product Assessments

Product Assessment

Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	Solution Completeness	"Sell More" Capabilities	User Experience	Analytical Capabilities	Product Vision	Configurability
Accenture CAS								
Accenture Cloud								
Accenture Newpage								
AFS Technologies								
Asseco Bus. Solutions								
Coheris								
Comarch								
eLeader								

= good to very good = average to fair = below average

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Product Assessment

Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	Solution Completeness	"Sell More" Capabilities	User Experience	Analytical Capabilities	Product Vision	Configurability
GreatVines								
ITC Infotech								
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Kantar Retail XTEL								
Klee Commerce								
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Product Assessment

Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	Solution Completeness	"Sell More" Capabilities	User Experience	Analytical Capabilities	Product Vision	Configurability
RW3								
SAP								
Spring Mobile								
StayInFront								
Univera								
VisitBasis								
Zenput								

= good to very good = average to fair = below average

Analysis of Representative Vendors

Accenture CAS & Accenture NewsPage www.accenture.com/us-en/software-cas.aspx

Profile: Part of the Accenture Products & Platforms group. A visionary in field sales automation going back nearly 30 years with key acquisitions in the form of CAS and NewsPage. The latter is still a separate offering for distributor management and salesforce automation centered in Kuala Lumpur. A cloud offering has also been announced and will be based on Salesforce.com, which will then make for 3 separate solutions: Accenture CAS, Accenture Cloud, and Accenture NewsPage.

Geographic presence: North America (25%), Latin America (9%), Europe (20%), Asia/Pacific (42%), and Africa (4%).

Total consumer goods users (seats): 161,000.

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:

Accenture CAS: Is fully embedded into all solutions. It features a novel perfect store index plus the ability to drill down to underlying KPIs, like share of shelf, and promotional compliance. We believe this is the ideal jumping off point for analytics. 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. Analytics are possible “in-flight” without connecting to the back end system. Performance KPIs include gamification for more user engagement. 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.

Accenture NewsPage: The distributor management offering has the requisite analytics including perfect store, perfect promotion, and digital merchandising. In this regard it is ahead of its competitive set. The KPI/graphics render well but do not yet have gamification or RAO. The analytical dashboard is quite nice for handheld devices through the Microsoft Datazen technology so that graphics render well on a smart phone.

We rate analytics as Above Average across both offerings.

Technology architecture/delivery options:

Accenture CAS & Accenture Cloud: The on-premise solution using Silverlight and SQL databases will be supported into the foreseeable future, except that Silverlight will be migrated to HTML 5. The solutions are available as managed services, hosted in the cloud or on premise. 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-premise solution with respect to perfect store, sales rep cockpit, asset management, performance management, or optimization.

Accenture NewsPage: A web application delivery framework from either SaaS or on-premise. It is able to 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-premise solution if desired. Modules can be enabled or disabled using configuration tools as well as adapted at the business process level.

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: RES (Malaysia), WestPac (Phillipines), PTV Group, 4Brands Reply (Europe), Accenture (Global), Verismart (Thailand).

Service partners that are able to deploy but have not yet done so: NEC, Gimasys, Strategy& Wireless Dynamics, Rural Sourcing.

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

User experience:

Accenture CAS and Accenture Cloud: Above Average. All of the solutions have undergone upgrades in the UX. They were good before, but this is an organization that always pushes itself. The ability to change the screen layout based on the project at hand and to personalize based on individual preferences are exceptional. Also, the gamification feature right in the cockpit is as it should be. The augmented reality feature of taking a picture of an individual store and dragging an image of a display module into it to show the local management how the display will look in their store environment is both unique and valuable.

Accenture NewsPage: Has a rich, menu-drive functionality and more performance metrics than other solutions of this type, including Playbook for media files and video. Basically, the user experience is on par with or above most solutions catering to developed markets. The Android tablet version is quite impressive.

Vendor trend: The distributor management capabilities through Accenture NewsPage comprise approximately 65% of the user base and is the fastest growing segment. But this is to be expected given growth in emerging versus mature markets. The inability to move to the cloud has slowed growth with Accenture CAS and we do not see it getting its fair share of new deals. It has also lost some large user organizations to competitors for a host of reasons, from cost to difficulty in upgrading the highly customized on-premise solution.

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. Responsiveness to market requirements such as “perfect store” continues to be very good. 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. At present Salesforce.com has indicated that it will go to market with Accenture and we will watch to see how disciplined this approach turns out to be, given the Salesforce predilection to pitch itself as a development platform. We also believe that Accenture as a services firm will 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. Thus, Accenture CAS has competition from within and without, while the new cloud solution is being brought up to par with the on-premise solution.

Another challenge continues to be attracting global services partners and even more regional ones to help with deployments.

Accenture NewsPage: Has fewer challenges. It is a highly evolved solution with tremendous growth potential and local leadership in Malaysia that really understands the needs of the emerging markets.

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. Even the distributor management offering, which caters to emerging markets, is very high quality. Accenture CAS also has 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 evolution of these products makes for an excellent offering across all technology delivery types and geographies. The key will be to execute with the new Accenture Cloud in a better way than with previous “managed services” approach, which only saw some traction. The Accenture family of solutions will be stronger in the long run provided that the Salesforce relationship can be effectively managed for mutual benefit and does not devolve into internal competition.

The Accenture NewsPage solution will continue to be a global leader in distributor management.

Consider Accenture CAS when: You seek global capabilities for proven solutions that have global reach, but local expertise, and also when you seek a superior user experience. But be sure that your desires for a cloud solution align with the platforming plans based on which functionalities you require and when.

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

Avoid Accenture CAS if: You need an experienced global deployment partner other than Accenture.

Avoid Accenture NewsPage if: You really just want cheap and simple.

Distinctions: Accenture NewsPage — POI Best-in-Class for Distributor Management.
Accenture CAS — POI Best-in-Class for Data Visualization and Gamification.

AFS Technologies www.afsi.com

Profile: AFS has grown from its legacy in the food service industry to an end-to-end consumer goods platform that includes ERP, TPM, analytics, plus 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.

Geographic presence: North America (45%), Latin America (7%), Europe (27%), and Asia/Pacific (21%).

Total consumer goods users (seats): 132,000.

Tiers represented: All.

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

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

Analytics: Is based on Microsoft's analytical stack and enhanced with G2 Analytics if desired. However, G2 Analytics is not integrated and has to be launched as a separate application. Has nice in-flight analytics in disconnected mode. We rate analytics as 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, synch/data exchange. All components are proprietary developments by AFS and can be delivered as on-premise, hosted/private cloud, public cloud, or multitenant SaaS.

Service partners: Infosys, Senior Software (Romania), MD Profy (Serbia), ScanMex (Mexico), Spica (Slovenia), Minerva (Slovakia & Czech Republic), KPBS (Russia), SiscoMV (Mexico/Central America), and MultiSystems (Caribbean) have been engaged but have yet to deploy for AFS.

Technology partners: Microsoft, Rackspace, Motorola, Trax, Intermec, Amazon.

User experience: 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. The image recognition capability (Trax) is nicely integrated and seamless to the user. We like the flow of activities from the "where" through mapping, to the "what" via targeting, and then to the "how" through activity planning. Overall, it is Above Average for UX. However, the look and feel varies considerably across Android (which we like the most) and Windows.

Vendor trend*: Going back over a year the company experienced a great deal of upheaval in the form of management turnover, moving the development function from India to Slovakia, and standardizing on the former Visicom platform instead of Quofore as had been previously announced. Additionally, the bulk of the Tier 1 user organizations from 3+ years ago have left for other solutions. The company has re-tooled, relocated and reorganized in order to pursue

opportunities in all tiers. New seats in the last year have come through expansions with existing organizations. At present, AFS does not have product issues. The products are sound. What it needs is an injection of confidence in the marketplace to assure prospects that it is positioned well for the future.

Strengths: Global client base with deep local expertise in key markets like China. An end-to-end set of offerings from ERP, to business intelligence (BI), to retail execution.

Challenges*: In order to secure qualitative global leadership AFS will need to:

1. Offer functionality in advanced capabilities such as gamification, social selling, perfect store, RAO, and personalized landing pages. Some of these are under way but AFS will need to catch up to competitors.
2. Attract global deployment partners to give it the ability to handle multiple, simultaneous deployments with a single partner.
3. Execute consistently in the marketplace and secure strong client references, particularly among Tier 1.

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

Key differentiators: AFS offers deep DSD functionality, including DEX integration and support for ruggedized devices. The solutions are highly ergonomic both in terms of process flow and interaction with the device.

Outlook & prognosis*: AFS has a strong sense of direction for the first time in several years. As it overcomes a few challenges we have listed and demonstrates to the market that it has a solid product and a determination to help its clients “sell more” it will leverage its large install base and secure a global leadership position.

Evaluate AFS when: You seek good solutions that can cover the globe with largely separate applications. Also, when you seek complete DSD functionality.

Avoid AFS if*: You want your own customized solution, if you want multiple global deployment options, a rich stack of “sell more” capabilities, or want an iPad platform.

* Indicates a section that has been modified based on additional information released by AFS after the initial publication date.

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

Profile: A visionary, Europe-headquartered player that is catching on in Asia with a mature offering that is currently deployed across 35+ countries. It is a subsidiary of the broader Asseco Group, which has 19,000 employees in various technology and services areas such as HR, ERP, analytics, data quality, and outsourcing across 50+ countries.

Geographic presence: Europe (98%) and AsiaPac (2%).

Total consumer goods users (seats): 25,500.

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 and 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. We rate it Above Average.

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

Technology architecture/delivery options: On-premise is still supported but not actively marketed. Hosted/private cloud is the primary delivery option in EMEA. Public cloud 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.

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.

Vendor trend: Strong positive trend with increasing ability to win against larger incumbents. Strong focus on innovation. Very strong roadmap and demonstrated ability to deliver against it.

Strengths: Deep Pan-European expertise and functionality across all aspects of retail execution and monitoring. Optimizing field-based activities continues to be 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 voice recognition.

Challenges: We do not see significant challenges for Asseco because it is growing, innovating, and expanding globally. Making the move to the North American market is never easy, but we believe they have the potential to do so.

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

Key differentiators: Excellent user experience for field and office users, strong client references, 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 strong player with global potential in the next 1-2 years.

Evaluate Asseco when: You seek a partner with strength in Europe but ability to move with you into the rest of world. Also, if you favor a product with strong usability and innovation in areas like coaching, motivation, and retail activity optimization (RAO).

Avoid Asseco if: You are keen to use Microsoft devices right away; the Mobile Touch product is compatible with Android and iOS. MS support is announced but not yet available.

Distinctions: POI Best-in-Class for both Retail Activity Optimization and Coaching.

Coheris www.coheris.com

Profile: A Europe-centric vendor with a robust field sales automation offering and a focus on merchandising/shelf management for consumer goods companies with typically less than 300 users. Recent efforts have centered on being able to conform to underlying business processes while reducing low value tasks. Coheris is listed on the Euronext Stock Exchange.

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

Total consumer goods users (seats): 4,342.

Tiers represented: All tiers.

Solution offerings: Merchandising and distributor management.

Major product sub-segments not covered: Tobacco.

Analytics: Offers embedded BI tools including visualization, pre-built OLAP cubes, and data mining and predictive modeling. Usability of analytics is ergonomic and graphical representation is extensive. 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. It even has the ability to suggest the best way to visually represent the data based on what is selected.

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-premise 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 as Above Average. UI is a tile-based orientation and is flow-based for seeing the list of stores, understanding which stores to visit through KPIs, and executing to complete promotions or increase share of shelf. Noteworthy are the shelf and store simulation tools, which are very rich and engaging. The desktop version has been enhanced and is Above Average. It features the ability to do visual analysis by region or country as a drill-down on a map, pre-built insight and KPI reports, and is user friendly.

Vendor trend: Coheris has increased its market penetration in Europe while shedding users in outlying markets. We attribute much of this to improved user experience and the importance of shelf visualization capabilities, which it has incorporated well ahead of demand.

Strengths: It is one of the first companies to be able to perform complex pricing functions on a mobile device while in disconnected mode. It has in-depth best practices and an ability to bring them to bear in concert with clients that are relatively new to automating business practices. The combination of transactional retail execution plus analytics and store/shelf visualization continues to be a strength.

Challenges: Reliance on Windows 8 and while failing to offer solutions for iOS and Android causes prospects to exclude them from consideration. It has also been slow to move beyond on-premises, but now has a private cloud offering. At the end of the day 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, but struggles to get footholds on its own.

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: 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.

Outlook & prognosis: Coheris has been a player for 20 years, and will continue to be so 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 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 across non-Windows operating system types like Android or iOS.

Comarch <http://www.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): 4,507.

Tiers represented: Tier 2 and Tier 3.

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

Major product sub-segments not covered: Tobacco.

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. However, they could be more graphically oriented and visually engaging. We rate them as Average. Nevertheless, Comarch is improving steadily — even since we began this evaluation. Gamification/leader boards must be built out as a joint effort.

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 premise, 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

Romania – Expert Software SRL

Turkey – Bizofis

Serbia – Saga

Hungary – Synergon

Croatia – CS Computer

Bulgaria – Eltrade

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

User experience: We like the tile-based architecture and depth of information, but navigation requires a great deal of scrolling to the right to see all of the information. The new back office solution is still very grid-like and monochrome, but the calendar is improved. The new Android version doesn't scale correctly on the device. It is as though the letters are too small for their placeholders. Overall we rate the UX as Average.

Vendor trend: Comarch is a competent technical organization but needs some help with elements of design. It has won a few small deals in the last year or so, but needs more differentiation to become a larger player.

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 solid roadmap for RAO, gamification, and coaching. We like the automated follow up capability to ensure that key activities are executed in a subsequent visit.

Challenges: Showing differentiation 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: Facilitates turn-by-turn driving instructions based on a list of desired store visits.

Outlook & prognosis: Comarch needs to decide whether it will invest to realize its potential. It has the resources and personnel, but lacks a compelling story that will propel it 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.

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

eLeader www.eleader.biz

Profile: An innovative mobility company that primarily enables field sales automation, but also mobile banking and commerce capabilities.

Geographic presence: North America (4%), Latin America (15%), Europe (44%), and Asia/Pacific and Middle East and Asia (37%).

Total consumer goods users (seats): 14,100.

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. A report writer for the desktop version is also available for users to build their own reports using a wizard. The analytical dashboard for desktop version can be configured at the individual user level based on specifying and organizing various widgets in the administrative tools. Overall we rate analytics as Average.

Configuration/Customization: The solution is Microsoft and utilizes proprietary system administration tools for configuration, which do not require Microsoft tools. We like the fact that this is done through drag-and-drop as opposed to sorting through hierarchies and checking boxes. 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 was outside of the routine upgrade path.

Technology architecture/delivery options: On premise, hosted/managed services, or cloud. Multitenant SaaS is not offered. Customers still use various versions and have separate databases.

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 their being solicited by competitors.

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

User experience: Above Average; one of the best we have seen on the mobile device. In particular, we like how it can deliver an iPad-like experience on a smart phone and can even do mapping in a beneficial way on a small screen. The mobile dashboard is also very appealing. 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 how mobile users can search for nearby customers by increments of distance, and desktop users can spot execution issues and immediately send a message to the field user(s) for correction.

Vendor trend: Moderate growth, good vision, and the ability to attract local as well as multinational CG clients. Continues to be profitable despite relatively high investment in R&D. Very strong expansion into Asia in the last 12 or so months.

Strengths: The company has a surprisingly global footprint across 80 countries and has extended way beyond the typical food and beverage to include a large number of consumer electronics companies. Is able to serve China without being behind the local firewall due to Polish roots.

Challenges: Has traditionally relied on partners to create reports and only recently added functionality to be give users the ability to manage report creation. Its penetration of the US market lags behind the rest of the world.

Adjacent offerings: Bar code scanning, mobile device management, POS data management, field service management, image recognition, and field service management.

Key differentiators: A superior user experience on the mobile device. Ability to execute on all major mobile and desktop platforms, including bring your own device (BYOD). Offers a free trial pilot with the ability to make configuration changes during the pilot. Deep functionality in managing vehicles, personnel, and organizational structures. Data visualization of rich media such as planograms is unrivaled. We think taking orders verbally in the field over a Bluetooth headset is really cool and eLeader already has several clients live on this capability.

Outlook & prognosis: We find that eLeader has global potential because it can handle all commercial models and is very flexible. The diversity of the user base continues to give it more avenues to growth than a rival operating in a single sector such as food/beverage. It continues to aggressively add capabilities that make it more than just a mobility play with strong linkage between and for the field as well as office-based users.

Evaluate eLeader when: You seek excellent usability and deep functionality for mapping and coordinating visits.

Avoid eLeader if: You seek the traditional support model of localized personnel by region or major country, as opposed to a hybrid approach with first line support coming from your personnel and supplemental lines being provided by eLeader from a centralized facility. Also, if you seek a single partner to perform integration services or to deploy worldwide.

Distinction: POI Best-in-class for Mobile User Experience.

GreatVines www.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 (93%), Latin America (2%), Europe (3%), and Asia/Pacific (2%).

Total consumer goods users (seats): 9,539.

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 focus is on adult beverage sector.

Analytics: 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. Where it excels is in gamification/incentives based on attainment of points for completing activities. These also include “leading indicators” — activities which, if executed timely and correctly, will drive revenue such as checking that the products is served by the glass, highlighting any objectives left open from the prior visit, executing staff training, ensuring product is featured on the menu, and getting the product authorized for distribution. “Lagging” indicators include shipments, on-shelf availability, or wholesaler 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 is very compelling, and the ability to motivate the sales force through attainment of objectives for points or cash effectively closes the cycle.

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 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 but only support iPad. No definitive plans are in place to support Android or Windows until the demand manifests itself.

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.

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 and built for user efficiency in getting a lot done during a store visit. This is consistent with adult beverage subsegment requirements where there is much to be done both in the on-trade (bars, pubs, clubs) as well as off-trade (boutiques, traditional retail stores, liquor stores). However, it is not a “pretty” solution. It looks more like a typical iPad offering circa 2010. For user experience we rate it as Average.

Vendor trend: It has a demonstrated ability to meet the needs of adult beverage companies of all sizes despite being organically grown and self-financed without debt. It has grown consistently and been marginally profitable. R&D investment is relatively high for this space.

Strengths: The level of expertise and delivered functionality for this space are 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 multitiered distribution, including depletion data integration, deep functionality for gamification across multiple functions that is way beyond leader boards.

Outlook & prognosis: Thus far it has been able to be a leader in the US market because of the government-imposed artifice of multitiered 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.

Evaluate GreatVines when: You are an adult beverage company in the US market and don't have the patience to adapt the functionality of a traditional retail execution to suit your unique requirements. Also, if you value the experience of a partner with this level of expertise. It is definitely worth a look outside of the US if you feel you can get the local support you require.

Avoid GreatVines if: You have simple, generic retail execution needs such as retail audit. Also, if you need offline capabilities for complex pricing schemas or are working offline on anything but an iPad.

ITC Infotech www.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: For Oracle solutions, analytics are included out of the box. For non-Oracle solutions, these have to be built as you go along based on needs and preferences. This is due to a relatively small number of CG clients, wide variation in client requirements that might require creation of a complex data model, and a tendency to create bespoke solutions for those 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. It also 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 Oracles 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-premise, hosted/private cloud, or on a public cloud.

Service partner: 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. Given the flexibility of HTML 5/CSS framework the UX could be suited to customer desires.

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: Ability to focus on industry capabilities and requirements on Oracle and Microsoft platforms, with flexibility to deploy on open-source platforms. Resources available in a company with 6,500 employees. Large services team. When they win, it is because of the implementation and ongoing support more so than the product itself.

Challenges: ITC Infotech has some unique offerings, however it does not position itself well in the marketplace. It also has the limitation of not really having an out-of-the box product that it can show to prospects because most of what it has is custom developed. It has not yet achieved critical mass in terms of number of clients or total consumer goods users. It also has some functional deficiencies such as the inability to do complex pricing in disconnected device. 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 does not include key industry requirements such as the "sell more" capabilities described in the introductory sections of this document.

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. There isn't a big market for this, but in the POI 2015 TPx and Retail Execution Survey showed that 19% of respondents specifically seek a vendor that will write custom code on top of an existing solution for them. Thus, there is demand for this type of an offering, but ITC Infotech will need to market itself better to have a chance of moving beyond a niche player best suited to emerging markets.

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.

Ivy Mobility www.ivymobility.com

Profile: A Singaporean company with 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, 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 (23%), Asia/Pacific (54%), Latin America (3%), and Middle East (20%).

Total consumer goods users (seats): 54,200.

Tiers represented: Tier 2 &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: Excellent in-flight analytics that are the best we have seen. Not only is it quite robust for the markets it serves, but on the global stage we rate the analytics as Better than Average in functionality and insights like brand to brand comparisons, tying marketing activities such as GRPs to trade programs, and guided selling through “Ivy Insights” and “Ivy Alerts” that prompt specific actions in the field. Also, good analytical features such as suggested order quantities based on history and some macro adjustment factors, time spent on each call, and is fully functional for analysis based on roles (seller, regional/national/general manager). Actual visual rendering of data is only Average and should be brought into line with the value of the insights. Overall we rate it as Above 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 incentive 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 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 (TCS) (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), C3I (China), HPT (Vietnam), Naviworld (Vietnam, Thailand, Middle ZEast), ProV International (North America, Europe, Middle East, AsiaPac), Tiarag Consulting Services Inc. (North America, AsiaPac).

Technology partners: SAP, Oracle, Salesforce.com, Botree (DMS), SifyTally (Accounting), Oracle, Qlikview, Esri (geographic information system), Google (maps), Baidu (maps), Jaspersoft, Planorama, Flow, Amazon Redshift.

User experience: For functionality we rate it as Above Average and constantly improving. Elements that we particularly like include: gamification with the “gold/bronze/silver” metaphor and ability to see how a sales person rates relative to the leaders based on underlying achievements, 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. Qlikview is nicely embedded, but overall rendering of data and esthetics we rate as Average.

Vendor trend: Very positive growth trend, consistently profitable, and a strong roadmap going forward.

Strengths: It is effectively a single solution that can be deployed globally without getting hung up on cost differentials, whereas many other global players are a loose collection of disparate solutions. It also has a partner network that can execute nearly anywhere. Expertise in pharma OTC distribution and hybrid processes related to selling (a.k.a. “detailing” physicians). An early-mover to multitenant SaaS. Agnostic visualization layer allows user organization to use something other than the embedded Qlikview. Deep expertise in emerging markets.

Challenges: Managing rapid global expansion and the expectations of new investors and penetrating the highly competitive European and U.S. markets as a late entrant.

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: Payment gateway concept (IvyPay) is very interesting 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 in-flight analytics, extremely low TCO, and relatively rare expertise in Asia/Africa and Middle East.

Outlook & prognosis: Given very good growth in the last year or so, many blue-chip clients, and a continuing focus on improving the product, we continue to see them as having excellent global potential.

Evaluate Ivy when: You prefer multitenant SaaS with quarterly releases, a single product that can be utilized globally, excellent value for the money, 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 or 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. This is not uncommon but should be taken into consideration.

Distinction: POI Best-in-Class for Gamification.

Kantar Retail XTEL www.kantarretail.com/xtel

Customer profile: A European vendor that is a Kantar Retail company (part of the data investment management division of WPP plc.) and is making a global play.

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: We rate analytics as Above Average across the board. It was always very good, but Xtel really got a boost from Kantar on KPIs and data visualization. Excellent in-flight analytics to optimize field activities even while disconnected. The desktop version is analytically superior in how the tile-based landing page segues right to bubble charts for customer segmentation. Good analytics are also rendered on the mobile device. The report builder is quite strong. The linkage of gamification to incentives is well thought out and takes analytics to a whole new level through the WIFM (what's in it for me) question.

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

Technology architecture/delivery options: On-premise or hosted on Amazon Cloud (AWS).

Service partners: Capgemini/iGate, Everis, Tecnomcom, DCode.

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: Continued strong momentum and considerably greater financial backing on top of an excellent product offering are a great combination to continue expanding. Product roadmap for retail execution is also strong.

Strengths: High client retention and excellent user references. Credibility and insights of being part of Kantar Retail organization. Consistent ability to deliver a superior user experience.

Challenges: Penetrating the Americas has been relatively slow, even being part of Kantar Retail. We believe that they have all the right offerings, but need to ramp up their efforts.

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: 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, virtual reality to envision it collaboratively with retailers, Kantar Retail XTEL to execute it, Planorama to capture it, and Kantar Retail XTEL 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 XTEL will become a global player in the next 3 years on the back of its quality and breadth of solutions and influence network.

Evaluate Kantar Retail XTEL 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.

Avoid Kantar Retail XTEL if: You seek something cheap and simple to meet transactional requirements.

Distinction: POI Best-in-Class for Desktop UX and Gamification.

Klee Commerce www.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): 13,200.

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 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. Fully customizable with Klee providing development and support resources for a one-off solution if so desired.

Technology architecture/delivery options: On premise, hosted/private cloud, and public cloud based on Microsoft Azure. All cloud clients have their own instance of both the front end and database.

Service partners: Klee does its own deployments through its Klee Consulting and Integration arm. Training and support are done through SMT Software (Poland) and the Retail Factory (Latin America).

Technology partners: SAP, Oracle, Microsoft.

User experience: We rate as Above Average and applaud the recent improvements. The new “Book Touch” feature is a unique way of presenting marketing materials with a combination of show player and interactive selling to drive a higher level of engagement. This, plus a new version (Klee Sales 8.0) launched in February, 2016, offers a more tile-based orientation, more “touch” ergonomics, a vastly improved calendar including a management view, integration of Google Street View to help a user identify a store/shop, and KPI attainment that shoes up as a plot on a map. These features result in increased sales effectiveness. Continues to offer the ability to configure dashboards at the user level through “skins.”

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. Willingness to create and service a custom solution.

Challenges: Got a late start on iPad because existing clients were not asking for this format but actually still preferred laptop and Windows tablet. Failure 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.

Adjacent offerings: Storage of digital assets, 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: 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: Previously we believed that Klee needed to create more homogeneous applications and fewer custom solutions. However, we have come to realize, based on the 2015 TPx and Retail Execution Survey, that there is a market for custom applications and France is a key component of that. Ergo, Klee serves a valuable niche in its sphere. It will not become a huge enterprise, but will serve its owners and clients as a proving ground for innovation.

Evaluate Klee when: You seek a partner to help you adapt and possibly customize a solution to your specific requirements and value expertise in the Western European market, particularly France. Also, you like robust product visualization and in-store simulation capabilities.

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.

MC1 www.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: Has added more visualization in the latest release and improved graphics on the handheld. We find the graphical KPI tracking to be very appealing. Also, 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 and Average 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 premise, hosted/private cloud, multi-tenant SAS.

Service partners: Services are provided through re-seller channel providers in the Caribbean region, Central America, Brazil, the Southern Cone region, and North America. Nevertheless, it has yet to deploy through a partner. Recent focus on training, support, and documentation has improved MC1's ability to support future deployments through its partner network consisting of:

HP, Smart Logistics (Caribbean), Cima IT (Central America), Vantage (Canada), Saberpoint (USA), Focus Trade (Brazil).

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

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

User experience: The solutions are complete for retail execution and monitoring, including map integration and pushing tasks out for a person to address a unique situation. It renders the same regardless of platform, but we rate it as Average in overall user experience. Some recent developments that take gamification to the point of literally being an adventure game are quite interesting.

Vendor trend: Strong trend in revenue, profits, and deal flow despite issues in the Brazilian economy. Because of its deep understanding of Latin America it was able to grow user count by 17% in the last year.

Strengths: A process approach to deployment based on process templates that then segue to roles, languages, KPIs and the ultimate solution configuration. This discipline reduces time in deployments. Ability to handle complexity in areas such as:

- Pricing and tax rules for countries like Brazil, Colombia, and Ecuador.
- Complex logistics rules for commodities-based companies.
- Product complexity with permutations and combinations such as clothing sizes and colors.
- Large numbers of transactions with a demonstrated ability to handle 300,000 customer records.

The solution also enables BYOD to avoid personal safety issues associated with overtly carrying devices in certain markets.

Challenges: Entering North America continues to be a challenge. Also, executing through re-seller partners is not something we have seen work well, if at all. MC1 needs to continue to build out and mature its partner network for services and support.

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. They have also partnered with Salesforce.com to utilize existing investment in CRM tools to add retail execution functionality without the use of middleware. This provides the best of functions like contact management from Salesforce along with industry capabilities from MC1, thus preserving the company standard while giving users what they need.

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 success in Latin America, but less likely to have an impact more broadly in the near future without additional “sell more” capabilities, such as guided selling through branching logic and suggested order.

Evaluate MC1 when: You seek deep retail execution and monitoring expertise in Latin America with a demonstrated ability to that can scale up to 5,000+ users in a single client instance. Also, If you like bundling of devices and services.

Avoid MC1: If you seek a global technology platform or if you have an imminent desire for multi-tenant SaaS.

Pitcher www.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: 2,500.

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: Durables and semi-durables.

Analytics: Has some unique radar charts and spider diagrams that offer insight into retail activities. Has an exceptionally nice dashboard with gamification badges as elements thereof. We rate analytics as Above Average whether through Pitcher Insight or with the option to export through the data cube to Qlikview or Tableau.

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

Technology architecture/delivery options: Hosted/private cloud and multi-tenant SaaS. No plans for on-premise.

Service partners: Nefos, Bluesoft, hundreds of digital marketing agencies.

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

User experience: 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. We see this as a key feature. Experience on tablets we rate as Above Average and on smart phones as Average as it is not very graphically oriented.

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.

Strengths: Configurability and the ability to leverage interactive selling capabilities that are prominent in the pharma space. 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 between CG and pharma offerings and being a relatively late entrant into a highly competitive space.

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

Key differentiators: Has some unique “cost to serve” functionality around time, distances, customer segment, and other attributes that can be key in determining whether to visit a store. Combined with sell-out data, this could be an interesting version of RAO.

Outlook & prognosis: We expect to see more of them because they have a keen sense for how sales people like to utilize tablet devices and already have a broad geographic footprint.

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.

Distinction: POI Best-in-Class for Social Selling.

RW3 Technologies www.rw3.com

Profile: A geographically focused, lifestyle company that was historically dedicated to merchandising, but has recently moved into van sales and distributor management. An early entrant into RAO, including the ability to manage and integrate POS and other data. Also an early mover to hosted solutions.

Geographic presence: North America (100%).

Total consumer goods users (seats): 5,500.

Tiers represented: All. Also, all segments of consumer goods, including food and beverage, tobacco, personal care, household products, and semi-durables and durables.

Solution offerings: Distributor management, merchandising, and van sales. DSD is available but has not yet been implemented.

Major product sub-segments not covered: None.

Analytics: We rate as Above Average because of the depth of options for the merchandising function and capabilities for analyzing POS data for identifying opportunities. Also, excellent navigation and graphical rendering of data. Has the ability to do store-specific reporting based on yesterday's data. Product ships with an embedded data cube and visualization layer as well.

Configuration/Customization: The focus is on applying functional upgrades across the entire user base; however, customization is delivered through integrated modules and product enhancements to enable that connectivity while keeping the integrity of the product.

Technology architecture/delivery options: On-premise or private cloud.

Service partners: RW3 provides its own services.

Technology partners: Apple, Microsoft, ZAYO (hosting).

User experience: The solution is very complete and role based. It includes mapping integration but not corridor search. The new tile-based architecture is a plus. It is a really powerful tool because of the depth of functionality for each role in the organization. Being able to push a report to a team member also leverages the power of the extended organization. For functionality that users need, we rate them as Above Average.

Vendor trend: Growth is not a priority as this is a lifestyle company that prides itself on depth of client partnering and retention. It is profitable and very stable; the top three executives have been with the company for an average of over two decades.

Strengths: Robust configurability, strong guided selling capability and client retention.

Challenges: Ramp up on van sales and DSD were relatively late. Geographic focus is good in allowing for depth, but may be excluded from opportunities where a more global footprint is sought.

Adjacent offerings: DSR and analytical personnel/capabilities as a service.

Key differentiators: Very deep industry expertise and ability to work with users to enable best practices. Services offerings around data analytics that allow user to outsource any of a number of analytical functions so that sales people can receive the analysis and focus more on selling. We know of no other vendor that does this.

Outlook & prognosis: It will remain highly competent, but small and focused.

Evaluate RW3 when: You want to achieve RAO ahead of the pack; when you seek a highly tailored services offering; or, when you seek depth of merchandising capabilities.

Avoid RW3 if: You seek a global solution or just want something basic and inexpensive.

Distinction: POI Best-in-Class for Merchandising and RAO.

SAP www.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-premise to cloud.

Geographic presence: North America (20%), Latin America (25%), Europe (41%), and Asia/Pacific (13%).

Total consumer goods users: 150,000.

Tiers represented: All. Strong geographic representation in absolute numbers, geographic ratios, and diverse in industry subsectors.

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

Major product sub-segments not covered: None.

Analytics: Have varying levels of sophistication depending on the product. All are proprietary. Cloud for Customer (C4C) offers configurable dashboards with a tile-based drill down to reports and KPIs. DSD also has a landing page for the Android and is vastly improved from the Windows Mobile version. The new service pack, launched in April, 2016, features more reports and the ability to create your own reports. However, you may need IT people with ABAP programming experience to create these reports. More reports are on the way in the roadmap. Analytically we rate it as Average as it covers the basics but doesn't offer any unique KPIs or innovative ways of delivering insight. The exception is the merchandising function in C4C, which has some unique views and KPIs designed to bring insight and efficiency to the in-store visit process. This we rate as Above Average.

Configuration/Customization: SAP is moving away from customization. Obviously, the on-premise REX and DSD solutions are still customizable. However, the C4C product is clearly moving away from this. SAP has a formal policy for allowing customization, unlike other vendors that tend to be opportunistic.

Service partners:

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

DSD: SAP Consulting, CapGemini, Intelligence, LatCapital.

Distributor Management: SAP Consulting.

Technology partners:

C4C: Ricoh Innovations.

DSD: Honeywell/Intermec, Zebra/Motorola, Zebra Smart DEX.

Distributor management: none yet.

User experience: The user experience varies because the retail execution solutions are a disparate mix of offerings without a single back-end. SAP offers 2 Retail Execution Solutions: an older REX on-premise version and a new Cloud for Customer (C4C) version. The older REX option requires SAP CRM and SMP (SAP Mobile Platform), which can increase the complexity of the buying decision due to these additional requirements. C4C can run stand-alone but if you are already running SAP, it is integrated to SAP including SAP CRM.

The DSD solution UX is improved across the board compared to the Windows Mobile UX, which was downright primitive. It now navigates from a landing page and gateway to all other capabilities. This now makes REX the laggard on UX, but not to worry because it is not being actively marketed and will likely be retired in a couple of years (no specific

announcement has been made and there are releases being made through April 2017). What is noteworthy about the SAP UX path is the level of specificity of the roadmap. It appears to us that the days of joint development are well over and there is a discipline around adding to the usability and feature set. We applaud this. We expect to see more and continuous improvements on Android for DSD. The DSD UX we now rate as Average, is actually significant given how far it has come. We also rate the C4C UX as Average. It has all the requisite functionality and navigates well, but is not particularly attractive. More importantly, it lacks out of the box gamification, social selling, perfect store, and deep capabilities in the way of guided selling. There are some options that would allow a user organization to develop or bring these to bear, but they aren't part of the solution set or are just waiting to be turned on. SAP needs to work to get users more engaged in sales effectiveness through the "sell more" capabilities. The same can be said for in-flight analytics. It has offline capabilities but users will need to specify what they want to track on the fly, develop the best practices of doing so, and then bring the resources to bear to make it happen. Capabilities such as seeing the number of stores visited while in offline mode are possible, but seeing total monetized orders is not.

Some positive and unique elements of the UX include:

- DSD: 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; functionality for reconciling empty bottle returns.
- C4C: available-to-promise option to ensure that a customer doesn't have his product sold to someone earlier in the route; 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; 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.

Vendor trend: SAP shows more focus in retail execution than ever before. It leverages the user network with steering committees and has a greater focus on an articulated road map as opposed to a set of joint development projects. Moving the DSD product to a modern interface is a big move and is paying dividends in the emerging markets which comprises nearly 40% of SAP users. By our count, it is number two in global user count despite being only Average in analytics and UX, so with the right focus on "sell more" functionality, it has the potential to keep the positive trend going.

Strengths: Strong and ergonomic transactional functionality as a result of working with a large and diverse client base. Name recognition with IT organizations. One of the few vendors with DEX integration, which is central to the DSD channel. Large partner base and ability to execute globally. 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. Closing the gap on the sales effectiveness or “sell more” capabilities to more effectively compete with best-of-breed offerings. Inability to sell outside of the SAP ecosystem.

Key differentiators: Deep expertise in emerging markets. Depth of functionality on merchandising offering. Momentum install base on the C4C (cloud) product. Specific publications on device compatibility by product offering based on detailed testing.

Outlook & prognosis: We have no expectations that SAP will have a single offering across all selling models in the foreseeable future, but it is closing many gaps with best-of-breed solutions. If it can turn its considerable resources to sales effectiveness and user experience, it can be the clear market leader in the next couple of years.

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 are 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 place a high value on a superior user interface or deep, out-of-the-box functionality for sales effectiveness.

Distinction: POI Best-in-Class for Merchandising.

Spring Mobile Solutions www.springglobal.com

Customer profile: Business unit of larger mobility player that continues to shed non CG businesses to sharpen its focus. It was an early entrant into SaaS-based solutions and has a global footprint. It has a partnership with Salesforce.com for chatter, one version of analytics and access to the App Exchange. SAP has a minority ownership position in Spring Mobile.

Geographic presence: North America (30%), Europe (14%), Latin America (50%), AsiaPac (5%), and Africa (1%).

Total consumer goods users (seats): 17,000.

Tiers represented: All.

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

Major product sub-segments not covered: None.

Analytics: Employs a hybrid approach combining built-in dashboards, reports, and third party analytics tools. All are fully embedded. Additionally, there is the option of utilizing a SQL 2014 back end in conjunction with Microsoft B.I. “Powerview” or a visualization tool such as Qlikview or Tableau. Analytics are very intuitive and have helpful features such as customer visit dashboard to tell the user everything about a particular account. We also found the manager dashboard to be very robust. We rate it Average to slightly-Above Average.

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

Technology architecture/delivery options: Cloud-based multitenant SaaS.

Service partners: Infosys (Global strategic partner), YKP (LatAm), Mindtree, Tectura, K2, NuvaVia (Africa), Unisys (Customer Support in LatAm).

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

Technology partners: SAP for data model alignment, Salesforce.com for offline mobile chatter and CRM integration, Trax and Planorama for image recognition, Qlikview and Tableau for data visualization.

User experience: The solutions are both ergonomic and intuitive just as with the analytical elements. The guided selling features extend beyond just tasks to combine collateral based on context and the customer dashboard that was previously mentioned. 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. Having a suggested order as well as a prominent “plus or minus” button to ratchet the quantities up or down is very nice. The overall user experience is oriented towards sales effectiveness. The Chatter social capability has the ability to do key word searches to better share best practices. Overall, we rate it Above Average.

Vendor trend: Client acquisition continues to be strong and the company is stable in its senior management and profitability. Client retention is also strong.

Strengths: We like the consistency of look and feel across the entire product offering. This allows for the creation of hybrid business processes by drawing from any of the various modules (such as having DSD drivers do merchandising or merchandizers take orders). 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. Spring Mobile has not only the ability to meet customer needs through configuration but also a willingness to spend the time to do so.

Challenges: Needs a more stable approach to partnering. The network is appropriate for what it is attempting to do globally but there have been many changes to the lineup of partners both on the services and technology partner rosters. More stability will drive greater depth of combined expertise and more seamless delivery to users.

Adjacent offerings: Device management and field service (Latin America only).

Key differentiators: Deep expertise in LatAm, specifically the demonstrated ability to handle the complex taxation schemes in Brazil. Many vendors claim they can do it, and only then attempt to figure out how. Spring can indeed handle Brazilian taxation. The strength of the partnership with SAP for integration. Expanded offerings across application, device rental, device management, and airtime. One of the few vendors with tobacco industry expertise.

Outlook & prognosis: Continued global expansion and visibility across all routes to market.

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 across all the relevant operating systems with the total cost of ownership (TCO) of multi-tenant SaaS.

Avoid Spring Mobile if: You seek an on-premises solution, are prone to customizing, or just want software and will have your IT organization handle support from implementation forward.

Distinction: POI Best-in-Class for Social Selling.

StayinFront www.stayinfront.com

Customer 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 (57%), Europe (17%), Latin America (9%), and AsiaPac (17%).

Total consumer goods users (seats): 57,500.

Tiers represented: All.

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

Major product sub-segments not covered: None.

Analytics: Consists of proprietary analytics, a KPI engine and dashboards that work both on and offline in order to do in-flight analytics. The dashboards segue nicely to gamification and rankings/leader boards to see who the top three peers are and what it will take to unseat them. We like the “gauge” orientation to KPI attainment. A really novel profit calculator is able to do simulations such as remove 3 low performing products, substitute with better performers, and see what the incremental profit will be. Dashboards are very robust and the tool features a full report builder, push reports, and many pre-configured KPIs. For analytics we rate it Above Average.

Configuration/Customization: On-premise 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-premise is an option but not common.

Service partners: IBM, Infosys, Wipro.

Technology partners: Lab4motion/Planorama/Trax (image recognition), Augment (virtual reality), Amazon (hosting), CACI (route optimization in U.K. market).

User experience: Very oriented towards sales effectiveness in a stepwise and guided fashion. The “Pitchbook” capability helps to identify opportunities at the store level and provide appropriate collateral/direction for that context. The “Augment” tool (described below) then helps to seal the deal by providing a compelling virtual reality view of what the

merchandising could/should look like. Together they are quite powerful. Additionally, the solution provides a community for sharing photos and best practices. The solutions are very ergonomic and provide a superior experience whether iOS, Windows, or Android. Swiping on an activity immediately sets up a follow up so that continuity of visits is maintained. We also like the navigation buttons, which are reminiscent of a video game, allowing users to move around on the mobile device and make entries of things like product quantities. Because of the innovative nature and quality of the UX, we rate it as Above Average.

Vendor trend: Added over 10,000 new users in the last year. Revenues continue to grow and the company is profitable. Senior leadership has been in place for nearly 20 years, which is quite uncommon in this industry. It is a very stable company with a solid roadmap through 2018.

Strengths: Proven ability to scale up to 15,000+ users at a single company and on a global basis. Strong client retention. Excellent deployment partner network.

Challenges: No significant challenges that we are aware of.

Adjacent offerings: Direct mail/fulfillment capabilities.

Key differentiators: StayinFront is the defacto retail execution solution being used by the Advantage Sales and Marketing (ASM) sales agency. This effectively means that StayinFront has hundreds more CG clients by virtue of all the brands that ASM represents and provides for more feedback on the marketplace and requests for enhancements. The “Augment” tool enables a user to snap an image of the inside of the store and insert an element of merchandising such as a display module into the picture so that store personnel can envision what it will look like and help to sell displays and assets into the store. It is quite simple to do and we believe this is the wave of the future. Additional differentiators include:

- Multiple, global deployments with 5,000+ users and doing so with SaaS.
- An install base and expertise in life sciences with the same architecture that allows for hybrid selling in the pharma OTC and health personal care subsegments where this may mean an office visit with a practitioner or interacting with a pharmacist.
- Ability to handle complex pricing in offline mode.
- Also offers 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.

Outlook & prognosis: Continued presence and relevance as a global player and innovator into the foreseeable future.

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 for Mobile UX, Guided Selling, and Analytical Insights.

Univera Computer Systems www.univera.com.tr

Customer profile: A 145 person Turkish company with a strong presence in Southeastern Europe, Central Asia, Western Asia, and the Caucasus. 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): 20,500.

Tiers represented: All. As many as 1,450 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: The product has Qlik embedded as the standard for analytics with both Qlikview and QlikSense. All pricing rules reside on the database of the mobile device for complex pricing and in-flight analytics. Data visualization is exceptional based on how Qlik is configured out of the box. We found the dark background and graphical renderings to be exceptional. Users can create their own dashboards. 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. The desktop version is equally robust. Has a full Information Services component to automate who gets which reports and how often. We rate it Above Average for Analytics.

Configuration/Customization: Full set of 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 premise or hosted/cloud.

Service partners: System Group (Russia, Kazakhstan, Ukraine, Moldova), Teymurlu (Azerbaijan), Parbis (Iran), Microsoft Azure for hosting.

Technology partners: Qlik, Microsoft, Google, Zebra, Honeywell, Samsung.

User experience: This is not an emerging markets-centric solution. It has all the features and benefits you would expect to see in Western Europe or North America. The mobile device has a tile-based orientation that is highly appealing. It has full planogram integration throughout and can do asset management. The retail audit capability was complete but not impressive; basically a check-the-box tool. It can do suggested order quantity, vendor stock balancing, and integrates with government invoicing software including being able to design a custom invoice. Overall we rate the user experience as Above Average.

Vendor trend: The company has a solid revenue and personnel growth trajectory, and the two owners are among senior management, which adds stability. R&D percentage of sales has ramped up beginning in 2015 to pursue integrated image recognition, predictive sales forecasting, loyalty management, and some trade promotion capabilities.

Strengths: The quality of the user experience and breadth of services. 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 tracking, warehouse management.

Key differentiators: The thing that most stands out about Univera is that so many of its customers claim "global" deployments with some other vendor, or perhaps two, yet 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 more common Russian, Arabic, and Turkish.

Outlook & prognosis: Univera has all the potential to work its way further east into India and Indochina with all of the diverse languages and some unique business processes. It also has strong potential in the rest of Europe. We often find vendors that are excessively rooted in their own culture. Their websites, sales collateral, and even the product demos we review are just too ethnocentric. Univera does not suffer from this, but is far more cosmopolitan than at least half of the vendors we have reviewed. Thus, it has great potential based on the quality of the offerings and willingness to adapt and enter markets that others have overlooked. Iran is a good example.

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 product and services.

Avoid Univera if: You seek something that is already adapted for the Western hemisphere or is just a rudimentary tool in general.

VisitBasis www.visitbasis.com

Customer profile: VisitBasis is a retail execution solution sold through eCommerce. You download the software and start the monthly payments. The product is marketed through web search and some resellers in Africa, Russia, and Australia. VisitBasis will work with you online to configure your solution but does not visit you on-site. The fee schedule for the solution is published online and solely based on the number of subscribers.

Geographic presence: VisitBasis would not disclose this information but stated that it has users in the U.S., Russia, Australia, New Zealand, Ukraine, Kenya, Uganda, South Africa, Egypt, U.K., Saudi Arabia, Ireland, Canada, Brazil, and Mexico.

Total consumer goods users (seats): Approximately 3,000.

Tiers represented: Tiers 2 and 3, or small affiliates of Tier 1.

Solution offerings: Merchandising, distributor management. They claim to offer DSD, but are not familiar with DEX integration.

Major product sub-segments not covered: All.

Analytics: Based on BigQuery with some proprietary components that also allow for API integration with a 3rd party. Graphics are very basic and grid-like, similar to an Excel add-in. Any sort of a dashboard or landing page would be accomplished through a custom report, not on-line. We rate it Below Average for analytics and find that a BI tool would have to be added to improve sales effectiveness.

Configuration/Customization: Only reports can be customized.

Technology architecture/delivery options: Cloud-based multi-tenant SaaS. Only Android and iOS are supported.

Service partners: Google Cloud Services.

Technology partners: None.

User experience: The merchandising solution had full audit capabilities. The user experience was very basic despite having elements of HTML 5 and Java. Lack of dashboard or landing page doesn't aid in navigation. We rate it Below Average for UX.

Vendor trend: Very hard to tell due to non-disclosure of financial information. As best we can tell the company has been in business about 3 years, has less than 10 people, and has annual revenue of less than 1 million USD. It appears to be growing though, and appears to have a remarkable geographic footprint.

Strengths: It is a solution that you can stand up in days with a minimal cost; they claim for as little as \$1,000 USD.

Challenges: We have found that most prospects typically want some form of personal attention, not just the ability to download the application and access the support documentation. Nonetheless, VisitBasis has found some traction. However, doing web searches can be tedious if not misleading, so it will likely be hard to grab much mindshare. The lack of financial disclosure and client references will also be an issue.

Adjacent offerings: None.

Key differentiators: It is a low cost and largely do-it-yourself solution with a global footprint. It is the only vendor we know of that publishes the subscription costs on its website. The cost starts at \$15 USD per user per month for the silver product, and goes up from there for gold and platinum. It does require a quote based on number of users. During our research we were told that a Lite version goes for about \$10 per user per month and audit for about \$19. It offers free onboarding for users through on-line support and tutorials.

Outlook & prognosis: VisitBasis will fulfill a role as the starting point for affordable, rapidly deployed, and integrated on your own (through exposed APIs for a few hundred dollars each) merchandising solutions. However, the concept of retail execution sold on the Web as a pure service, like subscribing to cable TV, is revolutionary. The market may not be large because broker/sales agents provide much of this service for smaller companies, but it

could be a really interesting niche in many geographies. VisitBasis will need to improve its transparency for us to be able to gauge whether it is succeeding.

Evaluate VisitBasis when: You want it simple and inexpensive, don't want any consultative selling, and don't expect to check user references or interact with an assigned account manager.

Avoid VisitBasis if: You want more analytics in a dashboard/graphical view, a more current user experience, a partner to help with best practices, personalized customer service, or integration support.

Zenput www.zenput.com

Customer profile: Retail execution vendor that caters to both manufacturers, as well as retailers, that want to perform store-check activities. The company was founded in 2013 and is based in San Francisco, USA.

Geographic presence: North America (70%), Asia/Pacific (5%), Europe (5%), and Latin America (20%).

Total consumer goods users (seats): 2000.

Tiers represented: Tier 2 and 3 with 1000 users as the largest client deployment in consumer goods. As a scalability reference, it has a 2,500 user deployment in a single instance in another vertical industry.

Solution offerings: Merchandising.

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

Analytics: Basic analytics are embedded in the application. For more detailed analytics they provide open APIs to add a more robust front end. It has no in-flight analytics and must connect to a server to provide any feedback against KPIs or inflight analytics throughout the workday. The KPIs render in a fixed way; you cannot choose how it renders or under which icon. Has basic reports such as stack rankings and visit reports. We rate it Below Average for Analytics. A BI tool would have to be added make it a tool for improving sales effectiveness.

Configuration/Customization: Customization is not an option at present.

Technology architecture/delivery options: It is cloud-based delivery, but not multitenant. Native iOS, Android, and mobile web on Windows are all supported as mobile devices.

Service partners: None. Cloud platform is Amazon (AWS) but self-managed. Implementations are done in-house.

Technology partners: None.

User experience: It is largely a forms-based retail audit solution, but the forms are very easy to assemble or change by a non-technical person. Has some guided selling such as triggering activities at the next visit based on observations made today. No gamification is

available. Photo capture is ergonomically embedded within the store visit routine. We rate it Below Average for user experience.

Vendor trend: It has been able to move quickly from a startup to a million dollar plus company, but mostly amongst retailers wishing to do store checks. Nevertheless, there are manufacturers using it.

Strengths: Being a provider to both retailers (including restaurants) and manufacturers.

Challenges: Not having expertise or best practices to share with manufacturers is a sizable obstacle due to lack of context and credibility. Merchandising is primarily relevant in developed markets but they are lower growth. There are also very low barriers to entry in the merchandising space — we see many small forms-based offerings and there is a lot of movement in and out of the market.

Adjacent offerings: None.

Key differentiators: It is not a highly differentiated product on the functionality or delivery. What is attractive is that it is very low cost and runs on virtually any mobile device.

Outlook & prognosis: We believe there will always be a niche for basic, forms-based merchandising solutions. Zenput has a better attitude and approachability than other, similar solutions we have evaluated that were downright combative. Ergo, Zenput has advantages in this space. However, there are solutions with deeper expertise/functionality in merchandising and many others that offer the full complement of DSD, van sales, distributor management, and merchandising from a single source. We believe this will limit growth to make Zenput a niche vendor like many others that are focused exclusively on merchandising. Also, they will need more industry acumen to really get traction with manufacturers. We think it is advantageous that they are totally employee owned as this should help with retention and providing better customer service.

Evaluate Zenput when: You seek a low-cost, forms-based merchandising solution for North America.

Avoid Zenput if: You seek best practices, help with integration, or services after go live such as data loading. Also, if you seek the “sell more” capabilities such as in-flight analytics, image recognition, RAO, or much in the way of guided selling.

Other vendors we evaluated

Salseforce.com — Largely a development platform that must be built upon by either a services firm or other vendor in its network. Some of these are actually featured in this report. Recently, it has chosen to partner more deeply with Accenture and declined to participate in this analysis by not providing in-depth information through our survey. We do hear of Salesforce.com personnel telling prospects that they can meet their retail execution needs, but they typically get eliminated early on for lack of functionality or inability to perform many tasks in offline mode, underwhelming analytics, or general lack of industry expertise. Either they then approach with a development partner, or move on. We don't believe that a custom build on the Salesforce.com platform can be achieved for nearly the same cost as commercial off-the-shelf (COTS) software. It may be uniquely tailored to individual needs, but we don't believe that many CG companies are so unique in what they do that they cannot accommodate their business processes with a COTS offering. Nevertheless, Salesforce.com often looks good as a PowerPoint presentation or a pitch for a custom build.

If you find the Salesforce.com SaaS proposition and flexibility to be intriguing, we recommend looking at solutions that are architected on Salesforce.com with a COTS offering combined with industry acumen and best-practices.

Microsoft — A broad offering of excellent technologies, but lacks an out-of-the-box solution as well as expertise in the underlying business processes required for success in retail execution. We rarely see CG manufacturers trying to build their own retail execution capabilities on Microsoft components. When they do they typically outgrow them quickly and upgrade to a COTS offering. If Microsoft is one of your preferred vendors, we recommend considering some of the offerings in this report that are based on Microsoft technologies.

Antenna and Kony — Are mobile development platforms. Unlike Microsoft, they lack the analytical and user components. We have not seen either of them make it past the first round of an RFP in many years due to lack of functionality and industry/business process expertise. We believe that retail execution is simply not the right venue for what they have to offer.

Other Enablers

We recognize that there are additional ways to improve retail execution. And, while not specifically part of this analysis, they are possibly adjunct or complementary to the retail execution capabilities described above. What follows is a brief summary of two capabilities, Crowdsourcing and Remote Monitoring, which we believe should be considered as an integral part of any retail execution strategy.

Enabler: Crowdsourcing

We see an increasing interest in an on-demand workforce (often referred to as “crowdsourcing”) of the data collection component of the store visit. This means checking for:

- Product availability, both current items as well as in a new item launch.
- Presence of a shelf tag.
- Presence of a promotion or display and its location.
- Presence of point of sale (POS) materials.
- Capturing pricing, both promotional or every day.
- Details about assortments.

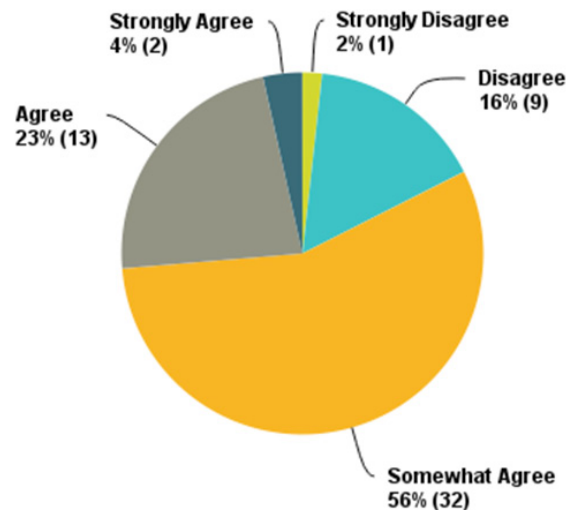
It can also take photos and upload them to support the facts represented by the data.

But the context is broader than just merchandising. It can also be a means of helping distribution partners to be more effective by providing feedback on their activities and helping increase collaboration with retailers via a new stream of data that quantifies the shopper view of in-store merchandising conditions. And more holistically, it can compensate for data quality/coverage issues from sell-out data from syndicated or direct sources.

What it can't do is take orders, check planogram compliance, or anything related to replenishment.

Support for such systems appears to be pretty widespread as demonstrated in the following response to the POI Survey.

Chart X: Responses to the statement, “you believe that merchandising activities can be crowdsourced.”



In this case, we believe that the “somewhat agree” response is viable because of the limitations on what can and cannot be done by crowdsourced personnel and by its nascent, yet rapidly evolving, capabilities. Therefore, we believe that 83% of the respondents believe that it has a role. That role may vary based on factors such as the geography (a distant and isolated city), or product category (high velocity and prone to stock-outs), or timing (a seasonal item or new product introduction), but it does have a role.

Our intention here is not to evaluate the vendors in the crowdsourcing of the retail execution space, but to ask two key questions:

4. Should the industry begin to integrate data from these solutions to get a more complete view of a market?
5. Where should that integration take place?

To answer these questions, we evaluated an offering from Quri (www.quri.com), a crowdsourced retail execution solution that operates in the U.S. market. What we found is that it definitely has a place in the retail execution portfolio. There is already a substantial following among Tier 1 CG companies that are using Quri to avoid blind spots in the marketplace, regardless of whether retail execution is done by themselves (direct sales force), a broker/sales agent, or distributor (like adult beverage). We believe this data should absolutely be combined with other in-store information to create the best possible perspective of market conditions and opportunities.

We do not believe that a generic BI tool (like those designed for financial reporting and analysis) should be the aggregation point for retail execution data.

The other take-away from our analysis involves the nagging question about where the enhanced “perspective” on market conditions should reside and be viewed. We do not believe that a generic BI tool (like those designed for financial reporting and analysis) should be the aggregation point for retail execution data. At the same time, we have pointed out that many of the solutions evaluated in this report have some shortcomings in dash boarding, data visualization, and ability to drive actionable insights. Our evaluation of Quri showed that it could be a viable consolidation point for all types of field level data. This would naturally be at the discretion of the user organization, but there are options. And in this case, Quri has analytical capabilities that are on par with many of the best solutions we have evaluated herein. Therefore, we recommend the following:

- Consumer goods manufacturers and their channel partners should consider all data elements (i.e. traditional retail execution, sell-out data, and crowdsourced data) as critical to completing the picture of the marketplace. Solution providers should, in turn, consider crowdsourced data as another critical element and be pre-built to receive, combine, and render it for users.
- The “best” analytical and visualization solution between retail execution and crowdsourced options should be selected as the consolidation point.
- The augmented data should be used to drive the activities that we have described herein; specifically, those that deliver actionable insights to “sell more” product than would be possible through mere transactional solutions or those with a less complete view of the marketplace.

All of this is a heady task, but we believe that it is well worth the effort because of the sustainable competitive advantage that it will deliver, especially for early adopters.

Enabler: Remote Monitoring

This refers to that which can be known about store-level conditions without actually entering the physical store. Examples include:

- Product availability
- Promotional compliance
- Product listing opportunities
- Approved products that are currently not in the assortment

All of this insight is gleaned through evaluation of the POS (also known as ePOS in many geographies) data. The more often this data is made available, the more actionable it is. For example, POS data that is a week old and shows product availability issues at a list of stores may not mean that the issue has not been resolved. There may be other procedural issues that can be corrected with a visit and some focus, but the revenue opportunity was lost from the time that the out-of-stock started and was ultimately corrected.

These are many of the issues that retail activity optimization (RAO) seeks to resolve, but in a more directed and integrated fashion. Nevertheless, most manufactures and retail execution solution vendors are not ready to make the jump to RAO because they may lack expertise in obtaining, cleansing, and analyzing the POS data,

Most manufactures and retail execution solution vendors are not ready to make the jump to RAO because they may lack expertise in obtaining, cleansing, and analyzing the POS data, or in building out the decision engine.

or in building out the decision engine. Thus, it was in the spirit of providing additional insight into retail conditions that we engaged with RI, formerly known as Retail Insight. (www.ri-team.com), a UK-based solution provider with offices in London, Bentonville, Singapore and Sydney. We specifically looked at their Compass product and its ability to evaluate POS data by store, by day, and by SKU to determine where the issues/opportunities lie. Compass actually utilizes the same POS data engine that RI contractually provides for the world's largest grocery retailer for store level analytics.

The primary value of this type of remote monitoring offering we see as threefold:

- Spot the opportunities quickly despite the vast amount of data and the fact that it may be provided daily in the case of many other retailers; or, virtually on demand as in the case of Walmart.
- Determine which actions are to be taken to fix the situation(s) and drive the most value. This is done through alerts, which are key to making it easy for the user.
- Provide valuable KPIs such as “lost sales,” “availability scoring,” and “peer store comparisons” that are critical to improving manufacturer/retailer collaboration. Because the underlying data is by store it can be summed to provide insight by region, territory, or other parameters.

It is also very helpful that the Compass tool has visualization capabilities through Tableau, geographic mapping, heat mapping, and the ability to “box” a group of stores with a mouse and see how they are performing both as a group and individually.

There is more to be said about RI and Compass but the reason we have touched on it here is that we believe it is a key gateway to RAO. We also believe that every retail execution deployment in a market that has direct POS data would significantly benefit from a tool like this. In fact, it makes the most sense to have it integrated so that the insights from Compass, or ability to “detect,” should be combined with the ability to “execute” — from route planning through to capturing the actions taken. As an intermediate step, CG manufacturers or their agents could get the insights through Compass, but ultimately they should be combined into a seamless loop of “detect and execute” at all levels or responsibility — even at the execute level — to drive better collaboration through top-to-top discussions.

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 run from solution-only to having all sorts of services options and architectures from on-premise to cloud. And, they are available from vendors with local expertise and presence. The POI's overarching recommendation, however, 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.

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