



**Promotion Optimization Institute, LLC**

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# Vendor Panorama for Retail Execution and Monitoring in Consumer Goods 2018

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## Introduction

We are once again pleased to offer this analysis of the global Retail Execution marketplace. It comes at an absolutely critical time because our 2018 POI Survey and research on the State of TPx and Retail Execution indicate that:

- Overall satisfaction with the ability to execute at retail declined by 3 percentage points from the prior year. Only 60% express some satisfaction, of which two thirds say they are only “somewhat satisfied.”
- 81% of respondents have challenges finding tools that enhance Retail Execution worker productivity. This is 5 percentage points worse than last year.
- 90% of respondents say they have challenges moving capabilities from transactional to analytical.
- Many Retail Execution solutions being used today do not enable field-based users to make appropriate decisions at the store level. Only 13% feel strongly that they have the tools they need to make such decisions. Some of this is due to a lack of off-line capabilities. Only 35% of survey respondents say that their off-line needs are being met and this figure declined by 16 percentage points from prior year.
- Among office-based users, only 22% are fully satisfied that their analytical needs are being met. This impedes users from generating insights and managing field-based personnel.

This data points to a sort of “perfect storm” given how aggressive eCommerce players like Amazon, Alibaba, and Taobao have become. Hence, being able to execute at retail has never been more critical, regardless of your route to market. The rewards are huge for those companies who can get it right, and that is the impetus behind this report.

## Recommendations

- Prioritize functionality above delivery method. The lines between SaaS, managed services, hosted private cloud, and public cloud are blurrier than ever and highly dependent on where the deployment(s) will take place. On-premises is still as popular as cloud. Don't be lead to believe that you have to take less functionality or flexibility because everybody is moving to the cloud, because this is simply not the case.
- Continue to prioritize capabilities that will help users be more effective, i.e. to “sell more.” Otherwise, why spend the money? These capabilities include retail activity optimization (RAO), image recognition, guided selling, social selling, gamification, voice recognition, and in-flight analytics. Each of these is described in the Product Assessment section below. Our 2018 survey showed that about 71% of respondents do not have the “sell more” capabilities, so they give a significant competitive advantage to those who attain them.
- Test, script, and test some more to ensure that prospective solutions can meet your off-line requirements for in-flight analytics and complex pricing/promoting. The only way to know is to test. This is still a big issue in the space, as we stated above.

*Continue to prioritize capabilities that will help users be more effective, i.e. to “sell more.” Otherwise, why spend the money?*

- Recognize that a single solution is not likely to meet your global needs. There is just too much disparity in price, suitability to local requirements, and availability of support to be able to do so. We find that 3-5 solutions are typical for truly global companies.
- Continue to focus on the requirements of non-field users, meaning managers and office-based personnel who support the field. We find that some solutions are quite mature for field users but can have significant limitations for those who have other roles. The same can be said for system administration tools and related personnel. It is highly advantageous to you to be able to manage the configuration of your retail execution, create reports, add users, add fields, or perform other such tasks without involving the IT organization or the vendor.
- Ask for best practices from your vendor or implementation partner. The POI 2018 Survey found that only 13% felt strongly that they received best practices in combination with their solution. You often have to ask for them. You should find out the background(s) of those who are expected to deliver them. Then, document precisely the sort of best practices you are looking for and make this part of the scope of work.

## Market Overview

Market requirements have changed slightly in the last 3 years, hence the need to continue focusing on the requirements that follow to address ongoing opportunities. We note the following trends as it relates to the solution marketplace:

- Lack of a small set of dominant players. There are several small players with Retail Execution revenues of less than \$20 Million USD that rival the global or enterprise players. More solution options exist than ever before. There has not been any significant consolidation among vendors in the last year. In this Panorama, we will be evaluating 23 solutions from 21 vendors.
- We still do not see any efforts around developing home-grown solutions and have not for several years. The market is relatively mature and the various vendors offer: solutions-plus-services such as asset management, monthly pay-by-user arrangements as opposed to lump sums up front, best practices baked in from years of experience with multiple manufacturers, and more attractive upgrade paths.
- Analytics and the ability to help a salesperson make informed decisions at the point of sale continue to be a key differentiators.

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

What now follows are our evaluation criteria so that you will understand the basis by which we have rated the vendors in our analysis.

## Evaluation Criteria

### Company Assessment

#### **Company Viability**

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

#### **Geographic Strategy**

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

#### **Market Responsiveness and Track Record**

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

#### **Deployment Capabilities**

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

#### **Market Understanding**

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

## **Vertical/Industry Strategy**

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

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

## **Partner Leverage**

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

## **Company Vision**

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

## **Product Assessment**

### **Product Aptness and Flexibility**

The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology, and feature sets as they map to current and future requirements that will enhance the competitive advantage of users. Web and mobile technology that is scalable and can support internal sales agents and partner sales agents. The data model can support appropriate hierarchies of customers and products, for example: product family, brand, and stock-keeping unit. The product also supports multiple platforms, such as laptops, tablets, and current forms of handheld devices. The vendor's technology can be expanded to integrate with other companies' legacy solutions, best-of-breed offerings, or syndicated data sources. This criterion also includes important enablers, such as order and data management, mobile printing, barcode scanning, content management, contract management, reporting and analysis, and full on/off-line 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 salesperson to the venues where the greatest impact can be achieved. This not only includes the activities to be executed, but also the optimal routing between venues.

### **Delivery Flexibility**

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

## **Solution Completeness**

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

- Merchandising
  - Call planning/execution/reporting cycle
  - Image capture
  - Analytics
  - GPS/mapping integration
- Distributor management
  - Call planning/execution/reporting cycle
  - Channel partner visibility
  - Analytics
  - Product/payment integration
  - Order entry
  - Sales collateral management
- Van sales
  - Pre-sales/route sales
  - Order entry
  - Price data management
  - Mobile invoicing
  - Product/payment reconciliation
  - Analytics
  - Price data management while disconnected
- Direct store delivery
  - DEX Integration (in applicable markets)
  - Call planning/execution/reporting cycle
  - GPS/mapping integration
  - Mobile invoicing
  - Product/invoice reconciliation

## **Off-line Capabilities**

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

## **User Experience**

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

## Analytical Capabilities

Analytical abilities involve the ability to derive insights through:

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

## Product Vision

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

- **Retail Activity Optimization (RAO)** - This uses recent (daily or more frequent) point of sale (POS) data to determine which stores to visit, what to do while there to drive the greatest return on resources, and the best sequence for reducing drive time. RAO not only optimizes in-store execution, but also reduces cost factors, such as fuel and the personnel costs associated with visiting locations where there is low or no need.
- **Image recognition** - This captures an image of the store shelf and transmits it into the cloud where images of manufacturers’ and competitors’ brands are analyzed to determine compliance to approved schematics, compliance to some promotional agreement, key performance indicators (KPIs) such as share-of-shelf, and so forth. This drives the activities the salesperson will engage in at that store after the few minutes it takes for the results to come back to that person’s mobile device.
- **Guided selling** - This utilizes branching logic, store-specific data, fact-based selling, and graphical delivery to direct activities and maximize impact at the individual store level.
- **Social capabilities** - This harnesses the power of social networks between peers and from managers to peers to give immediate feedback, solve problems, and share best practices from within the retail execution solution without having to resort to a separate tool.
- **Gamification** - This utilizes leader boards, compensation simulation, embedded games, as well as daily/weekly contests as motivators for the field force.
- **Voice enablement** - 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. Conversely, it enables the solution to “speak” to the user to share instructions from managers that come in via social, share insights about an upcoming store visit, and anything else that would allow a user to multitask by have a device speak as opposed to reading from it.

- **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 off-line or must send transactional data to the central server and back to the device to provide these insights.
- **Virtual reality** - This allows the visualization of an image such as a display module or cooler within the context of an individual retail outlet to provide the best possible understanding of appearance and fit.
- **Predictive analytics/optimization and pattern recognition** - Enable a user to understand probable outcomes that are not within the realm of the human mind to understand. Examples include the optimal time to bring product to a store before it becomes unavailable or the best route between 15 stores that have been chosen for a visit today so as to reduce drive time. Pattern recognition, on the other hand, is the ability to identify relationships between variables and answer questions that people have not thought to ask. Examples include identifying that a store consistently sees an increase in sales during the first 3 days after a merchandising visit despite no product availability issues or identifying social triggers that impact sales that nobody ever thought to consider. These capabilities are often provided under the banner of machine learning or artificial intelligence.

## **Configurability**

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

## **Promotion Optimization Institute 2018 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 “POI Best-in-Class.”

## **POI 2018 Best-in-Class Award Recipients**

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

Note that recipient names in black text indicate second year-in-a-row winners. **Those in blue text indicate a first-time recipient.**

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

### Vendor Assessments

Figures 1 through 6 are company and product assessments for the vendors covered in this research. Note that the ratings do not comprise a normal distribution (i.e. as many Above Average as Below Average ratings) because there are many solutions in the marketplace that are not included in this report for various reasons. Hence, ratings are absolute versus the market, and not relative versus other vendors featured in this report. The source for all figures is POI's primary analysis conducted in 2018.

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

**Figures 1 – 3: Company Assessments**

Company Assessment								
Vendor/Category	Company Viability	Geographic Strategy	Responsiveness & Track Record	Deployment Capabilities	Market Understanding	Vertical/Industry Strategy	Partner Leverage	Company Vision
Accenture CAS & Accenture Cloud	●	●	○	◐	●	●	◐	●
Accenture NewsPage	●	●	●	●	●	●	◐	●
AFS Enterprise	●	●	●	●	●	●	●	●
AFS POP	●	◐	●	●	●	●	●	◐
Asseco Bus. Solutions	●	●	●	◐	●	●	●	●
Comarch	◐	●	◐	◐	◐	●	○	◐
Customertimes	●	◐	◐	●	●	●	◐	◐

= Above average  
  = Average  
  = Below average

## Company Assessment

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

● = Above average   ◐ = Average   ○ = Below average

## Company Assessment

Vendor/Category	Company Viability	Geographic Strategy	Responsiveness & Track Record	Deployment Capabilities	Market Understanding	Vertical/Industry Strategy	Partner Leverage	Company Vision
MC1	●	●	◐	◐	●	●	●	◐
Pitcher	●	◐	●	◐	●	◐	◐	◐
SAP	●	●	●	●	●	●	◐	●
Spring Mobile	●	●	●	●	●	●	●	●
StayinFront	●	●	●	●	●	●	●	●
Univera	●	●	●	◐	●	●	●	●
Zaptic	◐	◐	◐	○	◐	◐	●	●

● = Above average   ◐ = Average   ○ = 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 NewsPage	●	●	●	●	●	●	●	●
AFS Enterprise	●	●	●	◐	◐	●	●	●
AFS POP	●	○	●	◐	◐	◐	◐	○
Asseco Bus. Solutions	●	●	●	●	●	●	●	●
Comarch	●	◐	●	○	●	◐	○	●
Customertimes	●	○	●	◐	◐	◐	◐	●

= Above average  
 = Average  
 = Below average

Product Assessment								
Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	Solution Completeness	"Sell More" Capabilities	User Experience	Analytical Capabilities	Product Vision	Configurability
eBest	●	○	●	◐	◐	◐	◐	●
EdgeVerve	●	○	●	○	◐	●	●	●
eLeader	●	●	●	◐	●	◐	◐	●
GreatVines	●	◐	●	●	◐	●	●	●
ITC Infotech	◐	●	◐	○	○	◐	◐	◐
Ivy Mobility	●	◐	●	●	●	●	●	●
Kantar Consulting	●	●	●	●	●	●	●	●

= Above average  
 = Average  
 = Below average

Product Assessment								
Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	Solution Completeness	"Sell More" Capabilities	User Experience	Analytical Capabilities	Product Vision	Configurability
MC1	●	●	●	◐	●	●	◐	●
Pitcher	●	◐	●	●	●	●	◐	●
SAP	●	●	●	●	◐	●	●	●
Spring Mobile	●	●	●	●	●	●	●	●
StayinFront	●	●	●	●	●	●	●	●
Univera	●	●	●	●	●	●	●	●
Zaptic	●	●	◐*	◐	●	○*	○*	●

● = Above average  
 ◐ = Average  
 ○ = Below average

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

## Analysis of Representative Vendors

### **Accenture Cloud, Accenture CAS, and Accenture NewsPage** [accenture.com/cpgsolutions](http://accenture.com/cpgsolutions)

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

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

We will evaluate the two offerings separately.

### **Accenture CAS and Accenture Cloud** [accenture.com/cpgsolutions](http://accenture.com/cpgsolutions)

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

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

**Tiers represented:** All.

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

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

**Analytics:** Embedded analytical capabilities include continuous tracking of KPIs in the “sales cockpit” even when off-line, suggested order quantities, and more management insights for coaching subordinates. This cockpit metaphor has been expanded to include one for store level information that is critical and includes target attainment.

Analytics is fully embedded into all solutions. Additionally, it has full reporting and analytics, including OLAP with a single back-end across all retail execution functions except for distributor management. The dashboard U.I. is outstanding for all formats. The future roadmap includes game changing elements such as combining optimization and gamification in one capability so users can see outcomes of their efforts such as badges or even commissions earned. It also includes a recommendation engine with natural language ability to ask the system for an explanation. RAO is based on filters for certain in-store circumstances. This gives the user the ability to choose which stores with which issues to address. Thus, the POS data helps to identify the issues and the user can filter or choose which ones to visit and address. Future predictive analytics will provide further insight in the form of possible outcomes. We rate analytics as Above Average.

**Technology architecture/delivery options:** The Accenture CAS on-premises solution will be supported into the foreseeable future and has been nearly completely migrated from Silverlight to HTML 5. The solutions are available as managed services, hosted in the cloud, or on-premises. The Accenture Cloud solution is between 95% and 100% on parity with the on-premises solution. It is built on the Salesforce.com platform as a multi-tenant SaaS model.

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

We found the Accenture CAS solution to also be very configurable and with intuitive tools to do so. It is possible to customize as well.

**Service partners:** 4Brands Reply (Europe), Accenture (Global), Rural Sourcing.

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

**User experience:** The UX continues to evolve and improve. Some of the aspects we like include how goal attainment is portrayed as a shaded bar with an arrow showing progress, the use of corridor search to find an alternate visit nearby, the ability to dump a list of visits right into the route plan to be populated, and the Sales Folder function which keeps collateral in folders based on the stores for which it is relevant. The UX is very good. We rate it Above Average.

**Vendor trend:** 2017 didn't see much momentum. Some improvements such as more HTML 5 will certainly improve prospects, but we see issues in sales execution. Elsewhere we see significantly more interest in solutions that are aligned with Salesforce, despite Accenture Cloud enjoying a preferential partner position.

**Strengths:** The new Perfect Plan capability in Accenture Cloud is very cool because it utilizes the Einstein AI platform to provide real-time analytics of the retail situation at various levels. The organization has the most disciplined approach to UX development that we have seen. It works though as the output remains strong.

**Challenges:** The key challenge continues to be building the sales pipeline and getting back into opportunities after being discounted as “not yet fully ready” for close to 3 years. Also, the tendency of Accenture as a services firm to be more motivated to do a custom build on the Salesforce platform than it will be to offer just the services component of an Accenture Cloud deployment. Finally, attracting global services partners, and even more regional ones, to help with deployments.

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

**Key differentiators:** The Accenture offerings have the advantage of its scale and presence, which is unrivaled. It has the ability to bring truly “smart” capabilities to bear through AI and machine learning. As an example, creating a suggested order based on some arithmetic of past orders is pretty standard. Doing it with predictive models that take into account all available factors is the kind of game-changers that Accenture Cloud and Accenture CAS are about.

**Outlook & prognosis:** It is a tough situation because this is not a solution for the masses at an attractive price. It is powerful and appealing for the needs of Tier 1 companies. Nevertheless, we don’t see many of those deals being done. Accenture NewsPage is better suited for growth. Accenture CAS and Accenture Cloud need to make a leap to the cutting edge now that they have achieved parity between the two solutions. They need to become highly differentiated such that CG companies actively seek them out and see the value in a premium product.

**Consider Accenture CAS and Accenture Cloud when:** You seek global capabilities for proven solutions that have global reach, but local expertise. Also, when you seek an excellent user experience. In addition, if you have designs on Salesforce.com for omni-channel capabilities that extend beyond just Retail Execution. Finally, if you see the value in bringing AI to bear in your sales processes.

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

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

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**Accenture NewsPage** [accenture.com/cpgsolutions](http://accenture.com/cpgsolutions)

**Geographic presence:** North America (.3%), Latin America (4%), Europe (2%), Asia/Pacific (73%), and Africa (18%).

**Total consumer goods users (seats):** 129,336.

**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:** As Accenture NewsPage has entered Europe and North America we no longer consider it an emerging markets-centric solution. The analytical capabilities for Perfect Store, call productivity, store coverage, and other aspects of sales efficiency/effectiveness are very strong. Add to that the ability to predictively determine the Next Best Action and

it is one of the best on the market. It even includes talking about products they both have and have not ordered in the past, so it has mini-category management capabilities. Clearly the actual analytical capabilities go in lock step with the availability of the data, but all of the potential is there to derive the insight and act against it. NewsPage also has a great vision for contextualization at the store level, which we applaud. The data also renders very nicely for handheld devices.

We rate analytics as Above Average for use in any market.

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

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

**Service partners that have deployed in the past:** RES (Malaysia), WestPac (Philippines), Accenture (Global), VeriSmart (Thailand).

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

**User experience:** Has an impressive UX that features excellent gamification, a digital playbook for learning and training, a step-wise approach to store visits, and even the ability to recommend how much time to spend in a given store based on conditions there. It also has contextualized analytics for each retailer or class of trade for discounts and activities.

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

**Vendor trend:** Accenture NewsPage is on a very positive trajectory in new client acquisition and product development. It was among the top three companies in new user licenses sold since our last report. The roadmap is second to none.

**Strengths:** The background of NewsPage in emerging markets coupled with Accenture global resources and influence. The user experience is exceptional. The list of name-brand clients is impressive. The eCommerce front end that allows the traditional trade to see the product, see a promotion, order it, complete the purchase, and have it delivered is very nicely laid out.

**Challenges:** Building out a more multi-regional or global deployment partner network will be critical as it builds more momentum across regions.

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

**Key differentiators:** The degree to which it assists and prompts with insights throughout the selling process. That, combined with gamification and predictive analytics, puts it within reach of allowing salespersons to perform simulation around their compensation. It also has a digital merchandising solution that is akin to image recognition. All of the processing is done on the

device instead of the cloud in just a few seconds. It can calculate percentages for planogram compliance, SKU distribution, and overall results. It is not as powerful as the cloud solutions, but is cheaper and faster. Over time we believe this will be the new paradigm.

**Outlook & prognosis:** The Accenture NewsPage solution will continue to be a global leader in the emerging markets and gain a foothold globally due to its strong capabilities.

**Consider Accenture NewsPage when:** You want deep expertise in emerging markets, the ability to execute globally, and value the ability to combine strong in-store execution with advanced analytics.

**Avoid Accenture NewsPage if:** You just want a low cost, transactional solution. You need a solution for markets where data is scarce and could not take adequate advantage of advanced capabilities.

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

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**AFS Technologies** [afsi.com](http://afsi.com) and **The POP Company** [thepopcompany.com](http://thepopcompany.com)

**Profile:** AFS has grown from its legacy in the foodservice industry to an end-to-end consumer goods platform that includes ERP, TPM, analytics, and retail execution and monitoring through the acquisition of the former Ross Computer Systems, Quofore, Visicom, and, most recently, the POP Company to deepen its presence in Asia. It is now one of 5 vendors with a global presence.

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### **AFS Technologies, the “Enterprise Solution”**

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

**Total consumer goods users (seats):** 149,000.

**Tiers represented:** All.

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

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

**Analytics:** The analytics are very strong and build upon the Microsoft Power BI capabilities that we wrote about last year as a boon to more authored reporting capabilities and visualization. We would like to see it completely embedded as opposed to a separate offering. We applaud the approach of providing insights in the form of exception reporting and alerts. This is key as Nielsen and other granular data is brought to bear and can overwhelm a user otherwise. The in-flight analytics are also exceptional for spotting something of immediate interest and drilling down. We also like that the customer fact sheet as well as exception report by product can be reviewed upon arriving at the store or during route planning. It is not available off-line, but this is not a problem.

The addition of natural language query is very cool and favors both field and office-based users. It has some gamification, but we would like to see more in this area to facilitate more comparisons, make it fun, and perform analysis of how to improve versus peers. We know

of one instance where data is being passed between the Enterprise and POP solution for consolidated reporting so this shows other companies may want to follow this two pronged solution path knowing that they can do consolidation for analytics and reporting. We rate it as Above Average.

### **Configuration/Customization:**

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

### **Technology architecture/delivery options:**

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

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

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

**User experience:** Offering a more component-based approach is a newsworthy advance because of how companies are creating hybrid processes such as DSD and merchandising. Focus on Perfect Store is more based on improving the components instead of the overall score, which we like. Also, being able to show how peer stores are performing.

Having the “campaigns calendar” is very useful for organizing collateral and activities. It isn’t what we would call pretty, but it is visual, which is nice. Other areas in the solution could benefit from a graphic at just the right time. In some places the print is small and not sized well for the solution. The Android Mobile and IOS solutions, require a lot of scrolling up/down and side/side, which may be a personal preference feature that we aren’t fond of. The iOS version is a work in progress and needs more esthetics and graphics. We continue to rate it as Average

**Vendor trend:** The company has a strong trend over recent years in terms of both client retention and growth. Going to market as more of an integrated company with POP makes it formidable. The roadmap is very good with key elements such as AI and ML-driven insights, more capabilities in Perfect Store, and route optimization on the front end.

**Strengths:** The diversity of the install base from clients with tens of thousands of users down to just a few is a testament to the appealing functionality. Having an enterprise as well as emerging markets offering that are both proven and growing. Also a strength is the power in the analytics and early move to AI. The partner network is also a real plus.

**Challenges:** We don’t see significant challenges. Having POP start selling in developed markets could have presented a challenge, but that was averted by having a single sales force offer the best solution to meet the customer need.

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

**Key differentiators:** The depth of the relationship with Microsoft across development, technology and platform, services, and existing software solutions. We don't see Microsoft partnering like this elsewhere. Also, the deep local expertise in key markets like China. Offering the DSD solution both at an all-inclusive price, or based on data through put, is innovative and we have not seen it elsewhere. AFS also benefits greatly from its relationship with a large global food company that partners for visionary as well as practical solution elements and is constantly testing the boundaries.

**Outlook & prognosis:** We find AFS to be very self-aware. It has literally re-invented itself in recent years and overcome challenges to position itself as a global leader. We believe that AI can be a real game changer for this space and that AFS has a realistic and mature view of the possibilities it can bring.

**Evaluate AFS Enterprise solution when:** You seek strong solutions for global, local, or anything in between and favor strong analytics in the form of insights and guided selling. Also, If you want trade promotion management capabilities as well from a single vendor. Finally, if you want to create hybrid sales processes across merchandizing and selling.

**Avoid AFS Enterprise solution if:** You want your own customized solution or a single back-end solution across all markets and channels. Also, if you want the absolutely slickest tool on the market.

**Distinctions:** POI Best-in-Class awards for: Merchandising, Guided selling, Analytical insights.

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**The POP Company** [thepopcompany.com](http://thepopcompany.com)

**Geographic presence:** North America (1%), Asia/Pacific (99%).

**Total consumer goods users (seats):** 18,000.

**Tiers represented:** All.

**Solution offerings:** Primarily merchandising, some order taking.

**Analytics:** The solution has capable reports for tracking the business, but is best seen as reporting against task attainment and productivity. It does not have BI functionality as companies that buy it don't want something that heavy. It is not graphically rich on the desktop version or mobile. The reporting is nicely embedded. Any additional reports would have to be developed as a service. It does have in-flight reporting of ongoing activities without having to sync.

**Configuration/Customization:** It is configurable. Customization to accommodate unique requirements is an option, but the vast majority of requests for expanded functionality are added to the base product.

**Technology architecture/delivery options:** Multitenant SaaS based on Microsoft Azure. It has several data centers including one in China.

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

**User experience:** It is not a stand out solution in terms of how it renders but it does have some unique and thoughtful features, such as:

- A “lasso” tool for grabbing a group of stores and dragging them into a territory.
- Route planning that can select stores by attribute.
- As you specify activities to be performed in the back-office tool you actually see how it will look in the phone app in a side by side view.

**Vendor trend:** The company is growing nicely and expanding into new markets. It has benefited greatly from being part of AFS.

**Strengths:** Having expertise in the emerging markets where so many competitors do not. Also having a cost/pricing structure to match. It is both rapidly deployable and scalable. Many strong brand names have already chosen it.

**Key differentiators:** Excellent route planning back-office solution, possibly one of the best we have seen. Good value for the money.

**Outlook & prognosis:** As it is catching on outside of the emerging markets, the outlook is good. Being part of AFS increases its ability to invest and expand. We see it having global potential.

**Evaluate The POP Company when:** You seek a capable merchandising solution for AsiaPac, or if you see “forms-based” retail solutions in the developed markets as really boring and want more for about the same money. Also, if you would like to download the POP Retail Execution solution from the Microsoft AppStore on a “try and buy” basis. If you want to be able to trade up to a more feature-rich enterprise product without a lot of contract angst and while keeping your data intact. If your merchandising function requires only basic order entry functionality in a hybrid process, POP is a good option.

**Avoid The POP Company if:** You want your own customized solution, something on-premises, or have an immediate need for a single back-end solution across all markets and channels. Finally, if you want a really slick tool for tablet computers, as POP isn’t ultra-slick and the form factor isn’t optimized for tablets.

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**Asseco Business Solutions** [mobiletouch-fmccg.com](http://mobiletouch-fmccg.com), also [connector-fmccg.com](http://connector-fmccg.com)

**Profile:** A Europe-headquartered player that is moving globally with a mature offering that is currently deployed across 50 countries. It is a subsidiary of the broader Asseco Group, which has 22,000 employees in various technology and services areas.

**Geographic presence:** Europe (94%) and AsiaPac/Middle East (6%).

**Total consumer goods users (seats):** 35,200.

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

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

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

**Analytics:** Excellent mobile analytics and dashboards that include target attainment, incentives, and Perfect Store scores. Back office reporting is based on Oracle BI for office-based users. Additional analytics to support managers in coaching subordinates are highly differentiated and insightful. The triangulation between Perfect Store, gamification, and the field sales fundamentals is exceptional. We like the “Optimizer,” which shows primary stores to be visited as well as secondary stores nearby. We rate it as Above Average.

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

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

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

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

**User experience:** Above Average for both field and office-based users; in particular, Mobile Touch for field users is as good as it gets. Exceptional gamification for all sorts of incentives, both financial and non-financial. The interrelationship between Perfect Store and gamification is outstanding in providing continuous motivation. The solution guides users to stores with Perfect Store issues and then allows them to obtain Perfect Store points for performing certain Perfect Store tasks, a sort of “Perfect Store on the fly,” but like a game. The selling orientation is based on motivating the field force to sell and giving them the tools to effectively do so by helping them to see what they need to do to win. The scope of both gamification and social is unprecedented based on how they help field sales people to succeed. Exceptional use of hovers instead of having to drill down.

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

**Strengths:** The solutions are exceptionally user friendly and offer a single platform for all routes to market, but can be acquired as modules. This means that selecting Asseco doesn't lead to any sacrificing because some capabilities are relatively weak or not so user friendly that you might get with a less modular solution. Optimizing field-based activities continues to be a strength with enablers such as leader boards and the first retail activity optimization (RAO) solution that we have seen move beyond prototype capabilities. Asseco has an excellent vision and strong product roadmap in areas such as augmented reality and machine learning to enhance selling processes. It benefits from not having the baggage of legacy solutions or having made acquisitions.

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

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

**Key differentiators:** Very strong orientation towards user experience and actually making it fun to use. Strong client references, excellent functionality for helping managers coach their subordinates, mobile device management, and expertise with channel partner data. Unique functionality for understanding and leveraging influencer and key opinion leader relationships for brands. This includes understanding affiliations, making relevant invitations, scoring advocacy relationships, and coordinating sampling. It also has contract management capabilities for alcohol/tobacco and southern European requirements. New capabilities for gamification with retailers is interesting for conveying brand communications, making offers, helping them with Perfect Store, and has various reward programs that can be picked from based on total order.

**Outlook & prognosis:** We see Asseco as a continued innovator in the “sell more” capabilities and ultimately a global leader. It has a very strong roadmap that will enable sales effectiveness and efficiency in all classes of trade and in all geographies. We also look for it to push into AI and machine learning in meaningful ways that will improve sales execution.

**Evaluate Asseco when:** You seek tools to sell more and enable a great user experience, specifically if you place high value on Perfect Store, coaching, motivation, and retail activity optimization (RAO). Also, if you value continuous innovation and a partner that will work with you to deepen your competitive advantage.

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

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

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**Comarch** [sfa.comarch.com](http://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 (99%), Asia (1%).

**Total consumer goods users (seats):** 4,980.

**Tiers represented:** Tier 2 and Tier 3. Also Tier 1 companies doing business in relatively small markets.

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

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

**Analytics:** Includes a complete analytics offering consisting of predefined tables, KPIs, OLAP cubes, subscription-based push reports, and dashboards. Analytics are highly interactive and have some innovative KPIs. New functionality around suggesting which products to promote, at what price, and where, takes it deeper into “sell more” capabilities. The sales funnel metaphor is useful for showing how leads move to contracts and closed deals in the HoReCa channel. There is now a profitability simulator for selling in this channel and it drives different approval workflows to leverage visibility. Overall, we rate it as Above Average.

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

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

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

Korus Consulting (Russia), Bizofis (Turkey), Synergon (Hungary), Eltrade (Bulgaria), Expert Software SRL (Romania), Saga (Serbia), CS Computer (Croatia).

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

**User experience:** Having a set-wise Perfect Store set of capabilities is a big plus. Also, Coaching capabilities have expanded to include greater ability to capture and track objectives, comments, and improvement areas with internal notes and external emails. There are also more guidelines baked in to help users with store-level promotions or validating promotional compliance. We also like the ability to choose which dashboard elements to feature. It has nice product visualization for product pick lists. The UX in iOS is better than in Android. The new web app for back-office people and managers who spend some of their time in the office provides more flexibility when there is no need for off-line capabilities. They both cover the bases, but neither has an impressive UX. Overall, we rate the UX as Average.

**Vendor trend:** Comarch is a competent technical organization and has added some personnel, but still needs some help with elements of design. It grew its user base modestly since our report last year, which is the first real growth we have seen in several years. Consolidating all of the industry people into a single group in early 2018 should provide needed focus and enable selling industry, as opposed to product line solutions.

**Strengths:** It has the company backing and resources to invest for growth. It also has deep capabilities across omni-channel and specific functionality in HoReCa (hotel/restaurant/catering) for assigning service technicians, doing surveys, parsing notifications to sales reps, and performing task monitoring. Also, there is a roadmap for RAO and gamification for in-store activities.

**Challenges:** Showing product differentiation and “sell more” capabilities in a highly competitive market. This will be critical to growing beyond Europe. In general, it just needs to get into more sales cycles.

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

**Key differentiators:** Has unique functionality for selling based on recipes and a cool drag-and-drop workflow engine with the ability to add conditions to initiate an alert. One of a very few small companies to offer integrated TPM, Retail Execution, and eCommerce. One very interesting differentiator is the use of a 3rd party service which tracks which local chains are assigned to which distributors, which change frequently. They then integrate the data from those outlets to provide a single view of that outlet, regardless of which distributor has sold your products to it. Presently it is only in Poland, but has potential elsewhere.

**Outlook & prognosis:** Comarch needs to commit to differentiating and becoming a leader. It has the resources and personnel, but lacks a compelling story that will propel it to grow and to extend beyond its roots in Eastern Europe. The work being done to perform more automation of tasks, optimize operations, and spot opportunities by using predictive capabilities and algorithms is promising and we will be eager to see the outcomes over the next 12-18 months.

**Evaluate Comarch when:** You seek a partner with end-to-end capabilities, extensive services, and deep expertise in Eastern Europe. Also, if you are quite involved in the HoReCa channel or want TPx and Retail Execution from a single vendor.

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

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## **Customertimes** [customertimes.com](http://customertimes.com)

**Profile:** Customertimes is a cloud software publisher and system integrator providing applications, consulting services and team extensions with experienced senior offshore consultants and developers. Its relevant experience for consumer goods lies in retail execution capabilities built exclusively on Salesforce.com plus SAP back-office expertise to ensure proper integration. It also leverages its SAP partnership for eCommerce and Salesforce for field service.

**Geographic presence:** North America (1%), Latin America (6%), Europe (86%), and Asia/Pacific (1%), Middle East (6%).

**Total consumer goods users (seats):** 13,600.

**Tiers represented:** All tiers.

**Solution offerings:** Merchandising and order taking.

**Major product sub-segments not covered:** Tobacco.

**Analytics:** Has nice, configurable dashboards that leverage Salesforce capabilities, but with a full off-line option. For deeper analytics it leverages other Salesforce products (such as Einstein Analytics) to use the open APIs to drive deeper analytics or logic such as RAO. It can provide a dashboard with in-flight analytics to give a salesperson the requisite information, but nothing of a query nature for additional insights. As a result we rate it Average.

**Configuration/Customization:** We find it to be extraordinarily configurable with an intuitive approach that rivals a cockpit as opposed to sorting through branches of functionality. The Salesforce APIs can be used to add functionality including custom code because doing so will not impede the upgrade path. Customertimes also has the resources to do so plus access to the Salesforce ecosystem. However, they would not likely do anything that would impede the upgrade path because it is a SaaS offering.

**Technology architecture/delivery options:** Cloud-based SaaS on the Salesforce Sales Cloud.

**Service partners:** CAPGemini, Changi Consulting, CGI, Easyfront, EI Technologies, iKumbi Solutions, Salesforce CSG, Siway, Viseo.

**Technology partners:** Salesforce, Apple, Google, SAP.

**User experience:** We rate it Above Average for tablets based on the quality of the dashboards, ergonomics, embedded social selling (Chatter), and interactive selling. The back-office solution has very high usability and is like a web-page. However, on the hand-held device we find it to be a bit monochrome and not graphically oriented. It has the functionality and the image recognition capabilities are nicely embedded. In fact, they can actually drive the visit as opposed to being something done along the way. Nevertheless, we rate the hand-held UX as Average.

**Vendor trend:** This is the first year that we are featuring Customertimes so we can only say that they are growing rapidly and that the solutions exhibit a deep understanding of the space as we would expect to see 7-10 major releases into the product cycle. It has also been able to achieve a footprint on multiple continents and with sales organizations as large as 3,000. We like the 30 day free trial concept.

**Strengths:** Meeting key industry requirements such as full off-line capabilities for in-flight analytics and complex pricing, omni-channel offerings for selling in emerging markets, and excellent capabilities for presenting and managing collateral. One of the few vendors we know of that can handle color and size permutations such as those that are found in clothing.

**Challenges:** Gamification is pretty basic and Customertimes relies on partners in the Salesforce ISV network to complete this. Back office has dashboards, but deeper analytics would be accomplished through a BI tool.

**Adjacent offerings:** POS data management, POS data cleansing, shelf management/ visualization, field service management.

**Key differentiators:** Deep expertise in pharma OTC sub-vertical including “detailing”/selling and taking orders in pharmacies in markets where pharmacists recommend prescription and non-prescription products. The interactive selling capabilities are very good, nicely embedded and allow for taking orders from within the presentation. Expertise in Salesforce as well as SAP for an end-to-end solution. We don’t see that depth of consulting expertise elsewhere.

**Outlook & prognosis:** We see Customertimes being a global player, initially in pharma OTC and then all other subsectors. Its relationships and expertise with Salesforce and SAP give it credibility beyond its actual stature.

**Evaluate Customertimes when:** You favor the Salesforce platform but need it pre-built to meet CG requirements; you want deep pharma OTC capabilities such as detailing and OneKey data integration; you have concerns about integration into your SAP back-end; you seek a vendor that already has the privacy certifications for markets such as the EU (GDPR) and Russia (Federal Laws 152 and 242).

**Avoid Customertimes if:** You want an on-premises solution; are a multinational company that does not like to be one of the first to use a solution in a given country; you prefer simple and cheap such as a forms-based audit tool; you want a really slick hand-held UX.

**Distinctions:** POI Best-in-Class award for Interactive Customer Presentations.

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**eBest Mobile** [ebestglobal.com](http://ebestglobal.com)

**Profile:** A suite offering from Asia that is moving into Europe and North America. It has solutions with its own IP as well as built on Salesforce.

**Geographic presence:** AsiaPac (99%), North America (.07%), Europe (.3%), Africa (.5%).

**Total consumer goods users (seats):** 143,600.

**Tiers represented:** All.

**Solution offerings:** Distributor management, van sales (front end, no settlement back-end or DEX capabilities), merchandising.

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

**Analytics:** We find it to be very robust for understanding internet of things (IoT) data gleaned from coolers and other assets to be a major benefit. This may not seem obvious at first, but knowing how many times a cooler door has been opened can be a useful indicator of demand. The same for actually being able to detect whether product is available. On the more transactional side the KPIs were static and lacked the ability to drill in. Power BI is an option, but not embedded. The gamification lacks the ability to drill into the details to see how to improve. Overall, we rate it Average.

**Configuration/Customization:** Only configuration. Customization outside of the upgrade path is not preferred but has been done in the past.

**Technology architecture/delivery options:** Cloud and Multi-tenant SaaS.

**Service partners:** IT Authorities in North America, Ritmus in Europe, Tiarg in LatAm, and Eagle Marketing in Japan.

**Technology partners:** Salesforce, Microsoft, Trax.

**User experience:** The landing page is largely numeric KPIs and not graphical. Having the eLearning messages embedded is a real plus for users at all stages of the learning curve. The phone UX requires a great deal of scrolling down and could be more tabular. Order entry is not as ergonomic as many we have seen. We like the ability to add notes to each photo taken to better remember what the upshot was. The functionality is rich for ordering and moving equipment/assets, even down to notes relative to installing them, such as staircases that must be ascended. We like the "Selling Stories" module for doing interactive selling and taking orders. However, it has no provision for bringing the data for an individual store that can be more compelling. The UX is good, and in particular for emerging markets, but not on par with the leaders for developed ones. As a whole we rate it Average.

**Vendor trend:** This is the first report where eBest is featured. Nevertheless, the growth trajectory is solid for an 18 year old company. It has multiple offices globally and we don't detect any shortcomings in its strategy. Its partner network also appears to be solid.

**Strengths:** We like the ability to track salesperson performance down to the minute-by-minute basis if desired. It is very well suited for beverage companies based on its install base. Having omni-channel capabilities for customers to get self-service orders, queries, and offers is a real plus. We find it to be well developed and friendly for those users.

**Challenges:** The vast majority of users are on an Azure-based solution and located in China, where Salesforce has no footprint and is believed to be too expensive. Thus, eBest is split across two technology footprints for development and support. Penetrating Europe and North America is never easy and Salesforce can be fickle about which vendors it supports. In the case of eBest it often competes with them.

**Adjacent offerings:** Customer self-service, IoT product line for asset tracking and cooler metrics, a supervisor module for tracking and monitoring front line reps.

**Key differentiators:** The way the IoT data is brought in to facilitate insights is a real stand out.

**Outlook & prognosis:** We believe that eBest will continue to be a significant player in Asia, China in particular. We believe it will struggle in developed markets until it moves to the front of the pack in areas such as gamification, analytics, and guided selling. Otherwise it doesn't have much leverage except for price.

**Evaluate eBest when:** You want a good, not great, solution for the money. But in particular, when you are looking for something for Asia. Also, if you want a partner with lots of beverage experience.

**Avoid eBest if:** You want cutting edge analytics, UX, and sell-more capabilities.

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**EdgeVerve, an Infosys Company** [edgeverve.com](http://edgeverve.com)

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

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

**Total consumer goods users (seats):** 1,500 on Distributor Management and 1,900 partners utilizing the data visibility offering.

**Tiers represented:** All.

**Solution offerings:** Distributor management and van sales.

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

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

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

**Technology architecture/delivery options:** Multi-tenant SaaS.

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

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

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

**Vendor trend:** The company continues to grow significantly year over year in personnel and revenues. The DMS complementary data management offering has more momentum than van sales, but this is to be expected. Nevertheless, EdgeVerve has a stable of blue chip multinational clients as well as some locals.

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

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

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

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

**Outlook & prognosis:** TradeEdge is compelling. It offers a low cost-to-serve way to penetrate the emerging markets. There is also a play for developed countries with certain products from venues such as kiosks, but this product is essential to any company trying to grow in the emerging markets. Current work is under way to enable processes with AI and Machine Learning that will make handling all this data easier and provide more insights. Given the right marketing and messaging it will be a critical capability for years to come.

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

**Avoid EdgeVerve if:** You want merchandising.

**Distinction:** POI Best-in-Class award for Distributor Management.

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**eLeader** [eleader.biz](http://eleader.biz)

**Profile:** A mobility company that primarily enables field sales automation, but also has mobile banking and commerce capabilities.

**Geographic presence:** North America (1%), Latin America (11%), Europe (39%), and Asia/Pacific and Middle East and Asia (49%).

**Total consumer goods users (seats):** 17,420.

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

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

**Major product sub-segments not covered:** None.

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

**Configuration/Customization:** The server components are based on Microsoft software, but eLeader positions itself as doing each deployment “from scratch.” Customization outside of the routine upgrade path is an option, but is not common.

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

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

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

**User experience:** UX is very good, particularly in how it renders on a mobile device. Gamification is through earning icons and points, but it lacks the ability to simulate results and see what it will take to win. It has a good stepwise approach to the store visit to ensure compliance. In particular we like the ability that each user has to create a visit dashboard that is suited to how they like to work. A library of videos covering day-to-day issues and guides to performing certain functions is a benefit to all types of users.

New functionality around Perfect Store and Perfect Visit are a real plus. However, additional gamification functionality is now needed to really take this to the next level. There are also some unique functionalities, such as performing a credit check before beginning a new order, selecting a distributor that will actually deliver an order, and collecting stock information from the distributor to make sure the product is available for an order. We also like the ease with

which it can create a planogram from the actual picture taken in the store. The UX for both the mobile and desktop versions we rate as Above Average.

**Vendor trend:** Moderate growth and attracting more food and household customers in addition to the relative strength in the electronics sector. The past year has also seen more projects around the world than in prior years. Having secured more deals with sales agencies is also a good thing because they tend to speak for multiple principles and add a strong point of view. Nevertheless, development of a tool called Productive 24, which organizes back office processes, provides fleet management internal communication, and even coordinates conference rooms is interesting, but combined with proprietary image recognition capabilities, is diverting focus away from analytics and some of the “sell more” capabilities like social and deep gamification.

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

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

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

**Key differentiators:** There are several differentiators that caught our eye including:

- The ability to build custom promotions on the fly down to the store level. This includes guardrails to ensure that such promotions stay profitable and on strategy. Has its own workflow to get such promotions approved as well.
- Support for “push messages,” which are cheaper than SMS, don’t clog email, and always come from a trusted source, even if application is not running. HTML images can be attached to these.
- Merchandising can be done from a single screen by selecting all the items that an entry will apply to and then just entering it once.
- Ability to attach different tax rates within a single order.

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

**Evaluate eLeader when:** You seek excellent usability and experience or have a need to create account-specific planograms and promotions.

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

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**GreatVines** [greatvines.com](http://greatvines.com)

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

**Geographic presence:** North America (94%), Europe (3%), Asia/Pacific (3%) and LatAm (<1%).

**Total consumer goods users (seats):** 13,800.

**Tiers represented:** All.

**Solution offerings:** Distributor management, retail merchandising.

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

**Analytics:** The sweet spot is the focus on:

- “Leading” indicators - Activities which, if executed timely and correctly, will drive revenue, such as checking that the product is served by the glass, highlighting any objectives left open from the prior visit, executing staff training, ensuring the product is featured on the menu, getting a display or on a tap handle, getting the product authorized for distribution, and so forth.
- “Lagging” indicators - This includes shipments, on-shelf availability, or wholesales sales (depletions) to correlate the activities that were executed with the results, e.g. how an activity such as staff training yielded a 6+ lift in Territory X.

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

The overall analytics are based on GoodData as standard Salesforce.com components were not found to be suitable. We still find that to be the case. Nevertheless, both are available if an organization so desires. It definitely looks better when rendered through GoodData. In particular, this shows in a cleaner and more impactful landing page since the last time we reviewed the solution. Overall, analytics are highly suited to the adult beverage space requirements such as depletion reporting, location information through Nielsen TD Linx, and a complete selling dashboard.

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

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

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

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

Off-line capabilities are delivered on the GreatVines Mobile solution for iPad, Windows, iPhone, and Android phone devices. Support for Android Tablet is contingent upon the manifestation of adequate demand.

**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 big improvement is mobility for working off-line. For now it is just the Android and iOS phone versions, but tablet will follow. The solution is highly ergonomic, but mostly it is efficient and designed to enable users to sell more across modern trade, specialty wine and spirit stores, and the on-trade (pubs, clubs, and restaurants). It has seen some improvements in UX, but we still rate it as Average.

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

**Vendor trend:** The past year was one of global expansion, albeit still small in most markets outside of the U.S. The enhancement of the pricing application to a hosted, JavaScript-based tool is a real plus for what-if analysis and expanded planning. In particular, it is attractive because it can cache data and work off-line. GreatVines is very well suited to the adult beverage space. Despite being self-financed and without debt, it continues to grow profitably. Offering the product on the Microsoft/Google Play/iTunes stores for a try-before-you-buy should drive trial among the myriad of small distillers and vintners who run so lean that they don't take time to look much at such technologies.

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

**Challenges:** Client acquisition is a challenge because prospects are typically on spreadsheets or something bootstrapped on Microsoft Outlook. There are some large adult beverage companies but they are often linked to their ERP vendor. However, we have seen more wins against the big players in the last year, but 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 the adult beverage sub-segment. Expertise in multi-tiered distribution, including depletion data integration, and deep functionality for gamification across multiple functions that is way beyond leaderboards. Being able to create objectives on an individual rep basis through "Goal Mine" with the system providing relevant reference data to make a meaningful goal is very powerful. It then can sum all of the individual goals to ensure that they deliver the overall objective.

We also like the ability to click and see nearby stores at any point in time, or to see stores near to a specific venue. The ability and ease of tagging photos within a store visit is really cool.

**Outlook & prognosis:** Thus far it has been able to be a leader in the US market because of the government-imposed artifice of multi-tiered distribution. Additionally, it has been able to follow some U.S. 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 U.S. and offer solid potential elsewhere. We would actually like to see this approach of leading and lagging indicators applied to the food/beverage/personal products world with its corresponding gamification because it has a lot to offer.

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

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

**Distinction:** POI Best-in-class award for Gamification.

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## **ITC Infotech** [itcinfotech.com](http://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 3 solution offerings for other companies: one based on the Siebel Open UI, one on MS Dynamics, and a proprietary Java-based tool. This report will focus only on the latter because of changing strategy of the ISV with respect to Siebel and the Trade Marketing Execution (TME) focused solution on MS Dynamics product. While the solution on MS Dynamics has been successfully rolled out in specific geographies based on customer preferences for Microsoft technologies, it needs further enhancements as per the in-house product roadmap that is currently being finalized. The third Java-based solution is built on the premise that "one size does not fit all" and caters to the needs emanating from operations in emerging markets around the world.

**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:** We find assortment planning on the mobile device to be very interesting as a way of inserting category management at the outlet level for emerging markets. It can also be done at the manufacturer or distributor level if the store level is too granular. Dashboards are still very basic and not able to show multiple components on a single dashboard. We hope this will improve as the focus shifts to put all the development efforts behind the Java-based solution. Other than KPIs and a few dashboards, it is a work in progress. This analytical solution we rate as Average.

**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 with a full complement of services to support it.

**Technology architecture/delivery options:** It is offered as on-premises, hosted/private cloud, or on a public cloud on standard IaaS platforms such as Microsoft Azure, AWS and Oracle Cloud.

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

**Technology partners:** Oracle, Microsoft, Kinvey, Salesforce, SAP Business Objects, Revolution Analytics, Parature, Qlik, resco.net, Tableau.

**User experience:** It covers the basics, but is not visually engaging or graphically oriented. We found a great deal of white space and small letters that did not fill in their fields well and were often hard to read. One bright spot is the ability to slide a customer name to the side from a list and perform a number of tasks based on a colored option bar. Overall we find it to be Below Average. This is perhaps more driven by the bespoke development process than ITC Infotech's lack of vision/expertise. We believe that more clients would translate into more demands for more and deeper functionality offered.

**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. There has been no growth in user count that we can detect since last year.

**Strengths:** We see the strengths as three-fold:

1. The willingness and ability to localize based on client requirements.
2. Leading with consulting and having software to complement it.  
There are substantial resources available in a company with 6,500 employees and a large services team. When they win, it is because of the implementation and ongoing support more so than the product itself.
3. Willingness to do a custom version of a solution and wrap support service around it (also known as a bespoke solution).

**Challenges:** ITC Infotech does not market itself well and has not yet achieved critical mass in terms of number of clients beyond a small few. 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. Because users are deployed across the three platforms we believe it is a distraction, if not a drain on resources.

**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. Ability to totally outsource support for your application, whether a unique version or a standard solution. We find it interesting that the solution can go as much as 7 days without a sync session. It can also program event-based sync for certain situations. The rest of the time it is standard background sync.

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

**Evaluate ITC Infotech when:** You seek deep expertise in the Asian market, and emerging markets in general. Also, if you seek proven experience in the tobacco industry because the majority of vendors we have evaluated do not have it. But mostly where you want something really custom and a partner to support it for you.

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

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## **Ivy Mobility** [ivymobility.com](http://ivymobility.com)

**Profile:** A global Retail Execution provider and one of the three with the highest growth in user count since last year. 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. The product has been totally re-architected on the Salesforce Sales Cloud except for Distributor Management since our last report.

**Geographic presence:** Africa (10%), Europe (20%), Asia/Pacific (45%), Latin America (5%), and Middle East (15%), and North America (5%).

**Total consumer goods users (seats):** 107,005.

**Tiers represented:** All.

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

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

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

Overall, we rate it is Above Average for the depth and quality of the insights.

**Configuration/Customization:** It is very configurable. All modules are based on one underlying platform, which allows for easy creation of hybrid roles, each with specific process steps, KPIs, and inventive dashboards. The field execution processes can be configured based on channel and outlet type to ensure execution of the required steps. Multiple markets with different localized configurations can coexist in the same tenant. The demo of system administrative tools we saw, which included such activities 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, Microsoft Azure (including China), or Salesforce. In the markets where cloud hosting is bound by restrictive legislation, Ivy Mobility utilizes local hosting providers, typically major telecom providers.

**Service partners:** Tata Consulting Services (global), Tech Mahindra (global), Intergrupo (Latin America, Spain), Technocrat IT (Africa), Vinthoughts (Indonesia, ASEAN), Technosoft IT (Indonesia, ASEAN), Lead Systems (Hungary) HPT (Vietnam), Naviworld (Vietnam, Thailand, Middle East), ProV International (North America, Europe, Middle East, AsiaPac), Tiarq Consulting Services Inc. (North America, AsiaPac), Brandt International (ASEAN), Lenovo (China), IBM Bluewolf, PricewaterhouseCoopers, Infox (China), Knotstrands (Nigeria)

**Technology partners:** SAP, Oracle, Apple, Salesforce, Tally (Accounting), Qlikview, Amazon Web Services, Microsoft Azure

**User experience:** The UX provides great functionality, like hovers, that show you what you need to see without taking the time to drill in and out. We also like the tile-based approach to navigation. Other strong UX elements include gamification with the “gold/bronze/silver” metaphor and the ability to see how a salesperson rates relative to the leaders based on underlying achievements, the ability to use the cursor to “box” a group of stores and then have the solution route-optimize the best sequence for visiting them, time and motion tracking versus what is average/normal to help people be more efficient, a novel chat functionality that allows a user to annotate photographs with captions that enable a discussion, and the tile-based architecture that drills to the dashboard. Data and graphical rendering could be strengthened further. This is slated to happen in 2018 so we will acknowledge it here. Other strong UX elements such as Chatter on and off-line, the ability to change languages on the fly, and a clever share of shelf calculator with drag and drop metaphor allow it to retain an Above Average rating.

**Vendor trend:** Strong growth and excellent vision. Transition to the Salesforce platform was pretty uneventful, which sets Ivy up for innovation and market penetration.

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

**Challenges:** Stepping up the visualization despite several attempts at a more advanced UX. Also, basing the Web portal on Salesforce Lightning where other vendors have found it to be only moderately attractive, will add challenges. Having no on-premises offering will keep it out of some opportunities in developed countries, where the preference for this approach runs close to 40% based on survey data.

**Adjacent offerings:** Shelf visualization as a tool for capturing share-of-shelf. Vending machine management, counter sales/beauty advisor application, mobile payments, QR-code based loyalty management. Also, solutions to support ecommerce and omni-channel business for self-service ordering on the web or mobile for outlets as well as an on-demand solution to connect buyers and sellers in emerging markets and the eCommerce for B2B market.

**Key differentiators:** The early move to AI and Machine Learning currently does, and will, pay dividends. We also think the payment gateway concept (IvyPay) is very interesting for emerging markets and facilitates payments while reducing dependence on distributors to do collections. The ability to create hybrid business processes across modules with a single back-end. Outstanding analytics, deep van sales functionality such as “must order” SKUs, extremely low TCO, and relatively rare expertise in Asia/Africa and the Middle East.

**Outlook & prognosis:** Ivy will continue to solidify its position as a global leader over the next couple of years. Because it is now available on the Salesforce platform, it has access to the Einstein suite of capabilities for image recognition, AI, and advanced analytics. This will continue to enable leadership in the space.

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

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

**Distinction:** POI Best-in-Class award for Analytical Insights and Merchandizing.

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**Kantar Consulting** [kantarconsulting.com](http://kantarconsulting.com)

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

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

**Total consumer goods users (seats):** 17,200.

**Tiers represented:** All.

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

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

**Analytics:** New capabilities include the ability to perform sales decomposition to more insightful selling. It is also going more deeply into looking at the financial impact of lost sales. The addition of capacity planning as part of route planning is also a plus, but then being able

to actually optimize activities based on capacity represents a great stride in RAO because it introduces selling capacity as a key constraint. Finally, adding in compensation attainment will ultimately lead to sales people being able to do simulation about their compensation, which is the ultimate gamification.

The analytical capabilities are very strong across both the field and office-based solutions. The latter is moving to Power BI from Microsoft, which will be a plus for report creation and impromptu analytics. The strength of the Kantar analytics includes both insights as well as how they render visually. Specific examples include: a deep understanding of underperforming stores in a 2X2 matrix based on a Perfect Store index, dashboards at the product level if desired, the ability to quantify the impact of lost sales due to some condition or executional shortfall, guided selling activities based on detected anomalies, gamification that compares a user to the top three peers and allows for drill down and understanding how to close various gaps, and the ability to optimize assortments at the store level. We rate them as Above Average.

**Configuration/Customization:** Customizations can be developed but are discouraged. Kantar Consulting provides continuous product enhancements that incorporate new features to meet the evolving needs of consumer goods manufacturers.

**Technology architecture/delivery options:** Public cloud through Amazon Web Services or Microsoft Azure.

**Service partners:** Everis, HCL.

**Technology partners:** Microsoft, Qlik, Oracle, Amazon AWS, PTV Group.

**User experience:** Moving to HTML 5 has been a real plus. It is intuitive, innovative, and fun to use. Kantar has a specific work stream for the “sell more” capabilities, which we applaud. This manifests itself in offering a balanced depth of gamification, social selling, RAO, guided selling, and image recognition. The expanded pitch book with 3D and virtual reality is very impactful. The HQ solution is a standout UX. It includes elements of RichMix and Planorama for better shelf-level insights. The Perfect Store capabilities are stepwise with a strong daily dashboard and a thoughtful scatter plot for segmenting stores based on Perfect Store or other metrics to make it easy for the user. The integration of the virtual reality shelf is outstanding for manipulating shelf conditions and viewing secondary displays, etc. Overall we rate the UX as Above Average.

**Vendor trend:** The footprint of the retail execution solution still doesn't mirror that of Kantar overall, but it is growing, retaining clients, and able to appeal to companies of all sizes. The offerings are mature and compelling while the roadmap continues to press into key areas such as coaching, voice recognition, and retail activity optimization.

**Strengths:** High client retention and excellent user references. Credibility and extended insights of being part of Kantar organization. Consistent ability to deliver a superior user experience with excellent visualization and embedded insights through other Kantar assets.

**Challenges:** Penetrating the Americas has been relatively slow, even with Kantar's strong global presence. The offerings are very strong. The company just needs to stop reorganizing and reconfiguring and focus on sales execution across the globe. This has to be done with greater intensity because several key competitors are very good at selling to the IT organization so Kantar has to be even better at helping the business to see the merits of its solutions and pushing the decision.

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

**Outlook & prognosis:** Kantar Consulting will epitomize the balance between insightful and usable for a subset of the market that is looking to enable a mobile workforce to have the greatest possible impact. We believe it also has the potential to bring optimization capabilities to multiple business processes including: orders, van load, store segmentation, selling activities, and beyond. Kantar has the assets and data science expertise to make this happen in the short run.

**Evaluate Kantar Consulting when:** You favor a strong user experience, excellent analytics, and European expertise with the potential to expand most everywhere. Also, evaluate when you seek retail execution as part of a larger, end-to-end store visualization/shelf management/ assortment/image recognition/in-store execution solution with best practices consulting and eLearning for total business support. Also, when you seek the ability to execute with a physician or other health practitioner as well as at stores.

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

**Distinctions:** POI Best-in-Class for Desktop UX, Gamification and Data visualization.

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**MCI** [mcl.com.br](http://mcl.com.br)

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

**Geographic presence:** Latin America (100%). This includes Mexico, which geographically is North America, but functionally and culturally is LatAm.

**Total consumer goods users (seats):** 46,630.

**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:** New functionality for pervasive KPIs as well as contextualization of information gives users more of what they need when they need it. The analytics are delivered in a much more visually engaging way across all form factors. We find the graphical KPI tracking to be very appealing. Also, it has the ability to click on a location and see the exact status of most everything, as opposed to abbreviated information in a hover. Mobile analytics and optimization are based on proprietary capabilities. The solutions have full off-line capabilities for in-flight analytics. We rate it Above Average for insightfulness as well as for visual rendering.

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

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

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

PWC, Smart Logistics (Caribbean), POPA Sistemas Abiertos (Central America), Ipesa (Central America), Focus Trade (Brazil), Trintegra (Southern Cone).

**Technology partners:** SAP, Salesforce.com, HP, Microsoft Azure, Amazon AWS, Zebra, Google Cloud Platform, Samsung, Softex, DXC.

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

**User experience:** Recent improvements in the back office for configuration options will favor users through capabilities such as rules-based information optimization and contextualization down to the size of an icon and which icons are shown as a function of the context. The UX is tile-based and includes all the key elements packaged in an ergonomic way: messaging, KPIs, gamification, and order entry where appropriate. It now features enhanced tools for configuring once and deploying across the various form factors. One feature we like is the ability to turn the device sideways and see a different view of KPIs and additional insights as all are configurable for portrait and landscape modes.

**Vendor trend:** More pan-LatAm deals and partnering with Salesforce.com for back office functionality will also give it more appeal for omni-channel capabilities. Enhanced data integration capabilities through its MDCS tool will help with analytics to glean insights through external data sources such as POS. The partner network has also improved.

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

**Challenges:** MC1 works with a good assortment of local and multinational companies in LatAm but needs to expand its footprint into other markets to ensure continued growth. It also has to succeed with re-sellers. Currently, execution through re-seller partners is not a model that we have found to work, let alone work well.

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

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

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

**Outlook & prognosis:** Continued leadership in Latin America. Possibility to expand into additional geographies by hiring local personnel, but not through re-sellers. MC1 has a solid set of solutions; it just needs to market itself more broadly and spread its influence.

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

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

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**Pitcher** [pitcher.com](http://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:** 5,800.

**Tiers represented:** All.

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

**Major product sub-segments not covered:** None.

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

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

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

**Service partners:** NTT Data, Deloitte Digital.

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

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

**Vendor trend:** Continued positive trend in revenues and deal flow as a relatively small player. Nevertheless it has a surprisingly broad global footprint. It has the ability to win in the usual spaces such as food and beverage as well as semi-durables such as tires.

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

**Challenges:** Being a small company and dividing resources across multiple industries.

**Adjacent offerings:** Some TPM functionality for managing back-end requirements of programs. The “Pitcher Inflight” product for inside sales and doing remote sales presentations.

**Key differentiators:** Very strong interactive selling capabilities based on work they have done in the pharmaceutical industry. Also, the ability to do real-time discussions for immediate collaboration. It has a virtual reality version of gamification that not only includes badges and leaderboards, but utilizes scenes and animations similar to a contemporary video game with a virtual reality mission/objective for the users. This may be too advanced for most CG companies, but it is very cool.

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

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

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

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

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**SAP** [SAP.com](http://SAP.com)

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

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

**Total consumer goods users:** 235,000.

**Tiers represented:** All.

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

**Major product sub-segments not covered:** None.

**Analytics:** There are varying levels of sophistication depending on the product. All are proprietary. Hybris Sales Cloud (formerly known as C4C) offers configurable dashboards at the individual user level with a tile-based drill down to reports and KPIs. We find them to be very insightful. In particular we like the decision maker mapping to better understand the players within the customer organization and who makes decisions. This provides another analytical dimension. The ability to check whether product is available to promise (ATP) is a strong decision making tool. Offline pricing has been available in Hybris Sales Cloud from mid-2017 onwards. Off-line pricing has been available in DSD since 2008. We rate all platforms as Above Average.

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

**Technology architecture/delivery options:** Distributor Management can be delivered in a private cloud. Hybris Sales Cloud can only be delivered as public cloud/Multitenant SaaS. It is not available as a private cloud. Customers can be on a private edition, but in the public cloud, which means that they don't control the upgrades. Typically, in a private cloud, customers have full flexibility to control when they upgrade.

**Service partners:** Hybris Sales Cloud: Ecenta, Maihiro, SAP Consulting, TCS, Deloitte, TPC, Baseline, IBM, EY, Infosys.

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

**Distributor Management:** SAP Consulting.

**Technology partners:**

**Hybris Sales Cloud:** Ricoh Innovations, Honeywell/Intermec, Mediafly, Invisible Solutions, Maihiro.

**DSD:** Honeywell/Intermec, Zebra/Motorola.

**Distributor management:** None yet.

**User experience:** The big news in UX is that the DSD solution was totally updated last year. Hybris Sales Cloud has made progress as well, but DSD was seriously lagging, so the change is more appreciated. While the old REX solution is still supported, we will not speak to it in this report because Hybris Sales Cloud is the go-forward platform.

Some positive and unique elements of the UX include:

- **Hybris Sales Cloud:** The ability to configure the elements of Perfect Store in the back-office solution are a real stand out based on usability and flexibility. However, how it executes on the mobile device is just average. The UX is consistently improving. Real-time, pre-packaged integration allows for dynamic pricing, checking inventory on the fly, and reserving stock. It is also ergonomic. Not having a gamification capability out of the box, but having to assemble it from other SAP capabilities, is a drawback. The Responsive User Design also adjusts the form factor on the fly for the best viewing experience. Also, it has the ability to be routed an urgent opportunity by a dispatcher; a clever way to optimize an impromptu visit to a nearby store that was not on the original route plan; deeper analytics around Perfect Store; RAO precursor functionality for allowing time to conduct various types of activities; Google map pins with details about each location; team selling functionality to coordinate efforts of various people who touch a particular account; and the ability to push activities to groups or people based on geography, role, or other attributes. We value the ability of users to organize their own dashboards and personas even though their companies may not prefer/allow this. We find image intelligence-based survey capture to be very promising. Nevertheless, overall usability as Above Average.
- **DSD:** Deep functionality, like being able to reserve stock; three different ways to order, including proposed order, order from scratch, and based on historical; large and ergonomic number buttons for easy ordering; ability to take partial payments across payment types; and functionality for reconciling empty bottle returns. We really like the use of pink shaded spaces throughout the app to guide the user to the place where an entry is expected. The back-office UX is quite industrial in how it renders out of the box so we recommend configuration to arrive at the preferred 'persona'. What it does offer is unparalleled functionality and depth. This makes it difficult to rate because it is really powerful, but not pretty. The reconciliation tool is particularly powerful and easy to use so we will go with Above Average for UX with the caveat that it is not the most attractive.
- **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. We rate it as Average.

Some things that we would like to see include more out-of-the-box gamification, more of a coaching cycle with follow-up as opposed to merely analyzing and some sharing of view with subordinates, and more leverage of social selling.

**Vendor trend:** SAP is the overall winner for number of incremental licenses sold since our last report. It continues to penetrate all markets, in particular those where a couple of vendors may specialize but the overall market isn't very focused on such as Saudi Arabia, Japan, Indonesia, Central America, and the smaller countries of South America. It continues to show more focus in retail execution than ever before. Additionally, it has a strong roadmap through 2019 that consists of capabilities such as voice recognition, RAO, "Perfect Store," augmented reality, chat bots, planogram creation editor, promotional simulation, and generally utilizing AI to be predictive and spot patterns.

**Strengths:** Install base in the CG industry, resources to get things done, and momentum in the marketplace. 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. Also, being able to bring capabilities such as gamification, social selling, and Perfect Store to bear in line with market demand.

**Adjacent offerings:** POS data management – Demand Signal Management (DSiM), POS data cleansing, location-based tracking, TPM/TPO/Customer Business Planning, Predictive Analytics.

**Key differentiators:** The ultimate combination of integration plus deep analytics and functionality. Global footprint with unrivaled support. Unrivaled ability to sell to the IT organization.

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

**Evaluate SAP when:** You use SAP for ERP. We have not seen it integrated elsewhere and are not confident about the ease of doing so. You seek a vendor with a proven ability to scale. You want an end-to-end solution from a single vendor leveraging SAP systems. Also, when you work with distributors that are exclusive to you. Finally, when you favor deep functionality and powerful analytics over having the most advanced look and feel.

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

**Distinctions:** POI Best-in-Class awards for Analytical Insights, Desktop UX, Merchandizing, and Distributor Management.

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**Spring Mobile Solutions** [springglobal.com](http://springglobal.com)

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

**Geographic presence:** North America (52%), Europe (9%), Latin America (35%), AsiaPac (3%), and Africa (1%).

**Total consumer goods users (seats):** 27,400.

**Tiers represented:** All.

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

**Major product sub-segments not covered:** None.

**Analytics:** Continue to evolve through collaboration with a global beverage company and other key customers. It combines out-of-the-box functionality through dashboards and views plus reports and third-party analytics tools. All are fully embedded. In particular we like the approach of having analytical elements placed throughout the selling flow, right where they are needed, as opposed to in a single analytical area or cockpit. We find the upgraded analytics to be extremely insightful and action oriented through branching logic. It is known as MobileSellingStories and is focused on customer-specific analytics for product sell-in, secondary displays, and promotions to store managers with store-level data. It includes simulation capabilities that describe scenarios for a store manager (like what will happen if they take a display program based on peer stores). The suggested order capability rolls up to the packing quantities for the entire truck.

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

**Configuration/Customization:** Primarily configuration. Customization is an option, but not recommended. Spring prefers to build special requirements into the base product instead of as customizations on a customer-by-customer basis.

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

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

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

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

**User experience:** The standout area in UX is the web or HQ version, which fully takes advantage of HTML 5 and is the personification of usability and insight. It is so unlike other back offices systems, which look more industrial and render like Excel. It provides more tools for managers such as seeing an entire list of activities in sequence - and which are not on the list - for visits that are seeking approval and a collateral publishing tool that understands which pieces are not begin utilized and actually asks salespeople to provide feedback on them.

The field tool is also enhanced with superior gamification that is a part of activities throughout the day as opposed to an afterthought. The dashboard is tile-based on the left with dial-based KPIs on the right based on what is selected on the left and the role for which they are configured. It is graphically rich, ergonomic, and quite pleasing. Action items based on observations or data feeds make for more of a flow than a series of tiles. One can create action items for a peer, and even a manager, to visit a store for a specified task.

The UX is very strong across the board and we continue to rate it as Above Average.

**Vendor trend:** The trend is very positive in growth and strong client retention. The roadmap through 2019 is highly focused on the “sell more” and advanced analytical capabilities in innovative ways that include vocal instructions, visibility into delivery activities, scheduling store visits automatically when certain conditions are met, automatic mileage tracking, in-flight tasking/re-tasking of field personnel by managers, and more ability to capture best practices through expanded social selling. It is an exceptional roadmap.

**Strengths:** The focus on providing insights at key stages in the selling process is exceptional, whether it is Perfect Store, or just getting the most from a sales visit. The approach to gamification, known as “Top 3 and Me,” offers the ability to view the leaderboard and understand what is needed to close the distance to them and is one of the best we have seen. The Chatter-based social capability is highly evolved. It can do keyword searches to better share best practices. It also works in off-line mode and the tasking of a peer is an extension of the social, so the insight can lead to an action.

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

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

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

**Key differentiators:** The quality of the UX is highly differentiated both on the device and back-office solution. The analytics and depth of what we would call a “mobile business review” are beyond anything we have seen. The strength of the partnership with SAP for integration is also a big plus. The roadmap is perhaps the best we have seen because of how it focuses on sales efficiency and effectiveness, or simply selling more.

**Outlook & prognosis:** A global leadership role where “sell more” capabilities are required.

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

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

**Distinctions:** POI Best-in-Class awards for Analytical Insights, Guided Selling, Social Selling, Mobile UX, Gamification.

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**StayinFront** [stayinfront.com](http://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 (49%), Europe/Middle East/Africa (18%), Latin America (9%), and AsiaPac (24%).

**Total consumer goods users (seats):** 66,000.

**Tiers represented:** All.

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

**Major product sub-segments not covered:** None.

**Analytics:** Is now enabling deeper analytics and insights with the acquisition of 20:20 Retail Data Insight. This provides for the current of clean and timely data required to drive insights down to the store level. Others have attempted to do this via partnerships, but often while waiting to find a joint client to pay for the integration. This is a huge move for StayinFront as it builds upon a strong analytical product and takes the StayinFront Insights product to higher levels from the user device all the way back through the optional insight data warehouse with predictive lost sales, comparisons to similar stores nearby, and contextualized, fact-based selling through the PitchBook module. It has very strong performance graphics and the ability to smart map stores with up to 7 color indicators based on segmentation. This segues to action by swiping left to add stores to the schedule. The addition of correlative relationships in causality will make it even more powerful. Also it has some great simulation capabilities such as removing a competitor and replacing it with your products and seeing the impact, benchmarking versus similar stores, and suggested orders through algorithms as opposed to basic. Because of the depth of the insights and how they render graphically, we continue to rate it Above Average.

**Configuration/Customization:** On-premises solutions are still supported but have not been sold in nearly 4 years. With the exception of several large, multinational companies, 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. The administrative portal in the Edge module is transitioning to the touch interface so it makes configuration easier.

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

**Service partners:** IBM, Infosys, Wipro, Comtec.

**Technology partners:** Lab4motion (image recognition), Augment (virtual reality), Amazon AWS (hosting).

**User experience:** Is among the 2 or 3 best in the market based on the depth of functional options, how they render, and how easy they are to use. It is very oriented towards sales effectiveness in a stepwise and guided fashion. The graphics and screen layouts continue to be outstanding. Gamification parses out the components and weightings. It is very nice, but could provide more in the way of “what to do to raise your score.” Linking documents to tasks as a means of helping users understand how to perform them is a real plus. The integrated coaching capability is also strong as it draws on past performance evaluations, utilized reports and insights on how to improve performance, and pushes the results to all the relevant parties for follow up and as a beginning point next time around. The PitchBook tool has workflow to help in gathering the appropriate data, performing the calculation, or showing the results. The “Augment” tool then helps provide a compelling virtual reality view of what the merchandising could/should look like. Together, they are quite powerful. StayinFront has been a leader in integrating augmented reality for simulating how displays and other assets will look in the store context. Additionally, the solution provides a community for sharing photos and best practices. Because of the innovative nature and quality of the UX, we rate it as Above Average.

**Vendor trend:** StayinFront has a knack for the “global deal” with some of the largest deployments (seats and geographies) that we have seen. But it can also scale down very well to a single country for a local manufacturer. Its momentum has attracted a strong stable of global and local implementation partners. It is a very stable company with a solid roadmap going forward.

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

**Challenges:** No significant challenges that we are aware of.

**Adjacent offerings:** Data. Direct mail/fulfillment capabilities.

**Key differentiators:** We see the key differentiators as:

- The depth of analytics and insights with expertise of the 20:20 Retail Data Insight acquisition.
- Demonstrated ability to handle and support thousands of users across multiple geographies with a single instance of the solution.
- Having a very broad assortment of “sell more” capabilities in one solution, as well as being an early mover in obtaining them.
- Offering a Lite version called “LT,” which allows the user organization 8 standard functionalities plus a menu of up to 7 more from a list of 15, based on requirements. It runs on a single pane interface and carries a reduced price compared to the fully loaded solution.
- Optimal combination of strong analytics while still having excellent usability.

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

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

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

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

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**Univera Computer Systems** [univera.com.tr](http://univera.com.tr)

**Customer profile:** A 148 person Turkish company with a strong presence in Southeastern Europe, Central Asia, Western Asia, and the Caucuses. It is a very mature technology vendor dating back to 1992 and featuring such capabilities as support services, project management, and 4 new releases per year. In addition to Retail Execution, it offers a complete omni-channel commercial suite.

**Geographic presence:** Asia (12%) and Europe (88%).

**Total consumer goods users (seats):** 27,100.

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

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

**Major product sub-segments not covered:** None.

**Analytics:** The customer dashboard is outstanding in its ability to deliver insights about all aspects of the business from revenues to promotion to assets in place on a single screen. All dashboards are role-based and can be configured at the individual user level, which we applaud. This alone can deliver insights beyond a standard approach. We also like the ability to create and work against customer-specific targets. The product has Qlik embedded as the standard for analytics with both Qlikview and QlikSense. Graphically, it is a superior product. It has full off-line capabilities through a mobile database for complex pricing and in-flight analytics. It features the ability to highlight a section of a map and see attributes, such as the sales amounts and trends, for all those accounts. Also, it features some unique views of upsell and cross sell opportunities. The desktop version is equally robust. It has a full Information Services component to automate who gets which reports and how often.

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

**Configuration/Customization:** Customization is possible based on the size and strategic importance of the project.

**Technology architecture/delivery options:** On-premises or hosted/cloud. Also, as multi-tenant SaaS.

**Service partners:** System Group (Moscow, Kiev, Almaty, Chisinau), Teymurlu (Azerbaijan), Parla Team (Iran).

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

**User experience:** The UX continues to benefit from upgrades. It combines high usability and ergonomics with a strong graphical orientation. In particular we like how the gamification and insights are embedded. Panorama Social, the Univera proprietary social selling tool, then provides social media messaging capabilities for various user types and enhanced notifications. This is not an emerging markets-centric solution. It has all the features and benefits you would expect to see in the most modern markets. The mobile device has a tile-based orientation that is highly appealing and graphically rich on all form factors. It has full planogram integration throughout. We really like how order entry is laid out as a series of boxes with visual product images instead of a list of products on the left and lots of white space on the right. This makes it more like a web page.

New capabilities that we have been asked not to reveal too much about include the ability to interact verbally with the system before and after a call so as to better multitask while in transition. This would also extend to product ordering. Overall, we rate the user experience as Above Average.

**Vendor trend:** Continued strong growth in user count and good client retention. The two owners are among senior management, which adds stability. It continues to expand geographically and into areas such as enabling broker field sales organizations and HoReCa. The addition of web self-service by shop owners and then fulfillment through distributors expands the offering, but it also has the back office capabilities to do the invoicing for CG companies that want to sell direct to consumer. This is out of scope for this publication, but illustrates the breadth of the product offering.

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

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

**Adjacent offerings:** POS data management, shelf management/visualization, location-based IoT asset tracking, warehouse and production management, eCommerce, MRP and procurement, enterprise social networking (Panorama Social), field service automation, route and delivery optimization, outsource system administration.

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

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

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

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

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

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**Zaptic** [zaptic.com](http://zaptic.com)

**Customer profile:** Offers “digital transformation for deskless workers.” In this case, it is the merchandising function and front end for van sales. We would describe it as a configurable mobility framework. The company is based in the U.K.

**Geographic presence:** Europe (56%), North America (22%), AsiaPac (22%).

**Total consumer goods users (seats):** 2,750.

**Tiers represented:** All.

**Solution offerings:** Merchandising, van sales.

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

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

What is unique here compared to other offerings is the focus on providing a very flexible set of configuration tools and letting user organizations create their own analytical frameworks. This allows them to enable their proprietary measures without sharing them with competitors, which is so common in SaaS offerings. This approach isn't for those who want the most possible out of the box. It also makes rating Zaptic very hard. There are standard KPIs and they render very well. However, there are no off-line capabilities for analytics when disconnect except for some enabled for in-flight. What you get out of the box we rate as Average.

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

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

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

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

**User experience:** UX continues to add usability elements and has the potential to be anything that you want it to be based on how you chose to configure it, while remaining consistent across functions. Some screen elements are really nice while others are basic. Some that we like include:

- Being able to plan a route or simply select a list of stores and have the system optimize the route that connects them.
- Route optimization that has a different start and end point so a person can start at home and end at the office, or at an appointment at the end of the day.
- Seeing data from peer stores nearby through integration with RSi and thus enabling fact based selling.
- Excellent, graphical view of promotional compliance. Flagging stores for opportunities or requiring interventions.
- Solution configuration back-end that is a picklist of options instead of complicated hierarchies and branches.
- Specifying activities and sub-activities and then seeing them graphically as a flow chart. Then being able to see the data that will come back through the process and tag those items that users will or will not want to utilize.
- Having KPIs baked in along the way instead of in a cockpit so the user sees key data when they need to see it, and not have to toggle to an analytics screen. However, this must be configured.

Because the usability and configurability are both high, and because it has some insightful ways of enabling users, we rate it Above Average. The caveat however, is that some organizations may not find that it has everything they need, as in the proverbial “90% complete out of the box,” but can be easily configured by non-technical people to close the gaps. Hence, we still see it as an “art of the possible” solution.

**Vendor trend:** Very positive as it has garnered interest from companies in many sectors and of various sizes in a short amount of time. It has done so on multiple continents and doubled in size since our last evaluation.

**Strengths:** Flexibility and appealing to “the art of possible” at a low price per user that is on par with solutions coming out of Asia or other very low cost regions. The relationship with RSi for the underlying data is a real plus because it is already integrated.

**Challenges:** Most vendor selections are more of a feature/function contest with the solution having the most for the least being the winner. What Zaptic is advocating will require a new mindset. In the past, purchasing a development platform meant lots of money and time. This perception still lingers and Zaptic will need to work to change it.

**Adjacent offerings:** Store Operations Cloud for Retailers, mobile equipment monitoring.

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

**Outlook & prognosis:** There will always be a market for solutions that are unique and highly tailored. Being able to do so at an affordable price point is the best of both worlds. Broker/sales agencies can really get the benefit from this offering because of their deep subject matter expertise and desire to offer something that is unique and very easy to use. We can also see retailers using Zaptic to audit their own stores.

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

**Avoid Zaptic if:** You seek deep best practices, help with integration, or services after go live such as data loading. Also, if you seek the out-of-the-box, “sell more” capabilities such as analytical gamification (versus simple leader boards) or peer-to-peer social selling.

## Other Enablers - Jyve

Once again we feature a capability that we see as adjunct to Retail Execution solutions featured above and having potential to dramatically improve executional outcomes. In this case, we focus on a capability that combines the personnel flexibility of crowdsourcing, executional capabilities of DSD, and the scale/coverage potential of a broker/sales agent. The term “crowdsourcing” already has many connotations so we prefer the term “on-demand merchandising force.” We will spare you yet another acronym, but it will likely follow. The company doing this is called Jyve and is currently operating in the majority of U.S. states.

Here is a brief flow of how it works:

- Prospective Jyvers apply to the company and are screened online by a proprietary mechanism that looks at key factors such as facial expressions, eye contact, and enthusiasm as predictors of success. They also undergo background and reference checks.
- They then receive multiple means of training to ensure that they are adequately prepared for the types of tasks they will do while in retail stores. They also receive ongoing training through Jyve University.
- Jobs, or “Jyves” as they are called, are posted on a virtual board and can be seen by the Jyvers. This allows CG companies, distributors/wholesalers, or retailers to specify where they want tasks performed. It could be individual stores, regions, cities, or whatever.
- Jyvers then select the Jyves that they want to do and commit to complete them in a certain timeframe.
- Unlike crowdsource personnel, they are fully able to build displays, change facings to comply with a planogram, etc. This is an important distinction compared to crowdsourced personnel because they are empowered to identify, as well as fix, issues. The fact that they do Jyves for manufacturers, distribution partners, or retailers is also unique.
- Since the compensation is pay-for-performance and the retailers actually rate Jyvers on a company app, the best Jyvers get first pick of the jobs. They also tend to be the most efficient and make the most money at it so they stay motivated. There is simply no room for people who may be inclined to just “go through the motions.”
- The activities executed at retail are summarized and the date is provided back to the CG company.

There is obviously more to it than this, but our purpose here is not to create an exhaustive description nor give away the Jyve “special sauce,” just highlight that it represents a unique way to surgically execute in retail stores with trained and motivated people, but not have to carry the HR overhead. It is probably best to just list the benefits to CG manufacturers and distributors as we see them so we will do so here:

- A more selective approach to the personnel who do the work.
- More training and a mandate to do more than just observe and report back.
- A more committed workforce as opposed to casual labor.
- The ability for CG companies or distributors to pulse the coverage when and where they choose.
- Rapid feedback on activities performed, plus the ability for the retailer to rate the service performed.
- Not having the cost of acquiring, training, or maintaining employees.

What this isn't is an analytics play. Jyve is all about getting the job done and done well, not necessarily about having the most robust dashboard or analytics tools to be able to analyze the field. They do provide the data stream of activities, but with the assumption that CG companies will combine it with other data and utilize it in their own existing dashboard. Some client dashboards are in the works, but that is really secondary to the improved ability to execute.

We believe this enabler to be complementary to current Retail Execution capabilities featured in this report as a way to expand retail coverage and respond to market conditions. We also see the data generated by Jyve as being consolidated in a back-office retail execution solution with other inputs such as POS data to provide the best possible insight into market conditions and opportunities.

## **Vendors not included this year**

Coheris and Klee Commerce did not respond to our requests for information to update the report. We did not feel comfortable including them without the requisite discussions and a detailed product review.

## **Conclusion**

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

### About the 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)<sup>™</sup> program, and industry-leading summits around the globe.

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

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



#### **Contact information:**

**Michael Kantor**  
Founder & CEO  
Promotion Optimization Institute (POI)  
914-319-7309  
[mkantor@p-o-i.org](mailto:mkantor@p-o-i.org)

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