

Promotion Optimization Institute, LLC

2019 Vendor Panorama for Retail Execution and Monitoring in Consumer Goods

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Introduction

POI is once again pleased to offer this analysis of the global Retail Execution marketplace. It comes at an absolutely critical time because our 2019 POI Survey and research on the State of TPx and Retail Execution indicate that:

(Source & for the full report: POI State of the Industry Report February 2019) [Inkd.in/gfFi2Fm](https://www.linkedin.com/company/promotion-optimization-institute)

Overall satisfaction with the ability to execute at store level increased 21.1% from the prior year. The “somewhat agree” respondents were fairly flat year-over-year, but the largest gain is seen in the “agree” category. The group leapt from 15.2% agreeing in 2018 to 38.4% in 2019.

91.2% of respondents (1.2% increase vs. 2018) say they have challenges moving capabilities from transactional to analytical.

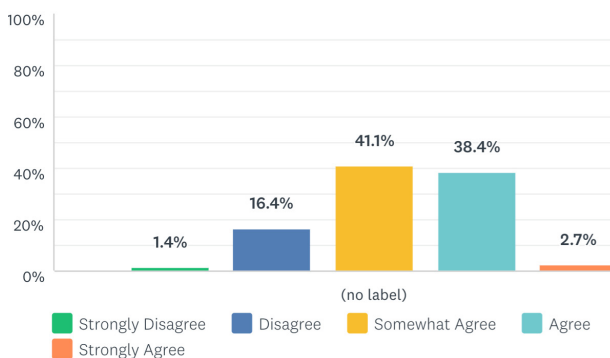
Many Retail Execution solutions being used today do not enable field-based users to make required decisions at the store level. Only 28.5% (up 12%) agree/strongly agree that they have the tools they need to make appropriate decisions.

While the number grew in 2019 and turned around a negative two-year trend, this is a critical gap for retail execution teams.

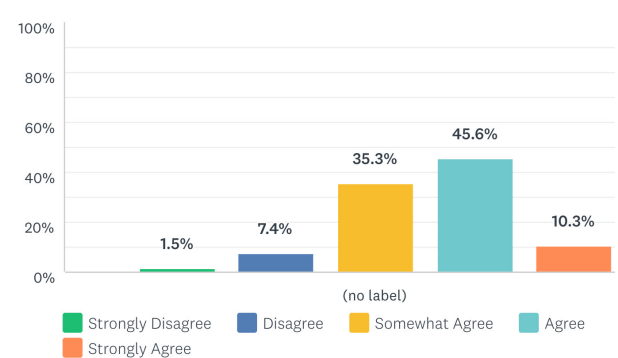
Some of this is due to a lack of off-line capabilities. Only 39.7% of respondents (up 4.7% from 2018) say that their off-line needs are being met, which leaves 60.2% of execution teams struggling. This too is an important functionality gap to close.

Among office-based users, only 32.9% agree/strongly agree (up 10.9%) that their analytical needs are being met. Retail analytics is foundational to providing insights around the execution reality in the field. HQ personnel need analytical insights to compete with pricing, go to market strategies, shopper marketing intel, etc. A lack of analytics also impedes retail team leaders from generating region insights and managing field-based personnel.

Satisfied with the Ability to Execute at Store Level:



Have Challenges Moving from Transactional to Analytical:



RetX Survey Question	Change vs. YAGO	POI Perspective
Which routes to market does your company or division/geography utilize?	<p>11.68% decrease in direct store delivery (DSD).</p> <p>5.27% decrease in selling through distributors.</p> <p>1.94% decrease in delivering to a warehouse with you or broker managing in-store execution.</p> <p>1.82 decrease in selling directly from the truck (can sales).</p>	With the exception of DSD, the change year-over-year is minimal. As companies look for cost savings, many organizations are evaluating the cost/benefit of DSD. With omni-channel pressure this is an added concern for brick and mortar retailers who need to maintain in-stock and service offerings to delight the customer.
Challenges having quality execution and visibility when working through third-parties like brokers.	In 2018 respondents noted a 7pt. decline in the challenges associated with 3rd party brokers, and there was no multi-year trend. In 2019 the challenges have lessened by another 6.5%.	Since brokers have proprietary systems that they offer as part of their service, there is a data integration issue required to get a holistic view of the market. 85.5% still have this problem. And, in many cases, they use multiple brokers across various markets, channels, or product categories.
Advanced Retail Execution capabilities:		
Image recognition	In 2018 there was a 9% improvement with no multi-year trend. In 2019 there is a dip of 5.1%. There is a 4.7% lift in those planning this enhancement on their roadmap.	Cost and speed said to be a key issue, which accounts for the 69.4% don't have this capability.
Gamification	In 2018 respondents noted 14pts. better and a continued trend. In 2019 there is a dramatic -13% decline.	75% (14.1% increase) still don't have the capability and don't have it as a planned enhancement. We still see it as a benefit to getting users involved and motivated.
Retail activity optimization (what stores to visit, what sequence, and what to do when there)	In 2018 there was a 4pt. decline. We see only a 1.7% decline in 2019. 68% don't have the capabilities and don't have it as a planned enhancement. Planned enhancement levels have dropped substantially by 16.3%.	As a tighter definition for what this actually entails has become more prevalent, some organizations have recognized that they don't actually have the capabilities. POI sees retail activity optimization as functionality that can have immediate ROI and drives efficiency and effectiveness in the field, increasing productivity.
Social selling capabilities	In 2018 there was a 10% decline and reversal of the positive trend. 2019 experienced an 8.3% increase. Not quite to 2017 levels, but much improved over 2018.	Social selling is relatively easy to add to an existing solution. Nevertheless, 70.8% don't have it or plans to enhance to gain the functionality.
Guided selling	2019 breaks a multi-year positive trend. 23.9% have guided selling, a decrease of 6.6%.	68% (+5.2%) don't have or plan to enhance.
Augmented reality	In 2018 there was no change and in 2019 the change was slight. 12.7% have augmented reality, 76% do not have this capability and don't plan to enhance; 11.3% note this as a planned enhancement.	While augmented reality feels futuristic, ordering household goods, clothes, and food felt futuristic a few short years ago. POI will keep the pulse on this technology and CPG engagement.
Crowd sourcing	In 2019 21.1% of respondents utilize crowd sourcing. 5.6% decline; no multi-year trend.	71.8% don't have it or plans to enhance.

Retail Execution Recommendations

Prioritize functionality above delivery method. In the realm of retail execution, the lines between SaaS, managed services, hosted private cloud, and public cloud are blurry and highly dependent on where the deployment(s) will take place. On-premise is still as popular as cloud for retail execution capabilities. Don't be led to believe that you have to take less functionality or flexibility because there is a perception that RetX capabilities are all moving to the cloud. 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.

Take Bring Your Own Device (BYOD) in Retail Execution seriously, not just as user preference, but also as a standard if you intend to be active in emerging markets.

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 pilot the functionality yourself.

Recognize that a single solution is not likely going to meet your global needs. There is just too much disparity in price, suitability to local requirements, and availability of support. It is typical to have 3-5 solutions for truly global companies.

Our 2019 survey showed that about 68% of respondents do not have "sell more" capabilities, so they give a significant competitive advantage to those who attain them. Begin investigating how you can enhance prioritized selling.

Ask for best practices from your vendor or implementation partner. The POI 2019 Survey found that only 21.9% (8.9% increase) 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 best practices. Many vendors have a separate team that can support this effort. It is important to document upfront the sort of best practices you are looking for and incorporate this need into the scope of work.

Understand specifically what capabilities each Retail Execution solution offers relative to off-line and complex pricing. There isn't a need to jointly develop or custom build the vendor's solution. There are numerous solutions in market today that have these capabilities and have so for years.

Consider how advanced retail execution capabilities like image recognition, gamification, retail activity optimization, embedded social capabilities, and guided selling can be added to your sales tool-kit to provide line of sight to in-store opportunities and execution at the store level.

Retail Execution Vendor Call to Action:

- Support manufacturer business case development
- Support manufacturer project team with best practices
- HQ, internal team, involvement, analytics/reporting, and training
- Vendor capabilities must advance to:
 - Enable field-based users to make required decisions
 - TPM and RetX system connectivity
 - Enhance 3rd party broker connectivity (Ties in with TPM - RetX system connectivity)
 - Provide off-line capabilities
 - Retail activity optimization

While the data represents some improvement in specific categories, the overall retail execution landscape is a “perfect storm” given how aggressive eCommerce players like Amazon and Alibaba have become. The ability to execute at retail has never been more critical, regardless of your route to market. The rewards are huge for those companies who get it right.

Retail Execution Market Overview

Market requirements have changed 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 few years. In this RetX Panorama, we evaluated 21 solutions from 19 vendors.
- We still do not see any efforts around developing home-grown solutions and have not for several years. The market is relatively mature, and the various vendors offer: solutions-plus-services such as asset management, monthly pay-by-user arrangements as opposed to lump sums up front, best practices baked in from years of experience with multiple manufacturers, and more attractive upgrade paths.
- Analytics and the ability to help a salesperson make informed decisions at the point of sale continue to be key differentiators between vendor solutions and also with sales rep execution in the field.
- The Gamification will take on new importance with the addition of AI. The solution recommendations can be linked to “the potential” a sales rep can achieve by executing certain tasks.
- Dynamic image recognition for smart image capturing of planograms, share of shelf and pricing, AI/ML, RAO, gamification, digital content management, and other capabilities are moving from future product vision to becoming base standard in the RetX space based on market demand.

Next, we relay the evaluation criteria we used when evaluating the vendors, so that you understand the basis for the 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-premise, hosted, public cloud, and multitenant SaaS. Also, the willingness to customize by writing code that would take the solution out of the upgrade path and effectively make it a separate instance.

Solution Completeness

The vendor's ability to enable the key processes for the various types of retail execution and monitoring in which it competes: (Noting new capabilities below in blue that are becoming base standard in the RetX space and will be included in the solution completeness in 2020/21. Many of the vendors are delivering these new technologies today and or have them on their roadmaps for 2019/20. In this year's panorama, ratings are still based on our historical criteria. In the future, these capabilities will move from product vision to product reality and form a new basis for evaluation).

- Retail Merchandising:
 - Call planning/execution/reporting cycle
 - Image capture (Including assortment and availability check, share of shelf, pricing)
 - Note market is trending toward dynamic IR with smart image capture
 - Analytics
 - GPS/mapping integration
 - Prescriptive analytics with ML/AI to provide insights on more effective routing, "sell more," pricing and planogram opportunities
 - Digital Content Management (including how easily the content flows in the call sequence to support "sell more")
 - Gamification
- Distributor management:
 - Call planning/execution/reporting cycle
 - Channel partner visibility
 - Analytics on sales performance, territory planning, and category performance
 - Product/payment integration
 - Order entry
 - Sales collateral management and flow in the call sequence
 - Digital Content Management
 - Geotagging
 - Gamification at the seller, outlet, and distributor level

- Van sales:
 - Pre-sales/route sales [route and store sequence planning (with ML/AI)]
 - Prescriptive analytics with ML/AI to provide insights on more effective routing, “sell more,” pricing and planogram opportunities
 - Order entry
 - Price data management
 - Mobile invoicing
 - Product/payment reconciliation (Including end of day reconciliation)
 - Analytics
 - Price data management while disconnected
 - Digital Content Management
 - Gamification at the seller and outlet level
- Direct store delivery:
 - DEX Integration (in applicable markets)
 - Call planning/execution/reporting cycle
 - GPS/mapping integration with Geotagging
 - Mobile invoicing
 - Product/invoice reconciliation
 - Delivery van allocation – Smart prescriptive loading
 - Prescriptive analytics with ML/AI to provide insights on more effective routing, “sell more,” pricing, and planogram opportunities
 - Gamification at the seller and outlet level

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.
- **Prescriptive analytics with ML/AI to provide insights on more effective routing, “sell more,” pricing and planogram opportunities.**

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, every day pricing compliance, 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 having a device speak as opposed to reading from it. Voice enabled route changes is another capability that is on the horizon.
- **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 out of stock or the best route between the 15 stores on today’s route schedule, 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.

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 2019 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. **Green indicates new Best-in-Class Category.** **Orange denotes new category recipient in 2019.**

Functional area	Recipient(s)	Why critical to retail execution?
Mobile UX	Asseco, Spring, StayinFront, Accenture Cloud	Increased adoption, usability, and engagement.
Desktop UX	eLeader , Kantar, SAP, Univera , Repsly	Addresses the needs of office-based personnel to analyze and direct field efforts.
Gamification	Accenture Cloud, Asseco, eLeader , GreatVines, Kantar, Spring	Encourages effort and provides constant feedback through all manner of incentives and programs.
Data Visualization	Accenture Cloud, Kantar	Turns data into insight with meaningful and quickly understood graphics and/or dashboards.
Analytical Insights	AFS Ent., Ivy Mobility, SAP, Spring, StayinFront	Provides KPIs in unique and innovative ways.
Retail Merchandising	AFS Ent., Ivy Mobility, Pitcher , SAP,	Fully enables this vital function with all necessary roles and analytical requirements.
Distributor Management	Accenture NewsPage, EdgeVerve (back-end), SAP	Ability to execute with a channel partner - particularly critical in emerging markets, which is a vast opportunity today.
Retail Activity Optimization (RAO)	Accenture NewsPage, Asseco, StayinFront	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	Comarch , Pitcher , StayinFront	Maximizes impact at the point of decision. Uses branching logic and interactive capabilities to automatically determine what to show next based on previous input(s).
Predictive AI/ML	Accenture Cloud , AFS , Accenture NewsPage , Ivy Mobility , StayinFront	Uses Artificial Intelligence/Machine Learning to predict or prescribe best routes, pricing, planograms, store or distributor orders, van loads, and more.

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 2016.

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 Cloud & Accenture CAS	●	●	◐	◐	●	●	◐	●
Accenture NewsPage	●	●	●	●	●	●	◐	●
AFS Enterprise	●	●	●	●	●	●	●	●
AFS POP	●	◐	●	●	●	●	●	◐
Asseco Bus. Solutions	●	●	●	◐	●	●	●	●
Comarch	◐	●	◐	◐	◐	●	○	◐

● = 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	●	●	●	●	●	◐	●	◐
Repsly	●	●	●	●	●	◐	●	◐
SAP	●	●	●	●	●	●	◐	●
Spring Mobile	●	●	●	◐	●	●	●	●
StayinFront	●	●	●	●	●	●	●	●
Univera	●	●	●	◐	●	●	●	●

= 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 Cloud & Accenture CAS	●	●	●	●	●	●	●	●
Accenture NewsPage	●	●	●	●	●	●	●	●
AFS Enterprise	●	●	●	◐	◐	●	●	●
AFS POP	●	○	●	◐	◐	◐	◐	○
Asseco Bus. Solutions	●	●	●	●	●	●	●	●
Comarch	●	◐	●	○	●	◐	○	●

= 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	●	◐	●	●	●	●	◐	●
Repsly	●	◐	◐*	◐	●	●	◐	●
SAP	●	●	●	●	◐	●	●	●
Spring Mobile	●	◐	●	●	●	●	●	●
StayinFront	●	●	●	●	●	●	●	●
Univera	●	●	●	◐	●	●	◐	●

● = Above average ◐ = Average ○ = Below average

Analysis of Representative Vendors

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

Profile: All are part of the Accenture Products & Platforms group as a result of the acquisition of CAS and NewsPage. The latter is still a separate offering for distributor management and sales force 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. Accenture Cloud is the primary go to market solution which is reviewed here along with Accenture NewsPage. The Accenture CAS on-premise solution will be supported into the foreseeable future for existing clients. 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 offerings separately.

Accenture Cloud and Accenture CAS

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

Total consumer goods users (seats): 27,000.

Tiers represented: All.

Solution offerings: DSD, retail merchandising, and van sales.

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

Accenture Cloud:

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. Accenture Cloud has multiple options for client analytics:

1. **Salesforce:** Lightning report builder for reports and dashboards and Einstein analytics for advanced analytics combining Accenture cloud, Salesforce, and 3rd party data.
2. **Third-party vendor:** Salesforce partner ecosystem offers a variety of analytics tools with different degrees of sophistication via the App Exchange.
3. **Accenture Cloud Mobility Platform:** Features embedded Accenture Cloud Mobile Reporting for live, off-line transactional reporting and options to call or embed external mobile reporting and analytics tools.

The dashboard U.I. is outstanding for all formats. Accenture cloud has delivered 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 an initial prototype with natural language ability to ask the system for an explanation. Retail Activity Optimization (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. The addition of an off-line pricing engine and field analytics on the fly gives the user all the information in store. Accenture Cloud is working with clients to drive predictive analytics that enable the sales teams to drive sales and gain further insights in the form of possible outcomes. We rate Accenture Cloud analytics as Above Average.

Technology architecture/delivery options: The Accenture Cloud solution is now on par with the Accenture CAS on-premise 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.

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

Technology partners: Salesforce.com, Zebra (hardware), Honeywell (hardware), Accenture.

User experience: The UX has undergone a revolution and streamlined the look and feel of the user interface. The cockpit has all information on one page including KPI's and reporting. It is an intelligent layout that is user friendly and engaging. The Sales Folder has been enhanced and is easily accessible by sales, as they use digital sales materials to support selling activities.

Gamification is being enhanced in multiple areas:

1. **Perfect Plan:** The platform provides multiple plan scenarios to motivate the sales user to go the extra mile. Basic plan, Sell-in Promotions and gain additional points, Optimize the Perfect Store for a maximum amount of points.
2. **Predictive Order:** Platform has two options. Quick Order which presents and option to drive "X" level of sales or Extensive Order which is the same as the quick order but also tags on an additional set of tasks (new items, promotions, etc.) for additional bonus points.
3. **My Performance:** Uses gamification as a business strategy to drive user experience and behavior. This includes a leaderboard ranking of sales teams including social components to drive competition, sharing successes, and peer coaching/encouragement.

Accenture Cloud has advanced their call planning options to automate planning of calls on the mobile device based on visit frequency, and the new sales rep cockpit card provides information about overdue customers. The Head Office Processes have been overhauled and is an efficient way to manage and review surveys, questions, orders, and reporting.

The Accenture Cloud UX is very good. We rate it Above Average.

Vendor trend: While in 2017 we didn't see much momentum, in 2018 we see that Accenture has accelerated their execution, become a capabilities leader, and has a best in class vision for the future.

Strengths: Accenture Cloud provides a very comprehensive set of capabilities for Retail Execution in modern and traditional markets. This includes the closed loop RE process from strategic planning to RE management, visit preparation, in-store execution, team collaboration and monitoring. The solution is supporting a variety of retail execution user personas including supervisor, HQ sales manager as well as merchandizers and sales reps in the field. Field users can execute the visits with electronic Sales Folders and penny perfect priced orders

even without connectivity. The application is based on a Cockpit concept which provides a simplified, intuitive user experience that gives sales teams all the information in one place. The solution provides a seamless integration of Einstein Analytics for all kind of user types including field users using mobile devices.

Challenges: After a 4-year development phase, Accenture will need to work hard to get included in manufacturer RFP short lists. Also, attracting global services partners, and even more regional ones, will be important 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. 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 is about.

Outlook & prognosis: Accenture cloud capabilities are strong and the UX is top notch. Accenture is working to drive lower cost of ownership in 4 ways which should lead to inclusion in manufacturer RFP's:

- Infrastructure, run-ops, support, license all as part of a single per user per month fee
- High degree of configurability requires less time and cost in customization
- Ease of use and intuitive process promoting less time to train users
- Modern trade and traditional trade all within the same solution; Single system = lower cost of ownership

Consider Accenture Cloud when: You seek global capabilities for proven solutions that have global reach and need 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 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, Gamification, Mobile UX, and Predictive-AI/ML.

Accenture NewsPage

As Accenture NewsPage has entered Europe and North America, we no longer consider it an emerging markets-centric solution.

Geographic presence: North America (.2%), Latin America (3%), Europe (2%), Asia/Pacific (75%), and Africa (15%), Middle East (3%).

Total consumer goods users (seats): 163,545.

Tiers represented: All.

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

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

Analytics: The analytical capabilities for Perfect Store, call productivity, store coverage, and other aspects of sales efficiency/effectiveness are very strong. The ability to predictively determine the Next Best Action is more advanced than we have seen with most vendors. Advanced analytics is applied (but not limited) to: prioritized call scheduling; outlet forecast and what sales targets should be based on promotional uplift, seasonality and new outlets; appropriate merchandising allocation; customized assortment; optimal sales orders for each outlet; personalized trade promotions and the best trade strategy by retail segment; and new product planning to identify the best outlets that can be targeted for a new item. Advanced Next Best Action capabilities can analyze the field user performance as well as store clustering to determine the right frequency of calls for each outlet. Dynamic route planning can further optimize the outlet visits with the objective of maximizing sales, minimizing costs, and determining the optimal time to be spent within each outlet.

The Accenture NewsPage solution enables merchandisers to execute and track their in-store metrics efficiently thereby increasing their in-market time. The merchandisers are able to better influence stores and accounts by using the analytics, knowledge, and information available in the application to drive the right activities.

Should the organization require data consolidation from multiple sources to obtain a holistic view of the market performance, Accenture NewsPage also has a BI Analytics and Reporting platform that can be used to aggregate, cleanse, and normalize data from multiple sources to be analyzed and presented in a meaningful manner to the customer.

Accenture NewsPage shelf recognition taps into AI Deep Learning technology to train the application in recognizing individual objects and products that are arranged on the shelf. The image recognition technology is seamlessly enabled in the RE tool, and the results of the audit and compliance checks are sent directly to the RE tool.

Overall, Accenture's analytics model is designed with the intention of accelerating time to action and enhancing sales productivity and execution.

We rate Accenture NewsPage Analytics as Above Average and for use in any market.

Technology architecture/delivery options: A web application delivery framework from either cloud or on-premise. 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-premise 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), and DWP (Pakistan).

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

User experience: Accenture NewsPage 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 outlet based on in-

store conditions. An organization can link gamification to incentives to drive increased sales. A sales user can preview and share sell sheets and upselling detail, all on the single Sales order screen.

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 the tool can automatically calculate share-of-shelf.

We rate the Accenture NewsPage UX 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 companies regarding new user licenses sold since our last report. This is a consistent year over year trend for NewsPage. They have executed their roadmap consistently and their future roadmap is impressive. They have some of the best AI and machine learning in the market which drives efficiency and productivity for the manufacturers, which will drive enhanced business opportunities.

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 continues to build 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.

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. Their future roadmap is stellar.

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, Guided Selling, and Predictive-AI/ML.

AFS Technologies afsi.com and **The POP Company** 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 the POP Company to deepen its presence in Asia. It is one of 5 vendors with a global presence. In 2018, Symphony Technology Group (STG) acquired substantial AFS' interests, providing AFS with the possibilities to further expand and grow potential. TPG Capital is still owner of a large portion of the company, but STG now owns the majority of AFS and drives the strategic decisions of the organization moving forward.

AFS Technologies, the “Enterprise Solution”

Geographic presence: North America (48%), Latin America (11%), Europe (22%), Asia/Pacific (19%) Middle East (.2%).

Total consumer goods users (seats): 189,000.

Tiers represented: All.

Solution offerings: Retail Merchandising, distributor management, DSD and van sales.

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

Analytics: AFS analytics are very strong and build upon the Microsoft Power BI capabilities enabling authored reporting 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 AFS has expanded the data source capabilities to include: Power BI, data lakes, POS, retailer, and sell-out. The in-flight analytics are also exceptional for spotting something of immediate interest and drilling down. We also like the Sales Book, customer specific fact sheets, and the exception report by product that can be reviewed upon arriving at the store or during route planning to maximize in-store execution.

This year AFS has deployed AI in multiple areas of RetX: Power BI now has AI intelligence enabled, as well as front line AI that is applied to the RAO route optimization. All actions in a visit are intelligently created by the system based on company input as well as available data. Actions include review of individual store reports, customer profile, history, trends of execution, down to the level of a single SKU being “historized.” The AFS solution has the ability to dynamically detect the conditions of the shelf after an audit, isolate the exceptions, and respond to them with Best Practice resolution workflows. The solution is able to manage complex visit planning schemas in which stores are prioritized based on revenue potential or sales trends. During the visit execution, the user always has a clean view of the Perfect Store metrics that are affecting the store performance even down to the level of the brand, driving all the necessary corrective actions when applicable, with Perfect Store compliance metrics right on the user’s handheld to drive gap closure.

The 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. AFS has recently introduced the ability to connect in real time with external pricing engines from any ERP or any other commercial solutions. The impact to in-store execution, pricing analysis, and intelligence is great. In addition, this additional integration flexibility is a substantial benefit and will broaden AFS reach in the market. We rate AFS analytics 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-premise, hosted/private cloud, public cloud, or multitenant SaaS.

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

Technology partners: Microsoft, Google, Rackspace, Planorama, Intermec, Motorola, Zebra, Riaktr, Neal Analytics, Trax, CACI, Nielsen, MSA, Snap2Insight, and Augment. Microsoft represents the most strategic partner, and as such AFS is closely aligned with them across four dimensions:

- **Technology and platform** – Azure cloud and services, Power BI, Cortana Intelligence, AI/ML, etc.
- **Complementary solutions** – Dynamics CRM, ERP, Field Service, Workforce Planning, Gamification, etc.
- **Sales and Marketing** – AFS is the global go-to-market retail execution solution for the Microsoft field sellers, and AFS benefits from significant promotion and marketing investment, co-branded collateral, incentives to the Microsoft field for lead generation, and co-sell privileges
- **Services** – delivered through Microsoft Consulting Services.

User experience: In the last 12 months AFS has heavily invested in becoming one of the few providers that is offering a consolidated RE+DSD solution under a single product, yet taking a unique approach. Instead of offering front end products oriented to different business roles, AFS enables customers to build business processes by picking features from a vast toolkit that provides flexibility. With this approach, for instance, instead of having a singular van sales solution, AFS has a set of features that can be used for van selling, along with merchandising activities in Traditional trade, promotional compliance, Perfect Store, among others, creating a rich experience for end users. AFS has also focused heavily on the end user experience, enabling time and driving optimization, simpler execution workflows, cleaner screens, and making the solution much more amicable. AFS has a goal to help clients derive the value out of the system, with call time reduction, accurate data, and in-store actions driven by intelligent insights. All of which have positive revenue implications.

AFS offers several ways to manage planogram compliance from sophisticated planogram vs. realogram comparisons with AI/ML image recognition technology to simple/manual methods with images, surveys and audits, which allows AFS customers to determine which technology is the best for the market, category, user community, etc. AFS has dramatically improved their UX and is now Above Average.

Vendor trend: AFS continues to have a strong year over year trend 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 one of the most aggressive we have seen with key elements such as additional AI and ML-driven predictive orders, enhance Perfect Store and route optimization intelligent AI, back-end overhaul with Azure, improve gamification and potential tie-in with the Sales Book, Sales Simulator, and coaching.

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.

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 throughput, 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 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 and RetX from a single vendor. Finally, if you want to create hybrid sales processes across merchandising and selling.

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

Distinctions: POI Best-in-Class awards for: Retail merchandising, Guided selling, Analytical insights, and Predictive-AI/ML.

The POP Company

Geographic presence: North America (2%), Asia/Pacific (98%).

Total consumer goods users (seats): ~20,000.

Tiers represented: All.

Solution offerings: Primarily merchandising, with order taking.

Analytics: The solution has capable reports for tracking the business but is best seen as reporting against task attainment and productivity. Historically, POP clients haven't desired heavy analytics. Analytics are not graphically rich on the desktop version or mobile, yet the

user dashboard, route, and back-end territory planning screen are solid and user friendly. 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. A new analytics feature includes the ability to have visibility and gain insights around target stores vs executed stores. Export to analytic tools like PowerBI is also supported. We consider POPs analytics as Average, with the caveat that POPs users are traditionally not looking for deep mobile analytics.

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, Snap2Insight, Nielsen, Zebra, Motorola, Trax, Intermec, Amazon.

Service partners: Microsoft Consulting Services (Global), ScanMex (Mexico), KronIT (Mexico), KPBS (Russia).

User experience: POP invested this year in the mobile layout, and it is very intuitive. We like the new promo builder capability. POP has 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.

We consider the POP UX as Average, yet much improved.

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 an affordable cost/pricing structure. It is both rapidly deployable and scalable. Many strong brand names have already selected POP for the Asia/Pacific market.

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

Outlook & prognosis: As POP 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 LatAm, or if you see “forms-based” retail solutions in the developed markets as really boring and want more for about the same cost. 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-premise, 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.

Asseco Business Solutions mobiletouch-fmcg.com, also omnichannel-fmcg.com and connector-fmcg.com

Profile: A European-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 25,000 employees in various technology and services areas.

Geographic presence: Europe (86.6%), AsiaPac (6.7%), Middle East (5.5), Africa (.6%), LatAm (.6%) .

Total consumer goods users (seats): 45,000.

Tiers represented: Food/Beverages including adult Beverages, Tobacco, Personal care/health and beauty/pharma OTC. Can also handle all go-to-market modes such as Modern Trade, Traditional Trade, Pharma/OTC, and HoReCA (hotel/restaurant/catering)/On Trade.

Solution offerings: Retail Merchandising, Distributor Management, DSD, and Van Sales. Other=e-commerce B2B Partners (11%).

Major product sub-segments not covered: Semi-durables and household products and consumer durables (electronics/appliances).

Analytics: Excellent mobile analytics and dashboards through an ever-evolving Mobile Touch (SFA 2.0) system that include target attainment, incentives, and Perfect Store scores. Back office reporting has moved from Oracle BI to Microsoft Power 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. Mobile Touch provides (1) classical questionnaire-based Survey taking (e.g. configured set of KPIs to be audited; the surveys have features like pre-populated values from last audit etc.), (2) advanced Perfect Store (e.g. based on the company's picture of success and a related segmentation the field sales users can access detailed information about the picture of success, audit it, get results in real-time and advise on next actions; the results of a Perfect Store audit are shown in a KPI summary within the call, in real-time updated targets on the dashboard and in real-time updated compensation schemes/competition points; Perfect Store can be combined with Smart Presentation allowing the user to present Perfect Store in a compelling company CI-based layout and to create a customer-data driven business case) – manual, Image Recognition empowered and in hybrid mode, (3) Retail Activity Optimization (e.g. selected KPIs may be used as activity impact triggers driving the field sales route dynamically). Asseco is working on proprietary IR and Artificial Intelligence/Machine Learning, which are currently piloting with select customers.

We rate Asseco Analytics as Above Average (Best-in-Class).

Configuration/Customization: Highly configurable. Custom code is not preferred, but it is an option and is incorporated into the standard product offering.

Technology architecture/delivery options: On-premise is still supported but not actively marketed. Hosted/private cloud is the primary delivery option in EMEA. Public cloud 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, CACI (territory and route optimization), PTV (territory and route optimization), Augment (augmented reality).

User experience: Mobile Touch for field users is Best-in-Class. 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. Motivation and Coaching are two key drivers to impact performance in the stores. The most recent addition to the SFA 2.0 capabilities proposition is Mobile Touch Smart Presentation. This is a technology enabler to allow customers to dynamically present their insights based on store-level data in a branded very exciting UI (e.g. product catalogue presentation/order entry or Perfect Store).

Asseco has an Above Average UX for both field and office-based users.

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. Optimizing field-based activities continues to be a strength with enablers such as leader boards, Retail Activity Optimization (RAO) capabilities, and now as they are piloting AI/ML and proprietary IR. 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: Omnichannel Platform including services for Mobile Customer Portals, B2B/B2C E-Commerce, Data Integration receiving and managing channel partner data (Demand Signal Repository) including data cleansing, Data Intelligence including IR, AI/ML, and vendor managed inventory (VMI).

Key differentiators: Very strong orientation towards user experience and 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 are 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. Omnichannel focus: Going Digital/Omnichannel are key business drivers for the Future of Sales in FMCG. Thus, Asseco has added- next to their Retail Execution capabilities- a Customer Portal (online client of Mobile Touch). They have also complemented Mobile Touch with an eCommerce solution Connector B2B/B2C, Demand Signal Management/Data Integration solution Connector Platform and Data Intelligence solutions regarding IR, AI/ML, advanced Analytics (powered MS Power BI), VMI, etc.

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. It is beginning 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 available.

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

Comarch sfa.comarch.com

Profile: The Comarch SFA platform is a field sales offering and part of a greater European-diversified IT vendor, Comarch Capital Group. This enterprise encompasses innovative companies employing over 6000 individuals and generates more than 300+ million Euros in revenue. The Comarch Group is comprised of a unique mix of software development and implementation, internet society creation, and social responsibility entities.

Geographic presence: Europe (99%), Asia (1%).

Total consumer goods users (seats): 5,189.

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

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

Major product sub-segments not covered: Tobacco.

Analytics: The Comarch SFA system 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 (Hotel, Restaurant & Catering) channel. There is

a profitability simulator for selling in this channel, and it drives different approval workflows to leverage visibility and increase sales. Comarch has focused on tracking trends and understanding what user is purchasing what product in what outlet. Clients are able to take robust data and generate deeper analytics quickly around Perfect Store metrics. The SFA system utilizes traditional and modern trade and converges the data on the mobile application driving enterprise visibility. An OLAP Fast Grid 3.0 module is designed for analysts and demanding users who require quick and easy access to large amounts of data. It provides easy access to tabular summaries and charts directly from OLAP cubes shared in the solution - but in a more user-friendly way. Reports can be exported in MS Excel format, report templates can be saved and shared with other users. Standardized reports are available for different units of the organization including: sales, marketing, supply chain, logistics, deliveries, etc. Overall, we rate Comarch SFA 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. Each customer has a dedicated Project Manager that is responsible for the projects development. When a client needs customization, it is discussed with the R&D team. Each functionality is analyzed, mockups are consulted with the customer, and after acceptance, a final vision is realized - usually in SCRUM sprints.

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

Service partners: Comarch has done its own deployments to date, but it is partnering with the following services organizations going forward: Korus Consulting (Russia), Bizofis (Turkey), Synergion (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: Comarch SFA has step-wise Perfect Store capabilities. The dashboards and reporting are intuitive and robust at the same time. The improvements to Fast Grid 3.0 and the improvements to sorting and filtering have improved the client experience. Also, coaching capabilities continue to expand to include a 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 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. One huge differentiator is the ability of the Comarch SFA to manage adult beverage across the entire selling process. From origination, through the distributor, to the recipe and serving occasion, and ultimately to the sales/consumer. The system can now track volume from the distributor and relay what happened with the product through the sales cycle with increased visibility and accuracy. The platform has very nice selling flow with sales collateral imbedded into the sales sequence. The IR capabilities are excellent. The system automatically checks items against the planogram and then places missing items on a suggested order. Leader gamification rankings are now available, and Comarch has a separate department that focuses on gamification dedicated products which can integrate with the SFA solution. Comarch has also released RAO to optimize sales representatives' daily routes based

on advanced sales and market data analyses. Through RAO managers can create weekly or daily visits and tasks to activate in-store activities and reduce costs.

The Comarch SFA UX has moved from Average to Above Average, but if you are in the hotel, restaurant, adult beverage business this is an above++ average user experience.

Vendor trend: Comarch continues to grow its user base modestly since our report last year. Comarch consolidated all of the industry people into a single group in early 2018, and they have made excellent progress in the back half of the year. They also have a very solid and promising roadmap for 2019.

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, performing task monitoring, and managing the adult beverage process from origination through consumption. They have enabled video, recipes, and sell sheets right in the order screen for increased “sell more” opportunities.

Challenges: Comarch has developed product differentiation and “sell more” capabilities in the last year that will help them in a highly competitive market. This gap closure was critical to growing beyond Europe. The Comarch sales team now has to gain a seat at the table in future RFP’s as they have competitive capabilities.

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

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 has resources, personnel, a compelling enhanced system, and has the ability to transcend 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 continues to be promising and we will be eager to see the outcomes over the next 12 months. Again, the Comarch Sales team now has the challenge of breaking into new countries and markets.

Evaluate Comarch when: You seek a partner with end-to-end capabilities, extensive services, and deep expertise in 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.

Distinctions: POI Best-in-Class awards for Interactive Customer Presentation.

eBest Mobile 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 (99.5%), North America (.05%), LatAm (.11) Europe (.005%), Middle East (.23%) Africa (.10).

Total consumer goods users (seats): 216,000.

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: Semi-durables.

Analytics: eBest provides multiple options for analytical capabilities, depending on the customer requirements. Out of the box includes Salesforce.com and/or Microsoft Power BI. For Image recognition eBest has its own proprietary capability, or a client can choose to use a 3rd party IR solution (often the 3rd party results are not available until the next day). Over the last 12 months eBest R&D efforts have been focused on automation, specifically image recognition. They will continue to enhance and perfect IR through 2019. This positively impacts planogram checks, pricing validation, and in-store governance. The dashboards and analytics are solid, but continue to need depth and be more visually appealing for the user. 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 is true for being able to detect whether product is available and automatically forecast orders for delivery.

eBest has made good headway and yet we continue to rate eBest Mobile as Average.

Configuration/Customization: Both configuration and customization are possible. Customization is often the preferred option by most large CPG companies that utilize the eBest solution.

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

Service partners: Ritmus (Turkey), CMS (Thailand), IT Authorities (US), Tata (India).

Technology partners: Salesforce, Microsoft, Enterprise WeChat [elec payment (China)]; Insigma (IoT devices).

User experience: The eBest welcome screen is intuitive and prepares the sales user for their day. The flow of the iMarket tablet is very intuitive and easy to use. The route plan has a nice layout and dynamic route planning (RAO) is planned for release later this year. Having the eLearning messages embedded is a real plus for users at all stages of the learning curve. iMentor enables customers to identify train/coach opportunities for their front-line reps and ensure the reps are executing in market as they were trained. The iMentor - my Team Module- provides front line supervisors with a tool that allows them to be proactive to real time situations, rather than reacting when they see reporting the following day. 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. The 2019 roadmap is excellent and has many capabilities that will level the playing field with the competitive peer set.

The UX is good, especially for emerging markets, but it is not on par with the leaders for developed ones. As a whole we rate the eBest UX as Average.

Vendor trend: This is the first report where eBest is featured. The growth trajectory is solid for a 19-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. eBest is currently split across two technology footprints for development and support, and by mid-2019 they will have a complete end to end solution on the Salesforce.com platform including: SFA, retail execution, DSD, Van Sales, and the Distributor Management System. Penetrating Europe and North America is never easy, and eBest will need to partner with Salesforce tightly to ensure success.

Adjacent offerings: Customer self-service, IoT product line for asset tracking and cooler metrics.

Key differentiators: The way the IoT data is brought in to facilitate insights is a true differentiator.

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 develops advanced analytics, RAO, guided selling (all with prediction), and gamification. Otherwise it doesn't stand out, except for the price.

Evaluate eBest when: You want a satisfactory solution for the money. Especially, when you are looking for something for Asia. Also, if you want a partner with beverage experience.

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

EdgeVerve edgeverve.com

Profile: Edgeverve focuses on distributor management back-end solutions and some van sales in APAC through a product 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 (71%), Africa (1%), Europe (12.6%), LatAm (12.6%), Middle East (2%), North America (.84%).

Total consumer goods users (seats): 1,600 on Distributor Management and 4,000 partners utilizing the data visibility offering.

Tiers represented: All.

Solution offerings: Distributor management and van sales.

Major product sub-segments not covered: Tobacco.

Analytics: EdgeVerve has enhanced analytics to include AI-driven apps for promotion causals and predictive analytics for OTIF delivery of orders. It has also made significant progress on mastering data harmonization capabilities across POS and syndicated data using text mining and ML. As we know, improved data quality can have a positive impact to analytics across the client's organization.

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 or if it remained custom code it would be considered a bolt-on and would need to be retrofitted with each upgrade of base product. The EdgeVerve services team can provide these services. POI highly recommends not implementing any custom code that isn't part of the base product due to the upgrade complexity. Configure or have the enhancement worked into the base.

Technology architecture/delivery options: Multi-tenant SaaS.

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

Technology partners: Red Hat, Linux, Apache Software, Microsoft, Pentaho, PostgreSQL from Tableau, Amazon Web Services, Connex 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 is intended to be basic and cost effective. As a result, 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. Most of the growth this year is attributed to the data management and visibility aspect, which is out of scope for this report, yet it is noted below in the adjacent offerings section. 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: Helping global companies fully understand the dynamics of the emerging markets and what types of enabling technology are appropriate.

Adjacent offerings: Market Connect Module = Data as a service. Distributor/wholesaler/retailer data management. Data harmonization through machine learning. EdgeVerve offers this service which enables clients to focus on sales vs. data outages.

Key Differentiators: Much of the differentiation lies out of scope in data services, but it is worth mentioning: the ability to enable some retailers to order product from a product graphic oriented storefront and 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. 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. 2019 AI-driven capabilities around suggested ordering and intelligent order routing are in progress. 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 retail merchandising.

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

eLeader eleader.biz

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

Geographic presence: Latin America (12%), Europe (42%), AsiaPac (6%), Middle East (22%), and Africa (18%).

Total consumer goods users (seats): 16,600.

Tiers represented: All tiers. Expertise in consumables, consumer durables, footwear and apparel, and consumer electronics. They also have business in the service industry, banking and advisory, store chain management, and farmer advisory.

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

Major product sub-segments not covered: None.

Analytics: eLeader is using Microsoft SQL and Microsoft reporting services to provide a custom developed reporting tool. They are able to provide any form and utilize any data needed by the customer. Every report set is prepared at the request of the customer. Reports are created during the deployment phase and can be updated and changed as a regular service request. There is also the possibility to use a report creator available via web applications to create ad-hoc reports. We would like to see eLeader provide a standardized

set of best-in-class reports as a foundation and then have the client recommend adjustments. This will help to drive best practices, reduce deployment time, and help clients who don't know what they need in reporting. eLeader mobile visit has capabilities to integrate with any 3rd party solution used by a distributor, ERP, CRM, as well as Power Bi, Cognos, MS Dynamics, and more. With the latest development eLeader has added a possibility for the customer to build complex calculation methods using blocks (similar to basic visual programming). eLeader's Productive 24 allows building sophisticated IT systems by business analysts themselves, without programmers. Therefore, users can build their own digital version of even the most complex business processes and workflows which exist in their company. This reduces development, the time, resources and budgets necessary to build complex IT systems.

While picture capturing and recognition can be standalone solutions, when used with eLeader mobile visit solution, the recognition data can be seamlessly inserted into proper forms in tasks designated for the visit. Advanced automated analytics of the product from the pictures is done with eLeader shelf image recognition technology. This technology utilizes AI neural network to recognize products from images taken during the visit and delivers results of this recognition during the call. The connection with eLeader Mobile Visit SFA solution seamlessly inserts recognition data directly into tasks. An example- every time a product is highlighted as unavailable, it is automatically added to the order with recommended quantities matching sellout data for the last weeks. This allows visit time to be cut significantly and ensures that results are reported as they are in real time with digital image confirmation.

mCATman is an application that works with the image recognition solution that provides the possibility of building and optimization of planograms based on a variety of parameters like demographic data, POS data, best practices for merchandising standards, history of the orders, etc.

In the near term, eLeader's shelf recognition solution will automatically capture price for each label and be able to easily compare with min/max values based on the product listing for the specific store.

eLeader offers route optimization based on calculations of distance between the starting point, assigned number of Pos, and end point. Optimization takes place before the start of the call day and can be updated several times a day, taking into account any change in the schedule done by the users or supervisors.

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 are advancing the Analytics rating to Above Average. Again, while we would like to see more standardized reports out of the box for users, eLeader has the resources and service mindset that can deliver a client's needs.

Configuration/Customization: Customization possibilities are embedded into the configuration of the solution. The design of the system allows for the creation and addition of any module within the solution and then, dedicated configurations are provided for each customer. The core of the application will be identical for every customer.

Technology architecture/delivery options: On-premise, hosted/private cloud, and multitenant SaaS. 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, Panama, Dominicana, Puerto Rico, Russia, Turkey, Malaysia, Vietnam, 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, Honeywell, and Zebra.

User experience: UX is very good, particularly in how it renders on a mobile device. eLeader has implemented a new look and feel and now has the ability to highlight products according to their importance, category, or status. Gamification is utilized in a few ways to drive “sell more” behaviors. The OLIMPICS application indicates that the call is a Perfect Store visit, and a medal is achieved by the sales person. Sales dashboards reflect his/her position in current time.

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.

Functionality around Perfect Store and Perfect Visit are a real plus. 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.

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 tool advancements in Analytics and UX, combined with the organization’s roadmap of AI, RAO, and additional sell more capabilities catch eLeader up in the RetX marketplace.

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: eLeader needs to continue to develop 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, OCR, 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 the application is not running. Push messages can also carry requests for operations like deletion of data or forced synchronization which improves security and support for the organization.
- 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.

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 local support for deployments outside of their existing partner network.

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

GreatVines greatvines.com

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

Geographic presence: North America (96%), Europe (2%), Asia/Pacific (2%).

Total consumer goods users (seats): 13,218.

Tiers represented: Food/Bev, Tobacco and Personal care/health, and beauty/pharma OTC.

Solution offerings: Distributor management, retail execution and merchandising, National Account authorizations and compliance, trade program spend management, goal management, sales and activity analytics

Major product sub-segments not covered: Small presence in tobacco marketing with an agency and small food client base. 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 sales, such as presenting and securing that the product is served by the glass, executing staff training highlighting any objectives left open from the prior visit, 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, depletions, or wholesaler sales to retail to measure and correlate the activities that were executed with the resulting sales, 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/scorecards based on attainment of points for completing strategic activities.

The overall analytics are delivered on GoodData embedded in the GreatVines application, as GreatVines found the standard Salesforce.com components were not suitable based on client SFA needs. GreatVines keeps all clients on a common GoodData data model but allows clients to customize reports and dashboards for proprietary insights using the standard models.

Overall, analytics are highly developed and suited to the adult beverage space requirements such as depletion reporting, performance score carding, activity vs. sales analysis, chain authorization compliance and 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 tailored for the distributor analytics requirements of the adult beverage sub-segment, few other retail execution tools we have seen have this multi-tier functionality. It isn't particularly engaging in how it renders graphically, but does provide the distributor analytics insights needed for this segment. We rate it as Average for the general SFA client and Above Average for a client in the adult beverage sub-segment.

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: Multitenant SaaS, public cloud.

Service partners: Bain & Co., Equinox Tech Partners, iDSystemes.

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

User experience: This is a rebuilding year in rolling out the "Serenity" mobile app, but the outcome will be a totally renewed UI. The current 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).

The current UI continues to be average, yet we look forward to seeing the Serenity UI, enabled by Salesforce lightning, take GreatVines to new levels of user engagement and capabilities with the same off-line capability the mobile app has always had.

GreatVines recently added in goal plan improvements and Smart Sales Goal (vol, activity, leading indicators) and has also built "sequencing" into the task/action process like many other RetX solutions, which can be configured by the client. The current focus concentrates on what the rep will do when in the store and the future roadmap transitions to "preparation" action and which stores to visit. Most recently they have released new photo capture and review architecture, Serenity Mobile off-line and sync, a survey redesign, and an ETL upgrade.

While GreatVines is in transition to new and better programs, we continue to rate it as Average.

Vendor trend: GreatVines is very well suited to the adult beverage space. Despite being self-financed and without debt, it continues to have slow profitable growth. Offering the product on the Microsoft/Google Play/iTunes stores for a try-before-you-buy is a creative way to drive trial among the myriad of small distillers and vintners who run lean and don't take time to research technologies.

Strengths: The level of expertise and delivered functionality for the adult beverage sector is excellent. It also has an extensive change management approach before, during, and after implementation including suggestions for measuring results. Working with a couple of very large distributors/international suppliers and marketing companies helps them to stay on top of emerging requirements.

Challenges: Client acquisition is a challenge because prospects are typically on spreadsheets or something bootstrapped on Microsoft Outlook. GreatVines has to win over the hundreds of small brewers/vintners/distillers that don't tend to be very sophisticated and whose high margins often compensate for their lack of selling efficiency.

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 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. The tool 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 an adult beverage leader in the US market because of the government-imposed multi-tiered distribution requirement. Additionally, it has been able to follow some U.S. brands abroad. There is a benefit to exercising abroad, where the distribution is typically two tiered and there is a competitive playing field. We don't see GreatVines making significant inroads outside of adult beverage, but it is very compelling within its space. We would actually like to see the 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. 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.

ITC Infotech itcinfotech.com

Profile: ITC Infotech is the IT services subsidiary of ITC Ltd, an Indian conglomerate that includes many key consumer goods subsectors: tobacco, food, apparel, stationery, and personal care products. As such, it not only has created a retail execution and monitoring offering for its parent company, but has 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, further enhancements are currently being finalized as per the in-house product roadmap. 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: Asia/Pacific (62%), Europe (18%), Latin America (8%), Middle East (2%) Africa (7%) and North America (3%)

Total consumer goods users (seats): 15,750.

Tiers represented: Food and beverage, tobacco, and personal care/beauty/pharma OTC and household goods.

Solution offerings: Distributor Management, Van Sales, Retail Merchandising, and Pure Order Entry.

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

Analytics: New Performance dashboards have been integrated into the solution in 2018 which provides the field users with visit cycle activity details, sales performance, and the success rate of a visit. Different combinations of discounts are integrated in the system. The van sales solution is beginning to have two options for ordering: Traditional stock on hand and also a new predictive order quantity. Sales can choose to use one or the other option or a hybrid approach. This is a big step for the solution, and we look forward to ITC Infotech’s 2019 advancement roadmap. The Analytics and dashboards are a critical improvement, but the solution is continuing to catch up to the market. As a result, the ITC Infotech solution continues to be rated 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-premise, hosted/private cloud, or as multitenant public SaaS. The solution can be hosted 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, Microsoft Azure, GoDaddy, Anaplan, Highsoft, GeoTrust, NG Data, Symantec, Salesforce, SAP Business Objects, Parature, Qlik, resco.net, Tableau.

User experience: ITC Infotech has a new contemporary UX for a better user experience which they are piloting with key markets. The mobile layout, flow, graphics, and dashboards have been dramatically improved. The backend module continues to need work as the graphics are bland, reflects too much white space, and are hard to read. We do like that users can download the google route maps and have it on their device during the day when they are off-line. The screen is now supported from 5” – 10” (Android mobile). Overall, we find ITC Infotech UX to be slightly Below Average. When the 2019 roadmap is implemented this rating will improve dramatically.

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. In 2018, ITC Infotech landed another tobacco client with a base of 6000+ new users.

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 8,000 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. Service/consultant firms are highly unlikely to bring this vendor into a deal because it is self-supporting. User experience will require future enhancements (i.e. the 2019 roadmap) to penetrate North America, some Asian markets, or Europe. Users are deployed across the three platforms, and we believe this can be a distraction, and potentially a drain on resources.

Adjacent offerings: TPM/trade promotion optimization (TPO) and related service offerings and tele sales. They offer a solution called “Trade Insights” which is a comprehensive TM&D Analytics platform built on the Azure Data Platform, that aids effective evaluation of Trade performance, enhances field force productivity, and maximizes trade spend ROI.

- **Analytics at point-of-action** – Operationalized Analytical models to aid FF Reps in Retail Execution.
- **Diagnostic performance models** – Pre-built Analysis flows to pin-point the underlying root causes of deviations and anomalies
- **BYOD “Bring your own Data”** – Trade Insights captures and integrates publicly sourced and relevant Retail Store data to create a robust Outlet 360 view. The Outlet 360 Hub is a live, “always on” database of covered and uncovered outlets as well as enriched and undiscovered attributes acquired by leveraging various external, social/public data and analytical techniques. As companies undertake digital transformations these capabilities are critical.
- They also offer a Trade Sales and Distribution Planning solution called “Connected Planning” built on Anaplan, which brings together strategic planning, operational planning, and execution planning to ensure goal flow-down and purpose-based resource allocation.

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, coupled with leveraging data analytics solutions, add unique industry experience based on current client profiles, and provide a menu of support services due to the breadth of the parent organization.

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 service this sector. But mostly where you want something really custom built on enterprise cloud platforms and a partner to support it for you.

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

Ivy Mobility ivymobility.com

Profile: A global Retail Execution provider with consistently strong year over year user growth. It also has a significant presence in pharmaceuticals, which gives Ivy Mobility expertise in visiting pharmacies and helps 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 (40%), Latin America (10%), and Middle East (15%), and North America (5%).

Total consumer goods users (seats): 119,500.

Tiers represented: All.

Solution offerings: Retail merchandising, distributor management, DSD, 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 unit manager dashboard has excellent analytics and graphics. The Perfect Store Dashboard enables manufacturers to set targets, track historical trends, and quickly see progress on key performance indicators to maximize the in-store consumer experience. The user can view the assortment and shelf information to adapt the gold standard for assortment best practices to various store formats. In addition, the dashboards are prebuilt and flexible to support sales and distribution management for everyone in the organization from regional managers down to the sales representative in the field.

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 predictive analytical capabilities open up a whole new horizon for analytics with a focus on outcomes.

Manufacturers and distributors use Ivy Mobility to unlock the insights hidden in data using AI to understand assortments, market performance, promotion ROI, manage trade spend, and more. The insights can be used to improve customer service by predicting demand, to prevent failure from out of stock situations, and anticipate sales support needs. These advanced capabilities are generated from a high-volume data warehouse on Amazon Redshift with cluster to support machine learning (ml), models, and provide artificial intelligence to compute data for descriptive and predictive insights and analytics. The tool has a sales performance aspect driven by AI called Next Best Action, which denotes the gain or loss of taking or not taking a critical action.

Sales users are enabled with actionable insights on mobile apps to improve in-store performance and guide sales activities, and most often recommend the Next Best SKU (NBS). In the near term, Ivy Mobility is introducing new features to help brands identify the right regions, stores, and points of sales to activate to increase market share.

The share-of-shelf calculator is very nice because it is graphical rather than just numerical. 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 make it insightful. 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. This year it also launched expanded functionality in Ivy Insights for trade spend, execution and analytics, and market planning.

The applications now share a single common database which provides a 360-degree view of the customer and all activities. This gives the ability to sell anywhere, anytime and on any device and connect with all customers and employees via Salesforce Chatter.

Overall, we rate it as 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 incentive dashboards. The field execution processes can be configured based on channel and outlet type to ensure execution of the required steps. Multiple markets with different localized configurations can coexist in the same tenant. The demo of system administrative tools we saw, 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: Tech Mahindra (global), Intergrupo (Latin America, Spain), Technocrat IT (Africa), Vinthoughts (Indonesia, ASEAN), Technosoft IT (Indonesia, ASEAN), Lead Systems (Hungary) Lenovo (China), PricewaterhouseCoopers, Infox (China), Knotstrands (Nigeria).

Technology partners: SAP, Oracle, Apple, Salesforce, 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 were strengthened as planned. Enhancements were also made to the user experience including updates to labels, flows, use of icons, layouts, added naming conventions, and continued support for gestures to make it faster. Ivy Mobility has additional 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. Ivy Mobility UX is Above Average.

Vendor trend: Strong growth and excellent vision. Transition to the Salesforce platform was pretty uneventful, which sets Ivy up for innovation and market penetration. They recently launched Ivy Direct Store Delivery on the Salesforce Appexchange and have the DSD solution transition planned for this upcoming year.

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, and it has shown itself to be adept at expanding into all markets. Expertise in pharma OTC distribution and hybrid processes related to selling (a.k.a. “detailing”) physicians is interesting to some sectors.

Challenges: Having no on-premise 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 facilitate 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, Merchandizing, and AI/ML

Kantar kantarc.com

Customer profile: Kantar is a global company and offers an extensive analytics, insights, and execution portfolio. In this research we are evaluating the Kantar Retail Execution offering.

Geographic presence: Europe (93%), Africa (6%), and Middle East (1%).

Total consumer goods users (seats): 14,500.

Tiers represented: All.

Solution offerings: Retail Merchandising, distributor management, and van sales.

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

General: Kantar has successfully migrated Kantar RetX solutions to the new Sales Performance Platform. This new platform helps CPG companies by equipping an organization with cloud-based solutions to manage key sales processes and deliver against key growth pillars across the total company: assortment and space, pricing, trade terms and promotions, channel and customer planning, retail execution field force, and distributor management. As a result, CPG companies can successfully bridge connectivity between strategy and execution, enable effective ways of working across their organization, and profitably grow.

Kantar's investment in the new Sales Performance platform has positively impacted both analytics and user experience.

Analytics: The Kantar RetX solution provides a comprehensive reporting platform, enabling self-service reporting. The reporting provides both Dashboarding and Multidimensional OLAP navigation capabilities. MS Analysis services is embedded in the solution together with PowerBI to implement the reporting layer. Leveraging MS Azure, and a reporting layer powered by PowerBI, users are enabled with access to a self-reporting environment pre-filled with out-of-the-box reports. Kantar leverages data and AI services from the Azure Cloud computing platform to deliver descriptive, predictive, and prescriptive capabilities. These advanced technologies are utilized in Kantar's Retail Activity Optimization (RAO) and AI to intelligently and dynamically plan routes, to determine what is the best order to prevent out of stocks, and to preload the van with optimized stock. The solution provides standard reports and dashboards through PowerBI and MS Analysis services. All analytical algorithms are proprietary.

Kantar has the ability to perform sales decomposition for more insightful selling and also look into the financial impact of lost sales. The addition of capacity planning as part of route planning is a plus. The ability to optimize activities based on capacity represents a great stride in RAO, because it introduces selling capacity as a key constraint. Sales compensation simulation drives increased sales and is the ultimate gamification.

The analytical capabilities are very strong across both the field and office-based solutions. The strength of 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. Kantar enables a full set of retail execution capabilities with embedded best practices to manage both the modern and traditional trade. We rate Kantar Analytics as Above Average.

Configuration/Customization: Customizations can be developed but are discouraged. Kantar provides continuous product enhancements that incorporate new features to meet the evolving needs of consumer goods manufacturers. In order to speed up implementation and ensure quick scalability across different geographies, Kantar offers out-of-the-box versions of its solutions that can be deployed in less than 8 weeks.

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

Service partners: Everis, HCL, NTT Data, ICB Works.

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

User experience: The Kantar RetX system is highly intuitive and innovative. Kantar has a specific work stream for “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 image recognition engine incorporates breakthrough deep learning algorithms that are applied to planograms and pricing and are seamlessly integrated into the steps of the call, in real time.

The sales pitch book with 3D and virtual reality is very impactful. The HQ solution is a standout UX. Kantar’s solution provides strong back office capabilities for every specific business process (e.g. settlement management, stock and inventory management for DSD/Van Sales or Events, and Studies management for Pharma/Drugstore channel). It includes elements of the assortment and space optimization solution and Planorama’s image recognition and planogram converting solutions 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. The user experience has been totally revisited and improved.

Overall, we rate the Kantar UX as Above Average.

Vendor trend: The last 12 months have been one of investment and migration of the Kantar RetX solution to the new Sales Performance Platform. The Kantar RetX solution was previously above average, and with the added analytic and user experience improvements, the complete RetX experience is excellent. Kantar’s roadmap continues to be robust with future improvements slated in the following areas: reduction in total cost of ownership, additional UI and configurability enhancements, and continued investment in predictive and prescriptive capabilities.

Strengths: Kantar offers a full implementation of services from process design to solution deployment to change management. High client retention and excellent user references. Credibility and extended insights are available as part of the broader Kantar organization. Consistent ability to deliver a superior user experience with excellent visualization and embedded insights through other Kantar assets.

Challenges: Even with Kantar's strong global presence, penetrating the Americas has been faster for the trade promotion area of Kantar's portfolio. The retail execution solution is very strong and appropriate for the Americas, but Kantar has executed strategy and organizational changes that have impacted focus and sales. As the change settles, Kantar Sales teams are poised for success with an excellent solution and talented organization.

Adjacent offerings: Trade funds optimization, TPM/TPO, business planning, portfolio optimization, assortment and space optimization, virtual store/merchandising visualization, sales quotas, and incentive management, image recognition, retail, shopper and consumer 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. The Kantar solution takes Perfect Store to a new level by leveraging its portfolio of solutions to deliver the right retail insights, determine the right product mix and planogram, plan and optimize the right field activities, execute and monitor them, and 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 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 drive 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 develop and execute advanced capabilities.

Evaluate Kantar Consulting when: You favor a strong user experience, excellent analytics, and European expertise with the potential to expand globally. 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 change management for total business support. Also, when you seek the ability to execute with a physician or other health practitioner as well as at stores. If you need a single vendor that offers TPx and RetX capabilities.

Avoid Kantar Consulting if: You seek a transactional, inexpensive, and basic platform for Retail Execution.

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

MC1 mc1.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): 84,292.

Tiers represented: Food and beverage, personal care/health and beauty/pharma OT, and household products. Other: chemical, veterinary and construction.

Solution offerings: DSD, van sales, pure order entry, retail merchandising, and distributor management.

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

Analytics: MC1's dashboard and KPI's are a configurable yet standard deployment. In order to give more flexibility and analysis power to their clients, MC1 has invested on data exchange integration with Analytics Platforms. The 2019 Roadmap Includes: creation of connectors to Klipfolio, Power BI, and Domo which will enhance the flexibility to connect with other tools like Tableau in the market. With regards to prediction and AI, MC1 is currently in trials with the Machine Learning framework from Microsoft Azure and Google Platform, and the goal is to release these advanced analytics aspects in 2Q19. This includes launching the predictive order engine, using customer historical data and sales forecast. This will increase accuracy and reduce administration of the orders. The analytics are delivered in a 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, which is rare in the RetX space, but very helpful to the sales rep who doesn't lose system capabilities when he loses WIFI. This is executed with proprietary data sync and distribution middleware. Online and office have identical capabilities with data consistency. The platform can execute complex SAP pricing tables and schemes as MC1 has seamless connectivity with the client's SAP ERP. MC1 has transparent back office integration with add-ons to ERP functionalities, covering all execution process needs (native for SAP ECC - SD/DSD/CM) and KPI creation. An SAP ERP add-on with SAP ICC is renewed annually improving integration quality and costs reduction. 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: Hosted/private cloud, Multi-tenant SAS, public cloud. Private cloud is an option, which no clients use today.

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), Deloitte, IBM, DXC, and Assurance for SAP integrations for clients in Brazil.

Technology partners: SAP, Salesforce.com, Microsoft Azure, Amazon AWS, Zebra, Google Cloud Platform, Softex, DXC, and Honeywell.

User experience: The UX has undergone an update based on user interactions with the system. The system is tile-based and includes all the key elements packaged in an ergonomic way: messaging, KPIs, gamification, and order entry where appropriate. A new drag and drop configuration enables users to change the flow of the screen. The product is oriented to the customer processes with an encompassing service package including helpdesk, back office integration, and business continuity model. It 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. Realizing that most of their system tickets were related to data quality issues arising from the ERP, MC1 created data monitoring logs to proactively find data that is missing. Client teams can quickly correct the missing ERP data, which enables sales teams to place orders for all required items. These quick fixes close revenue leaks and increase store sales.

Vendor trend: More pan-LatAm deals and partnering with Salesforce.com for back office functionality will 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 is the ability to handle complex pricing and tax rules for countries like Brazil, Argentina, Colombia, and Ecuador. MC1's off-line capabilities and ability to handle aspects like complex pricing on the go sets it apart.

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. Currently, execution through re-seller partners is not a model that we have found to work historically, so MC1 will need to find a path to success with re-sellers.

Adjacent offerings: MC1's platform contains many ERP capabilities that facilitate order to cash 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. Lastly, MC1 has full off-line capabilities for in-flight analytics, which is executed with proprietary data sync and distribution middleware.

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; the organization has the opportunity to market itself broadly and build MC1 awareness.

Evaluate MC1 when: You seek deep retail execution and monitoring expertise in Latin America with a demonstrated ability to scale up to 30,000+ 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.

Pitcher pitcher.com

Profile: Pitcher is an eight year-old SaaS based player from Europe that has broadened its global footprint into North America, Asia, and LatAm. In its major release, Pitcher Instore 2.0, it has combined its consumer goods expertise with cross-industry experience in pharma, manufacturing, and financial services.

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

Total consumer goods users: 6500.

Tiers represented: All.

Solution offerings: Retail merchandising, Pure Order Entry, Distributor management, and van sales.

Major product sub-segments not covered: None.

General: The result of the last 12 months is an exhaustive overhaul of Pitcher's Retail and Trade Promotion Execution solution.

Analytics: Off-line store scoring has been put at the core of Pitcher Instore 2.0 and makes it a lot easier for retail teams to deliver the Perfect Store. HQ planners have an intuitive way to input and maintain the Picture-of-Success for every store or segment, and in turn, sales has a plan to drive in-store execution and are provided suggestions during the call regarding how the score can be improved.

Pitcher has created solutions that customers can maintain by themselves. Instore 2.0 makes this a reality for even the most complex multi-national rollouts. The system allows customers to combine their custom audit elements with out-of-the-box Pitcher widgets to get a solution similar to Excel in its flexibility, yet globally scalable, while not making any concessions with regard to the resulting data quality in analytics.

It has an exceptional store level dashboard, 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 dos." Also, it has some unique radar charts and spider diagrams that offer insight into retail activities.

We rate Pitcher analytics as Above Average, particularly for the smooth way that it transitions between insightful views.

Configuration/Customization: Highly configurable. Customization is not preferred.

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

Service partners: NTT Data, Deloitte Digital, and K-Section.

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

User experience: There were significant improvements to the user experience with the overhaul of the solution. In Pitcher Instore 2.0, a mission-based approach to store audits was implemented that is a lot more intuitive for users and an easy way to ensure HQ that the required actions are taken at the right time. Pitcher's mission-based approach built around the Perfect Store concept makes in-store execution intuitive for users and a lot more powerful for HQ. Users work within a comprehensive mission dashboard of a store and are presented with real-time suggestions of how customers can be guided towards their company's Picture-of-Success.

The HQ backend solution designed for Trade Marketing Managers, key account managers, and admins offers a user-friendly way of managing store level listings, trade promotion capabilities to keep greatest visibility of promotional execution, and a Mission Builder that allows the operations team to put together and assign in-store missions or setup Perfect Store models.

It has more functionality for profiles and follow-up activities than other 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. The Pitcher UX is excellent, having enabled best practices from life sciences, manufacturing, and financial services for embedded social for collaboration and team selling, coaching, and gamification. We continue to rate Pitcher's UX as Above Average.

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

Strengths: Pitcher's new mission-based approach built around the Perfect Store concept makes in-store execution intuitive for users and a lot more powerful for HQ. Field and HQ planner analytics that present an easy way to monitor execution of the Picture-of-Success.

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 Indoors" product for inside sales or "Pitcher Connect" and doing remote sales presentations.

Key differentiators: With their cross-industry experience, Pitcher gives a new flavor to retail execution, especially with their intuitive approach to Perfect Store execution. The efficiency gains from their solution allow users to spend more time as advisors to store managers leveraging the interactive selling capabilities based on the work Pitcher has executed in the pharmaceutical industry. Also, the ability to do real-time discussions for immediate collaboration. Pitcher's virtual reality is excellent and some of the best we have seen. It also 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. Pitcher also has an integration with eCommerce solutions such as Salesforce/Cloudcraze to allow B2B selling to be initiated by the sales rep and submitted to the eCommerce platform, thereby allowing the customer to complete the purchase themselves online after the visit.

Outlook & prognosis: We expect Pitcher 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 a need for retail merchandising and/or pure order entry, have an integrated selling approach when 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 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 Retail Merchandising, Social Selling, and Interactive Customer Presentations.

Repsly repsly.com

(This is Repsly's first representation in the POI RetX Vendor Panorama)

Profile: Repsly is a privately held global provider with head offices in both Zagreb, Croatia (Europe) and Boston, MA, USA. There is an additional office providing support and services in Johannesburg, South Africa. They have a Retail Merchandising offering that is currently deployed across 80 countries.

Geographic presence: North America (53%), Africa (15%), Asia Pacific (14%), Europe (10%), Latin America (7%), Middle East (1%).

Total consumer goods users: Repsly has 1100 clients in more than 80 countries, but does not disclose user counts.

Tiers represented: All. In addition to brands, Repsly also has 3rd party merchandisers/brokers and distributors as customers.

Solution offerings: Retail Merchandising (including 3rd party merchandiser). Some limited Distributor Management, DSD, and Van Sales capabilities.

Major product sub-segments not covered: None.

Analytics: Repsly has native reporting built into both the web and mobile applications for a fixed set of over 20 standard reports. Additionally, customized Advanced Reporting dashboards and analytics is available through embedded BI provided by the GoodData platform. The look and feel of the Repsly analytics is excellent, both on the mobile device and for the headquarters based user. The graphics are simple and visually pleasing as well as very functional with drill down capabilities. The standardized reports are built to answer key questions clients will have in their day to day business: Coverage data, Sales Rep Effectiveness, Promotion Execution, Shelf Execution, Real-time Performance Tracking, Campaign Effectiveness, and much more. The manager suite provides live visibility to all activities across the territory.

The system has a very nice filtering capability and also a "waffle" icon that when clicked can transform a report into a tabular form of the data. Reports are also easily shared by just clicking on the "share" icon.

In the last 12 months Repsly has enhanced data, analytics, and reporting:

- **Advanced Reporting.** Business intelligence (BI) capabilities for customized dashboarding, retail execution and sales analysis, visualization including geo-mapped KPIs, and ad-hoc reporting. Promotion event dashboards and TPM KPIs are a common scenario for Repsly's Advanced Reporting.
- **POS Data Integration.** Automatic integration of POS data for customers of IRI/SPINS data through a partnership with Destini. Additional POS dataset integration for data downloaded directly from retailer portals. POS data can be used to analyze promotion performance and revenue management.
- **Multi-level Sales Territory Orgs.** Customers can configure a hierarchical model of their sales organization for reporting, rollups, and data visibility.

Repsly's platform has a simplified self-service configuration and allows customers to configure their account using built-in control settings where changes are instantly rolled out to the field's mobile devices. Customers can setup, configure, load, and deploy their account without assistance from the Repsly team.

We rate Repsly analytics as Above Average.

Configuration/Customization: The product is highly configurable out-of-the-box to achieve different business workflows, and functionality can be extended through the REST API. Customers can request product enhancements through the Repsly Customer Success team or through a reseller partner. All requests are tracked in a centralized idea database which allows for reporting and analysis of demand areas. Depending on the nature of the request it can generally take anywhere from 3-12 months to process requests aligned with the product strategy.

Technology architecture/delivery options: Cloud-based —Single-instance multi-tenant SaaS.

Service partners: Repsly utilizes their partner network of 21 resellers who deploy the solution globally.

Technology partners: Amazon Web Services, Google, Apple, Microsoft, Elastic, MongoDB, and Good Data.

User experience: The UX is available in 10 languages, supporting Repsly's global footprint. The mobile app has an Instagram look and feel. It is visually pleasing and has a very nice workflow and sequencing. The management suite is one of the best we have reviewed. Managers have a standard dashboard that is a Facebook-like feed where they can see where their reps are, what the teams are working on, and provide immediate direction, support, share best practices, and gain feedback through instant messaging in the app. Alerts can also be added to note key opportunities for the sales reps to execute. This "social feed" of field activity allows both field users and head office users to communicate in real-time with activities as the data is captured in the field. Location-based tracking is built-in to Repsly and managers can track their reps in the field using GPS on the map view.

We would like to see gamification utilized in the system to build competition and drive "sell more" behavior. With the best in class social and communication threads that Repsly has, this is a natural next step. Repsly customers have used image recognition analytics services partners to provide insights into photos taken by their representatives in retail locations. Yet the image recognition tasks are not seamlessly integrated into the steps of the call in real time. Their customers have also managed planogram compliance both visually by comparing shelves in stores to standard planograms, and also by using image recognition through services partners analysis. Repsly's "Retail Audit" and "Forms" features allow customers to visually

check compliance with standardized pricing and note non-compliance for reporting and analytics purposes. Image recognition of shelf pricing information may be possible through a partnership with a machine learning service provider. The sales manager or sales rep/merchandiser manually plans routes in Replsly. Historical data can be flowed into the system to provide a benchmark for orders. Image recognition for planograms, pricing validation and oos reduction, dynamic optimized routing, optimized ordering are on Replsly's future roadmap and will help them keep up with the latest market demand.

"How" a system is deployed is critical to user adoption and success. We are including Replsly's deployment processes, as we see them as best practices for implementation success.

- **Replsly Knowledgebase.** All customers have access to a comprehensive online knowledgebase including how-to-guides, tips and tricks, videos, and release notes about the product.
- **Replsly U.** "Replsly University" is a regular series of 30-minute live webinars where all customers are invited to hear about new capabilities or tips and tricks are open to all customers to attend.
- **In Product.** Help topics and visual cues are built into the product to prompt users on how best to use capabilities in the product and show examples.
- **Monthly Newsletter.** A monthly newsletter is sent to all customers updating them on various topics including how to drive value from their Replsly solution along with key product information.
- **Targeted Adoption Playbooks.** These playbooks are sets of best practices for Replsly customers to use during deployments to get their programs online quickly and rolled out their entire team.

Note, in addition, for key accounts, the program also includes a Quarterly Business Review process to ensure alignment with program goals and address any barriers.

We rate Replsly UX as Above Average. The look and feel is quite excellent and the system has many favorable attributes. Yet, the system has key functionality to close that is becoming market standard. Replsly's future roadmap does have plans to close these opportunities. It will be important for Replsly to close these gaps to remain competitive in the market.

Vendor trend: This is the first year for Replsly in the POI RetX Vendor Panorama; trend report will begin next year.

Strengths: Replsly has 1,100 clients in more than 80 countries. It received input and enhancements from strategic customers, which has resulted in a great user experience. The mobile and HQ/ Manger Desktop UX and analytics are impressive.

Challenges: In order to stay up with market needs Replsly will need to deliver the 2019 roadmap or risk falling behind competitive retail merchandising offerings. We don't see any other challenges.

Adjacent offerings: POS data management, POS data cleansing, Shelf management/ visualization, Location-based tracking, TPM/TPO, CRM, ERP, Product master data management, Crowd-sourced field labor retail services.

Key differentiators: The social look and feel of the HQ and mobile UX. Social capabilities to keep managers and sales teams in communication "just in time" through the mobile app.

Outlook & prognosis: We believe that Replib will continue to be a significant player in Retail Merchandising. As it gains exposure it will gain additional global presence due to its excellent analytics and UX. Replib will need to deliver their 2019 roadmap, or it will fall behind the current peer leaders.

Evaluate Replib if: You need an excellent Retail Merchandising system for a single geography or global footprint.

Avoid Replib if: You want a simple, inexpensive offering.

Distinctions: POI Best-in-Class awards for Desktop UX.

SAP [SAP.com](https://www.sap.com)

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

Geographic presence: North America (18.3%), Latin America (17%), Europe EMEA, includes Africa and Middle East (52.5%), and Asia/Pacific (12.2%).

Total consumer goods users: 263,000.

Tiers represented: All.

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

Major product sub-segments not covered: None.

Analytics: There are varying levels of sophistication depending on the SAP product. All are proprietary. SAP Sales Cloud 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. The ability to check whether product is available to promise (ATP) is a strong decision-making tool. This year SAP has focused on their Perfect Store Planning & Execution with advanced KPIs and driving analytics, visibility, and in-store execution through: Dynamic classification/determination of products for an audit, enhanced off-line pricing capabilities, and improved pricing integration with S/4 ERP. The depth of analytics is excellent, yet graphically, the look is average. Based on the importance of substance over looks, we rate SAP Analytics as Above Average.

Configuration/Customization: SAP is moving away from customization. Obviously, the on-premise REX and DSD solutions are still customizable. The SAP 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: DSD and Distributor Management can be delivered on premise. SAP Sales Cloud can be delivered as private cloud or public cloud/Multitenant SaaS. A private edition is offered, and HEC HANA Enterprise Cloud is also available.

Service partners:

SAP Sales Cloud: SAP Consulting, Ecenta, Maihiro, TCS, Deloitte, Reply, TPC, Baseline, IBM, Ernst and Young (EY), Capgemini, Accenture, IB Solutions, Infosys.

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

Solutions: DSD International, EY, Tecom7.

Distributor Management: SAP Consulting.

Technology partners:

SAP Sales Cloud: Ricoh Innovations, Planorama, Honeywell/Intermec, Mediafly, Invisible Solutions, Maihiro.

DSD: Honeywell, Zebra/Motorola.

Distributor management: In process.

User experience: Some positive and unique elements of the UX include:

- **SAP Sales Cloud:** The ability to configure the elements of Perfect Store in the back-office solution is a real stand out based on usability and flexibility. The Perfect Store field solution that deployed in January is excellent and is based on a flexible template approach. The UX is consistently improving with SAP innovating with their customer base. A true differentiator based on the total SAP ecosystem is the Real-time, pre-packaged integration allowing for dynamic pricing, checking inventory on the fly, and reserving stock. The system is also ergonomic. Not having a gamification capability out of the box, but having to incorporate 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. Dynamic routing is available via SAP's partner, MaiTour, as a seamlessly integrated capability. Also, it has the ability to be routed an urgent opportunity by a dispatcher; RAO precursor functionality for allowing time to conduct various types of activities; Google map pins with details about each location; team selling functionality to coordinate efforts of various people who touch a particular account; and the ability to push activities to groups or people based on geography, role, or other attributes. We value the ability of users to organize their own dashboards and personas, while a company also has the ability to set a standard version for their organization. We rate the SAP Sales Cloud 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. We also like the DSD Tour monitor which visually depicts the planned route vs. executed route. The SAP DSD solution uses the clients map app. This provides flexibility, but also could be a hurdle if the client doesn't have a map app at time of engagement. 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 the DSD UX, with the caveat that it is not the most attractive.

- **Distributor management:** SAP DM has 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 SAP DM as Average.

Some things that we would like to see include incorporation of corrective actions, image recognition, and price compliance. Also, increased sell-more capabilities with intelligent ordering, enhanced out-of-the-box gamification, a development capability with coaching cycle and follow-up as opposed to merely analyzing and some sharing of view with subordinates, and increased leverage of social selling. The good news is that each of these areas are on the roadmap for 2019/20.

Vendor trend: SAP continues to be a leader in the 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 Japan, Indonesia, Middle East, Central America, and the smaller countries of South America. It continues to show increased focus in retail execution and this can be seen with the ongoing enhancements and strong roadmap. SAP has strategic game-changing plans for each of their solutions that are in development for 2019/20.

Strengths: Install base in the CG industry, company resources, 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 intelligent ordering, gamification, and social selling 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. SAP Sales Cloud is fully integrated into SAP ECC & S/4 Back end enabling a quicker seamless integration and positively impacts real time pricing, inventory check, credit check, and order transfers.

SAP Model Company, a new service in 2019, offers speed implementations based on best practices.

Global footprint with unrivaled support. Unrivaled ability to sell to the IT organization.

Outlook & prognosis: 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. 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 inexpensive and simple, or your distributors represent other manufacturer brands.

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

Spring Mobile Solutions 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 (56%), Europe (9%), Latin America (32%), AsiaPac (2%), and Africa (1%).

Total consumer goods users (seats): 28,775.

Tiers represented: All.

Solution offerings: DSD, retail merchandising, van sales, and distributor management.

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. We find the 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. Spring incorporates artificial intelligence to guide the user through day planning workflows and the order taking process.

User dashboards are excellent. The dashboards have been reinvented. They are embedded with Power BI and reflect how the customer looks at the business and utilizes the data.

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 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 found, for both field and office-based users, Spring to have Best-in-Class analytics capabilities for the level of insights, actionability, and how reports and KPI's render visually. We rate Spring Analytics 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.

Service partners: None.

Also, Amazon, and Microsoft Azure for hosting and Coeo for SQL Server support.

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

User experience: The web HQ version is a standout area in UX, which fully takes advantage of HTML 5 and is the personification of usability and insights. It is unlike other back office systems, which look industrial and render like Excel. It provides more tools for managers such as seeing an entire list of activities in sequence. The pre-planning visit detail screen is robust and during implementation it can be configured for the client's organization.

Spring has opportunity to develop RAO and image recognition (impacts IR planogram and pricing automation) to keep up with marketplace needs. Note, Spring does have intelligent (AI) guided selling with data driven suggestions.

The field tool is also enhanced with superior gamification that is a part of activities throughout the day as opposed to an afterthought. It is graphically rich, ergonomic, and quite pleasing. Action items based on observations or data feeds make for an intuitive flow compared to a series of tiles. The sell sheets/collateral are incorporated in the call flow, so they are easily resourced during selling opportunities. One can create action items for a peer, a manager, or for a store visit. New capabilities include automatic mileage tracking with reason codes and in-flight tasking/re-tasking of field personnel by managers.

The UX is very strong in key areas, yet without the RAO and automated planogram and price management through image recognition, we rate Spring UX as Average.

Vendor trend: The trend is strong client retention (organic growth within these select customers) and moderate new growth. Spring has a solid roadmap which includes image recognition, AI suggested selling, enhanced machine learning, adding incentives to gamification, and continuing to improve the already stellar dashboards and UX.

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. This service level drives loyalty and retention.

Challenges: We don't see any significant challenges. 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 excellent. The strength of the partnership with SAP for integration is a benefit.

Outlook & prognosis: Spring has a bright future. It has the potential to take a RetX global leadership role.

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 the ability to create hybrid business processes.

Avoid Spring Mobile if: You seek an on-premise 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.

StayinFront 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 (48%), Europe/Middle East/Africa (20%), Latin America (9%), and Asia Pac (23%).

Total consumer goods users (seats): 60,500.

Tiers represented: All.

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

Major product sub-segments not covered: None.

Analytics: TouchCG, StayinFront’s 20:20 Retail Data Insight system (RDI), provides clean and timely data required to drive actionable insights down to the store level. 20:20 RDI takes the StayinFront insights 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. StayinFront has a strong analytical product with great visuals.

- 2018 20:20 Retail Data Insight Integration Enhancements:
 - TouchCG Audit Grid correlating next step actions to resolve predicted problems.
 - Territory Dashboard to view store rank and details that allow field reps to know more about their territory.
 - Store Dashboard - Pre-Call and End-Call dashboard data added to the store visit form, allowing field users the ability to review potential uplift actions to increase sales and review actions taken within a store visit.
- 2019 Acquisition of Lab4Motion Digital Merchandising (renamed StayinFront Digital).

- StayinFront Digital is seamlessly integrated into TouchCG and delivers processing technology that saves time in-store, improves compliance, and eliminates the bias, subjectivity, and error of the manual audit process while concurrently allowing users to increase the types of metrics captured during in-store visits. Self-learning algorithms identify all types of SKUs and automatic stitching of photos allows for captured multi-photo expositions to be efficiently analyzed.

StayinFront 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. Also, StayinFront Touch has some great simulation capabilities. A sales rep can work up a planogram recommendation including replacing various competitor products and has the ability to present the impact to sales and store potential to the manager. The solution also has the ability to benchmark how the current store ranks compared to similar stores in the chain. The system creates suggested orders through algorithms, and the sales user has the ability to apply the system generated recommendations with one easy click. The visibility and tracking against goals on the dashboard are exceptional graphically and highly intuitive. StayinFront is releasing AI RetX applications as we release this report. Route, order, and shelf optimization are top AI benefits and focus areas. StayinFront Dynamic Route Planning, which is part of TouchCG, automatically creates daily visit plans by combining store valuation and ranking data to optimize the return on investment for rep visits rather than minimization of drive time. As a result of the depth of the insights and how they render graphically, we continue to rate StayinFront as Above Average.

Configuration/Customization: On-premise solutions are still supported but have not been sold in recent 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. The TouchCG Admin Portal has a touch interface making configuration easier. The Admin Portal was enhanced with promotional discount rules, in-field assets, and associated service requests and data from in-field activities, which will help manage teams and systems to reduce total cost of ownership.

Technology architecture/delivery options: Multitenant SaaS or private cloud on the front end with a common model approach that can be adapted for each customer.

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

Technology partners: Augment (virtual reality), Amazon AWS (hosting), Infosys (TradeEdge Distribution mgmt. system).

User experience: StayinFront is a RetX market leader 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 are outstanding. The Gamification is solid, and has the potential to benefit from the addition of AI, as StayinFront is recently incorporating AI into multiple areas of the solution. Linking documents to tasks as part of the call flow drives sales execution. 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 starting point for the next sales call. The PitchBook tool has best in class workflow which reflect appropriate store data and performs store level calculations and recommendations. StayinFront recently added asset management, planograms, and push reports support in TouchCG Admin with the ability to assign tasks to teams and filter

analytics. The “Augment” tool then helps provide a compelling virtual reality view of what the merchandising could/should look like. Together, these capabilities make for a powerful sales call. 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 the StayinFront UX 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. Highly configurable to enable use of a single solution for multiple markets. Its New Zealand 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 platform.
- Demonstrated ability to handle and support thousands of users across multiple geographies with a single instance of the solution.
- Level of resources applied to a project to ensure success.
- Having a very broad assortment of integrated “sell more” capabilities in one solution.
- Actionable alerts can be generated for reps, KAMS, customer marketing, and supply chain to take action and maximize incremental sales.
- Offering a Lite version called “LT” 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.
- Early deployment of AI capabilities to serve the RetX market demand for intelligent retail systems.
- StayinFront 20:20 RDI’s sophisticated algorithms identify patterns in the data that give clues to the root cause, directing field reps straight to the highest value issues or biggest “size of prize” (SOP). Trade promotion management features and ERP systems’ data are integrated and update promotions and pricing to the mobile units in real time.
- Recent release of the Dynamic Route Planning module will deliver the complete Retail Activity Optimization offering without the need for integration to a partner.

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, Predictive AI/ML, Retail Activity Optimization.

Univera Computer Systems 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. The company is well managed and has had substantial growth even with the 2018 financial crisis and increased inflation in Turkey.

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

Total consumer goods users (seats): 31,600. Growth mainly came from 5 new clients in Turkey, most of which were over 1500 users.

Tiers represented: All. In 2018, the organization also expanded beyond CPG into Automotive and Telecom.

Solution offerings: Van Sales, Retail Merchandising, Distributor Management, DSD sans DEX integration, and Pure Order Entry.

Major product sub-segments not covered: None.

Analytics: The Univera solution has 3 levels analytics capabilities:

1. **Panorama has standard reports with different architectures.** They are active reports, GIS reports (Google Maps), pivot reports with DevExpress component.
2. **Dynamic Reports:** Customers or any technical team are able to add dynamic pivot reports to the team system easily.
3. **BI Module:** Panorama has an OEM agreement with Qlik. The system utilizes QlikSense for big data reporting coming from multiple resources. For example, numerous clients have reporting data coming from Panorama and AC Nielsen integrated.

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.

Univera has recently announced a new IoT integration module on the merchandising solution called QuestForThing. We look forward to seeing the benefits of this leading-edge technology.

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-premise or hosted/cloud. Also, as multi-tenant SaaS (in Turkey).

Service partners: System Group (Moscow, Kiev, Almaty, Chisinau), Teymurlu (Azerbaijan), Parla Team (Iran), StandingTech (Iraq), Leank (Cyprus), Rednet (Egypt).

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

User experience: Univera combines high usability and ergonomics with a strong graphical orientation. The retail execution gamification is excellent. Panorama Social, the Univera proprietary social selling tool, provides social media messaging capabilities for various user types and enhanced notifications. Panorama social 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. 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. Univera doesn’t have image recognition with smart capture yet. These aspects continue to be manual including planogram and pricing checks. The system does have simple guided selling via dashboards and target track reports to drive sales. Univera has invested in a Sales Coach module, which is in use with two very large customers. The module is a conduit for sales managers to provide insight to the sales reps.

Overall, we rate the UX as Average. We would like to see image recognition with smart capture capabilities as is needed for the average market (proprietary or 3rd party). Please note that this may not be a requirement for Turkey as a regional offering, but we are rating the vendors based on universal benchmarks.

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. In order to keep up with the global market vendors Univera will need to invest in image recognition and AI capabilities (benefitting planograms, pricing, prescriptive orders, and route optimization).

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 other 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, 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, exceptional functionality, 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 analytics, intuitive solution and solid UX, 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 East Europe, Africa, 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 Desktop UX.

Other Enablers

TradeEdge Market Connect

TradeEdge Market Connect is a two-way data exchange that enables exchange of transactional data such as sales, order, inventory, invoice, and master data such as product, pricing, promotions, or similar information between a manufacturer and its channel partners. The data exchange can be configured to accept data in a variety of formats and received over multiple protocols. The data exchange technology is complemented by a shared services offering which, when partners don't send data on time, follows up over emails and phone to ensure compliance and timeliness. The platform can easily scale from acquiring distributor data in emerging markets to point-of-sale data from large modern retailers or syndicated data providers in the developed markets. The platform delivers cleansed, validated, transformed, harmonized, and enriched data for business decisions, analytics, and reporting.

To learn more about TradeEdge Market Connect, visit edgeverve.com/enterprise-solutions or send your request to edgeverve@edgeverve.com

Field Agent

This next enabler helps companies uncover “blind spots” in their retail execution. Field Agent crowdsources the smartphones of nearly two million shoppers, or “agents,” across seven countries to provide auditing, mystery shopping, and in-store research services to major brands and retailers. Their agents serve as a company’s “eyes and ears” inside stores everywhere; taking pictures, capturing video, and answering questions about retail conditions. Increasingly, Field Agent is also helping companies see across the omnichannel landscape, with near real-time visibility into pickup operations, delivery services, and mobile shopping.

The Field Agent mobile app is the central hub for all the firm’s data-collection activities, and a typical retail audit might work like this:

A company specifies a particular audit objective. Perhaps a brand needs to see and understand displays, prices, or planograms across a retailer’s entire chain.

Field Agent designs a “job,” or, alternatively, the client company uses Field Agent’s DIY platform to create a job themselves.

The job becomes available on Field Agent’s mobile app for agents in specific areas to review and reserve.

Agents visit designated stores to complete their assignments per the instructions, help images, training videos, etc. provided, usually within a two-hour reservation window.

Field Agent scrutinizes submissions before accepting the agent’s work and authorizing a payout. The firm has both digital (e.g., GPS-verification) and manual safeguards (dedicated QC specialists) in place.

Results appear on the client company’s real-time, online dashboard, but the company may also opt for one of Field Agent’s basic or premium reporting services.

The actual process will, of course depend on the client’s precise objectives and needs. Field Agent’s crowdsourcing platform and on-demand workforce offer significant flexibility and are adaptive to the unique needs of brands and retailers. In general, however, Field Agent offers its clients multiple benefits:

A true retail perspective. Field Agent’s team, consisting of CPG and retail veterans, understands its clients’ store-level challenges. The firm starts with real-world retail problems and addresses them through cutting-edge technology.

Efficiency. Together, crowdsourcing and smartphone technology represent a much faster and affordable approach to auditing or mystery shopping thousands of stores in a brief period of time.

Cost-savings. Compared to conventional methods of achieving in-store visibility, which ranged from expensive travel programs to permanent field teams, Field Agent’s crowd-powered, app-based approach is a low-cost option for companies of all sizes.

An extensive and diverse panel. With almost two million agents across Australia, Canada, Ecuador, Mexico, South Africa, the United Kingdom, and the United States, Field Agent provides retail visibility and clarity when and where it matters, and can even target specific shopper categories (e.g., mothers of infants) to carry out retail audits and research.

Quality. Field Agent's approach may be summed up: Efficiency on the front-end, quality on the back-end. Technology by itself is no guarantee of quality, so Field Agent has rigorous processes in place to ensure the delivery of accurate, high-quality data.

"What's really happening inside stores?" is, of course, an age-old question for CPG companies and retailers. Field Agent helps answer this question by offering eyes-on, a-picture's-worth-a-thousand-words kind of certainty, precisely when and where it matters. And the firm gets it done quickly and affordably.

We believe Field Agent is an essential tool for any retail "toolbox." Whether a company requires an ongoing retail-visibility program, or a simply a periodic means for seeing inside stores and across the omnichannel space, we consider Field Agent a go-to enabler for visibility and clarity at-retail.

Vendors not included this year

Customer Times and Zaptic 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-premise to cloud. And, they are available from vendors with local expertise and presence. Our overarching recommendation continues to be that CG companies seek out the solution(s) that will move their field sales personnel beyond transactional and enable them to "sell more," thus creating a competitive advantage.

About the Author

Pam Brown is Chief Commercial Officer at the Promotion Optimization Institute. In this role, she creates and executes POI strategy, advisory, and research. She elevates practices and CPG and Retailer relationships. Pam began her career executing at retail, and through promotions advanced to leading retail execution teams for Unilever. For Kayser-Roth she led all Sales and Broker teams west of the Mississippi. In her 14 years with Del Monte she carried many roles. She was the Director of Sales Strategy and Operations which included: Sales Systems and Reporting, BI Analytics, Sales Training, and Sales Policy. Pam's final role at Del Monte was the Director of IT Governance and PMO, which included planning and leading enterprise wide engagements. Pam has current, extensive knowledge in TPM, TPO, ROI, Revenue Management, Advanced Analytics, Change Management, Sales and Sales Effectiveness, Demand Planning, Supply Chain and other relevant best practices areas. Over the years she has researched, designed, and deployed Enterprise wide solutions to meet business needs. She understands how to execute and gain user adoption of new systems for physical retail and eCommerce. She has advised solutions providers on enhancements to core capabilities and partnered with other CPG manufacturers to share, learn and drive best practices in today's challenging retail and consumer goods environment for mutual benefit.

About the Promotion Optimization Institute

POI brings together manufacturers, retailers, solution providers, analysts, academics, and other industry leaders with the specific objective of collaboratively improving the promotion and distribution of consumer goods. Members of POI share cross-functional best practices in both structured and informal settings. Additionally, members benefit through our industry alliances, the Certified Collaborative Marketer (CCM)[™] program, and industry-leading summits around the globe. POI aims to instill a financial and metrics-based discipline not typically found with other trade groups. The goal of our innovative approach is collaborative promotion optimization. The focus is on the customer/shopper through sales, marketing, and merchandising strategies. Executive advisory boards keep us apprised of industry needs and help us provide desired outcomes for members, sponsors, and academia.



For more information: Visit poinstitute.com or contact:

Michael Kantor

Founder & CEO

Promotion Optimization Institute (POI)

914-319-7309

mkantor@p-o-i.org

Pam Brown

Partner & CCO

Promotion Optimization Institute (POI)

707-332-0450

pambrown@p-o-i.org