

RIS SOFTWARE LEADERBOARD '19

THE BEST OF THE BEST IN RETAIL TECH

- Top 20 Retail Software Vendors
- Top Tier-One & Mid-Size Vendors
- Top Vendors in Grocery, Apparel & Specialty
- Top Vendors in Customer Satisfaction

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EDITOR'S NOTE

Bulletproof Design

Consistency of methodology stays the same but there is one big change

BY JOE SKORUPA

Bulletproof design means technology is built to withstand challenges and is resistant to failure. More specifically, it means that well designed software, hardware or infrastructure is capable of delivering accurate and reliable results due to abundant safeguards embedded in the technology.

Bulletproof is an accurate description for the *RIS* Software LeaderBoard. In its early years, LeaderBoard methodology was more hands-on than it is today, following the common practice used by leading analyst firms.

However, as the LeaderBoard's reputation grew, high-scoring vendors began promoting their results, which is fine and highly encouraged, but some also began slamming competitors that had lower scores, which is actually an inaccurate way to interpret the results for two big reasons.

First, every vendor appearing in the LeaderBoard is a winner by definition. This is true because every vendor in a top-10 list is on top of an iceberg that extends downward to approximately 40 more names. Therefore, every vendor on the list is literally the cream of the crop in retail technology and, by extension, clearly a winner and not a loser.

The second reason has to do with the composition of the top-10 lists, which include vendors of every size, technology specification, retail segment, and scope of software offerings. As a result, many people have accurately said the top-10 lists are a classic mixture of apples and oranges, which is true in many cases.

BY THE NUMBERS

- 585 Vendor evaluations
- 322 Votes by retailers with revenue <\$1B
- 294 Retail voters
- 263 Votes by retailers with revenue >\$1B
- 170 Grocery/supermarket evaluations
- 165 Apparel evaluations
- 148 Specialty evaluations
- 70 Vendors with at least 1 vote
- 70 CIO and tech title voters
- 59 CEO/president voters
- 49 Vendors with 5+ votes
- 40 C-level voters (excluding CEO and CIO)
- 23 Vendors with 10+ votes

Once vendors began getting slammed because of their LeaderBoard results a few took a defensive approach and claimed bias infected the rankings. So, to remove any hint of bias, *RIS* began using an external research firm to manage the customer satisfaction survey portion of the report. The firm *RIS* uses is Litchfield Research. When the results are complete, Litchfield sends *RIS* a summary of the data and we create the LeaderBoard lists using the summary.

The only hands-on activity *RIS* does is trim each list from the bottom up to fit our top-10 format. Using an independent research partner ensures LeaderBoard results are bulletproof and without bias by anyone at *RIS*.

For consistency, few changes are made each year to LeaderBoard methodology and these are covered in detail in the pages ahead. However, this year we are making one big change.

We are changing the naming convention on the cover to match the year ahead (2019) instead of the year past (2018). In any case, it will be the 19th annual *RIS* Software LeaderBoard and the results, as always, will be bulletproof. **RIS**



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Influential Software Players for 2019

CUSTOMER SATISFACTION AND BROAD SUITES DELIVER THE HIGHEST RANKINGS

To enable a high level of year-over-year consistency, few changes are made to the methodology used in the *RIS Software LeaderBoard* each year and this report is no exception. However, one big change was made to the naming convention in the title of the report.

The title was changed to match the year ahead (2019) instead of the year past (2018). This year's report is titled the 2019 *RIS Software LeaderBoard*. Since the report comes out in December and is used by retailers over the next 12 months, then it follows that its period of influence occurs in the future instead of the past.

No matter what it is called the report will be the 19th annual *RIS Software LeaderBoard*, one of the most influential studies in retail technology. It is a must-read for retailers making plans for future IT investments and by investment advisors looking for future acquisitions.

2019 RIS Software LeaderBoard Top 20

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
1	Mi9 Retail	44.3	47	3	94.3
2	Salesforce	42.9	45	5	92.9
3	Celerant Technology	45.6	45	2	92.6
4	Cegid Group	43.4	44	5	92.4
5	ECRS	45.6	44	2	91.6
6	PCMS Datafit	40.3	44	3	87.3
7	Jesta I.S.	45.2	38	2	85.2
8	MultiDev Technologies	44.1	37	1	82.1
9	Aptos	31.3	45	5	81.3
10	SAP	30.3	44	5	79.3
11	Oracle	28.2	45	5	78.2
12	Logile	46.1	30	2	78.1
13	IBM	35.8	33	5	73.8
14	Profitect	41.1	28	2	71.1
15	Relex	43.0	26	2	71.0
16	JDA	32.2	33	5	70.2
17	Infor	32.2	32	5	69.2
18	Magstar	41.2	26	1	68.2
19	Microsoft	34.4	28	5	67.4
19	MicroStrategy	38.4	24	5	67.4
20	Manhattan Associates	33.8	28	5	66.8

2019 Large Vendors (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
1	Salesforce	42.9	45	5	92.9
2	Cegid Group	43.4	44	5	92.4
3	Aptos	31.3	45	5	81.3
4	SAP	30.3	44	5	79.3
5	Oracle	28.2	45	5	78.2
6	IBM	35.8	33	5	73.8
7	JDA	32.2	33	5	70.2
8	Infor	32.2	32	5	69.2
9	Microsoft	34.4	28	5	67.4
9	MicroStrategy	38.4	24	5	67.4
10	Manhattan Associates	33.8	28	5	66.8

2019 Customer Satisfaction for Large Vendors

RANK	VENDOR	CUSTOMER SAT.
1	Cegid Group	43.4
2	Lexmark	43.3
3	Salesforce	42.9
4	SPS Commerce	40.8
5	Zebra	39.1
6	MicroStrategy	38.4
7	Dell	37.7
8	Tyco Retail Solutions	36.7
9	First Data	36.5
10	IBM	35.8

Congratulations this year for top honors go to Mi9, Salesforce, Celerant, Cegid Group, ECRS and the rest of the software providers appearing

in the top-20 master list, the only list in the report that includes 20 vendors. This list not only includes a full set of data collected for each software

2019 Mid-Size Vendors (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
1	Mi9 Retail	44.3	47	3	94.3
2	Celerant Technology	45.6	45	2	92.6
3	ECRS	45.6	44	2	91.6
4	PCMS Datafit	40.3	44	3	87.3
5	Jesta I.S.	45.2	38	2	85.2
6	MultiDev Technologies	44.1	35	1	80.1
7	Logile	46.1	30	2	78.1
8	Profitect	41.1	28	2	71.1
9	Relex	43.0	26	2	71.0
10	Magstar	41.2	26	1	68.2

2019 Broad Suite Vendor Leaders (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
1	Mi9 Retail	44.3	47	3	94.3
2	Salesforce	42.9	45	5	92.9
3	Celerant Technology	45.6	45	2	92.6
4	Cegid Group	43.4	44	5	92.4
5	ECRS	45.6	44	2	91.6
6	PCMS Datafit	40.3	44	3	87.3
7	Jesta I.S.	45.2	38	2	85.2
8	Aptos	31.3	45	5	81.3
9	MultiDev Technologies	44.1	35	1	80.1
10	SAP	30.3	44	5	79.3

2019 Targeted Solution Vendor Leaders (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
1	UTC Retail	44.3	20	2	66.3
2	Logility	42.1	19	2	63.1
3	RTC Group	45.9	14	1	60.9
4	Diebold Nixdorf	35.0	20	5	60.0
4	SAS	35.0	20	5	60.0
5	Zebra	39.1	14	5	58.1
6	NGC Software	42.7	12	2	56.7
7	Revionics	44.1	9	3	56.1
8	Bamboo Rose	42.0	11	2	55.0
9	Toshiba Global Commerce Solutions	35.0	14	5	54.0
10	Lexmark	43.3	4	5	52.3

2019 Customer Satisfaction for Mid-Size Vendors

RANK	VENDOR	CUSTOMER SAT.
1	Logile	46.1
2	RTC Group	45.9
3	Celerant Technology	45.6
3	ECRS	45.6
4	Jesta I.S.	45.2
5	Mi9 Retail	44.3
5	UTC Retail	44.3
6	MultiDev Technologies	44.1
6	Revionics	44.1
7	Relex	43.0
8	NGC Software	42.7
9	Logility	42.1
10	Bamboo Rose	42.0

2019 Customer Satisfaction for Broad Suite Vendors

RANK	VENDOR	CUSTOMER SAT.
1	Logile	46.1
2	Celerant Technology	45.6
2	ECRS	45.6
3	Jesta I.S.	45.2
4	Mi9 Retail	44.3
5	MultiDev Technologies	44.1
6	Cegid Group	43.4
7	Relex	43.0
8	Salesforce	42.9
9	Magstar	41.2

2019 Customer Satisfaction for Targeted Solution Vendors

RANK	VENDOR	CUSTOMER SAT.
1	RTC Group	45.9
2	UTC Retail	44.3
3	Revionics	44.1
4	Lexmark	43.3
5	NGC Software	42.7
6	Logility	42.1
7	Bamboo Rose	42.0
8	SPS Commerce	40.8
9	Zebra	39.1
10	Dell	37.7

provider but it is also unfiltered. Many of the other 50 lists in the report are sorted by such factors

as revenue size of the vendor, revenue size of the retail voter, retail segment of the retail voter

and others.

Heading the top-20 master list this year is Mi9, a top-ranked

2019 Grocery Vendor Leaders (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
1	ECRS	45.4	44	2	91.4
2	Logile	43.0	30	2	75.0
3	Profitect	43.5	28	2	73.5
4	Relex	44.5	26	2	72.5
5	Magstar	44.0	26	1	71.0
6	IBM	31.0	33	5	69.0
7	Microsoft	32.1	28	5	65.1
8	JDA	25.5	33	5	63.5
9	Retail Pro	40.0	17	2	59.0
10	First Data	37.1	6	5	48.1

2019 Apparel Vendor Leaders (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
1	Cegid Group	44.8	44	5	93.8
2	Salesforce	43.6	45	5	93.6
3	Celerant Technology	46.1	45	2	93.1
4	Jesta I.S.	44.7	38	2	84.7
5	MultiDev Technologies	44.1	35	1	80.1
6	Oracle	27.5	45	5	77.5
7	Aptos	27.0	45	5	77.0
8	SAP	25.3	44	5	74.3
9	JDA	34.2	33	5	72.2
10	IBM	33.0	33	5	71.0

2019 Specialty Vendor Leaders (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
1	Cegid Group	43.8	44	5	92.8
2	Celerant Technology	45.0	45	2	92.0
3	Mi9 Retail	41.8	47	3	91.8
4	Aptos	35.4	45	5	85.4
5	PCMS Datafit	38.0	44	3	85.0
6	MultiDev Technologies	44.0	35	1	80.0
7	SAP	30.0	44	5	79.0
8	Oracle	26.9	45	5	76.9
9	IBM	38.5	33	5	76.5
10	JDA	34.4	33	5	72.4

2019 Customer Satisfaction for Grocery Vendors

RANK	VENDOR	CUSTOMER SAT.
1	ECRS	45.4
2	Relex	44.5
3	Magstar	44.0
4	Profitect	43.5
5	Logile	43.0
6	Retail Pro	40.0
7	First Data	37.1
8	Dell	36.6
9	Verifone	35.0
10	Microsoft	32.1

Top Apparel Vendors in Customer Satisfaction

RANK	VENDOR	CUSTOMER SAT.
1	UTC Retail	47.3
2	Celerant Technology	46.1
3	Cegid Group	44.8
4	Jesta I.S.	44.7
5	MultiDev Technologies	44.1
6	Salesforce	43.6
7	NGC Software	42.0
8	Logility	41.6
9	Tyco Retail Solutions	39.3
10	MicroStrategy	37.8

2019 Specialty Vendor Leaders in Customer Satisfaction

RANK	VENDOR	CUSTOMER SAT.
1	RTC Group	48.6
2	Celerant Technology	45.0
3	MultiDev Technologies	44.0
4	Cegid Group	43.8
5	UTC Retail	43.6
6	MicroStrategy	43.3
7	SPS Commerce	42.6
8	Mi9 Retail	41.8
9	Zebra	41.0
10	IBM	38.5

software provider for many years and now a recipient of the highly coveted number-one ranking.

The biggest surprise in the top-20 master list rankings is Salesforce, which until its acquisition of Demandware in 2016 did not have much of a presence in LeaderBoard rankings. However, as the number-two ranked software provider in 2019 its presence is destined to loom large in future years. **RIS**

2019 Customer Satisfaction by Tier One Retailers

RANK	VENDOR	CUSTOMER SAT.
1	Logile	47.1
2	Salesforce	46.0
3	Lexmark	45.8
4	Revionics	42.2
5	Relex	41.5
6	Profitect	40.4
7	Reflexis Systems	40.1
8	Logility	39.8
9	Tyco Retail Solutions	39.3
10	PCMS Datafit	38.6

2019 Customer Satisfaction by Mid-Size Retailers

RANK	VENDOR	CUSTOMER SAT.
1	Jesta I.S.	48.7
2	Logility	46.0
3	Celerant Technology	45.8
3	ECRS	45.6
4	RTC Group	45.5
4	NGC Software	45.5
5	UTC Retail	45.4
6	Relex	44.6
7	MultiDev Technologies	44.1
8	Mi9 Retail	43.4
9	Logile	43.0
10	Manthan Systems	42.9

2019 Top Vendors for Tier One Retailers (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
1	Salesforce	46.0	45	5	96.0
2	Cegid Group	46.8	44	5	95.8
3	PCMS Datafit	38.6	44	3	85.6
4	Jesta I.S.	41.7	38	2	81.7
5	Logile	47.1	30	2	79.1
6	SAP	26.8	44	5	75.8
7	Oracle	23.3	45	5	73.3
8	Profitect	40.4	28	2	70.4
9	Relex	41.5	26	2	69.5
10	JDA	31.1	33	5	69.1

2019 Top Vendors for Mid-Size Retailers (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
1	ECRS	45.6	44	2	91.6
2	Mi9 Retail	43.4	47	3	93.4
3	Celerant Technology	45.8	45	2	92.8
4	Cegid Group	42.4	44	5	91.4
5	Salesforce	39.8	45	5	89.8
6	Jesta I.S.	48.7	38	2	88.7
7	SAP	34.5	44	5	83.5
8	Oracle	31.7	45	5	81.7
9	MultiDev Technologies	44.1	35	1	80.1
10	Aptos	30.0	45	5	80.0

2019 Top Vendors in Customer Satisfaction

RANK	VENDOR	CUSTOMER SAT.
1	Logile	46.1
2	RTC Group	45.9
3	Celerant Technology	45.6
3	ECRS	45.6
4	Jesta I.S.	45.2
5	Mi9 Retail	44.3
5	UTC Retail	44.3
6	MultiDev Technologies	44.1
6	Revionics	44.1
7	Cegid Group	43.4
8	Lexmark	43.3
9	Relex	43.0
10	Salesforce	42.9

2019 Top Vendors in Retail Concentration

RANK	VENDOR	CUSTOMER SAT.
1	Mi9 Retail	47
2	Salesforce	45
2	Celerant Technology	45
2	Aptos	45
2	Oracle	45
3	Cegid Group	44
3	ECRS	44
3	PCMS Datafit	44
3	SAP	44
4	Jesta I.S.	38
5	MultiDev Technologies	35
6	IBM	33
6	JDA	33



THANK YOU!

FOR MAKING US NUMBER ONE

All of us at Mi9 Retail are honored to have been selected as the **NUMBER ONE VENDOR OVERALL** in the 2019 **RIS Software LeaderBoard**. We are truly passionate about helping retailers on their path to success and are thrilled to be recognized for our hard work and dedication.

As the fastest growing provider of enterprise software for retailers, wholesalers, and brands, Mi9 Retail enables the world's leading retailers to automate and optimize their entire Plan-to-Sell™ process, from planning to executing, influencing, and selling merchandise in-store, online, and on any device.

Want to know what makes us number one? Check us out at mi9retail.com or visit us at the **NRF Big Show** in booth #4209.

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A Granular View of Customer Satisfaction

Highlighting super achievers who deliver what retailers want in software applications

To understand the significance of the *RIS* Software LeaderBoard it is important to understand the weight carried by the Customer Satisfaction score, which appears in most of the 51 charts in the report.

The Customer Satisfaction score is based on the sum of 10 individual criteria, each of which is an essential element in the implementation and daily use of software in a retail enterprise. (To see a detailed explanation of the 10 criteria used for Customer Satisfaction and all other key elements used in LeaderBoard methodology, go to page 15.)

By breaking out the 10 criteria into individual lists we get a granular look into the specific strengths of the industry's leading software providers. And make no mistake, every vendor appearing in these lists is an industry leader.

Here's why. The overall average Customer Satisfaction score in the 2019 *RIS* Software LeaderBoard is 37.4. This means the average score for each individual criteria when looked at individually is approximately 3.7 – some are slightly lower and some slightly higher.

However, the lowest score that appears in any of the top-10 criteria lists highlighted in this chapter is 4.2, which is significantly higher than the overall average score. This means that every vendor appearing on these lists performs well above average and, in fact, they are super achievers in Customer Satisfaction compared to their peers.

2019 Leaders in Overall Performance

RANK	VENDOR	CUSTOMER SATISFACTION
1	ECRS	4.7
2	Logile	4.6
2	RTC Group	4.6
2	Celerant Technology	4.6
2	Bamboo Rose	4.6
2	Jesta I.S.	4.6
3	Relex	4.5
3	Revionics	4.5
3	MultiDev Technologies	4.5
3	UTC Retail	4.5
4	Cegid Group	4.4

2019 Leaders in Return on Investment

RANK	VENDOR	CUSTOMER SATISFACTION
1	ECRS	4.7
1	Jesta I.S.	4.7
1	Celerant Technology	4.7
2	Logile	4.6
3	RTC Group	4.5
4	UTC Retail	4.4
4	Revionics	4.4
4	Logility	4.4
5	Cegid Group	4.3
5	MultiDev Technologies	4.3
5	NGC Software	4.3

One trend that has become clear after reviewing retail technology evaluations over the years is that retail technologists (CIOs and other IT job titles who fill out LeaderBoard evaluation forms) are a tough crowd to please.

2019 Leaders in Total Cost of Operation

RANK	VENDOR	CUSTOMER SATISFACTION
1	Celerant Technology	4.7
2	Logile	4.6
3	RTC Group	4.5
3	Jesta I.S.	4.5
3	ECRS	4.5
4	Cegid Group	4.4
4	UTC Retail	4.4
5	Mi9 Retail	4.3
5	MultiDev Technologies	4.3
5	Revionics	4.3
5	Logility	4.3

2019 Leaders in Technology Innovation

RANK	VENDOR	CUSTOMER SAT.
1	Logile	4.6
1	ECRS	4.6
2	Celerant Technology	4.5
3	Salesforce	4.4
3	RTC Group	4.4
3	Revionics	4.4
4	Lexmark	4.3
5	Profitect	4.2
5	MultiDev Technologies	4.2
5	Cegid Group	4.2
5	Mi9 Retail	4.2

No doubt the reason for their toughness is the software their organizations use to conduct business is so critical to achieving success and, of course, the cost for implementing and maintaining the software is so high (typically in the



Top-ranked on the Leaderboard and around the world

The Leaderboard has spoken, and the 70,000+ stores using our signage platform agree: **Lexmark IS retail**. And our time-tested solutions and decades of expertise help retailers reach new heights.

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millions of dollars). This means that even minor issues with the software seem magnified when looking through this lens.

A Perfect Five

So, achieving a perfect score of five, in one of the 10 criteria used to create the Customer Satisfaction score is a relatively rare occurrence in LeaderBoard rankings. It is not unheard of, but it is rare and noteworthy.

This year Mi9 pulled off the rare feat of achieving a perfect five in perhaps the most important criterion – Recommendation. The reason Recommendation is considered to be elevated and in a class by itself is the other nine criteria are discreet, highly defined elements of Customer Satisfaction. In most cases, they are so well defined they can be measured using hard data.

However, Recommendation pulls together all elements associated with implementing and using a software application and then asks the evaluator a critical question: Would you recommend using this vendor's software to your peers, to other retailers you know? The answer to this question is the most sought after advice in retailing whenever CIOs and other IT executives gather to network at industry functions.

Other criteria winners in this year's LeaderBoard ranking (including ties) are the following vendors that scored number-one placements on one or more of the 10 criteria charts: Logile (with four number-one placements), ECRS (3), Jesta I.S. (3), Celerant Technology (2), and the RTC Group (2).

Each of these criteria winners deserves special recognition for leading retail software in a category that matters the most to end users – Customer Satisfaction. **RIS**

2019 Leaders in Software Reliability

RANK	VENDOR	CUSTOMER SAT.
1	Jesta I.S.	4.8
1	RTC Group	4.8
2	Cegid Group	4.6
2	Salesforce	4.6
2	ECRS	4.6
2	UTC Retail	4.6
3	SPS Commerce	4.5
3	MultiDev Technologies	4.5
3	Revionics	4.5
3	Logility	4.5
3	Logile	4.5
3	Celerant Technology	4.5

2019 Leaders in Ease of Administration

RANK	VENDOR	CUSTOMER SAT.
1	Jesta I.S.	4.7
2	MultiDev Technologies	4.6
3	Salesforce	4.5
3	Celerant Technology	4.5
3	ECRS	4.5
3	Mi9 Retail	4.5
4	RTC Group	4.4
4	Revionics	4.4
4	Relex	4.4
4	Logile	4.4
4	UTC Retail	4.4

2019 Leaders in Quality of Service

RANK	VENDOR	CUSTOMER SAT.
1	Logile	4.8
2	RTC Group	4.7
2	Jesta I.S.	4.7
2	Celerant Technology	4.7
3	UTC Retail	4.6
3	Lexmark	4.6
3	Relex	4.6
4	NGC Software	4.5
4	ECRS	4.5
4	Revionics	4.5
4	MultiDev Technologies	4.5
4	Magstar	4.5
4	Mi9 Retail	4.5

2019 Leaders in Ease of Installation & Integration

RANK	VENDOR	CUSTOMER SAT.
1	Lexmark	4.6
2	RTC Group	4.5
2	Mi9 Retail	4.5
2	Logile	4.5
2	Celerant Technology	4.5
3	Bamboo Rose	4.4
3	Cegid Group	4.4
3	Logility	4.4
4	Salesforce	4.3
4	ECRS	4.3
4	Revionics	4.3

2019 Leaders in Quality of Support

RANK	VENDOR	CUSTOMER SAT.
1	Logile	4.9
1	RTC Group	4.9
2	UTC Retail	4.6
2	ECRS	4.6
3	MultiDev Technologies	4.5
3	Revionics	4.5
3	Celerant Technology	4.5
3	Jesta I.S.	4.5
3	Mi9 Retail	4.5
4	NGC Software	4.4
4	Magstar	4.4
4	Relex	4.4

2019 Leaders in Recommendation

RANK	VENDOR	CUSTOMER SAT.
1	Mi9 Retail	5.0
2	NGC Software	4.8
2	ECRS	4.8
3	Relex	4.7
3	RTC Group	4.7
3	Logile	4.7
3	Jesta I.S.	4.7
3	Celerant Technology	4.7
4	Logility	4.6
4	Salesforce	4.6
4	Lexmark	4.6
5	UTC Retail	4.5

Tailored Software and Satisfaction

One size does not fit all in the world of retail technology

All vendors included in the RIS Software Leaderboard offer enterprise-class software to their retail clients. The term enterprise class is used to indicate these solutions are powerful, flexible and reliable enough to serve the needs of large regional and national retailers. The term also means the LeaderBoard excludes software designed for mom-and-pop or main-street retailers as well as most single-location retailers unless they are the size of Abt Electronics in Glenview, Illinois, or Harrods in London, which are in a class by themselves.

However, things change when a retailer's revenue rises above a billion dollars per year. At this level, it is common to find software that could easily handle transactions in the millions of dollars per day becomes overloaded when handling millions of dollars per hour.

The charts in this chapter show side-by-side rankings of vendors in Customer Satisfaction that fall into two classes – tier one (based on votes by retailers with annual revenue greater than a billion dollars) and mid-size (based on votes by retailers with annual revenue less than a billion dollars).

Each chart (or double chart technically) highlights one of the 10 criteria used to create the overall Customer Satisfaction score. A quick glance reveals that few vendors cross the billion-dollar dividing line. Those that do, like MicroStrategy and Salesforce, deserve special recognition for pulling off a rare and difficult feat. All other vendors that appear in these top-10 lists deserve recognition, too, because only the cream of the cream appear in this chapter.

2019 Leaders in Overall Performance by Tier One & Mid-Size Retailers

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	VENDOR	CUSTOMER SAT.	RANK	VENDOR	CUSTOMER SAT.
1	Bamboo Rose	4.8	1	Jesta I.S.	5.0
2	Logile	4.6	2	Celerant Technology	4.8
2	Salesforce	4.6	2	Logile	4.8
3	Lexmark	4.4	3	Relex	4.7
3	Relex	4.4	3	ECRS	4.7
4	Akamai	4.3	3	Logility	4.7
5	Cegid Group	4.2	4	NGC Software	4.6
6	Reflexis Systems	4.1	4	UTC Retail	4.6
7	Profitect	4.0	4	RTC Group	4.6
7	Jesta I.S.	4.0	5	Cegid Group	4.5
7	Dell	4.0	5	MultiDev Technologies	4.5

2019 Leaders in Return on Investment by Tier One & Mid-Size Retailers

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	VENDOR	CUSTOMER SAT.	RANK	VENDOR	CUSTOMER SAT.
1	Cegid Group	4.8	1	Jesta I.S.	5.0
2	Logile	4.7	2	ECRS	4.7
3	Lexmark	4.5	2	Logility	4.7
4	Profitect	4.4	2	Celerant Technology	4.7
4	Salesforce	4.4	3	Relex	4.6
5	Jesta I.S.	4.3	4	UTC Retail	4.5
6	Reflexis Systems	4.1	4	NGC Software	4.5
7	PCMS Datafit	4.0	5	RTC Group	4.4
7	SAS	4.0	6	MultiDev Technologies	4.3
7	Dell	4.0	6	Logile	4.3
			7	Cegid Group	4.2

2019 Leaders in Total Cost of Operations by Tier One & Mid-Size Retailers

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	VENDOR	CUSTOMER SAT.	RANK	VENDOR	CUSTOMER SAT.
1	Cegid Group	4.8	1	Jesta I.S.	5.0
2	Logile	4.7	2	Manthan Systems	4.7
3	Lexmark	4.5	2	Logility	4.7
4	Relex	4.0	2	Celerant Technology	4.7
4	Profitect	4.0	2	UTC Retail	4.5
4	Tyco Retail Solutions	4.0	3	ECRS	4.5
4	Bamboo Rose	4.0	3	Logile	4.5
4	NGC Software	4.0	4	RTC Group	4.4
4	Jesta I.S.	4.0	5	MultiDev Technologies	4.3
5	Reflexis Systems	3.8	5	Cegid Group	4.3
5	Salesforce	3.8			

Why Retailers Voted the Way They Did

The LeaderBoard evaluation form provides retailers with an opportunity to explain why they voted for a vendor the way they did. Instead of a simple numerical choice, this section of the form allows retailers to provide deeper insight into their evaluation thinking.

Here are select comments made by retailers about key vendors that appear in the 2019 LeaderBoard:

- "I have been working with Aptos for over six years. They know retailing and have made advances in keeping the technology relevant and innovative. They listen to their customers and make adjustments when needed. Areas I have experienced this in are project implementation and day-to-day support."

- "Cegid has a great team, great retail knowledge, and great software with a nice vision of the future."

- "Celerant continues to evolve, offering the expanded services we need and works to bring the 'big data' experience to a level that small businesses can both afford and utilize."

- "ECRS has been key to the success of our company. The reliability, ease of use of the software, and the responsiveness of the support team are excellent. I'm excited to work their innovations into our store in the (hopefully) near future."

- "JDA has made significant strides forward in the past few years in providing a vision for the future of their applications. Since we moved the JDA applications to the cloud our service has improved as well."

- "With Kronos we have had a great partnership since day one. We have overachieved labor ROI from expectation."

- "The treatment received from Lexmark is excellent, both at the level of support and development and production. They meet all expectations."

- "Logile has been an incredible

2019 Leaders in Technology Innovation by Tier One & Mid-Size Retailers

BY TIER ONE RETAILERS

BY MID-SIZE RETAILERS

RANK	VENDOR	CUSTOMER SAT.	RANK	VENDOR	CUSTOMER SAT.
1	Salesforce	4.8	1	ECRS	4.6
1	Cegid Group	4.8	2	Celerant Technology	4.5
2	Logile	4.7	3	RTC Group	4.4
2	Lexmark	4.7	3	NGC Software	4.4
3	Relex	4.4	4	Jesta I.S.	4.3
4	Profitect	4.1	4	Logile	4.3
5	PCMS Datafit	4.0	5	Mi9 Retail	4.2
5	Bamboo Rose	4.0	6	UTC Retail	4.1
6	Tyco Retail Solutions	3.8	7	Cegid Group	4.0
6	Reflexis Systems	3.8	7	Magstar	4.0
7	Jesta I.S.	3.7	7	SPS Commerce	4.0
			7	Salesforce	4.0

2019 Leaders in Software Reliability by Tier One & Mid-Size Retailers

BY TIER ONE RETAILERS

BY MID-SIZE RETAILERS

RANK	VENDOR	CUSTOMER SAT.	RANK	VENDOR	CUSTOMER SAT.
1	Salesforce	4.8	1	Jesta I.S.	5.0
1	Cegid Group	4.8	2	NGC Software	4.9
2	Jesta I.S.	4.7	3	RTC Group	4.7
3	Logile	4.6	3	UTC Retail	4.7
3	Lexmark	4.6	4	Cegid Group	4.6
4	MicroStrategy	4.3	4	ECRS	4.6
5	Reflexis Systems	4.2	4	SPS Commerce	4.6
6	Relex	4.1	5	MicroStrategy	4.5
7	Tyco Retail Solutions	4.0	5	Celerant Technology	4.5
7	PCMS Datafit	4.0	6	Salesforce	4.4
7	Bamboo Rose	4.0	6	Zebra	4.4

2019 Leaders in Ease of Installation & Integration by Tier One & Mid-Size Retailers

BY TIER ONE RETAILERS

BY MID-SIZE RETAILERS

RANK	VENDOR	CUSTOMER SAT.	RANK	VENDOR	CUSTOMER SAT.
1	Lexmark	4.8	1	Relex	4.6
1	Cegid Group	4.8	2	Celerant Technology	4.5
2	Logile	4.6	3	RTC Group	4.4
2	Salesforce	4.6	3	UTC Retail	4.4
3	Bamboo Rose	4.3	3	Mi9 Retail	4.4
4	Jesta I.S.	4.0	3	NGC Software	4.4
5	Reflexis Systems	3.9	4	Jesta I.S.	4.3
6	Tyco Retail Solutions	3.8	4	ECRS	4.3
6	MicroStrategy	3.8	4	Cegid Group	4.3
7	Relex	3.7	5	Magstar	4.1
7	Akamai	3.7	6	Salesforce	4.0

partner through the proof of concept and implementation of the labor standards software. Also, the response for enhancements has been incredible. The quality of new enhancements has been outstanding. Very few bugs with new logic.”

- “We have used Logility including multiple upgrades for over eight years. It has been a great partnership. The recent upgrade was very smooth. We impact our business positively through the analytical capabilities incorporated into the allocation system.”

- “We needed a new e-commerce solution and were very satisfied with the cost of implementation, the cost of continuing project development, and how Mi9 has handled support

**2019 Leaders in Ease of Administration & Maintenance
by Tier One & Mid-Size Retailers**

BY TIER ONE RETAILERS

BY MID-SIZE RETAILERS

RANK	VENDOR	CUSTOMER SAT.	RANK	VENDOR	CUSTOMER SAT.
1	Salesforce	4.8	1	Jesta I.S.	5.0
1	Cegid Group	4.8	2	Relex	4.7
2	Logile	4.5	3	UTC Retail	4.5
3	Lexmark	4.4	3	Celerant Technology	4.5
4	Jesta I.S.	4.3	3	ECRS	4.5
4	Bamboo Rose	4.3	4	RTC Group	4.4
5	Relex	4.0	4	Mi9 Retail	4.4
6	Profitect	3.9	5	NGC Software	4.3
7	Tyco Retail Solutions	3.8	6	Cegid Group	4.2
7	Reflexis Systems	3.8	7	Salesforce	4.2
7	PCMS Datafit	3.8	7	SPS Commerce	4.2
			7	MicroStrategy	4.2

so far. Implementation went smoothly for the most part and we’ve noticed pretty immediate results. We would definitely recommend Mi9 Retail’s e-commerce solution.”

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- “NGC is an outstanding company and has been a great partner for quite a few years now. They have provided a suite of solutions that have allowed us to effectively implement global specifications and quality management systems for our business. We look forward to working with them for many years to come with their PLM solutions.”

- “Profitect is a very good solution provider with a well-rounded staff and many great personalities that can handle building a partnership on both a professional and personal level.”

- “We have signed up to almost the entire Reflexis suite of solutions and are imminently due to deploy them across the business. So far, the service and support has been superb with the professional services team being embedded within the business program team.”

- Relex is very user friendly and also reliable. No issues with night batches and even version upgrades are done within hours.”

- “RTC Group is a true business partner and are treated as an extension or our IT department.”

- “Revionics always has great support and is very easy to use. Data for analysis is refreshed each week.”

- “UTC has been a proud partner for 10 years. The tech support team has always been prompt and extremely helpful in solving any issues and answering questions.”

Whether a retailer is tier one or mid-size, an expectation common to both is responsive customer service from the solution provider as well as product reliability, ease of implementation, ongoing support, and a feeling that the vendor is part of the IT team, a trustworthy partner in helping a retailer achieve success. **RIS**

2019 Leaders in Quality of Support by Tier One & Mid-Size Retailers

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	VENDOR	CUSTOMER SAT.	RANK	VENDOR	CUSTOMER SAT.
1	Logile	5.0	1	Jesta I.S.	5.0
2	Salesforce	4.6	2	RTC Group	4.8
3	Cegid Group	4.5	2	NGC Software	4.8
4	Lexmark	4.4	3	UTC Retail	4.7
5	Profitect	4.3	4	ECRS	4.6
5	Relex	4.3	5	Celerant Technology	4.5
6	Tyco Retail Solutions	4.2	5	Logile	4.5
7	Reflexis Systems	4.0	6	Relex	4.4
7	PCMS Datafit	4.0	6	Mi9 Retail	4.4
7	MicroStrategy	4.0	7	Magstar	4.3
7	Bamboo Rose	4.0	7	IBM	4.3
7	Jesta I.S.	4.0			

2019 Leaders in Quality of Service by Tier One & Mid-Size Retailers

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	VENDOR	CUSTOMER SAT.	RANK	VENDOR	CUSTOMER SAT.
1	Cegid Group	5.0	1	Jesta I.S.	5.0
2	Logile	4.8	2	NGC Software	4.9
2	Lexmark	4.8	3	UTC Retail	4.7
3	Salesforce	4.6	3	RTC Group	4.7
3	Relex	4.6	3	Celerant Technology	4.7
4	Jesta I.S.	4.3	4	Relex	4.6
4	Bamboo Rose	4.3	5	ECRS	4.5
5	Reflexis Systems	4.1	5	Logile	4.5
6	Profitect	4.0	6	Magstar	4.4
6	Tyco Retail Solutions	4.0	6	SPS Commerce	4.4
6	PCMS Datafit	4.0	6	Mi9 Retail	4.4

Leaders in Recommendation by Tier One & Mid-Size Retailers

BY TIER ONE RETAILERS			BY MID-SIZE RETAILERS		
RANK	VENDOR	CUSTOMER SAT.	RANK	VENDOR	CUSTOMER SAT.
1	Salesforce	5.0	1	Mi9 Retail	5.0
2	Lexmark	4.8	1	Jesta I.S.	5.0
2	Logile	4.8	2	Relex	4.9
2	NGC Software	4.8	3	ECRS	4.8
2	Cegid Group	4.8	3	NGC Software	4.8
3	Relex	4.6	4	RTC Group	4.7
4	Jesta I.S.	4.3	4	Celerant Technology	4.7
4	Profitect	4.3	5	UTC Retail	4.6
4	Reflexis Systems	4.3	6	Zebra	4.5
4	Bamboo Rose	4.3	6	Logile	4.5
5	Tyco Retail Solutions	4.2	7	Cegid Group	4.4



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Everything You Need to Know

LeaderBoard methodology and terminology is complex but easy to understand

The RIS Software Leaderboard

uses several unique terms throughout the report. The principal ones are Customer Satisfaction, Retail Concentration and Revenue Factor, which are referred to as “categories” in LeaderBoard terminology.

These categories are converted into numbers and aggregated to create scores in the top-20 “master” list and other top-10 lists identified as “full data set” charts, which means they use all three categories to produce a total number used for stack ranking.

Customer Satisfaction

The LeaderBoard breaks Customer Satisfaction into 10 specific “criteria,” another term used consistently throughout the LeaderBoard. Each of the 10 criteria carries its own unique score within the overall total.

Of the three categories, **Customer Satisfaction is the one that gives the Software LeaderBoard its distinctive identity.** It counts for a maximum of 50 points out of a possible 105 points used to rank vendors in the top-20 master list and other top-10 lists with a full-data-set designation.

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

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

Retail Concentration

Retail Concentration is an easy to understand category because it awards one point for each retail application or module a vendor offers for general availability from a list created by the editors at *RIS*. Retail Concentration is modified to reflect the evolution of retail technology. Five years ago, blockchain, IoT platforms, and machine learning/AI were insignificant factors. Today they are hot and have been added to the list of **50 Retail Concentration modules**.

RIS editors verify all Retail Concentration scores by visiting vendor websites. If the information is not easy to find, which is often the case, *RIS* cuts through the confusion and directly queries the vendor.

Revenue Factor

Of the three categories in the LeaderBoard, the one with the smallest impact is Revenue Factor, which accounts for five points out of a possible 105.

Revenue Factor is a point spread that goes across five ranges

as follows: vendors with less than \$20 million in retail revenue get one point, vendors between \$20 million and \$50 million get two points, vendors between \$50 million and \$125 million get three points, vendors between \$125 million and \$250 million get four points, and vendors greater than \$250 million get five points.

Final notes about other unique LeaderBoard terms:

- **Large Vendors** refers to software providers that have greater than \$125 million in dedicated retail technology revenue and **Mid-Size Vendors** refers to those with revenue less than \$125 million.
- **Broad Suite Vendors** refers to software providers with more than 21 software modules in their Retail Concentration score, and **Targeted Solution Vendors** refers to those with less than 20 modules.
- All Customer Satisfaction scores in Grocery charts exclusively feature votes by grocers. Similarly, Customer Satisfaction scores in Apparel and Specialty charts exclusively feature votes by apparel and specialty retailers.
- All Customer Satisfaction scores in charts using the terms **Tier One Retailers** (revenue greater than one billion dollars) and **Mid-size Retailers** (revenue less than one billion dollars) exclusively feature votes by retailers that fall into these specific revenue buckets. **RIS**

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- Joe Skorupa,
Editorial Director, RIS News

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