

SOFTWARE LEADERBOARD

A SUPPLEMENT TO RIS NEWS

2005



THE BEST OF THE BEST

THE TOP 45 SOFTWARE
VENDORS IN RETAIL

HEAD-TO-HEAD
COMPARISON
RANKINGS

VOTED BY
RETAILERS

PLUS:
FAST-MOVING
COMPANIES TO
WATCH

RIS

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»» DEMOCRACY IN ACTION



JOE SKORUPA,
GROUP EDITOR-IN-CHIEF

To paraphrase Winston Churchill, democracy isn't perfect, it just happens to be better than all of the other alternatives. This philosophy comprises the foundation of the Leaderboard research survey, now in its fifth year. The comparison to democracy is appropriate because the system in both cases hinges on collective judgments reached by a body of anonymous voters. While it's possible to disagree with conclusions, it's impossible to invalidate the process itself.

In the Leaderboard's case, voters are composed of qualified senior level retail executives with significant IT responsibility. They are invited to go to a secure Web site to cast their votes, and, after all votes are cast, the data is validated and cleansed of unqualified reviews and reviewers.

This year we received 519 valid votes from 223 separate respondents who reviewed 91 individual software vendors. Of the total vendors surveyed, only the top 45 make the final Leaderboard cut, which is why it is fair to say that every company that appears on the list is a winner in itself and a member of a very select group.

Two strong trends are evident in this year's Leaderboard ranking and category breakdowns that follow. The first is that mergers and acquisitions are having a significant impact on the retail software landscape. The second is that the big are getting bigger — meaning successful companies are winning more clients, more business and more revenue.

To adjust to these trends, this year's Leaderboard criteria has incorporated three small modifications: 1. Reducing the number of vendors on the list to 45 from 50 to account for acquired companies that no longer exist as separate organizations; 2. Increasing the number of functionalities in the Retail Concentration score to 40 from 35 to account for expanding application suites; and 3. Raising the levels in the Revenue Factor ranking to account for year-over-year financial growth.

The Leaderboard is unique among best-of-the-best lists, because it gauges *all* software vendors in the retail vertical in a head-to-head comparison ranking. No vendor sponsors the Leaderboard and no vendor is left out for lack of sponsorship. This approach has served it well over the years in building a strong reputation throughout the retailing industry. As a result, we will be launching Hardware and IT Services Leaderboards in 2006 to delve more deeply into these critical areas of technology.

If you have any feedback about the 2005 Software Leaderboard or the new Leaderboards next year, I'd love to hear it. Send to jskorupa@edgellmail.com and I'll be sure to follow up. All the best,

We will be launching
Hardware and IT Services
Leaderboards in 2006
to delve more deeply
into these critical areas
of technology.

» THE WINNER'S CIRCLE

Mergers and acquisitions shake up the year's rankings

Along with hurricanes and tsunamis, 2005 also will go down as one of the most active years for mergers and acquisitions (M&A) in the history of retail technology. This is a theme that emerges throughout much of the 2005 Leaderboard findings.

Despite the fact that 91 software companies received votes in the survey, so many vendors from previous lists were acquired by other companies on the list that the final ranking was trimmed from 50 to 45.

As a result, this year's best-of-the-best list has

fewer members and is more of an exclusive club. However, there is still opportunity for new players to emerge, and the following companies broke through for the first time: Catalyst, Cognos, Ecometry, Novell, ProClarity, Raymark, StorePerform and Sun.

Still, the big news is the huge leap made by SAP and Oracle to the top of the chart, a place they occupy in a virtual dead heat. Bolstered by recent M&A activity, these large, horizontal companies are making major commitments to the retailing vertical and the effort appears to be paying off among voters. ■

Top 45 Software Vendors

Rank	Company	Retail Concentration Score	Revenue Factor	Customer Satisfaction/Recognition	Total Score
1	SAP Triversity	39	5	38.83	82.83
2	Oracle Retail	39	5	38.60	82.60
3	GERS Retail Systems	36	3	41.42	80.42
4	NCR	34	5	41.37	80.37
5	JDA	36	4	40.31	80.31
6	Microsoft	26	5	44.05	75.05
7	CRS Retail Systems	30	3	40.00	73.00
8	Celerant	27	1	43.92	71.92
9	Retalix	30	5	34.33	69.33
10	Tomax	27	2	40.00	69.00
11	CommercialWare	25	1	42.80	68.80
12	Lawson	26	2	40.59	68.59
13	IBM	23	5	39.93	67.93
14	Business Objects	24	5	37.19	66.19
15	Datavantage	23	5	38.00	66.00



Rank	Company	Retail Concentration Score	Revenue Factor	Customer Satisfaction/Recognition	Total Score
16	Magstar	26	1	38.67	65.67
17	ECRS	19	1	45.17	65.17
18	SAS	16	5	44.13	65.13
19	Jesta I.S.	22	4	39.00	65.00
20	PCMS Datafit	17	3	44.80	64.80
21	Manhattan Associates	21	5	38.27	64.27
22	NSB Group	30	3	31.13	64.13
23	i2	25	1	37.27	63.27
24	Catalyst International	22	2	38.20	62.20
25	Manugistics	19	5	38.00	62.00
26	Raymark	23	1	37.32	61.32
27	DemandTec	16	2	41.56	59.56
28	MicroStrategy	23	1	35.22	59.22
29	SofTechnics	18	1	39.50	58.50
30	Island Pacific	20	2	35.29	57.29
31	BlueCube	15	2	39.71	56.71
32	Fujitsu	12	5	38.11	55.11
33	Sun	10	1	43.33	54.33
34	RedPrairie	20	2	31.75	53.75
35	360Commerce	13	2	38.00	53.00
36	Ecometry	18	2	32.00	52.00
37	Khimetrics	14	2	35.33	51.33
38	Sterling Commerce	10	2	38.17	50.17
39	AccessVia	9	1	40.00	50.00
40	Kronos	8	3	37.73	48.73
41	Novell	6	1	41.25	48.25
42	Cognos	10	1	37.14	48.14
43	StorePerform	11	1	30.60	42.60
44	ProClarity	8	1	32.50	41.50
45	Workbrain	6	2	28.43	36.43



SOFTWARE VENDOR	KEY RETAIL CLIENTS
360Commerce	Circuit City, Gap, Pep Boys
AccessVia	Kroger, Staples, Walgreens
BlueCube	Blockbuster, Luxottica Retail, Sears
Business Objects	Best Buy, Carrefour, Tesco
Catalyst International	Family Dollar, Fred's, Saks
Celerant	New York & Co./ Jasmine Sola, Orange County Choppers, Washington Redskins
Cognos	Amazon.com, American Eagle Outfitters, 7-Eleven
CommercialWare	Jos. A. Bank Clothiers, Patagonia, Sur La Table
CRS Retail Systems	Barnes & Noble, Chico's, Coach
Datavantage	Limited Brands, Ritz Camera Centers, The Finish Line
DemandTec	Best Buy, HEB Grocery, RadioShack
Ecometry	Bloomington's, Canadian Tire, Ross-Simons
ECRS	Aramark, Bi-Lo, Mac's Convenience Stores
Fujitsu	Nordstrom, OfficeMax, Payless ShoeSource
GERS Retail Systems	Hot Topic, Nextel, The Home Depot
i2	JC Penney, Payless ShoeSource, W.E. Europe
IBM	Metro Group, Pacific Sunwear, Pep Boys
Island Pacific	Gucci, International Speedway Corporation (NASCAR), Pacific Sunwear
JDA	Charlotte Russe, Meijer, Michael's Stores
Jesta I.S.	DSW Shoes, Genesco, Nexcom
Khimetrics	7-Eleven, Lowe's, Petsmart
Kronos	Best Buy Canada, FedEx Kinko's, Hannaford Bros.
Lawson	SuperValu, Target, The Children's Place
Magstar	Fields Stores, Value Drug Mart, Sam's Wines & Spirits
Manhattan Associates	JC Penney, Limited Brands, Sears
Manugistics	Hibbett Sporting Goods, Limited Brands, Staples
Microsoft	LoveSac, Title 9 Sports, Turnbull & Asser
MicroStrategy	Lowe's, Starbucks, The Container Store
NCR	Ace Hardware, Smart & Final, SuperValu
Novell	Boscov's, Overstock.com, Ritz Camera
NSB Group	Build-A-Bear, Chico's, JC Penney
Oracle Retail	Best Buy, JC Penney, Tesco
PCMS Datafit	Indigo Books, Karstadt, Luxottica Retail
ProClarity	Barnes & Noble, CompUSA, The Home Depot
Raymark	Aerosoles, Escada, Helzberg Diamonds
RedPrairie	GNC, JC Penney, Liz Claiborne
Retalix	Big Y, Hy-Vee, Pilot Travel Centers
SAP Triversity	Limited Brands, The Home Depot, TJX Companies
SAS	AutoZone, Kohl's, The Home Depot
SofTechnics	Harris Teeter, Kroger, Publix
Sterling Commerce	Argos, Best Buy, Target
StorePerform	Albertsons, Borders, Lowe's
Sun	Office Depot, Neiman Marcus, Target
Tomax	Benjamin Moore & Co., L.L. Bean, Safeway
Workbrain	RadioShack, REI, Target

» RETAIL CONCENTRATION & REVENUE FACTOR

Identifying depth of resources and industry punch

When vendors can offer a wide array of software applications it demonstrates to customers a serious commitment to the retail industry. Companies that have the ability to do this increase their footprint in the marketplace. Because developing new retail software demands a significant investment of time and resources, only vendors who have deep commitment to retail will score at the top of this category.

To reach the top of the *RIS News* Leaderboard in Retail Concentration and Revenue Factor, vendors make a significant commitment to developing applications in 40 different software categories, which is an increase of five modules over last year to account for the trend toward line extensions.

Some vendors continue to develop new products internally while others choose to go the acquisition route. SAP and Oracle, this year's top two in Retail Concentration and Revenue Factor, both lit up the retail scene in 2005 with major acquisitions. SAP acquired Triversity and A2i while Oracle purchased Retek, ProfitLogic, PeopleSoft and Siebel. Lawson, also in the top group, purchased Intentia and Retalix bought OMI, IDS and TCI.

Only the vendors who have deep commitment to retail score at the top of this category.

WINNERS IN REVENUE

Year over year, revenue increases, both through organic growth and through acquisition, made it necessary to modify the sliding scale used in calculating Revenue Factor. To receive a top score of 5 in Revenue, vendors must have accumulated \$150 million and above, compared to \$100 million

last year. The rankings were adjusted throughout the category, down to a score of 1, which accounted for \$20 million or less in revenue this year versus \$10 million last year.

In addition, this year the Revenue Factor category calculates only retail revenue versus last year's ranking, which did not exclude revenue from other verticals.

These slight modifications produced no dramatic shifts in results, however they better reflect current realities in the vendor landscape. ■

Leaders in Retail Concentration

RANK	COMPANY	SCORE
1	SAP	39
	Oracle	39
2	GERS Retail Systems	36
	JDA	36
3	NCR	34
4	CRS Retail Systems	30
	NSB Group	30
	Retalix	30
5	Celerant	27
	Tomax	27
6	Lawson	26
	Magstar	26
	Microsoft	26
7	CommercialWare	25
	i2	25
8	Business Objects	24

» CUSTOMER SATISFACTION

Focusing on the customer is the right thing to do

Pushing business decisions through a customer-centric prism is generally the right thing to do for retailers, and it's good advice for software vendors, too. High customer satisfaction rates are the best insurance for being able to generate repeat business and, as has been proven in many marketing effectiveness studies, testimonials from customers are the best possible marketing tool.

For these reasons and others, the Leaderboard Customer Satisfaction and Recognition Factor ranking is one of the most important lists in our survey of senior-level executives in the retail industry that have significant IT responsibility.

Unlike some other categories tracked in the survey, the Customer Satisfaction criteria list has gone unchanged for several years. It is comprised of points awarded by retailers who analyze vendor performance in 10 subcategories: return on investment, total cost of ownership, strategic value, ease of upgrading, ease of installation, ease of integration, ease of administration/maintenance, quality of support, quality of service and overall performance.

High customer satisfaction rates are the best insurance for being able to generate repeat business.

One point is awarded for the lowest level of satisfaction in each of the 10 categories and five is awarded for the highest level of satisfaction. The maximum total points for this category is 50.

A progressive scale also is added to this score that's called Recognition Factor, which amounts to a fraction of a point spread across the 10 subcategories. This is intended to ensure the validity of the respondent pool and also reward the achievement of gaining deep

penetration into the retail marketplace. The scale used delivers a maximum amount of points for vendors that received 25 or more retailer reviews and a minimum amount of points for vendors with five reviews.

Vendors that are able to generate large numbers of retailer reviews clearly have a sizable client base to draw upon, which is an indicator of satisfaction in itself, and they are rewarded for it on a sliding scale. ■

Leaders in Customer Satisfaction and Recognition

RANK	COMPANY	SCORE
1	ECRS	45.17
2	PCMS Datafit	44.80
3	SAS	44.13
4	Microsoft	44.05
5	Celerant	43.92
6	Sun	43.33
7	CommercialWare	42.80
8	DemandTec	41.56
9	GERS Retail Systems	41.42
10	NCR	41.37

» STRATEGIC VALUE & PERFORMANCE

Delivering a cost-effective solution

While not one and the same, it's reasonable that many of the leaders in the Overall Performance category also have scored well in the Strategic Value category. While Overall Performance is a broad concept category that measures how well a vendor has delivered a useful functionality, Strategic Value offers a more granular look at whether customers feel that the software is worth the investment. In order for a vendor to lead in

Strategic Value, it would have to deliver a solution that performed well relative to its cost.

ECRS and CommercialWare rank one and two respectively in both categories. Also notable is that SAS scored in the top three in both categories.

Scores in Strategic Value were significantly higher than the other breakout categories, ranging from 4.93 to 4.30, suggesting that respondents are particularly satisfied with the value from these software vendors. ■

Leaders in Overall Performance

RANK	COMPANY	SCORE
1	ECRS	4.77
2	CommercialWare	4.60
	PCMS Datafit	4.60
	SAS	4.60
3	Microsoft	4.57
4	Sun	4.53
5	NCR	4.49
6	SofTechnics	4.47
7	AccessVia	4.40
	i2	4.40
8	Lawson	4.36
9	CRS Retail Systems	4.30
10	GERS Retail Systems	4.28

Leaders in Strategic Value

RANK	COMPANY	SCORE
1	ECRS	4.93
2	CommercialWare	4.80
3	SAS	4.73
4	Jesta I.S.	4.70
5	Microsoft	4.62
6	Celerant	4.60
	i2	4.60
	PCMS Datafit	4.60
7	JDA	4.52
8	DemandTec	4.42
9	Khimetrics	4.37
10	Datavantage	4.30
	Tomax	4.30

» STRATEGIC VALUE & PERFORMANCE

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9	Khimetrics	4.37
10	Datavantage	4.30
	Tomax	4.30

» ROI AND TCO

Cost winners in the short and long haul

Little is more important to retailers than knowing that their investment is going to pay off. When searching for a vendor, the return on investment (ROI) question will inevitably be raised early in the process. The most successful vendors will promise what they can deliver and deliver what they promise. When focusing on making the CIO happy with the strength of the IT proposal, smart vendors don't forget about the CFO who is waiting, not so

patiently, to see a well-planned ROI business case.

While ROI is generally the delivery of results in the short term, a successful total cost of ownership (TCO) means the vendor has done her job creating a winning financial investment for the customer over the long haul.

While some of the IT giants score well in ROI and TCO, the lists are dominated by smaller companies that may benefit from their more affordable cost structure. ■

Leaders in Return on Investment

RANK	COMPANY	SCORE
1	ECRS	4.77
2	PCMS Datafit SAS	4.60 4.60
3	Microsoft	4.44
4	Sun	4.42
5	CommercialWare	4.40
6	GERS Retail Systems Jesta I.S.	4.37 4.37
7	Celerant	4.35
8	DemandTec	4.31
9	SofTechnics	4.30
10	Manugistics	4.27

Leaders in Total Cost of Ownership

RANK	COMPANY	SCORE
1	Celerant	4.77
2	GERS Retail Systems	4.70
3	ECRS PCMS Datafit	4.60 4.60
4	Microsoft	4.37
5	SAS	4.35
6	SofTechnics	4.30
7	Manugistics	4.27
8	CommercialWare	4.20
9	BlueCube CRS Retail Systems	4.10 4.10
10	Magstar	4.09

» QUALITY OF SUPPORT & SERVICE

Swift and reliable retailer response

CIOs want to know that vendors will respond with swift and reliable support and service if their IT systems encounter problems. Today, support is provided via help-desks, call centers, online portals, remote management tools and other methods. While it requires a sizeable commitment by a vendor to manage these channels, paybacks can include high levels of customer satisfaction and retention. PCMS Datafit and SAS are clearly satisfying users,

as both achieved an average respondent score of 4.60 out of a possible 5 in the Quality of Support category. Novell and NCR round out the top spots with scores of 4.55 and 4.49, respectively.

Quality of Service is typically linked to the ongoing maintenance required throughout the life-cycle of the software, including on-site and remote repairs, installations and upgrades. Celerant and ECRS tie at the top of this chart, while Novell, Sun, SAS and NCR round out the top five. ■

Leaders in Quality of Support

RANK	COMPANY	SCORE
1	PCMS Datafit SAS	4.60 4.60
2	Novell	4.55
3	NCR	4.49
4	AccessVia	4.40
5	ECRS	4.35
6	Sun	4.31
7	Lawson	4.30
8	GERS Retail Systems	4.28
9	Celerant	4.27
10	IBM Microsoft	4.26 4.26

Leaders in Quality of Service

RANK	COMPANY	SCORE
1	Celerant ECRS	4.60 4.60
2	Novell	4.55
3	Sun	4.53
4	SAS	4.48
5	NCR	4.41
6	PCMS Datafit	4.40
7	CommercialWare	4.30
8	GERS Retail Systems	4.28
9	Microsoft	4.23
10	AccessVia	4.20

» EASE OF UPGRADING

Gauging smooth transitions from start to finish

Software companies deliver beneficial services to CIOs by making the upgrading process as smooth a transition as possible. If a vendor can do this then they may win a friend for life, or at least for the life of the software. Software vendors can help the process along by having clear and detailed documentation and training, and providing good communication, support and service from start to finish.

CIOs expect to know the complete cost of an upgrade, the timeline of the installation and the business benefits the project will provide. Several other factors contribute to the success of an IT upgrade and these include: assisting the retailer in determining the company's upgrading needs, rating the cost-to-benefit ratio, reviewing the scope of the upgrade project, and calculating end-user acceptance.

CIOs expect to know the complete cost of an upgrade, the timeline of installation and the business benefits the project will provide.

Most of the vendors who achieve success with upgrades are firms that also find themselves in the top group in several other Leaderboard categories. Technology giants do not necessarily provide what retailers consider to be the best upgrade services, although several of the winners here are large firms, including Microsoft, SAS and Sun. Most of the firms here are newcomers to the top of the Ease of Upgrading category, including CommercialWare, SAS, Sun, PCMS Datafit, AccessVia, Cognos, Celerant and ECRS. In fact,

DemandTec, in the number one spot this year, and Microsoft are the only two repeats from last year's list.

While none of the companies on top of the Ease of Upgrading list received a perfect score of 5, all of the winners fared well. One might be suspicious if a vendor received a flawless score, considering the multitude of issues that arise during this type of implementation. The top scores in the chart, though, were higher than last year's, suggesting that companies are becoming more savvy and sophisticated when it comes to creating upgrade plans with clients. ■

Leaders in Ease of Upgrading

RANK	COMPANY	SCORE
1	DemandTec	4.64
2	CommercialWare Microsoft	4.40 4.40
3	SAS	4.35
4	Sun	4.31
5	PCMS Datafit	4.20
6	Tomax	4.10
7	AccessVia	4.00
8	Cognos	3.96
9	Celerant ECRS	3.93 3.93

» EASE OF INSTALLATION

Focusing on business needs and smoother rollouts

A successful installation roadmap involves people, processes and technology that work smoothly together. By working with retailers to design, test and install an application, and by creating more flexible, scalable systems, vendors help address the business needs of their clients and help ensure a smoother rollout.

Sometimes things can go awry, but it is clear that the companies appearing on this list know how to do it right and have made installation a smoother process for retailers.

Requirements for a smooth installation and scoring well in this category include creation of a clear roadmap, realistic timeline, attainable milestones and meeting expectations. Communication also is key, especially when it comes to surprises, pleasant or otherwise. In many cases, a CIO's job is on the line, or seems to be, when a major application is installed, so the importance of this category can not be underestimated. And a vendor that can excel in this area can probably find retailers that are interested in becoming new customers.

By working with retailers to design, test and install an application, and by creating more flexible, scalable systems, vendors help address the business needs of their clients and help ensure a smoother rollout.

Half of the leaders in Ease of Installation are new to the category and some are new to the Leaderboard. Novell, Celerant and Sun, ranked number two, four and five respectively, are all new to the Leaderboard. CommercialWare, BlueCube

and SAS, tied at seven, are new to the category. ECRS, Microsoft, PCMS Datafit, CRS Retail Systems, DemandTec and IBM are consistent leaders in this category and also were on the list last year.

Being named as a leader in Ease of Installation indicates that these companies have proven they have the know-how necessary to smooth the installation process for their clients — minimizing one of the major pitfalls for CIOs. ■

Leaders in Ease of Installation

RANK	COMPANY	SCORE
1	ECRS	4.77
2	Novell	4.55
3	Microsoft	4.48
4	Celerant	4.43
5	Sun	4.42
6	PCMS Datafit	4.30
7	BlueCube	4.10
	CommercialWare	4.10
	CRS Retail Systems	4.10
	SAS	4.10
8	DemandTec	4.09
9	IBM	4.01

» EASE OF INTEGRATION

Delivering functionality without disruption

A successful integration of new IT systems or upgrades can be considered accomplished when it delivers important functionalities without incurring significant disruption for the CIO and his company. When investing in new software or upgrades, retailers not only are counting on purchasing quality technology, they also are banking on the application's ability to improve their company's business processes.

Vendors who keep the CIO's priorities in mind score well in this category. CIOs want new software applications to integrate into their legacy systems with little difficulty. They also want the assurance that unanticipated staff will not have to be hired or that extensive modifications will not have to be made. Any newly integrated software also should require little or no ongoing or long-term maintenance.

Successful integration projects are accomplished when new functionalities are delivered without incurring significant disruption to a company.

Some CIOs say that 70 percent of their resources are spent on "keeping the lights on" and a great deal of this effort is devoted to problems with integration. Vendors score well in this category when they minimize the resources retailers are required to devote to maintaining or repairing integration efforts.

Coming out on top of the Ease of Integration category is PCMS Datafit, with Celerant and

Microsoft tying for second. Rounding out the top five leading vendors in Ease of Integration are Sun and DemandTec.

New to this year's top 10 list in Ease of Integration are PCMS Datafit, Celerant, Microsoft, Sun, SAS, Lawson, ProClarity, Jesta, Khimetrics and CommercialWare.

In fact, the only two vendors repeating from last year are DemandTec and ECRS. ■

Leaders in Ease of Integration

RANK	COMPANY	SCORE
1	PCMS Datafit	4.60
2	Celerant Microsoft	4.43 4.43
3	Sun	4.42
4	DemandTec	4.31
5	SAS	4.23
6	ECRS	4.18
7	Lawson	4.13
8	ProClarity	4.05
9	Jesta I.S. Khimetrics	4.03 4.03
10	CommercialWare	4.00

>> ADMINISTRATION & MAINTENANCE

Keeping things running quickly, easily and affordably

Of course you can always throw money at handling the boatload of administration and maintenance tasks that need to be accomplished in every retail IT department, but for many CIOs this is like throwing money in the garbage. In an era of increasingly tight IT budgets that show no sign of rising higher than two percent of total revenue in the retail vertical, the act of devoting significant capital and human assets to handle systems administration and maintenance duties is not considered the best allocation of available funds or staff hours.

As a result, retailers count on their software vendors for the applications they use to provide them with easy-to-use tools, interfaces, monitoring systems, diagnostics and overall management options to get the job done quickly, easily and affordably.

Vendors who score well in the Administration & Maintenance category can demonstrate excellence in an area of growing importance to CIOs.

Making this happen for retailers and, therefore, winning major points from respondents in this year's Ease of Administration and Maintenance category is Sun Microsystems, which is new to the Leaderboard Top 45 this year thanks to a renewed corporate push into retailing. Sun came out on top in this category just edging CommercialWare and PCMS Datafit.

Another newcomer to the Leaderboard Top 45 vendor list this year is Novell, which came in

fourth. Repeat winners from last year's Ease of Administration and Maintenance category include five companies: DemandTec, GERS, ECR Software, Microsoft and Datavantage.

With so much of the emphasis today shifting to efficient product lifecycle management of IT assets, vendors who score well in the Administration and Maintenance category have proven that they can demonstrate excellence in an area of growing importance to CIOs. ■

Leaders in Administration and Maintenance

RANK	COMPANY	SCORE
1	Sun	4.42
2	CommercialWare	4.40
	PCMS Datafit	4.40
3	DemandTec	4.31
4	Novell	4.30
5	GERS Retail Systems	4.28
6	Celerant	4.27
	ECRS	4.27
7	Microsoft	4.23
8	Fujitsu	4.20
	NCR	4.20
9	Datavantage	4.10
	SAS	4.10
	Tomax	4.10



» NEW AND NOTABLE

Vendors who were closest to making the Leaderboard list

afterBOT

This year afterBOT secured Smart & Final, operator of 231 warehouse-style stores in six Western states, as its newest retail client. The software vendor offers a Web-based solution called TransAccess that produces, stores and delivers digital receipts across the supply chain. The application allows retailers to integrate transaction receipts with customer data, offers Web-enabled customer access, improves the ability to target online marketing, and enables suppliers to monitor real-time POS activity.

AGILYSYS

Agilysys predicts fiscal 2006 sales growth between five and seven percent over 2005 sales of \$1.62 billion. For the six months ending September 30, 2005, sales were \$815.6 million, a nine percent increase over \$751.1 million for the same period last year. A distributor and reseller of enterprise computer technology solutions, Agilysys provides customer-centric software and services focused on the retail and hospitality markets. Symbol recently named Agilysys its "Premier Solution Partner of the Year" in recognition of outstanding sales and solutions achievements.

HYPERION

Named one of the *Fortune* 100 Best Companies to Work for in 2004, Hyperion serves global customers in 45 countries and works with a network of more than 600 partners. Hyperion generated revenues of \$703 million for the fiscal year that ended June 30, 2005. More than 10,000 customers rely on Hyperion software to provide visibility into how their businesses are performing and to help them plan and model to improve that performance. Key retail customers include Staples, North Face, Belk department stores, AutoNation and Life Time Fitness.

INOVIS

During the third quarter, Inovis signed more than 1,200 customer contracts, with more than 60 percent of those contracts representing renewals of existing customer relationships. Inovis successfully passed the

Global Data Synchronization Network (GDSN) Interoperability Certification test and was officially certified as a data pool on October 25, 2005. The vendor enables collaborative business processes and solves the B2B integration challenge for more than 20,000 customers and their trading partners. Key retail clients include: Dillard's, Sports Authority, Modell's, Burlington Coat Factory and Perry Ellis.

IT RESOURCES

Over the past year IT Resources has been focused on performance improvement and scalability. The performance improvements have come largely as a result of working closely with Microsoft to incorporate the latest technologies and methodologies to ensure the high levels of performance and scalability. The vendor also was recently accepted as a Microsoft Certified Partner. Key retail clients include: Saks Fifth Avenue, Neiman Marcus Group, Academy Sports & Outdoors, Nautica division of VF Corp. and Daffys.

NETKEY

Netkey provides an enterprise-level self-service software platform for deploying and managing customer- and employee-facing kiosk applications. The vendor says its software lowers the total cost of operation and ownership by reducing IT burden and increasing reliability and performance. Key retail clients include: Borders Books and Music, JCPenney, Saks, Target, PETCO, the U.S. Postal Service and the Army and Air Force Exchange Services (AAFES).

SHIFT4

Shift4 processed more than 13 million payment transactions representing the movement of more than \$1.1 billion in March with its payment gateway \$\$\$ On the Net. The company reports a tenfold increase in transaction numbers since 2002. \$\$\$ On The Net simplifies accounting by adding real-time enterprise-wide reporting and minimizing fraud. The company recently signed its largest single customer ever — a franchiser with more than 3,200 properties. ■

SOFTWARE LEADERBOARD

2005

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