



14TH ANNUAL

STORE SYSTEMS
STUDY 2017 RETAIL TECH
SPEND TRENDS

RACING AHEAD AT
THE *SPEED* OF
RETAIL

PRODUCED BY
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POWERING INTELLIGENT COMMERCE

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Racing Ahead at the Speed of Retail

Examining the gap between IT-fueled leaders and laggards

THERE WAS A TIME when consumer electronics was the hottest thing in retail. More than a dozen retail chains emerged throughout the country and blanketed the airwaves with incredibly annoying TV commercials. In the New York area, Crazy Eddie was dominant and promised “insane prices” and “Christmas in July.”

Crazy Eddie went bankrupt faster than most and flamed out spectacularly for one simple reason: Eddie Antar’s Brooklyn-based chain moved huge volumes of products at lightning speed but did so at a loss. There was a gap between prices and expenses and no possible scenario could get the black ink to overtake the trajectory of the red.

A similar situation is occurring in the area of tech investment. Several key leaders in the retail industry (i.e. Amazon and Walmart) are racing ahead of the pack by fueling their growth through IT investments unmatched by mainstream retailers, who we find are fueling their plans with traditional levels of IT investment.

The result is a gap emerging between IT-fueled leaders and laggards. According to data tracked in the 2017 *RIS*/IHL Store Systems Study it is difficult to see how the red line of technology debt accruing for laggards can overtake the black line of IT-fueled growth by leaders.

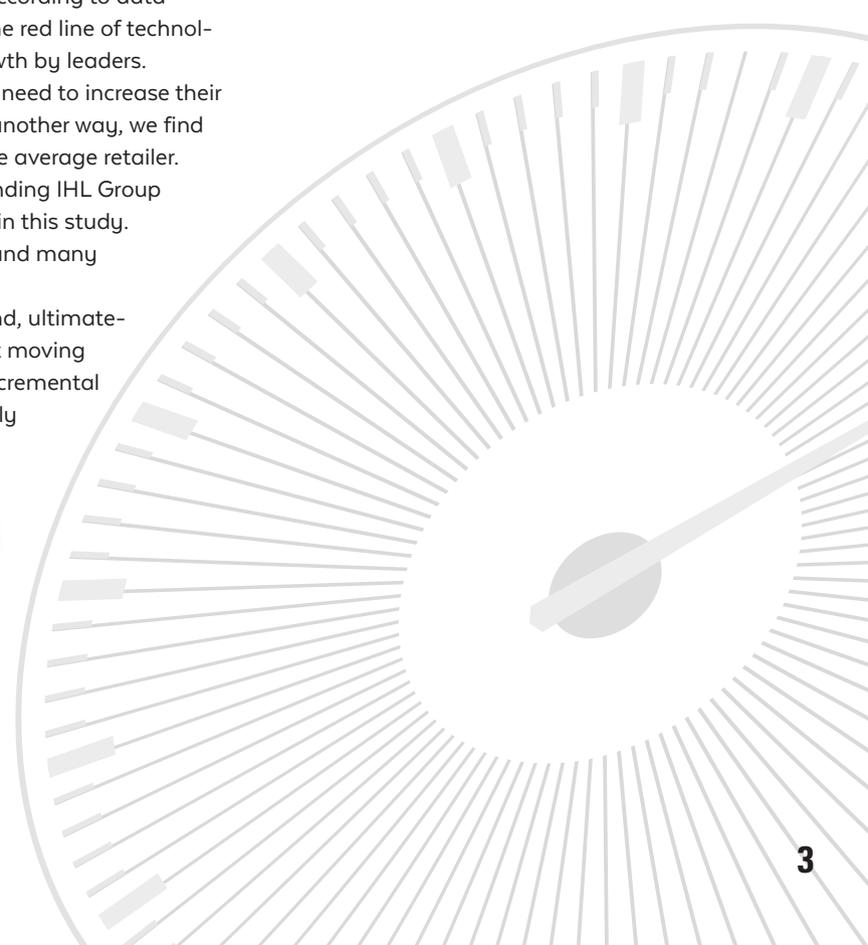
When we asked about this situation in the study we found that retailers need to increase their IT budgets by 65% to catch up to Amazon and Walmart. Sorting the data another way, we find that retail leaders are increasing their IT spending by 232% compared to the average retailer.

I am thrilled that this is the 14th year *RIS* has partnered with the outstanding IHL Group research firm to present the expert analysis and benchmark data featured in this study. I am also thrilled to be looking forward to developing a solid plan for 2017 and many years to come.

Crazy Eddie Antar never developed a solid plan, went out of business and, ultimately, went to jail. The question we all have to answer is: Can we catch a target moving at a faster speed than we are chasing? Yes, we can, but not by applying incremental strategies and tech investments. More of both will be required to successfully compete at the speed of modern retail.



Joe Skorupa
Editorial Director
RIS News



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Leaving the Channel Mindset Behind

Uncovering major trends about tech spending, the impact of Amazon, and why EMV refuses to die

BY LEE HOLMAN AND GREG BUZEK

THIS STUDY marks the 14th year that RIS and IHL Group have collaborated on the definitive study that examines coming trends in technological advances that impact retail operations, growth plans, budgets and technology purchases for 2017 and beyond.

Last year, we noted that retailers are gradually leaving behind their traditional “channel mindset” and instead are embracing transformative technologies that will ultimately enable them to streamline offerings and services to their customers regardless of channel. We call this strategy Unified Commerce, and it has become a major component of this study.

Major Trends for 2017

Retailers plan to increase their overall IT spending for the coming year with Enterprise IT spending expected to grow 4.5%

(about even with last year’s 4.6%) and Store IT spending expected to grow 4.7% (up from last year’s 3.9%). Since 2015 (its lowest point since 2008), the Store IT spending number has grown.

We can draw some other key conclusions from the data in the study. These include the following:

- Retailers are expecting an average 5.2% sales growth for 2017. This is good news in light of recent anemic numbers.
- Retailers expect to continue to expand their store count by 4.9% overall and expect to conduct 4.2% more store remodels than they did in 2016.
- A large cohort of retailers is planning a new POS purchase decision in the next 12 months with 32% targeting software and 25% hardware. These numbers are slightly up from last year’s study.



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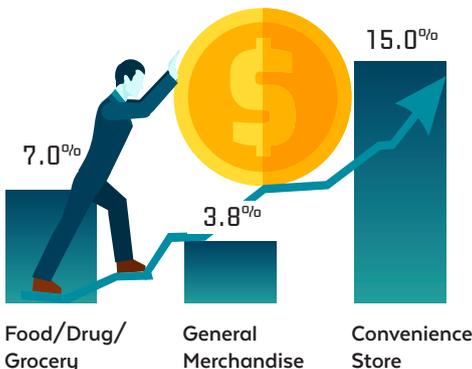
IHL Group is an independent business-consulting organization headquartered in Franklin, TN. It specializes in business consulting, professional and technology referral, market analysis and business planning for retailers and technology companies that focus on the retail industry. Anyone who wants more detailed data and analysis about this study can contact IHL Group at www.ihlservices.com.

- More than a third (34%) of retailers say their software spending in 2017 will be on cloud-based solutions, which is up from 26% last year. Among the solutions moving quickest to cloud are e-commerce (47%), sales/marketing (46%) and business intelligence (32%).

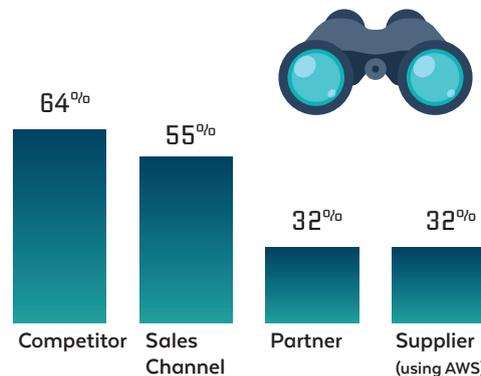
What’s Up with EMV?

Wasn’t retail supposed to be EMV compliant already? Unfortunately, EMV payment technology is still a huge part of the retailer’s security budget and it is continuing to ex-

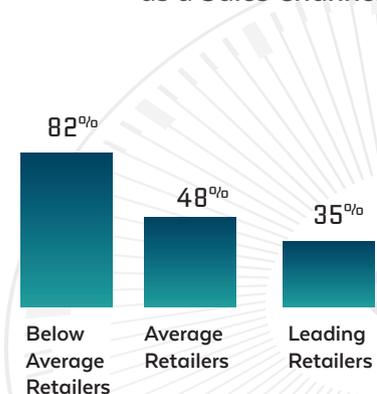
EMV Spending Increase



How Retailers View Amazon



How Retailers View Amazon as a Sales Channel



EXECUTIVE SUMMARY

pand. A big part of the reason is the backlog of solution and vendor certification. This is a huge problem for retailers as many banks are billing retailers for chargebacks that are not appropriate. In fact, we know of several retailers that are actually storing credit card numbers again for the sole purpose of auditing their own banks against the chargebacks. And this is taking money away from real security.

In the area of security spending (independent of EMV), retailers expect to see a 3.7% increase over last year, with general merchandise (GMS) and food/drug/grocery (FDC) retailers expecting increases of 4.2% and 3.2%, respectively.

While these are respectable increases they are overshadowed by spending planned for EMV. Last year 59% of retailers said they had tried and failed to meet the October 2015 deadline and 38% blamed card issuers as the bottleneck. Only 18% of retailers claimed to have made the deadline.

Now, a year later (when all but fuel retailers are supposed to be EMV compliant), retailers say they plan to increase their 2017 spending on EMV by an average of 4.8%. FDC retailers lead the pack with a 7.0% in-

crease. This is mainly due to the 15% increase anticipated by convenience-store retailers, who have a deadline in 2020 related to their fuel dispensers.

What the data doesn't show is the massive loss of productivity caused by the EMV mandate, slower transaction speeds, and retailers having to deal with fraudulent chargebacks by card issuers. Also, while fraud has decreased in stores since the deadline has passed it has increased 325% for online fraud where EMV technology is meaningless.

The Amazon Tiger

According to analyst reports more than 66 million households in the U.S. have an Amazon Prime membership. The website has become not just an online marketplace for new and used merchandise, but now 52% of all e-commerce searches start there (Google is at 30%). And during Black Friday and Cyber Week 2016, Amazon accounted for 30% of all online revenue.

Amazon's competitive strengths are manifold, but one that retailers should pay particular attention to is the amount it spends on innovation. Currently, Amazon

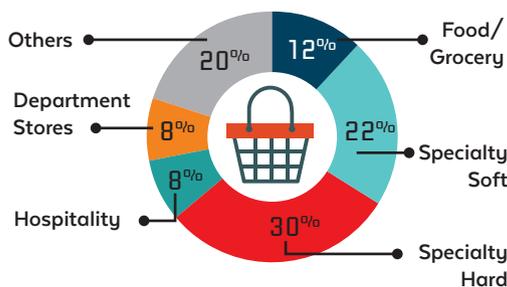
spends more annually on innovation than 22 of the top North American retailers combined, including Home Depot, Lowes, Kroger, Target, Best Buy, Macys and Staples.

We asked retailers how they viewed Amazon, either as competitor, sales channel, partner and/or supplier. Retailers are still in the process of trying to figure this out. A plurality of retailers view Amazon as a competitor (64%) and as a sales channel (55%), while nearly a third (32%) see them as a partner or supplier (for Amazon Web Services).

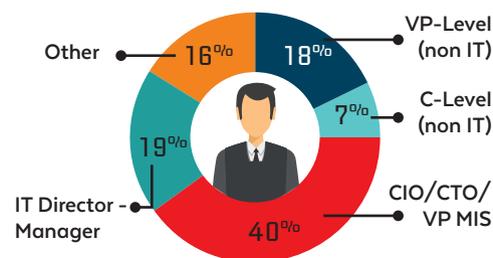
Digging deeper into the data, we find more than a third (36%) who view Amazon as a competitor are also using it as a supplier for Amazon Web Services (AWS). In effect, they are paying Amazon for the privilege of competing against them. We also found that only 12% of those with the highest expectations for revenue growth for 2017 use AWS.

Note that this report is a summary of the overall data. The more detailed study is available on the IHL website titled "Amazon Has a TIGIR by the Tail - Retail's Technology Innovation Gap". Those interested in these or other details can learn more about the complete study at www.ihlservices.com.

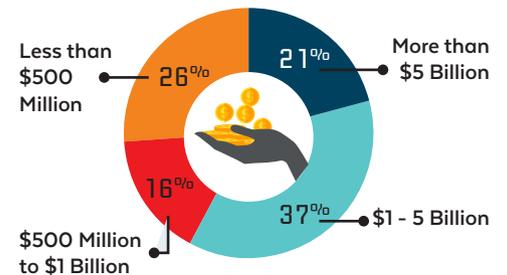
Retail Segments



Job Title



Retail Revenue Tier



Methodology

In this year's study 58% of the responses came from retailers with more than \$1 billion in annual revenue such as Gap, Staples, Dillard's, Sears, Rooms to Go, AAFES, Royal Farms, H.E.Butt, Rutter's and 99¢ Only. Of those, 21% had revenue in excess of \$5 billion. We define these respondents as Tier 1 retailers. Tier 2 retailers are defined as having annual revenue ranging from \$500 million to \$1 billion and they were well represented with 16% of responses. Another 32% consisted of retailers with less than \$500 million in revenue, which we call Tier 3.

Following a Master Plan

Retailers make steady gains in deploying core systems that enable Unified Commerce capabilities

A **UNIFIED COMMERCE** strategy in retail is based on the idea that regardless of what sales channels a retailer has in its business model there are two things that need to happen to optimize sales opportunities at cost-effective levels and deliver customer satisfaction:

1. Foundational systems, such as order management, inventory management and a customer database, have to be established with a single version of the truth capability on top of which are layered core retail business applications, such as merchandise management, supply chain, and marketing.

2. Retailer presentation to the customer in all sales channels needs to appear seamless and without evidence of back-end systems barriers that cause confusion to shoppers as they seek fast and convenient services.

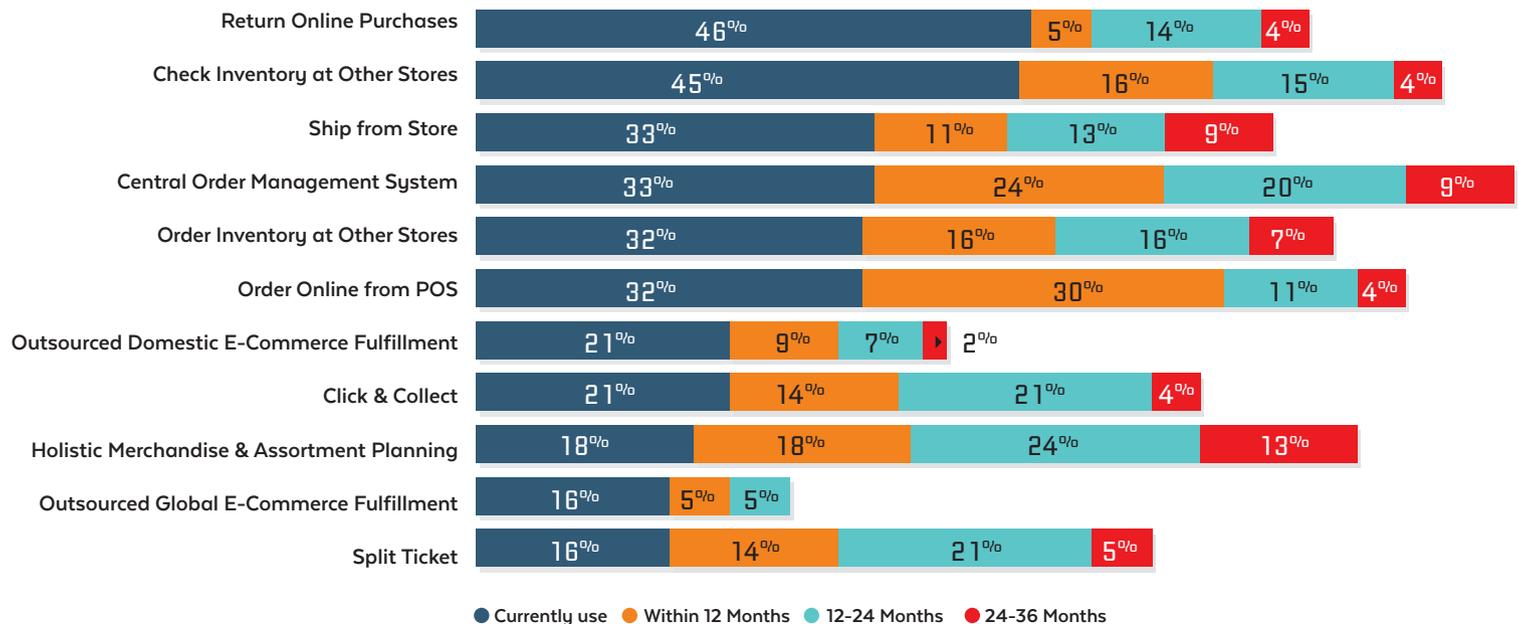
The key foundational system we have identified as being essential to a Unified Commerce strategy is a central order management system, which serves as a hub with spokes that touch many, if not most, of the other front-end and back-end functions

One-third of retailers currently have order management technology deployed and two-thirds of these are Tier I retailers, who

have annual revenue greater than \$1 billion. An advanced order management system is flexible enough to allow a retailer's choice of transaction interfaces (i.e. POS, mobile POS, e-Commerce, etc.) as well as solutions for merchandising, supply chain, BI/analytics and sales/marketing. Correctly deployed, the central order management system becomes an essential element in delivering one version of the truth to back-end systems and a seamless experience to the customer.

Among the essential Unified Commerce capabilities highlighted in the study, nearly half of retailers (46%) say they currently

Status of Unified Commerce Technologies and Systems





The Key Piece of the Unified Commerce Puzzle is a central order management system, which connects to most front-end and back-end functions

allow the return of purchases to the store regardless of the channel they were purchased in or fulfilled from. Retailers have worked hard to get this capability in place and those that haven't recognize how much work they will have to do to achieve it — only 5% say they plan to deploy it in 2017.

Next on the Unified Commerce function list is the ability to check inventory at other stores, where 45% of retailers are up to date. Nearly a third (32%) say that not only can they view inventory in other stores but they can also complete a purchase order of these products remotely.

The combination of managing customer returns in-store from any channel and enabling inventory visibility across all channels is a hallmark of an advanced level of maturity in today's retail marketplace. They

are essential Unified Commerce capabilities and required if a retailer wants to support endless-aisle sales even if a product is out of stock in one particular store. A major benefit of this capability is that it helps drive customers into brick-and-mortar stores and, once they are there, it ensures they won't leave disappointed without having accomplished what they made the trip for, which is to purchase a product.

Other capabilities that help retailers transform their stores through Unified Commerce capabilities include:

- Ship from store, where 33% of retailers say they currently possess this ability and another 11% say they plan to deploy it within a year. The benefit to the customer is that these products are closer in proximity and therefore require less shipping time. The

benefit to the retailer is lowering shipping costs and better inventory turns in stores, but only if inventory counts are accurate enough to get it right.

- Order online from the POS, where 32% of retailers say they currently possess this ability and another 30% expect to have it within a year.

- Rounding out the top Unified Commerce capabilities we tracked are click and collect (21%), holistic planning (18%), and splitting tickets between channels (16%).

Deeper into Unified Commerce

We took a quick look at how retailers who had several of these capabilities up and running to see how they were performing relative to the average performance of all respondents. Two findings jumped off the page.

Retailers who are already using a central order management system are expecting to see 2017 revenue grow 3.8% more than average. For retailers using split-ticket capabilities the numbers are even more pronounced as they are expecting revenue growth of 19.2% more in 2017 than the average.

One last word about Unified Commerce capabilities, in particular e-commerce fulfillment, a complex function that is beyond the capacity of many retailers to achieve using in-house resources. This is especially true if it involves international fulfillment.

We wanted to see if retailers thought it was worthwhile to use third-party providers of these services, which can occur in such a way that it is invisible to the customer. We discovered that 21% of retailers currently use third-party providers for domestic e-commerce fulfillment (rising to 30% next year) and the numbers for international e-commerce fulfillment are 16% today and then jumping up additional 5% next year.

Retailers who are already using a central order management system are expecting to see 2017 revenue grow 3.8% more than the average growth for all retailers.

Technology Drives Revenue

Analyzing IT spending by technologies, retail segments and the impact it has on revenue growth

IN SPITE of the sluggish economic environment over the past several years, retailers continue to increase their store counts and remodeling plans. This year, the biggest growth segment in store counts is general merchandise stores (GMS), which is planning a 4.6% increase for 2016. This is driven by the specialty soft goods segment, which expects to see a 6.2% increase in 2017. Food/drug/convenience (FDC) retailers plan a 4.4% expansion to their store count.

When it comes to remodels, FDC plans a 5.8% increase and GMS a 3.7% gain. A deeper look into retail segments reveals that convenience stores plan to increase their store count by 7.8%. For remodels, convenience stores will increase their activity by 7.0% over 2016 and food/grocery retailers will increase 5.8%.

be available to fund the transformation process currently underway in retail to convert channel-specific, siloed systems into a Unified Commerce system that encompasses “one version of the truth” for products, customers, transactions and fulfillment.

This transformation requires significant initial investment, but once it is up and running it should enable retailers to drive growth and achieve ROI through the reduction in costs for maintaining siloed systems that require complex and unreliable integration schemes to remain operational.

Retailers that have plans for increasing their store count in 2017 obviously need to increase their store IT spending and the data backs this up. They have a store IT planned

The average increase for retailers who plan an increase is 7.7%, which is up considerably from 2016’s 5.5% rise.



Strong IT Spending in 2017

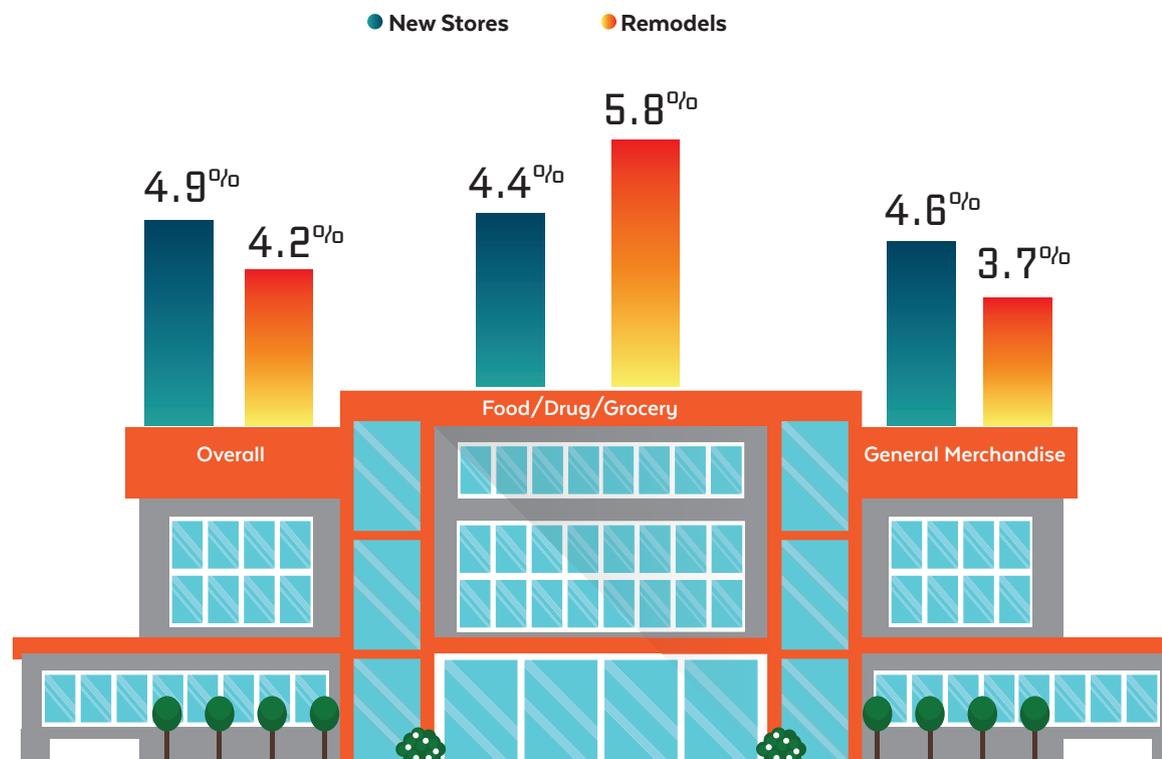
Enterprise IT spending is expected to rise 4.5% in 2017 after a bump of 4.6% last year. Food/grocery retailers expect a jump of 6.4%, and soft goods retailers plan a 5.8% increase over 2016.

Store IT spending, which will rise 4.7%, exceeds enterprise IT spending for only the third time since 2010. This could be an indication that retailers have been busy getting their enterprise systems in shape for delivering Unified Commerce capabilities and now want to support their operations in the store.

Standard maintenance costs for existing systems, which are 40%, comprise the largest share of the IT budget in 2017. Another 41% will be used for upgrading and integrating existing hardware and software systems in the enterprise.

This leaves only 19% of the IT budget to

New Store Count and Remodel Growth Plans



spending rate that is 26% above the average. Enterprise IT spending for this group of retailers is also well above average at 40%.

These numbers demonstrate that capital spending for store expansion and capital spending for technology go hand in hand. The flip side is also valid: retailers who anticipate a net decrease in store count for 2017 do not expect to see much of an increase in IT spending – a meager 0.4% increase for both enterprise IT spending and store IT investment.

Looking a bit closer at the data, we find that 61% of respondents plan to increase their enterprise IT spending next year, which is down from 72% last year. For store IT spending, 67% plan an increase in 2017, which is up slightly from 66% last year.

The average increase for retailers who plan an increase is 7.7%, which is up considerably from last year's 5.5%. The key purchase areas for these retailers are mobile devices for managers (39%), POS software (32%) and POS hardware (29%). Despite solid increases for the majority of retailers, 25% say their store IT spending will be flat in 2017.

Does IT Drive Revenue?

As we did with Unified Commerce analysis, we took a quick look at how well retailers perform when they are up-to-date with key technologies. Looking at POS client hardware (base system) we find that revenue growth expectations for 2016 are 105% above the average and are 46% above the expected average for 2017.

Applying this same kind of analysis to other technologies we find that retailers who are up-to-date exceeded the average revenue expectations for 2016 in five of the seven key technologies from 5.7% to 114.3%. For 2017 it is six of seven technologies and the numbers range from 2.0% to 46%.

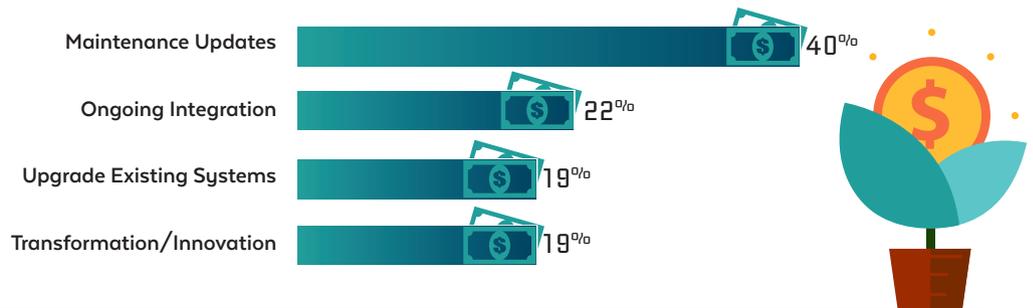
Age of Cloud Technology

It is safe to say that last year's study revealed something we knew was happening, but we didn't know the true extent, i.e. it is

IT Spending Growth by Retail Tier



IT Spending by Category



time to recognize that retailers have bought into the positive benefits of using cloud-based technology and, for enterprise solutions, the cloud has truly come of age.

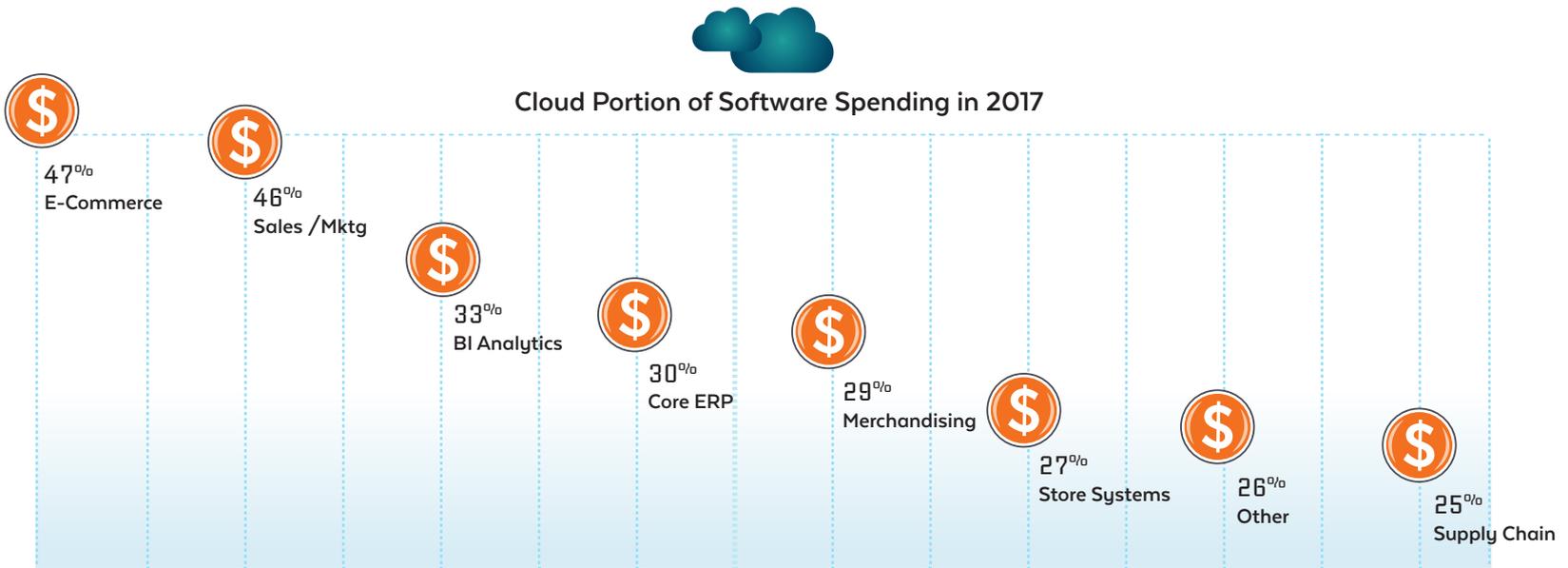
Last year, we found that 26% of retailers planned software spending was aimed at the cloud. For 2017, the number has grown to 34%. This corresponds to a \$528 million increase in cloud spending in the North American retail market.

The top solutions include e-commerce platform (47%, which is down a little from last year), sales/marketing (46%, which is up from 38%), and BI/analytics (32%), which is up a bit year-over-year. The biggest jump came from core ERP, which grew from 10% last year to 30% this year. In terms of retail segment differences, the overall cloud investment figures for general merchandise (GMS) and food/drug/convenience (FDC)

retailers are 33% and 31% respectively. Key areas for GMS are e-commerce (51% of planned software spending), sales/marketing (47%) and core ERP (31%). For FDC the breakouts include e-commerce and merchandising (both 39%), sales/marketing (35%) and BI/analytics (34%).

Given the increasing competition that most retailers are seeing from giants like Amazon and Walmart, we asked retailers what level of IT spending they would need to make to effectively compete with Amazon and Walmart. The answers were striking. Grocery retailers say their IT budget needs to grow 87% just for this year alone to effectively compete with Amazon and Walmart. For GMS retailers the figure is 55%.

Overall, the tech budget growth required is reported to be 65%. We refer to this gap as TIGIR – the Technology Innovation Gap in



Retail. This is an area IHL explores in great detail and the implications are enormous.

We also looked at retailer sales growth in three break outs — above average, average, and below average — and how they are planning their IT budgets. We asked these questions for the current year (2016) and next year (2017). The way we phrased the question allows us to cut the data into slices that we labeled “Leaders” (those expecting a revenue growth above average), “Average” (Average sales growth) and “Below Average” (Below average sales growth).

Retail Leaders, we find, are increasing their enterprise IT spending at a rate that is 232% faster than Average retailers and

their store IT spending is 148% faster. This is a major finding in the study because it indicates that Leaders are not only spending more on IT today, they are also increasing their lead over Average and Below Average retailers heading into 2017

Top Priorities for 2017

As we have done in previous studies, we asked retailers what their top store priorities are for the coming year. Once again, retailers say their highest priority is improving CRM/loyalty functionality, a perennial leader in this category that has ranked in the top five on our list for each of the past 11 years. This year 61% of retailers say they have

new investment plans for CRM and loyalty systems. We believe the reason for this high level of investment is that retailers can’t effectively use their existing shopper loyalty profiles in the store, and just as importantly, they are embracing a single-version-of-the-truth database that will include customer data across all channels.

We believe retailers recognize that most of the problems they are trying to solve with their current CRM capabilities will be seriously reduced (if not eliminated entirely) once their back-end issues are resolved.

Single transaction engine technology, which was chosen by 48% of retailers as a top priority, is tightly coupled to an enterprise order management system and together they serve as the foundation for creating a Unified Commerce strategy in a retail organization. A single transaction engine will also be tied to inventory visibility technology (chosen by 48% as a top priority) and lowering supply chain costs (39%) especially fulfillment across channels.

Store-level BI/analytics held steady year-over-year at 35%. Mobility for associates was a top-five priority in each of the last six years, but this year it dropped down the list. The first wave of in-store mobility has hit a peak and now becomes less of a priority and more of a standard tool in the retailer tool box. .

Transformational IT Spending Increase Needed to Compete with Amazon & Walmart



Pivoting to POS

Without a major upgrade legacy POS can become a stumbling block during a Unified Commerce transformation

THIS YEAR'S data shows steady purchase intentions for POS compared to last year. As retailers work on developing an advanced order management system and a consolidated customer database, they recognize that the legacy POS system they have been struggling to keep operational for years must be modernized if they want to take full advantage of all the other work they are doing in their Unified Commerce overhaul.

For traditional POS systems we find that 32% of retailers say they expect to make a

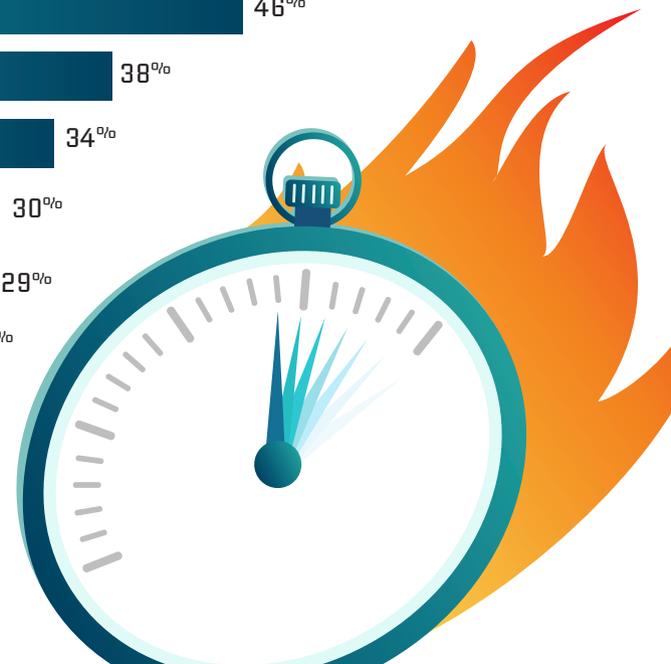
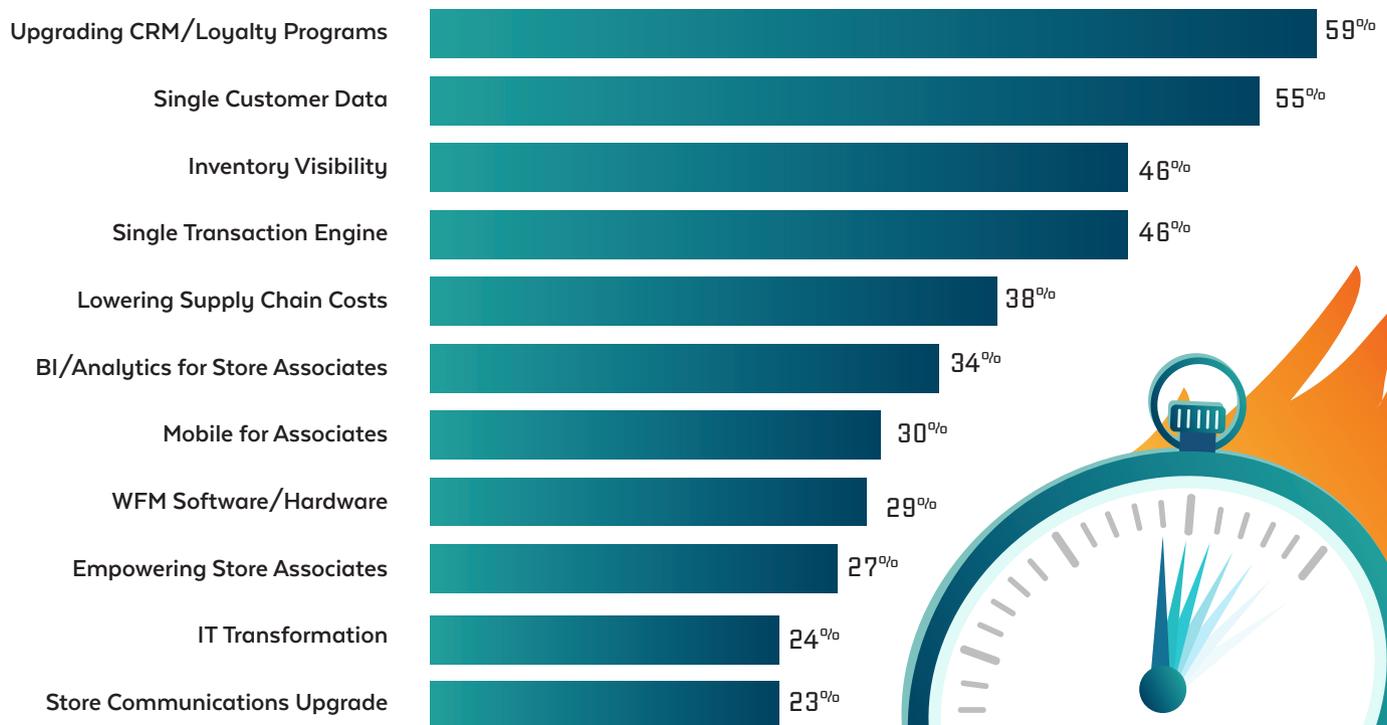
POS software purchase in 2017 (last year it was 31%) and 25% expect to make a POS hardware purchase (it was 23% last year).

For mobile POS we find that a quarter (25%) of retailers say they will be investing in mobile POS in 2017, which is down from 30% last year. This confirms that most retailers believe that mobile POS is thought of as an add-on as opposed to being a replacement for traditional POS.

Leading all segments for POS hardware purchase intentions for 2017 are mass mer-

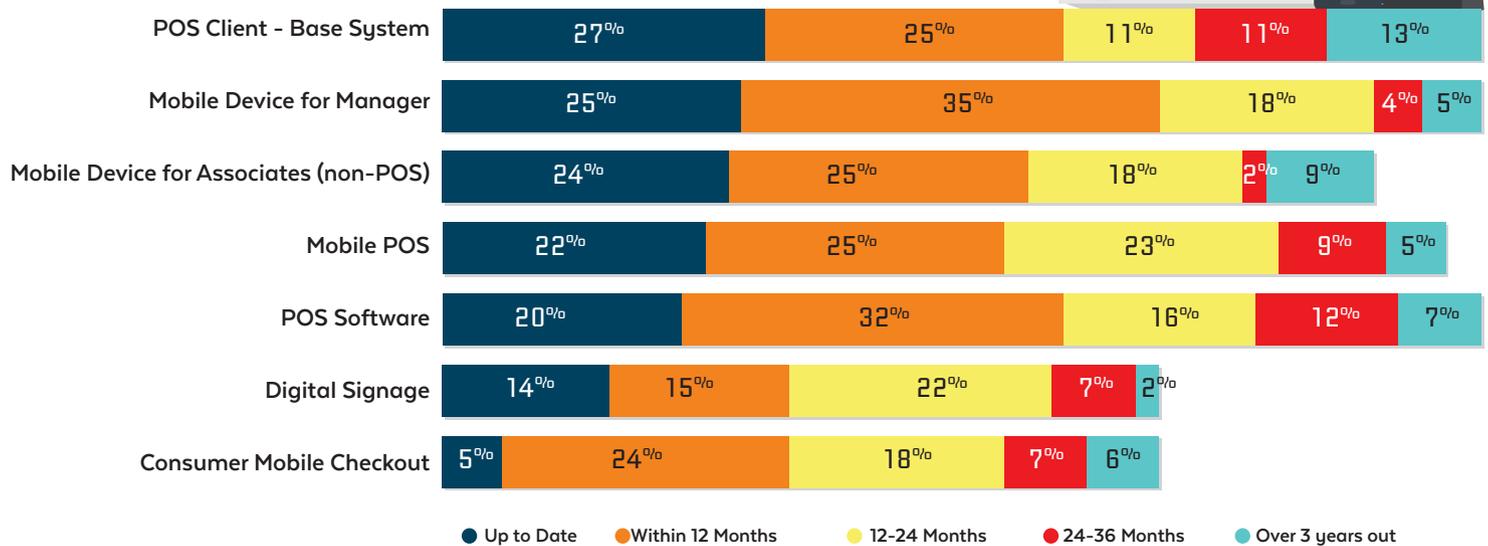
The strongest POS software purchase plans for 2017 are convenience stores and department stores at 50% each.

Top Store Priorities for 2017





Status of Key Store Systems Technologies



chants/warehouse clubs (40%) followed by department stores (33%). The food/grocery segment reports just an 11% increase in POS hardware investments, which is normal due to the fact that grocers hold onto their POS hardware two to three times longer than other retail segments.

The strongest POS software purchase plans for 2017 are convenience stores and department stores at 50% each. Specialty retailers have historically taken the lead with mobile POS deployments, but this year they take a back seat to convenience stores and to mass merchants, all of whom show at least a 40% expectation to make a mobile POS purchase in 2017.

There will be some significant spending this year on non-POS mobile devices. Managers are the highest priority with 35% of retailers saying they expect to purchase mobile

Three out of the top four heaviest future store IT investment areas are in mobile — mobile devices for store managers (35%), mobile POS (25%) and mobile devices for associates (25%).

devices for them. One quarter (25%) expect to purchase mobile devices for associates. Of these, specialty retailers are taking the lead with 52% making plans to purchase devices for managers and 45% targeting devices for associates.

Digital signage deployment plans are down from last year with only 15% of retailers saying it is in their IT budget for 2017.



Innovator's Dilemma

Emerging technologies push their way into the mainstream even as some retailers take a wait-and-see approach

IT IS SAID there is nothing new under the sun, but the past handful of years have seen the development of smart watches, 3-D printing, Visual Light Communication, drones and a host of other cutting-edge technologies. In this section we focus on technologies that have retail significance as well as the pursuit of innovation itself.

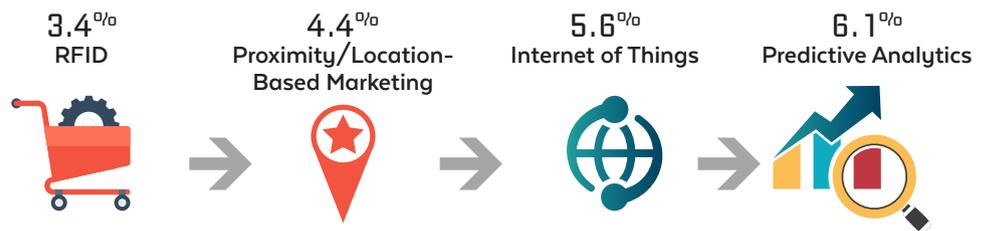
Leading the pack of innovative technologies is predictive analytics, an area where retailers say they will increase spending by 6.1% in 2017. Nearly two thirds (64%) of retailers say they plan an increase in predictive analytics with the largest blocks coming from specialty hard goods and soft goods.

The Internet of Things (IoT) is another area of growth, but is facing headwinds as retailers continue to work on Unified Commerce projects. Retailers plan to increase spending on IoT by 5.6% over 2016 levels. Most of this investment will be in the form of lab efforts and pilots. We expect IoT to be a huge opportunity in retail, but only after the Unified Commerce work is complete and proven technologies are in place.

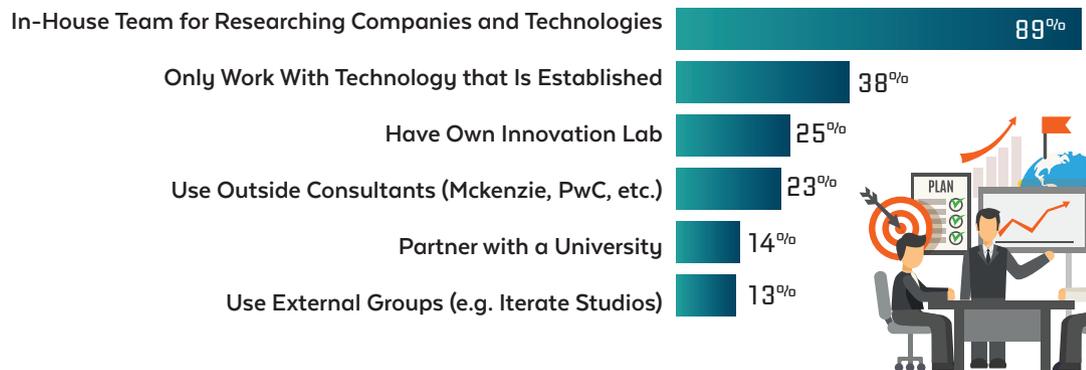
This year, 52% of retailers plan to increase their spending on proximity/location-based marketing (i.e. beacons), but less aggressively — rising 4.4% in 2017 compared to 5.0% last year. Once foundational technologies are in place we expect this area to grow significantly to enable personalized marketing.

While Macy's, Gamestop and Target are racing ahead with RFID it is also true that this is one technology that has suffered from a series of false starts. Now that the technology has become more refined we see that retailers are focusing on item-level RFID to track in-store inventory. We find that retailers expect to increase spending on RFID an

Increase in Spending on Emerging Technologies



Paths to Innovation



average of 3.4% in 2017. As expected, apparel retailers (specialty soft goods and department stores) lead the way with a planned increase of 7.9%.

Item-level RFID is the key enabling technology that will make ship-from-store work without disappointing customers due to inaccurate store inventory counts. However, it will need to be integrated into Unified Commerce systems to get the full benefit of the technology.

This year we asked retailers how they discover and develop new technologies and there doesn't seem to be a consensus on the process. The vast majority (89%) place heavy reliance on their own in-house team and a quarter (25%) have their own innovation lab. But 38% say they really don't innovate at all and only work with technologies already established in the market, and only 14% say they partner with a university to help them innovate.

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STORE SYSTEMS STUDY 2017

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Cegid is a leading player in the digital transformation of companies and a provider of cloud services and enterprise software to fashion, beauty, luxury goods and specialty retailers worldwide. Cegid focuses in omnichannel retailing, including POS, inventory and replenishment, clienteling, CRM and loyalty, ecommerce, and BI - all within a single, centralized database that works in real-time. More information: www.cegid.com/us



Cybera is a leading provider of secure, software-defined WAN (SD-WAN) solutions to many of the world's top enterprises. The company provides a simple solution to the growing complexity that distributed enterprises face at remote locations by uniquely automating application centric security and performance in the cloud, providing greater customer choice through best-of-breed partnerships, and integrated services that accelerate time-to-market. By virtualizing security functions in the fabric of the network, Cybera offers advanced enterprise-grade security for any location, no matter how remote. For more information: http://www.cybera.com/?utm_source=RIS&utm_medium=CSPromo&utm_campaign=PA%202017Q1%20RIS%20FIHL%20Study



HP Security - Data Security is a leader in data-centric security, safeguarding data throughout its entire lifecycle - at rest, in motion, in use - across the cloud, on-premise and mobile environments with continuous protection. For more information: voltage.com/breach or hpe.com/software/datasecurity



Manhattan Associates makes commerce-ready supply chains that bring all points of commerce together so you're ready to sell and ready to execute. Across the store, through your network or from your fulfillment center, we design, build and deliver market-leading solutions that support both top-line growth and bottom-line profitability. By converging front-end sales with back-end supply chain execution, our software, platform technology and unmatched experience help our customers get commerce ready—and ready to reap the rewards of the omni-channel marketplace. For more information: www.manh.com

