

# The Forrester Wave™: Retail Planning, Q1 2020

## The 12 Providers That Matter Most And How They Stack Up

by George Lawrie

March 12, 2020

### Why Read This Report

In our 20-criterion evaluation of retail planning providers, we identified the 12 most significant ones — Aptos, Blue Yonder, Cognizant, Infor, Logility, Manthan, Mi9 Retail, Oracle, RELEX Solutions, SAP, SAS, and Symphony RetailAI — and researched, analyzed, and scored them. This report shows how each provider measures up and helps CIO professionals select the right one for their needs.

### Key Takeaways

#### **Oracle, SAS, And RELEX Solutions Lead The Pack**

Forrester's research uncovered a market in which Oracle, SAS, RELEX Solutions, SAP, and Blue Yonder are Leaders; Mi9 Retail, Symphony RetailAI, Logility, Aptos, Manthan, and Cognizant are Strong Performers; and Infor is a Contender.

#### **Architecture, Assortment, And Continuous Planning Are Key Differentiators**

Vendors are moving their solutions to the cloud to embed artificial intelligence and machine learning more effectively in improved application architecture. Ultimately, architecture, assortment optimization, and integration of next best actions into continuous planning dictate which providers lead the pack. Vendors that can apply their machine learning engines to optimize channel and store cluster assortments and to integrate execution to continuous planning will position themselves to successfully deliver these crucial functions to their customers.

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by [George Lawrie](#)  
with [Fiona Swerdlow](#) and Sara Sjoblom  
March 12, 2020

### Table Of Contents

- 2 Cloud-Native Machine Learning Drives Retail Planning At Scale
- 3 Evaluation Summary
- 7 Vendor Offerings
- 8 Vendor Profiles
  - Leaders
  - Strong Performers
  - Contenders
- 13 Evaluation Overview
  - Vendor Inclusion Criteria
- 14 Supplemental Material

### Related Research Documents

- [The Forrester Wave™: Retail Planning, Q3 2017](#)
- [Now Tech: Retail Planning, Q4 2019](#)
- [Retail Moves From Seasonal To Continuous Planning](#)



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**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

## Cloud-Native Machine Learning Drives Retail Planning At Scale

Customers expect retailers and their suppliers to offer greater variety, strong price competitiveness, more personalization, and more innovation than ever before. The scale of computational challenge to source and transport, merchandise, and promote merchandise that delights demanding customers long ago overwhelmed even the wisest merchants assisted by the keenest spreadsheet wizard planners. Our first retail planning Forrester Wave™ in 2014 described retailers' frustration with planning demand, assortment, allocation, and promotions with a series of spreadsheets. Retail planning vendors continued the spreadsheet metaphor in retail planning application user interfaces, but they started to inject statistical rigor into retail decisions.<sup>1</sup> By 2017 vendors were helping retailers to integrate all of the decisions in a merchandise planning cycle — for example, recognizing the impact on supply chain planned promotions.<sup>2</sup>

However, consuming the multiple real-time data streams that characterize multichannel retail in 2020 can cause very real “indigestion” for statistically rigorous retail planning. This is why vendors now embed machine learning and artificial intelligence in their solutions. Retail planning customers should therefore look for providers that:

- › **Integrate all the stages of the planning cycle.** Few retailers or brands have the luxury to plan a handful of seasonal collections each year, supported with a leisurely sequence of financial plans, assortment plans, store plans, pricing and marketing plans, and a supply chain afterthought. Instead, they now are more likely to be continuously working on an assortment refresh every two weeks or even more frequently.<sup>3</sup> Retail planning solutions distinguish themselves by validating, for example, planned promotions or prices against the merchandise financial plan and against transportation or display capacity. The point of the integration is to empower executives to explore policies to maximize objectives such as revenue or margin growth or customer lifetime value, subject to constraints such as space, working capital, or logistics capacity.
- › **Integrate planning and execution.** In retail, as in military conflict, no plan survives first contact with reality. Vendors distinguish themselves by offering continuous planning and next best action prompts, which allows retail executives to tune their plans to changing circumstances through the planning period and to take corrective actions as their performance deviates from the plan.
- › **Apply quantitative techniques to assortment planning.** Given the breadth of choice available to each customer online, the hardest problem for a retailer is curating an assortment that will be compelling to each of its customer segments while incurring reasonable inventory holding and transportation costs. For most retailers, this scale of problem goes well beyond unaided human judgment.<sup>4</sup> Retail planning vendors distinguish themselves by embedding advanced techniques to infer customer preferences based on their observed willingness to pay for specific features, characteristics, or attributes.

**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

## Evaluation Summary

The Forrester Wave evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our [“Now Tech: Retail Planning, Q4 2019”](#) report.

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

**FIGURE 1** Forrester Wave™: Retail Planning, Q1 2020

# THE FORRESTER WAVE™

## Retail Planning

Q1 2020



**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

**FIGURE 2** Forrester Wave™: Retail Planning Scorecard, Q1 2020

	Forrester's weighting	Aptos	Blue Yonder	Cognizant	Infor	Logility	Manthan
<b>Current offering</b>	50%	2.84	3.46	2.39	2.96	2.53	2.78
Application characteristics	17%	3.00	3.00	3.00	3.10	4.00	4.00
Segmentation and clustering	17%	3.00	4.00	3.00	2.00	3.00	3.00
Demand management	17%	3.00	3.10	2.00	4.90	3.00	2.00
Inventory planning and operations effectiveness	17%	3.00	3.68	2.32	3.66	3.00	1.68
Agile merchandising	16%	2.00	4.00	3.00	3.00	2.00	3.00
References	16%	3.00	3.00	1.00	1.00	0.00	3.00
<b>Strategy</b>	50%	3.00	3.66	3.00	1.66	3.66	3.00
Product vision	33%	3.00	5.00	3.00	3.00	3.00	3.00
Execution roadmap	33%	3.00	3.00	3.00	1.00	5.00	3.00
Innovation roadmap	34%	3.00	3.00	3.00	1.00	3.00	3.00
<b>Market presence</b>	0%	4.90	4.00	4.80	3.90	3.90	2.90
Revenue	5%	3.00	3.00	1.00	3.00	3.00	3.00
Customers	50%	5.00	5.00	5.00	3.00	3.00	1.00
Number of SKUs in largest live assortment	45%	5.00	3.00	5.00	5.00	5.00	5.00

All scores are based on a scale of 0 (weak) to 5 (strong).

**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

**FIGURE 2** Forrester Wave™: Retail Planning Scorecard, Q1 2020 (Cont.)

	Forrester's weighting	Mi9 Retail	Oracle	RELEX Solutions	SAP	SAS	Symphony RetailAI
<b>Current offering</b>	50%	3.27	3.91	4.53	3.60	3.79	3.30
Application characteristics	17%	3.00	3.00	4.90	3.90	5.00	4.90
Segmentation and clustering	17%	3.00	5.00	4.00	4.00	4.00	4.00
Demand management	17%	3.00	4.10	4.00	4.90	4.90	4.00
Inventory planning and operations effectiveness	17%	3.66	4.32	4.34	3.66	3.66	3.66
Agile merchandising	16%	4.00	4.00	5.00	4.00	5.00	3.00
References	16%	3.00	3.00	5.00	1.00	0.00	0.00
<b>Strategy</b>	50%	3.66	5.00	3.66	4.34	5.00	3.00
Product vision	33%	3.00	5.00	3.00	3.00	5.00	3.00
Execution roadmap	33%	5.00	5.00	5.00	5.00	5.00	3.00
Innovation roadmap	34%	3.00	5.00	3.00	5.00	5.00	3.00
<b>Market presence</b>	0%	1.10	4.10	4.00	4.10	4.90	5.00
Revenue	5%	3.00	5.00	3.00	5.00	3.00	5.00
Customers	50%	1.00	5.00	5.00	5.00	5.00	5.00
Number of SKUs in largest live assortment	45%	1.00	3.00	3.00	3.00	5.00	5.00

All scores are based on a scale of 0 (weak) to 5 (strong).

**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

## Vendor Offerings

Forrester included 12 vendors in this assessment: Aptos, Blue Yonder, Cognizant, Infor, Logility, Manthan, Mi9 Retail, Oracle, RELEX Solutions, SAP, SAS, and Symphony RetailAI (see Figure 3).

**FIGURE 3** Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Aptos	Aptos Merchandise Lifecycle Management	9.2
Blue Yonder	Blue Yonder Retail Planning Suite	N/A
Cognizant	Cognizant Softvision Suite	19.07
Infor	Infor Retail Demand Management	14.8
Logility	Logility Digital Planning Platform	1904
Manthan	Manthan Merchandise Analytics	9.0
Mi9 Retail	Mi9 Demand Management Suite	N/A
Oracle	Oracle Retail Planning and Optimization	N/A
RELEX Solutions	RELEX Living Retail Platform	7.0
SAP	SAP Omnichannel Planning Suite	4.0
SAS	SAS Intelligent Planning SAS Customer Intelligence 360	N/A
Symphony RetailAI	SymphonyAI Category Planning and Management Suite	N/A



**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

## Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

### Leaders

› **Oracle must add to proven international capabilities, innovation to inspire customers.**

Redwood Shores-headquartered Oracle serves retail planning clients like Bata, Helzberg Diamonds, Home Choice, Podrzhka, and Stein Mart. It has deep international experience in integrated retail planning. Forrester estimates that Oracle generates more than \$50 million in annual revenue from retail planning. It has an above-par vision for retail planning, together with an above-par execution roadmap and innovation roadmap. Oracle must deliver on its promises because its references, though favorable, eagerly anticipate modernization upgrades.

In our evaluation, Oracle demonstrated above-par capabilities in customer segmentation, store-cluster-sensitive assortment planning, merchandise financial planning, planning for operational efficiency, and initial order, replenishment, and allocation. It has potential for improvement in campaign planning. Oracle is a best fit for retailers, distributors, and brands looking for integrated retail planning with international functionality and global support.

› **SAS offers above-par vision and functionality, but it needs to nurture its references.**

Headquartered in Cary, North Carolina, SAS Institute is one of the world's largest private companies, with estimated annual revenues in 2018 of \$3.27 billion.<sup>5</sup> It builds solutions across multiple industries, including retail planning and customer insight applications, on its proprietary visual, predictive, and streaming analytics platform, SAS Viya. SAS has an above-par vision for retail planning, together with above-par execution and innovation roadmaps. The company also offers an above-par delivery model and partner ecosystem. SAS clients include 1-800-Flowers, Belk, Levi Strauss, Ulta, and Very.

In our evaluation, SAS proved its ability to tackle hard optimization issues by demonstrating above-par application architecture, assortment optimization, and aggregate demand management. It has potential to improve customer segmentation and merchandise financial planning. SAS needs to nurture its references on the newest version of its Retail Planning solution. At the time of evaluation, SAS didn't have sufficient references using the newly released version of SAS Intelligent Planning to respond to Forrester's request for references. SAS is a best fit for brands and retailers that need the security of a large vendor with a massive ecosystem of implementers, but that also value the ability to: 1) extend retail planning applications using a proven platform to deploy sophisticated applications, without disrupting on premise infrastructure, and 2) try the solution before they buy.

› **RELEX offers autonomous retailing capabilities but needs to reposition for soft lines.** With more than 800 employees and offices in the US, UK, Germany, Italy, Spain, France, Sweden, Norway, Denmark, and Hong Kong. Helsinki-based RELEX provides its cloud-native Living Retail Platform, which delivers autonomous, adaptive retail planning and execution capabilities, to more

**The Forrester Wave™: Retail Planning, Q1 2020**

## The 12 Providers That Matter Most And How They Stack Up

than 250 customers worldwide. Clients include Ahold Delhaize USA, PetSmart, and WH Smith in the UK. RELEX has an above-par execution roadmap. It presented an innovation roadmap and a solution vision that are broadly on par with those of other vendors in this Forrester Wave.

In our evaluation, RELEX offered above-par architecture, customer segmentation, replenishment and allocation, planning within constraints, and aggregate demand management. In 2016 it acquired Galleria, a leading provider of microspace management, critical to grocery, convenience, and other hard goods retailers. Its support for cluster- or segment-specific assortment and merchandise financial planning was on par with the market. RELEX Solutions appeals most to international grocery and hard goods retailers looking for sophisticated planning and execution, taking account of constraints such as pack size and display space. It is less appealing for fashion or apparel retailers that focus on merchandise financial planning.

› **SAP's patient investment in retail planning is paying off, but it must coach references.**

Walldorf-headquartered SAP's vision is broadly on par with other vendors in the Forrester Wave, and execution and innovation roadmaps are above par. SAP generates more than \$50 million in revenues annually from its retail planning applications. Clients include US convenience chain Wawa, UK home improvement chain B&Q, and Coop Switzerland. SAP's retail planning clients are spread across the globe. Forrester estimates 10% are in the Asia Pacific region, 20% in Latin America, 40% in EMEA, and 30% in North America.

In our evaluation SAP offered above-par deployment options, application architecture, aggregate demand management, channel and store cluster marketing, customer segmentation, continuous planning, and next best action. Aggregate assortment and merchandise financial planning were on par with the market. Two out of SAP's three nominated references responded to our survey. SAP's omnichannel planning suite appeals to international retailers with some expertise in SAP HANA analytics and platform that are looking to capitalize on the clickstream, basket, and other data that SAP collects in its SAP Customer Activity Repository.

- › **Blue Yonder has above-par vision; now it must match execution to its vision.** In August 2018 JDA acquired Blue Yonder, a Scottsdale, Arizona, headquartered company dedicated to exploiting AI in retail. During the Forrester Wave process, JDA Software rebranded to Blue Yonder and rebranded its platform and software-as-a-service (SaaS) based products Blue Yonder Luminare. The company understands that consumer experience is heavily dependent on supply chain experience. This insight drives its above-par vision for retail planning. Its execution and innovation roadmaps were broadly on par with those of other vendors in our Forrester Wave. Blue Yonder is most famous for its platform powering the autonomous supply chain. We collected responses from four Blue Yonder users, three of which rated the solution and company as "excellent" and one as "good." Some clients in the public domain include German supermarket chain Kaufland and US-based L.L.Bean.

**The Forrester Wave™: Retail Planning, Q1 2020**

## The 12 Providers That Matter Most And How They Stack Up

Blue Yonder was generally on par with the vendors evaluated in terms of current capabilities, but it demonstrated above-par customer segmentation and store clustering, merchandise financial planning, and planning within constraints. Forrester believes that 60% of Blue Yonder deployments are in North America, 30% in EMEA, and 5% each in Asia Pacific and Latin America. It has forged creative partnerships with companies like dunnhumby. Blue Yonder appeals most to retailers and brands that look for international application of AI to solve thorny retail problems, such as optimizing customer experience at PetSmart or lifecycle pricing and markdown in fast fashion chain ORSAY.

**Strong Performers**

- › **Mi9 Retail's above-par replenishment and allocation need local implementation.** Miami-based Mi9 Retail has a solution vision and innovation roadmap that are on par with other vendors in the Forrester Wave and an execution roadmap that was above par. Mi9 delivers enterprise applications to automate retailers' plan-to-sell processes. Its customer base includes retailers like Abercrombie & Fitch and brands like Estée Lauder. The company acquired retail planning functionality when it bought JustEnough in January 2018.

Mi9 demonstrated above-par functionality in initial order replenishment and allocation. Otherwise, its functionality was on par with other vendors in the Forrester Wave. Mi9 user references were favorable, though they warned of the need to connect directly to the Mi9 product team in order to plan implementation around the product roadmap. The company needs to invest in project management resources that can help its users make the best implementation decisions to ensure that configuration for their unique requirements fits around the unfolding product roadmap. Mi9 is most appealing to retailers and brands looking for sophisticated initial order, replenishment, and allocation functionality.

- › **Symphony RetailAI is a grocery expert, and it should improve campaign planning.** Dallas-headquartered Symphony RetailAI has a solution vision, execution, and innovation roadmaps that are broadly comparable to those of other vendors in the Forrester Wave. Symphony generates more than \$50 million per year from retail planning applications software. It incorporated in January 2018, combining supply chain and CPG grocery applications from Symphony GOLD with customer insight applications from Symphony EYC. In 2019 Symphony released CINDE, an AI platform with natural language interface that processes billions of customer transactions to recommend timely, intelligent actions. While none of Symphony's nominated references responded to Forrester's written reference requests, the company's clients include Dollar General, Longo's, Southeastern Grocers, and Spartan Nash.

Symphony demonstrated an above-par application architecture, product to service cost ratio, and channel- and store-cluster-sensitive assortment planning. It also demonstrated above-par demand forecasting and planning for operational efficiency. In other respects, its capabilities were broadly similar to those of the other vendors in the Forrester Wave. Symphony is a best fit for everyday

**The Forrester Wave™: Retail Planning, Q1 2020**

## The 12 Providers That Matter Most And How They Stack Up

low-pricing retail and wholesale distributors, consumer packaged goods, and food and beverage brands planning very large combinations of stock keeping units (SKUs) and locations, in which merchants look for AI to prompt and assist them in their decisions.

- › **Logility is a proven platform for volume planning, must boost in-season capabilities.** Atlanta-based Logility demonstrated an above-par execution roadmap and evidence of the ability to plan high volumes of SKU and store or location combinations. It demonstrated above-par productization in the sense of requiring a relatively low ratio to services to product license in typical projects. It demonstrated below-par capabilities in recommending next best actions.

Logility's clients include North American and European retailers such as Group Dynamite, Hunkemoller, and Tuesday Morning. Logility is a best fit for North American and European apparel and footwear retailers and brands.

- › **Aptos must finish cloud-native replatforming, then improve continuous planning.** Atlanta-headquartered Aptos has solution vision, execution, and innovation roadmaps that were on par with those of the other vendors on the Forrester Wave. It offers store, commerce order management, and customer relationship solutions as well as product lifecycle management integrated with retail planning. Aptos retail planning users include Chinese apparel retailer Fast Fish and iconic British brand Mulberry.

Aptos is in the process of migrating to a new microservices-based, cloud-native architecture, Aptos ONE. Forrester believes that once the migration is complete, Aptos has the potential to differentiate itself based on architecture. Aptos's experience is largely in seasonal footwear and apparel retail. Its continuous planning capabilities are accordingly somewhat below par with those of other vendors for both continuous and seasonal merchandise expertise. Aptos is most suitable for multinational, multichannel apparel and footwear retailers.

- › **Manthan helps retailers that are unwilling to commit to autonomous planning.** Manthan is a retail analytics and AI company with headquarters in Bangalore, India. The company's vision, execution, and innovation roadmaps are broadly on par with those of the other vendors in the Forrester Wave. Manthan's deployment option, application architecture, customer segmentation and store clustering, and channel- and store-cluster-sensitive assortment planning are on par with other vendors, as well. Manthan received on-par ratings for its agile merchandising capabilities, including continuous planning and next best action. Forrester estimates its revenues for retail planning at between \$11 million and \$50 million per year. Manthan provides retail planning functions to organizations like Manitoba Liquor and Lotteries, US casual apparel chain rue21, and Emirati retail conglomerate Majid Al Futtaim.

Manthan demonstrated an above-par ratio of services to product license revenue. It also received above-par scores for number of SKUs in largest live assortment. It scored below par on aggregate demand management, initial order, replenishment, allocation, and planning for operational efficiency. Manthan will appeal most to retailers and CPG manufacturers that aim to exploit its advanced analytics to make data-driven decisions.

**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

- › **Cognizant needs global references for the complete planning and execution cycle.** Cognizant is a Nasdaq 100 company with headquarters in Teaneck, New Jersey. Its vision and roadmaps were on par with those of the other vendors in our evaluation. It provides IT services, consulting, and operations services. Cognizant acquired its retail planning expertise when it bought Softvision in October 2018. Forrester believes that 85% of revenues for retail planning are from North America.

Cognizant demonstrated on-par capabilities for all criteria except aggregate demand and planning within constraints, which were below par. Its references were favorable but appeared to have implemented only selected solution elements. Cognizant will appeal to retailers that value extensive consulting and systems integration capabilities and, most importantly, merchandise planning solutions.

**Contenders**

- › **Infor must deliver its vision and nurture its references.** Infor is a multinational enterprise software company with headquarters in New York. Its cloud-native retail demand management forms part of Infor CloudSuite Retail. Infor's vision for retail planning is broadly on par with the other vendors in the Forrester Wave, but its execution roadmap and innovation roadmap are below par. Forrester estimates that 10% of Infor retail planning clients are in the Asia Pacific region, 45% of its retail planning clients are in North America, and 45% are in EMEA. Clients include JD Sports, Macy's, and Walgreens. Infor acquired retail planning capabilities from Predictix in January 2016. On February 4, 2020, Koch Industries announced the intention to acquire Infor.

Infor demonstrated above-par deployment options, aggregate demand forecast, campaign planning, initial order, replenishment, and allocation. It fell below par for customer segmentation and store clustering. Although it has a comparatively similar number of customers compared to other vendors in the Forrester Wave, only one of Infor's selected users responded to our reference survey. This client expressed positive feelings about Infor upgrade processes and user accessibility. Infor appeals most to retailers planning very high volumes of merchandise, for example in pharmacy chains. Additionally, Infor appeals to variety and department stores because of its strength in demand management, initial order, replenishment, and allocation. Its wide range of deployment options will appeal to retailers and brands considering deployment of one or more services on a hyperscale infrastructure such as Google.

**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

## Evaluation Overview

We evaluated vendors against 20 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include application architecture, customer segmentation and store clustering, aggregate demand management, assortment optimization, initial and replenishment order recommendations, inventory allocation recommendation, continuous planning, and next best action.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision, execution roadmap, and innovation roadmap.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's annual revenue, number of customers, and number of SKUs in the largest assortment the vendor plans.

### Vendor Inclusion Criteria

Forrester included 12 vendors in the assessment: Aptos, Blue Yonder, Cognizant, Infor, Logility, Manthan, Mi9 Retail, Oracle, RELEX Solutions, SAP, SAS, and Symphony RetailAI. Each of these vendors has:

- › **A complete retail planning offering.** Our "[Now Tech: Retail Planning, Q4 2019](#)" enabled Forrester to identify vendors that offer a complete set of retail planning and execution functionality, from financial planning through assortment, inventory and space planning to pricing promotion and next best action prompts.
- › **Live clients in Forrester's typical Fortune 500 enterprise readership.** We looked for vendors with clients like Wawa and Dollar General or Adidas and Mulberry.
- › **Retail planning revenues of at least \$11 million annually.** We used annual revenue as a proxy for experience and durability, reasoning that vendors need a threshold revenue to continue to invest and compete.

## Supplemental Material

### Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting

**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

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point and encourage readers to adapt the weightings to fit their individual needs.

## The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.



**The Forrester Wave™: Retail Planning, Q1 2020**

The 12 Providers That Matter Most And How They Stack Up

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by December 2019 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

### Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

### Endnotes

- <sup>1</sup> Merchants have reached the limit of retail planning by instinct and art, and they need to apply some science to scale their judgment. But to let go, they've got to trust and use the best tools available. Vendors providing transparent predictive analytics and test and personalized learn capabilities can most successfully help meet the challenge. See the Forrester report "[The Forrester Wave™: Retail Planning Solutions, Q2 2014.](#)"
- <sup>2</sup> As the range of merchandise proliferates, the number of channels and customer segments expands, and product lifecycles accelerate, traditional spreadsheet or business intelligence (BI) retail planning is giving way to integrated retail planning. Improved ability to integrate subvertical planning process and actionable insight will dictate which providers will lead the pack. See the Forrester report "[The Forrester Wave™: Retail Planning, Q3 2017.](#)"
- <sup>3</sup> Traditional periodic or seasonal retail planning is under pressure in a world of agile trade, where more physical assets are shared and where third-party logistics or fourth-party logistics capabilities relieve merchants from the need to bet on a whole season's merchandise in order to minimize transportation costs. See the Forrester report "[Retail Moves From Seasonal To Continuous Planning.](#)"
- <sup>4</sup> Mintel's global new product database tracks more than 33,000 new product introductions each month, analyzing everything about them from ingredients to packaging. See the Forrester report "[Reinvent Product Innovation To Revive Your Brand.](#)"
- <sup>5</sup> Source: "Analytics in Action: 2018-2019 Corporate Overview," SAS, 2018 (<https://www.sas.com/content/dam/SAS/documents/corporate-collateral/annual-report/company-overview-annual-report.pdf>).



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