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The Forrester Wave™: Order Management Hubs, Q3 2010

by Roy C. Wildeman and Craig Le Clair
for Business Process Professionals

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Oracle EBS And Sterling Commerce Lead, With SAP, Oracle Siebel, And Microsoft Close Behind

by **Roy C. Wildeman and Craig Le Clair**

with Connie Moore and Andrew Magarie

EXECUTIVE SUMMARY

In Forrester's 112-criteria evaluation of order management hub (OMH) vendors, Oracle E-Business Suite and Sterling Commerce led the pack among the Leaders because of their ability to support both end-to-end ordering processes as well as order hub infrastructure. Meanwhile, SAP, Oracle Siebel, and Microsoft earned their Leader designations because of their strong support for end-to-end order management processes and forward-looking product strategies. Manhattan Associates, Amdocs, and JDA placed in the Strong Performer category for their specialization in targeted markets. The solutions evaluated in this Forrester Wave represent the top options to consider in shortlist discussions when seeking to invest in an order management hub solution.

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NOTES & RESOURCES

Forrester conducted demo-based product evaluations from April 2010 to June 2010 and interviewed eight vendor and 25 user companies including: Amdocs, JDA, Manhattan Associates, Microsoft, Oracle (E-Business Suite and Siebel), SAP, and Sterling Commerce.

Related Research Documents

["IBM To Acquire Sterling Commerce"](#)

June 2, 2010

["20 Steps To Delivering The Perfect Order"](#)

March 2, 2009

["The Forrester Wave™: Order Management Hubs, Q4 2008"](#)

November 14, 2008

ORDER MANAGEMENT HUBS ADDRESS UNPRECEDENTED PROCESS COMPLEXITY

The efficient and effective delivery of sales orders that consistently meet customer, supplier, and partner expectations is more intricate, difficult, and complex today than ever before. To keep your customers happy and reap the benefits of higher retention, today's order management software must:¹

- **Support multiple channels.** Customers expect their end-to-end ordering interactions — from placing an order, viewing an order status, changing an order, initiating a return, and completing payment — to stay consistent across all channels and all scenarios. And although the Web and mobile devices represent newer “must-have” channels, most organizations must also support longstanding requirements for in-person, call center, fax, and machine-to-machine interfaces.
- **Offer intricate combinations of products and services.** While most ordering systems have been historically designed to support products, services such as aftermarket warranties, maintenance agreements, and installations help firms boost sales margins and often eclipse products in overall sales. Many enterprises must now bundle products with these related services and require advanced quoting, contract, and integrated delivery and service scheduling functionality.
- **Orchestrate advanced fulfillment processes.** With the unprecedented extent of globalization and outsourcing inherent in today's supply chains, leading organizations are moving beyond single-site functionality like warehouse management or production available-to-promise (ATP) dating. Instead, they now focus on multisite visibility and coordination capabilities like distributed order brokering, automated drop-ship processing, and supply disruption management.

Select Industries Drive Advanced OMH Solution Requirements

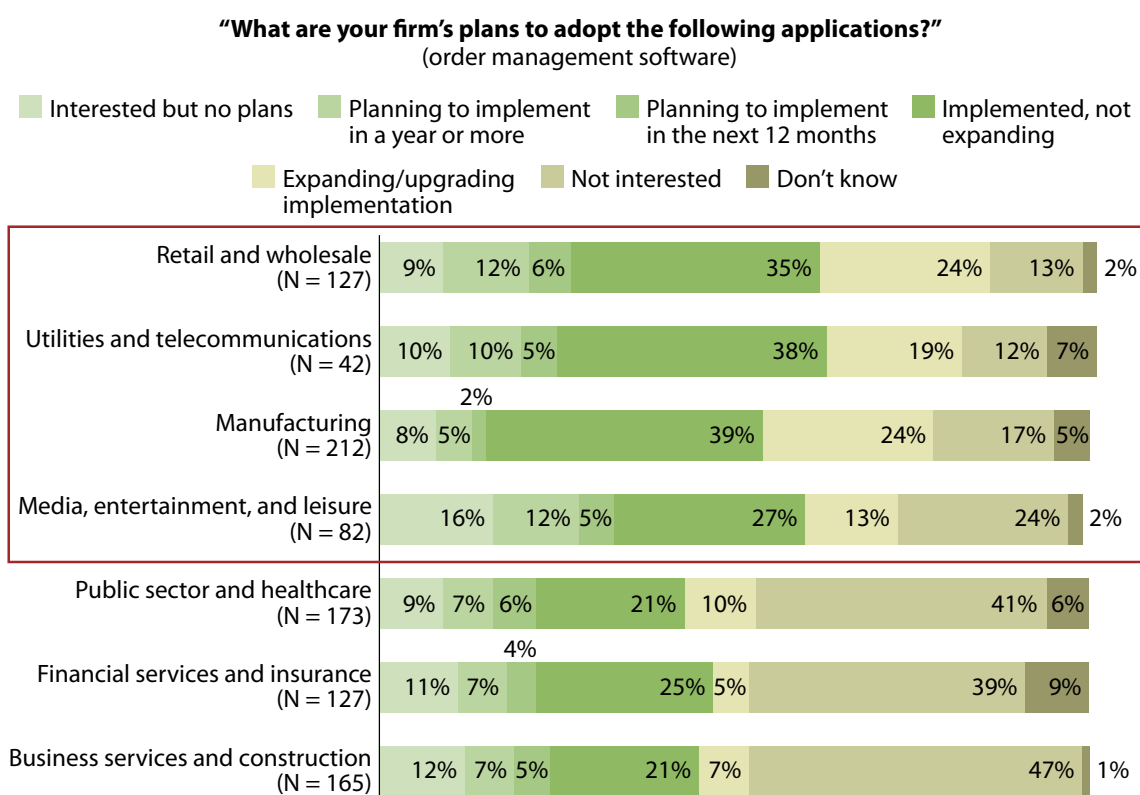
Across the overall market, four industries demand leading-edge capabilities that, as a result, act to reshape the nature of the order management hubs (OMH) application category (see Figure 1). The four industries are:

- **Retail and wholesale.** Beyond the obvious need to deliver consistent ordering experience across channels and scenarios, large-scale retail businesses must also deliver orders while optimizing inventory efficiency and tapping low-cost sourcing networks to stay competitive.
- **Telecommunications.** Communications service providers (CSPs) seek to differentiate themselves from their competition by delivering newly bundled or niche product offerings that match specific customer needs and are available ahead of the competition. The result? Staggering combinatorial complexity as these enterprises look to evaluate and repurpose thousands of existing product components across lines of business in the context of pricing, regulatory, and cross-channel ordering requirements.
- **Manufacturing.** In both the discrete-based and process-based sectors, global manufacturing enterprises must manage ordering processes across multitiered sales channels, complex product

and services configurations, and multifaceted fulfillment flows that span corporate divisions, supplier partners, subcontract manufacturers, and distribution partners.

- **Media and entertainment.** Media publishers are undergoing dramatic transformation with consumers of traditional print media moving to digital content and devices. While “game-winning” delivery and business models still remain uncertain, companies must start to re-evaluate the implications for how they will capture, bundle, and bill customers for these new digital offerings in the future.

Figure 1 A Few Key Industries Drive Market Requirements And Growth For Leading OMH Solutions



Base: 928 North American and European enterprise and SMB software executives

Source: Enterprise And SMB Software Survey, North America And Europe, Q4 2009

57204

Source: Forrester Research, Inc.

ORDER MANAGEMENT HUBS EVALUATION OVERVIEW

To assess the state of the OMH market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of the top on-premises order management hub vendors.

Evaluation Criteria Emphasize End-To-End Ordering Processes, Data, And Infrastructure

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 112 criteria, which we grouped into three high-level buckets:

- **Current offering.** We conducted an in-depth evaluation of the five major components of order management functionality. Order hub infrastructure components such as inbound order channels, presentation framework, core application foundation, and data and infrastructure represented 50% of the weighting, while business process modules composed the other 50% of the weighting for current offering.
- **Strategy.** For strategy, we assessed product strategy, corporate and go-to-market strategy, financial resources, and ownership costs. Product strategy composed the bulk of the overall score with 50% of the weighting.
- **Market presence.** Our criteria for market presence principally reflect the installed base for this application category. Subfactors that composed the main score included number of customers on all versions of the software, number of customers on maintenance, number of live customers on the current software version, amount of license revenue, revenue growth, and global customer base.

Evaluated Vendors Support Enterprise Requirements In An On-Premises Deployment Model

Forrester initially invited eight vendors with nine solutions for the assessment. The invited vendors were: Amdocs, Infor, JDA, Manhattan Associates, Microsoft, Oracle (E-Business Suite and Siebel), SAP, and Sterling Commerce. Upon mutual agreement, Infor declined participation. Each of the vendors included in our evaluation has (see Figure 2):

- **A broad business process footprint.** Key requirements included basic out-of-the-box support for opportunity-to-order-capture, order-capture-to-order-fulfillment, order-fulfillment-to-returns, and order-completion-to-cash business processes.
- **A deep investment in order hub infrastructure.** Vendors selected have placed and will continue to place significant investment in order hub infrastructure components, such as inbound order channels, presentation framework, core application foundation, and data and infrastructure.
- **Support for market-leading industries.** While this evaluation remained industry-agnostic, we focused on vendors that offer core support for one or more of the industries that lead the market in terms of order management complexity and corresponding functional requirements (see Figure 3).

- **Target customers with 500-plus employees.** All the vendors in this evaluation target customers with a company size of more than 500 employees.
- **Support for on-premises deployment.** While opportunities existed to evaluate hosted, systems-integrator-led, and SaaS options, this evaluation focused on traditional on-premises deployed solutions.
- **Mindshare among the Forrester client base.** The vendors we evaluated are frequently mentioned in Forrester client inquiries, shortlists, consulting projects, and case studies.

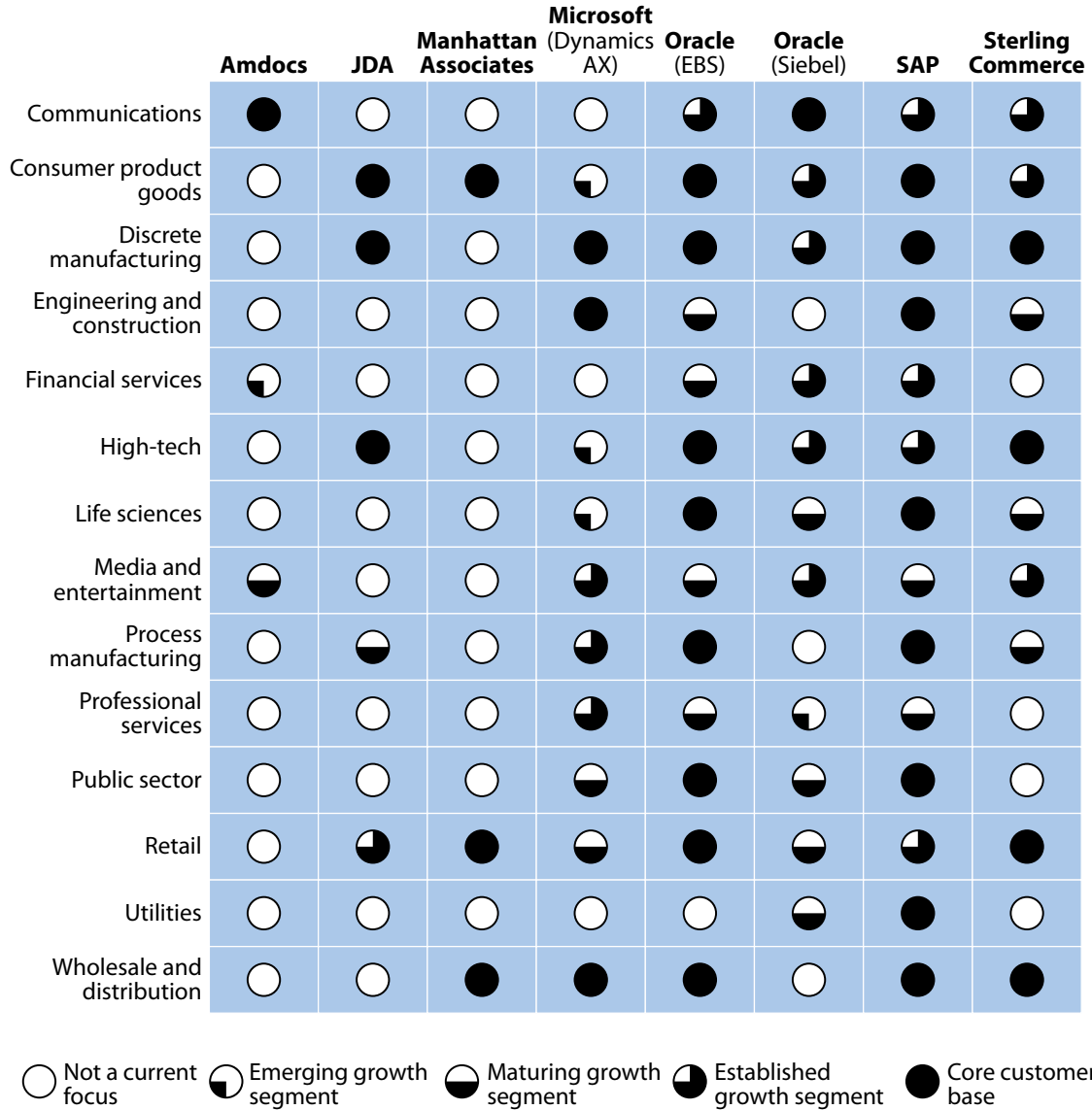
Figure 2 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Amdocs	Amdocs CES Ordering	v8	January 2010
JDA	Order Management	6.3	August 2009
Manhattan Associates	Distributed Order Management/Reverse Logistics Management	2010	February 2010
Microsoft	Microsoft Dynamics AX 2009	2009	June 2008
Oracle	Oracle E-Business Suite	12.1.2	December 2009
Oracle	Oracle Siebel	8.1.1.2	February 2010
SAP	SAP Business Suite	7.0	May 2009
Sterling Commerce	Sterling Order Management	9.0	April 2010

Vendor selection criteria

Does the vendor have a broad business process footprint?
Does the vendor have a deep investment in order hub infrastructure?
Does the vendor provide support for market-leading industries?
Does the vendor target customers with 500-plus employees?
Does the vendor provide support for on-premises deployment?
Does the vendor have mindshare among the Forrester client base?

Figure 3 Evaluated Vendors' Current Industry Footprint



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Source: Forrester Research, Inc.

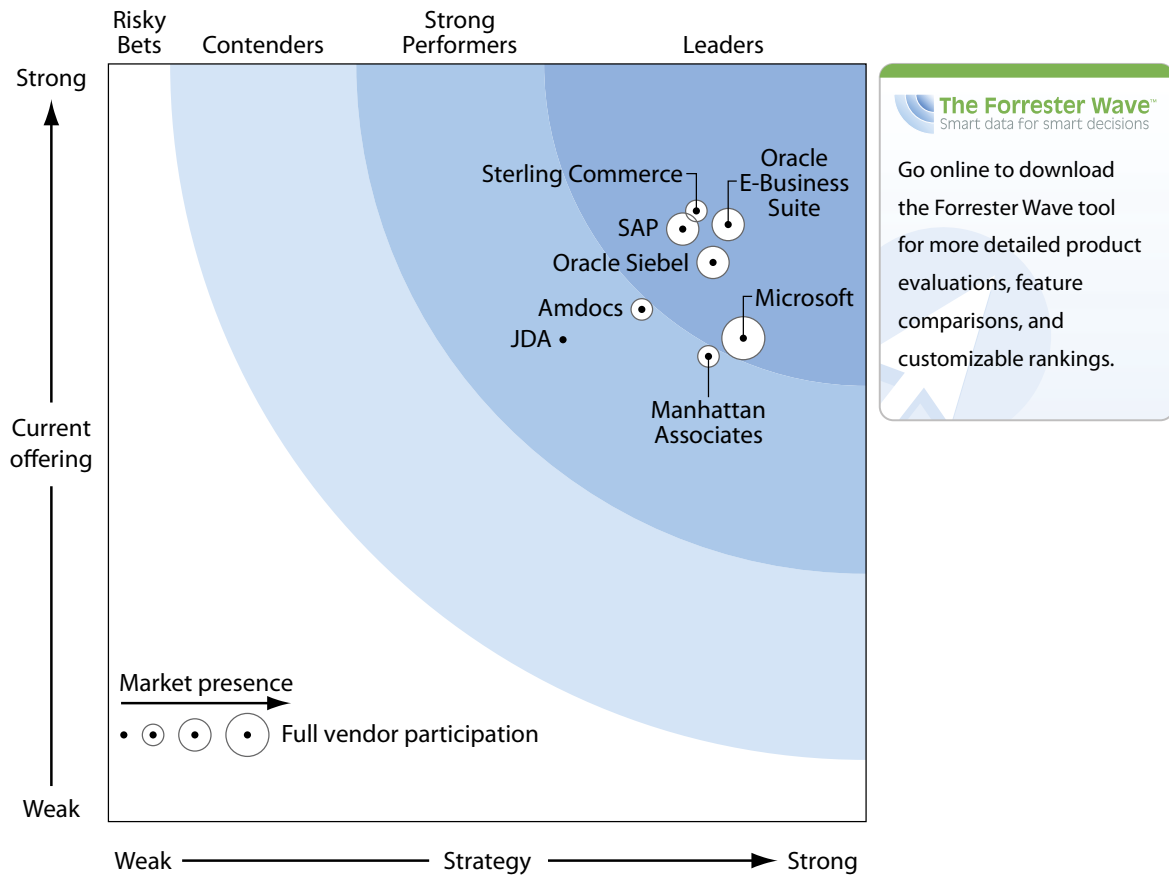
THE BEST ORDER MANAGEMENT HUBS TACKLE UNPRECEDENTED COMPLEXITY

Many vendors assume that they have solutions that meet the business process requirements for delivering orders in today's complex environments. Others believe that they deliver the solution through strong order hub infrastructure. However, only a limited number of vendors can deliver the right balance between business process expertise and order hub infrastructure to meet today's unprecedented order management complexity. The evaluation uncovered a market in which (see Figure 4):

- **Oracle E-Business Suite and Sterling Commerce stand out among the Leaders.** These two vendors deliver the fundamentals for order hub attainment, which include balance between business process expertise and order hub infrastructure. Sterling Commerce gained the lead in this year's current offering evaluation with the highest marks for end-to-end business process support and application foundation. During the course of this Forrester Wave evaluation, IBM announced plans to acquire Sterling Commerce; Forrester sees this move resulting in additional enterprise integration and BPM options via IBM for current Sterling Commerce customers in the future.² Oracle EBS performed in the top three for most of the evaluation's subcategories with the top score in product strategy and presentation framework categories.
- **SAP, Oracle Siebel, and Microsoft deliver strong offerings.** SAP placed third among the Leaders with the second-highest marks for end-to-end business process, including the top score for the order-completion-to-cash subprocess, as well as strong, balanced support for inbound order channels, presentation framework, and core application foundation. Rich support for inbound order channels, opportunity to order capture, and data and infrastructure capabilities returned Oracle Siebel to the Leaders' band. Microsoft enters the Leader band for the first time based principally on the strength of its strategy, including a top three product and go-to-market strategy as well as market-leading ownership costs.
- **Manhattan Associates, Amdocs, JDA excel in specialized markets.** Amdocs continues as a Strong Performer, delivering differentiated capabilities for telecommunications. Meanwhile, Manhattan Associates also returns to the Strong Performer band with core strengths to capture order fulfillment. JDA debuts as a Strong Performer with strengths in order fulfillment and core application foundation based on its acquisition of i2 Technologies' order management capabilities.

This evaluation of the OMH market is intended to be a starting point only. We encourage readers to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 4 Forrester Wave™: Order Management Hubs, Q3 2010



Source: Forrester Research, Inc.

Figure 4 Forrester Wave™: Order Management Hubs, Q3 2010 (Cont.)

	Forrester's Weighting	Amdocs	JDA	Manhattan Associates	Microsoft	Oracle E-Business Suite	Oracle Siebel	SAP	Sterling Commerce
CURRENT OFFERING	50%	3.38	3.18	3.07	3.19	3.94	3.69	3.91	4.03
Inbound order channels	10%	3.20	3.15	2.55	2.30	3.35	3.90	3.80	3.80
Presentation framework	10%	3.00	4.00	2.80	4.40	4.40	4.40	4.20	3.80
Business process modules	50%	3.43	2.74	3.07	2.78	3.77	3.16	3.91	4.02
Core application foundation	10%	4.00	4.20	4.00	3.80	4.20	3.90	4.20	4.70
Data and infrastructure	20%	3.25	3.40	3.03	3.76	4.27	4.44	3.70	3.97
STRATEGY	50%	3.52	3.00	3.96	4.19	4.09	3.99	3.79	3.88
Product strategy	50%	2.80	3.35	4.15	3.75	4.50	4.40	3.85	3.95
Corporate and go-to-market strategy	20%	4.60	2.10	3.40	4.30	4.20	4.20	4.80	4.00
Financial resources to support the strategy	10%	5.00	3.00	3.00	5.00	5.00	5.00	5.00	4.00
Ownership costs	20%	3.50	3.00	4.50	4.75	2.50	2.25	2.00	3.50
MARKET PRESENCE	0%	2.40	1.90	2.20	4.30	3.70	3.60	3.90	2.70
All versions of this solution	20%	2.00	1.00	1.00	5.00	3.00	3.00	5.00	1.00
Customers on maintenance	10%	3.00	4.00	4.00	3.00	4.00	3.00	5.00	4.00
Number of live customers (this solution version)	40%	2.00	2.00	2.00	5.00	4.00	4.00	3.00	3.00
Amount of license revenue from order management hub product	10%	3.00	1.00	1.00	3.00	3.00	3.00	5.00	3.00
Revenue growth (this solution)	10%	2.00	1.00	4.00	2.00	3.00	3.00	2.00	3.00
Global customer base	10%	4.00	3.00	3.00	5.00	5.00	5.00	5.00	3.00

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders Deliver Cutting-Edge OMH Technology

- **Oracle E-Business Suite.** Oracle E-Business Suite (EBS) takes top honors in this edition of the Forrester Wave evaluation of order management hubs. Oracle EBS places third in support for end-to-end order management cycle business processes. Within the business process modules, the solution places in the top three for opportunity to order capture and in the top two for both order fulfillment to returns and order completion to cash. Oracle EBS ties for first among vendors evaluated for presentation framework and places in the top two for data and infrastructure with leading analytical capabilities.

Of all the vendors evaluated, Oracle EBS earns the highest marks for overall product vision. Product strategy and future enhancements include the near-term delivery of distributed order orchestration, which provides a key component that's missing from the current lineup. Oracle delivers a rich go-to-market strategy for Oracle EBS with a significant majority of customer references providing a positive feedback on the overall solution. Areas of relative weakness include implementation costs and price modularity. We recommend this solution for existing Oracle customers, Oracle customers via acquisition, and those enabling various components of Oracle Fusion Middleware. The solution has significant traction in wholesale distribution, industrial manufacturing, high-tech, consumer goods, retail, life sciences, and some public sectors.

- **Sterling Commerce.** Sterling Commerce returns as a Leader in this edition of the Forrester Wave of order management hubs. Sterling Commerce leads among all the vendors evaluated for overall support of end-to-end order management processes. Another area of strength includes the top core application foundation. Sterling Commerce's solutions tie for third among vendors evaluated in the support of various inbound order channels and place third for data and infrastructure.

Additionally, Sterling Commerce earns high marks for overall product vision and go-to-market strategy. Companies with a hodge-podge of existing systems often seek Sterling Commerce's solutions as the source of truth for orders. Consider this solution in all your vendor shortlists, especially for enterprises in retail, communications, consumer products, discrete manufacturing, high-tech, and logistics industries. In the future, IBM's plans to acquire Sterling Commerce will result in additional enterprise integration and BPM options for current Sterling Commerce customers.

- **SAP.** SAP is a Leader in this evaluation, similar to its positioning in the previous order management Forrester Wave. SAP places second in support for end-to-end order management business processes with top honors in order-fulfillment-to-returns and order-completion-to-cash processes. In addition, SAP ties for the second-highest score among vendors evaluated for a rich and broad support of inbound order channels, with market-leading support for mobile and partnership channels. SAP's core application foundation also ties for second among vendors evaluated, with most areas exhibiting advanced or market-leading functionality. SAP also provides advanced capability in most areas of data and infrastructure. Leading capabilities include support for all major databases, scalability, and analytics.

SAP delivers a market-based strategy toward end-to-end order management, with significant investments in B2C areas like Web channel experience, high-volume event-based settlement capabilities via its acquisition of Highdeal, and improved integration with Vendavo for price management and optimization. Until the business suite products (i.e., ERP, SCM, and CRM) are fully integrated onto the same data model and process stack, however, the overall delivery of the vision will remain fragmented. However, for customers who have made strategic

investments in SAP, a rich level of broad functionality can be leveraged across various product lines. SAP delivers a tier one go-to-market strategy with very strong customer references. Forrester recommends SAP to existing SAP clients across a plethora of industries including banking, insurance, automotive, chemicals, consumer products, engineering, construction and operations, high-tech, industrial machinery and components, life sciences, mill products, mining, oil and gas, media, professional services, retail, telecommunications, travel and logistics services, utilities, and wholesale distribution.

- **Oracle Siebel.** Order Siebel is also a Leader in this evaluation, as it was in the previous order management Forrester Wave. Oracle Siebel places second in the ability-to-order-capture processes and is among the top four in order-fulfillment-to-returns processes. Areas of improvement include support of order management processes in order capture to order fulfillment and order completion to cash. On the infrastructure side, the Oracle Siebel solution ranked the highest with the most comprehensive support for inbound order channels. Market-leading areas include support for direct field sales, call center, mobile device, machine-to-machine, and partners. The Oracle Siebel offering ties for first among vendors evaluated for presentation framework, earning top marks for content management, role-based security, and localization support. A combination of leading analytical capabilities, reporting richness and flexible data model support, earn the Oracle Siebel product top honors in the data and infrastructure category.

Oracle Siebel's order management hub strategy is among the top three for product strategy. When distributed order orchestration is delivered, the Oracle Siebel solution should deliver a critical capability that customers have been seeking. Strong customer references, rich professional service capabilities, and global support bolster the solution's Leader standing. We recommend this solution for those organizations with heterogeneous environments and those deploying various components of Oracle Fusion Middleware. The solution shows significant traction in the high-tech, manufacturing, communications, utilities, entertainment, financials banking, insurance, life science, and public sector industries.

- **Microsoft.** Microsoft Dynamics AX 2009 vaults into the Leader category in this edition of the Forrester Wave evaluation of order management hubs. Microsoft Dynamics AX 2009 provides basic to advanced support for the overall processes in the order management cycle business, with its strongest capabilities delivered in the order-capture-to-order-fulfillment subprocess. Microsoft provides basic support for most inbound order channels, but areas for improvement include direct field sales, fax, call center, Web, and mobile. Strong content management, portal sophistication, and localization support drive a rich user experience in the presentation framework. Areas of strength in the core application foundation include business process management orchestration, general processes for workflow and notifications, and general administration. Additionally, Microsoft delivers broad support for most data and infrastructure capabilities.

Microsoft's product strategy represents a compelling vision for end-to-end order management. As large and enterprise-sized companies continue to experience difficulty with existing systems, Microsoft Dynamics AX 2009 will play an increasing role as a key alternative for divisions and subsidiaries looking for lower-cost and more effective alternatives. Microsoft placed third of the vendors evaluated for its corporate and go-to-market strategy due to strong customer references and extended global reach through partnerships. We recommend the Microsoft solution to companies with existing Microsoft tools and technologies and for larger companies up to \$5 billion in revenues looking for a user-centric solution. Microsoft Dynamics AX 2009 shows good traction with companies in discrete and process manufacturing, wholesale and distribution, architecture and engineering construction, professional services, media and entertainment, retail, and the public sector.

Strong Performers Provide Rich Solutions

- **Manhattan Associates.** Manhattan Associates is a Strong Performer in this Forrester Wave evaluation, similar to its positioning in the previous Forrester Wave evaluation of order management hubs. Manhattan Associates earns a place in the top two for support of order-capture-to-order-fulfillment processes. Other subprocesses in order management hubs represent areas for improvement but do provide basic capabilities or support for critical integration points. Manhattan Associates delivers basic support for most inbound order channels, including improved support for in-person and call center channels via its new Distributed Selling module. Areas for further improvement include direct field sales, fax, and kiosk. For its presentation layer, Manhattan Associates provides leading display capabilities for content management. Areas for improvement include localization support. Manhattan Associates also delivers a solid application foundation with leading capabilities in order brokering and general processes for workflow and notifications, monitoring for workflow and notifications, and configuration of business processes. Despite strengths in scalability and SOA architecture, Manhattan Associates scored the lowest in data and infrastructure with a need to provide more prebuilt analytics and key performance indicators (KPIs).

Manhattan Associates' product strategy places third among vendors evaluated, showing a rich understanding of what it will take to build a market-leading order management hub solution. While this is a compelling and strong vision, areas of improvement include the development of a broader industry strategy. Strong customer references and core focus in order management hubs represent a key strength. Long-term strategy will require more focus on establishing an ecosystem of services partners and global sales enablement. Manhattan Associates placed second among vendors evaluated for overall ownership costs. We recommend Manhattan Associates solutions to those focused on solving critical order-capture-to-order-fulfillment challenges. The vendor shows strength in multichannel retail, fast-paced consumer goods operations like grocery, and third-party logistics companies.

- **Amdocs.** Amdocs remains a Strong Performer in this edition of the Forrester Wave and delivers advanced to leading capabilities for most of the business processes in the order management cycle. Despite its telecommunications roots and heritage, Amdocs brings a compelling set of OMH solutions that are applicable to other industries, such as media and entertainment, financial services, and other services industries. Amdocs shines in advanced opportunity-to-order-capture capabilities with industry-leading support for product catalog, product/service configuration, pricing, rebates and promotions, order bundling processes. The solution also excels in order promising and scheduling, spare parts management, and delivers advanced functionality in invoicing and automated billing processes. However, warranty plan processes and accounts payable matching processes represent business process areas with room for improvement. Amdocs delivers leading support for in-store POS and call center channels as well as broad support for an advanced core application foundation. On the data and infrastructure side, Amdocs delivers significant capabilities in scalability and analytics.

Amdocs' product strategy follows a pragmatic market-based adoption approach. The key elements of the product vision include enhancing capabilities within the core communication service provider (CSP) industry, building stronger selling capabilities, and creating total cost of ownership reduction tool kits for maintenance and support. Amdocs places second for its corporate and go-to-market strategy among vendors evaluated, with differentiating professional services capabilities and global support. Currently Amdocs has a strong presence in the tier one and tier two segments in the CSP industry, but it is engaging customers in other industries as well that fit the criteria defined above. The product makes an especially good fit for buyers that conduct business in the CSP space and require complex product and service order management support.

- **JDA.** JDA debuts as a Strong Performer in this Forrester Wave evaluation via its 2010 acquisition of i2 Technologies. JDA delivers mostly advanced capabilities in the order-capture-to-order- fulfillment process area and is one of the top three solutions evaluated. Order fulfillment to returns and order completion to cash represent areas for improvement but do provide basic capabilities or integration to external systems. JDA addresses most multichannel requirements with leading in-store (point of sale [POS]) support but lacks advanced capabilities in direct field sales, fax, and mobile channels. JDA delivers basic to advanced presentation framework functionality including leading capabilities in localization support. The acquisition of i2 Technologies provided JDA with an agile and comprehensive application foundation as well as advanced support for master data management, enterprise integration capabilities, and a highly scalable architecture. Prebuilt analytics and key performance indicators (KPIs) represent areas of improvement.

JDA delivers a rich product vision that leverages its strengths in multitier order promising across multiple selling channels as well as the company's supply chain collaboration and visibility capabilities. Despite strengths in order management focus, professional services, and

global reach, JDA scored the lowest in corporate and go-to-market strategy based on the lack of available customer references. We recommend JDA's solutions to those organizations focused on solving critical order-capture-to-order-fulfillment challenges, including high-tech, consumer products, retail, and other discrete and process manufacturing verticals.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference survey.** To validate product and vendor qualifications, Forrester also conducted a reference survey with around four of each vendor's current customers. JDA did not provide reference customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based

on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ Enterprises that deliver perfect orders drive a direct correlation to positive stakeholder satisfaction scores. Combined with personalization, configuration, and repetitive order support, enterprises also report an 8% to 19% increase in customer retention, which results in a 3% to 5% increase in order sizes. See the March 2, 2009, “[20 Steps To Delivering The Perfect Order](#)” report.
- ² If approved, IBM’s proposed acquisition of Sterling Commerce will provide customers with comprehensive, end-to-end integration and commerce capability that covers a wide range of real-world business challenges. However, due to the large number of available alternatives from the combined companies, execution on delivering a cohesive message to the customers may be tricky. See the June 2, 2010, “[IBM To Acquire Sterling Commerce](#)” report.

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