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Promotion Optimization Institute, LLC

2019 Vendor Panorama for Retail Execution and Monitoring in Consumer Goods

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Company Assessment

Vendor/Category	Company Viability	Geographic Strategy	Responsiveness & Track Record	Deployment Capabilities	Market Understanding	Vertical/Industry Strategy	Partner Leverage	Company Vision
StayinFront	⬤	⬤	⬤	⬤	⬤	⬤	⬤	⬤

Product Assessment

Vendor/Category	Product Aptness & Flexibility	Delivery Flexibility	Solution Completeness	"Sell More" Capabilities	User Experience	Analytical Capabilities	Product Vision	Configurability
StayinFront	⬤	⬤	⬤	⬤	⬤	⬤	⬤	⬤

⬤ = Above average   ◑ = Average   ◯ = Below average

StayinFront stayinfront.com

Customer profile: Global player that entered the CG space years ago by leveraging its expertise in life sciences field sales automation, which helped it to demonstrate scalability early on. In 2000, two companies, one in New Zealand and one in the U.S., combined to form what is now StayinFront. This explains the strong presence in Australia and New Zealand.

Geographic presence: North America (48%), Europe/Middle East/Africa (20%), Latin America (9%), and Asia Pac (23%).

Total consumer goods users (seats): 60,500.

Tiers represented: All.

Solution offerings: Distributor management, DSD, merchandising, and van sales.

Major product sub-segments not covered: None.

Analytics: TouchCG, StayinFront's 20:20 Retail Data Insight system (RDI), provides clean and timely data required to drive actionable insights down to the store level. 20:20 RDI takes the StayinFront insights from the user device all the way back through the optional insight data warehouse with predictive lost sales, comparisons to similar stores nearby, and contextualized, fact-based selling through the PitchBook module. StayinFront has a strong analytical product with great visuals.

- 2018 20:20 Retail Data Insight Integration Enhancements:
    - TouchCG Audit Grid correlating next step actions to resolve predicted problems.
    - Territory Dashboard to view store rank and details that allow field reps to know more about their territory.
    - Store Dashboard - Pre-Call and End-Call dashboard data added to the store visit form, allowing field users the ability to review potential uplift actions to increase sales and review actions taken within a store visit.
- 2019 Acquisition of Lab4Motion Digital Merchandising (renamed StayinFront Digital).

- StayinFront Digital is seamlessly integrated into TouchCG and delivers processing technology that saves time in-store, improves compliance, and eliminates the bias, subjectivity, and error of the manual audit process while concurrently allowing users to increase the types of metrics captured during in-store visits. Self-learning algorithms identify all types of SKUs and automatic stitching of photos allows for captured multi-photo expositions to be efficiently analyzed.

StayinFront has very strong performance graphics and the ability to smart map stores with up to 7 color indicators based on segmentation. This segues to action by swiping left to add stores to the schedule. Also, StayinFront Touch has some great simulation capabilities. A sales rep can work up a planogram recommendation including replacing various competitor products and has the ability to present the impact to sales and store potential to the manager. The solution also has the ability to benchmark how the current store ranks compared to similar stores in the chain. The system creates suggested orders through algorithms, and the sales user has the ability to apply the system generated recommendations with one easy click. The visibility and tracking against goals on the dashboard are exceptional graphically and highly intuitive. StayinFront is releasing AI RetX applications as we release this report. Route, order, and shelf optimization are top AI benefits and focus areas. StayinFront Dynamic Route Planning, which is part of TouchCG, automatically creates daily visit plans by combining store valuation and ranking data to optimize the return on investment for rep visits rather than minimization of drive time. As a result of the depth of the insights and how they render graphically, we continue to rate StayinFront as Above Average.

Configuration/Customization: On-premise solutions are still supported but have not been sold in recent years. With the exception of several large, multinational companies, the vast majority of recent deployments have been multi-tenant SaaS. The solution is among the most configurable that we have reviewed. Enhancements in functionality are introduced in a way that allows user organizations to choose whether to activate those features or not through the administration module. The TouchCG Admin Portal has a touch interface making configuration easier. The Admin Portal was enhanced with promotional discount rules, in-field assets, and associated service requests and data from in-field activities, which will help manage teams and systems to reduce total cost of ownership.

Technology architecture/delivery options: Multitenant SaaS or private cloud on the front end with a common model approach that can be adapted for each customer.

Service partners: IBM, Infosys, Wipro, and Comtec.

Technology partners: Augment (virtual reality), Amazon AWS (hosting), Infosys (TradeEdge Distribution mgmt. system).

User experience: StayinFront is a RetX market leader based on the depth of functional options, how they render, and how easy they are to use. It is very oriented towards sales effectiveness in a stepwise and guided fashion. The graphics and screen layouts are outstanding. The Gamification is solid, and has the potential to benefit from the addition of AI, as StayinFront is recently incorporating AI into multiple areas of the solution. Linking documents to tasks as part of the call flow drives sales execution. The integrated coaching capability is also strong as it draws on past performance evaluations, utilized reports, and insights on how to improve performance, and pushes the results to all the relevant parties for follow up and as a starting point for the next sales call. The PitchBook tool has best in class workflow which reflect appropriate store data and performs store level calculations and recommendations. StayinFront recently added asset management, planograms, and push reports support in TouchCG Admin with the ability to assign tasks to teams and filter

analytics. The "Augment" tool then helps provide a compelling virtual reality view of what the merchandising could/should look like. Together, these capabilities make for a powerful sales call. StayinFront has been a leader in integrating augmented reality for simulating how displays and other assets will look in the store context. Additionally, the solution provides a community for sharing photos and best practices. Because of the innovative nature and quality of the UX, we rate the StayinFront UX as Above Average.

Vendor trend: StayinFront has a knack for the "global deal" with some of the largest deployments (seats and geographies) that we have seen. But it can also scale down very well to a single country for a local manufacturer. Its momentum has attracted a strong stable of global and local implementation partners. It is a very stable company with a solid roadmap going forward.

Strengths: Strong client retention. Excellent deployment partner network. Highly configurable to enable use of a single solution for multiple markets. Its Australasian roots also make it particularly able to attract clients in that region.

Challenges: No significant challenges that we are aware of.

Adjacent offerings: Data. Direct mail/fulfillment capabilities.

Key differentiators: We see the key differentiators as:

- The depth of analytics and insights with expertise of the 20:20 Retail Data Insight platform.

- Demonstrated ability to handle and support thousands of users across multiple geographies with a single instance of the solution.

- Level of resources applied to a project to ensure success.

- Having a very broad assortment of integrated "sell more" capabilities in one solution.

- Actionable alerts can be generated for reps, KAMS, customer marketing, and supply chain to take action and maximize incremental sales.

- Offering a Lite version called "LT" allows the user organization 8 standard functionalities plus a menu of up to 7 more from a list of 15, based on requirements. It runs on a single pane interface and carries a reduced price compared to the fully loaded solution.

- Optimal combination of strong analytics, while still having excellent usability.

- Early deployment of AI capabilities to serve the RetX market demand for intelligent retail systems.

- StayinFront 20:20 RDI's sophisticated algorithms identify patterns in the data that give clues to the root cause, directing field reps straight to the highest value issues or biggest "size of prize" (SOP). Trade promotion management features and ERP systems' data are integrated and update promotions and pricing to the mobile units in real time.

- Recent release of the Dynamic Route Planning module will deliver the complete Retail Activity Optimization offering without the need for integration to a partner.

Outlook & prognosis: Continued global presence and innovation into the foreseeable future. Being private/closely held and not having any venture backing keeps it focused on the long term.

Evaluate StayinFront when: You want a superior user experience and abundance of "sell more" and analytical capabilities most anywhere in the world. Also, if you want multiple global deployment partner options.

Avoid StayinFront if: You want a basic and low-cost point solution.

Distinctions: POI Best-in-Class awards for Mobile User Experience, Analytical Insights, Guided Selling, Coaching, Interactive Customer Presentations, Retail Activity Optimization.