Syndicated Research:

Price List

IHL Syndicated Research Price List

Analysts
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Publication Date: October 2014

HARD DATA, **SMART** DECISIONS

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About IHL Group

Who We Are
IHL Group is a global research and advisory firm specializing in technologies for the retail and hospitality industries. The company, based in Franklin, Tenn., generates timely data reports, offers advisory services and serves as the leading retail technology spokesperson for industry and vendor events.

What We Do
IHL provides customized business intelligence for retailers and retail technology vendors, with particular expertise in supply chain and store level systems. Our customers are retailers and retail technology providers who want to better understand what is going on in the overall technology market, or wish to identify specific equipment needs for the retail market.

When We Started
Greg Buzek served as Product Development Manager for two Fortune 500 retail technology suppliers for 6 years. Faced with making recommendations to senior management with spotty reports stuffed with technical jargon and unsubstantiated data, in 1996 he left to form IHL Group as an arms length consulting firm that delivers exacting research to corporate managers.

How We Work
Reliable market analysis is essential for corporations to accelerate revenue and expand their market share. Most research providers do not disclose data sources or statistically defend the validity of their assumptions. We do. We disclose in precise detail exactly how and why we reached our conclusions so that our customers can be comfortable with the data they are using.

What We Know
Our associates and advisors have over 100 years combined years of retail technology experience. Our associates have worked as product managers, sales representatives and executives in the retail market. We have the relationships, tools, and experience to meet your research and consulting needs.

IHL Research at a Glance

Cloud POS – Why The Time Might Be Right

$1,495.00

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It wasn't all that long ago that when someone mentioned "the cloud" as an option for Point-of-Sale (POS) systems, those in the know would scoff and say, "It's just not possible." And quite frankly, the initial deployments of cloud POS systems were not very good. Yet with new iterations of systems and a rapidly changing retail landscape that requires the same data wherever the consumer wishes to shop, many retailers are beginning to consider a Cloud-based POS application as a viable solution. Make no mistake, it is not for every retailer size and shape, but new hybrid deployments, along with the participation of larger retailers in the discussion, are making the potential use of the cloud for POS as worthy of the discussion, something most retailers would not even consider even 2 years ago.

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North America

AUTHOR(S)
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Lee Holman

This research is a combination of numerous IHL research studies throughout the last 12 months as well as retail and vendor discussions. It takes into consideration recent retailer and vendor mergers and the fact that more and more vendors are building POS products from the inside out. Meaning they are starting with the Order Management System and adding a front-end POS application that can run across mobile, ecommerce and traditional POS platforms.

We review the best practices, where it makes sense and where it doesn't. In the process, we discuss how the goals of retailers and an integrated system are being challenged with the rapid evolvement of payment technologies like EMV and mobile wallets such as Apple Pay.

For more information and to download a complete outline, see the product on our website.

Mobile POS: Reaching Escape Velocity – All Systems Go

$3,495.00

ADD TO CART

Mobile in retail is now a $7.8 Billion business worldwide and one that continues to grow rapidly. In fact, it is the single fastest moving trend in retail since Internet was added to the stores. Mobile and the buzz about Mobile in Retail has been increasing ever since Apple began using it in their stores. Of the various store functions that can be performed using Mobile technology, one of the most interesting is that of Mobile POS.

This report looks at the current state of Mobile POS in North America, the adoption rates of the various retail verticals, and the shipment and installed base details by type of device (Rugged Handheld, Non-Rugged Handheld, and Tablets).

We also provide forecasts for shipments and installed base of these devices, as well as an estimate of the impact that these devices will have on the use of traditional POS hardware. From the C-Level on down, the buzz about Mobile in Retail has been increasing ever since Apple began using it in their stores. Retailers desire the same experience and the same throughput, and one of the most attractive functions they see is the use of handheld devices for Mobile POS. The use of Tablets (such as the iPad) is especially pertinent, since double-digit growth in shipments of these devices for Mobile POS use will be the norm for the foreseeable future.

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Lee Holman

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POS Software for Specialty Hard Goods Market Share

$795.00

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The North American Specialty Hardgoods retail vertical includes some of the largest and most diverse retailers on the planet, who have the most complex POS transactions in all of retail. This 40 page market study delves deep into the POS Software market for these retailers. We identify which software providers are leading the pack, what their market share is, and which complementary systems their software has been installed within the industry.

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AUTHOR(S)
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Sean M. Alexander

This study provides a quick independent snapshot of the industry so that DIY, Books, Electronics, Furniture, Pets, and other Hardgoods retailers can quickly get to a short list of tested and proven POS solutions.

It includes not only vendor reviews but also the following:

Market Share and Profiles of Top 5 Software Providers. The report goes into detail on the market share of the top 5 providers by number of accounts, installed base, and the retail sales represented in the top 200 Hardgoods accounts in North America. For each of the top 5 software providers we provide a solution overview, key partnerships and architecture as well as the items outlined below.

Key Customers where the package is installed. This is a list of key customers (from public information and store audits) for this application by vendor. This provides an objective basis for reference accounts for retailers, not just those that will rave about them.

The legacy systems to which each of these vendors' systems have been interfaced. (ie. To which Merchandising, Inventory, Workforce Management and other key complementary systems has this POS system been interfaced?)

Key contacts at similar retailers. (For retail customers only, we will provide up to 5 peer contacts at retailers with similar application architectures to your own.)

For more information and to download a complete outline, [see the product on our website.]

POS Software for Specialty Soft Goods Market Share

$795.00

ADD TO CART

The North American Specialty Softgoods retail vertical enjoys one of the most diverse and dynamic technical environments in all of retail. This study provides a quick independent snapshot of the industry so that Apparel, Shoes, and Department Store retailers can quickly get to a short list of tested and proven POS solutions.

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AUTHOR(S)
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Sean M. Alexander

These retailers must not only serve their customers well, but must do so while appearing to be on the cutting edge technically. This 42 page market study delves deep into the POS Software market for these retailers. We identify which software providers are leading the pack, what their market share is, and which complementary systems their software has been installed within the industry

It includes not only vendor reviews but also the following:

Market Share and Profiles of Top 5 Software Providers. The report goes into detail on the market share of the top 5 providers by number of accounts, installed base, and the retail sales represented in the top 200 Hardgoods accounts in North America. For each of the top 5 software providers we provide a solution overview, key partnerships and architecture as well as the items outlined below.

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The legacy systems to which each of these vendors' systems have been interfaced. (ie. To which Merchandising, Inventory, Workforce Management and other key complementary systems has this POS system been interfaced?)

Key contacts at similar retailers. (For retail customers only, we will provide up to 5 peer contacts at retailers with similar application architectures to your own.)

For more information and to download a complete outline, see the product on our website.

North American Retail POS Terminals

$3,495.00

ADD TO CART

This study focuses on the North American Retail POS Terminals market for 2013-2018. It includes shipment, installed base and trends analyses of POS devices. The report is designed for use by POS Hardware and Software Providers, Maintenance Providers, Printer Manufacturers, EFT device vendors, Retailers and others who might have a vested interest in the North American Point-of-Sale Market.

Additionally, the report covers emerging trends and influences that affected the market in 2013 and those that will help form market decisions in the future. It also includes estimated market value for shipments and installed base and a forecast for shipments and installed base through 2018.

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We provide detailed analysis in 13 retail market segments:

- **Food/Supermarkets**
- **Drug Stores**
- **Superstores/Warehouse Clubs** (Costco, Sam's, etc. Includes Wal-Mart and KMart Super Centers)
- **Department Stores** (Traditional anchor stores and discount department chains)
- **Category Killers** (Home Centers, Electronics, Pet Superstores, Bookstores, Sporting Goods, Furniture, etc.)
- **Specialty Other** (mall and strip-mall based Specialty Stores, predominantly apparel, shoes and gifts).
- **Mass Merchandisers** (includes Discount Stores)
- **Convenience Stores/Gas Stations**
- **Table Service Restaurants** (Including hotel bar/restaurant)
- **Quick Service Restaurants/Fast Food**
- **Lodging**
- **Casino/Cruise**
- **Entertainment: Theaters, Theme Parks, Stadiums, Museums, Parks**

For more information and to download a complete outline, see the product on our website.

EMEA POS Terminals

$3,495.00

ADD TO CART

Our 13th annual EMEA EPOS report explores the market climate for EPOS terminals in the Europe/Middle East/Africa region. After years of struggle, this market is seeing dramatic growth.

More than just numbers without explanation, this report goes deep into discussion of retailing in the countries and segments to reveal the forces that are shaping EPOS purchase decisions. We believe it is important for our customers to not only see numbers, but understand the market behind the data so as to make more informed decisions for the future. The report includes country by country shipments, installed base, forecasts and trends for the electronic point-of-sale terminal market in EMEA.

Additionally, the report covers emerging trends and influences that affected the market in 2013 and those that will help form market decisions in the future. It also includes forecasts for shipments through 2018.

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Europe/Middle East/Africa

AUTHOR(S)
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Lee Holman

Along with the general retail environment for each country/region, we discuss the country by country shipments, installed base, and forecasts for the following retail market segments:

- Food/Supermarket
- Drug Store
- Hypermarkets/Supercenters
- Department Stores
- Mass Merchants
- Specialty Stores
- Convenience/Gas
- Hospitality

For more information and to download a complete outline, see the product on our website.

Asia/Pacific POS Terminals

$3,495.00

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GEOGRAPHY
Asia/Pacific

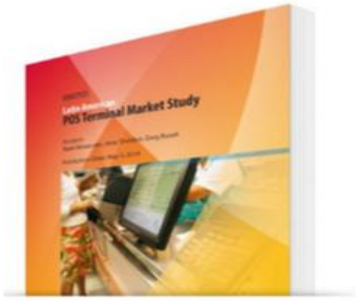
Our Asia/Pacific POS Market Study has 24 figures in 52 pages in which we explore the market climate for POS terminals in the Asia/Pacific region. It includes shipment, installed base and trends analyses for POS in Japan, China, India, Australia/New Zealand, South Korea, Vietnam, Taiwan, Hong Kong, and Other Asia/Pacific countries.

More than just numbers without explanation, this report goes deep into discussion of retailing in the segments in these countries to reveal the forces that are shaping POS purchase decisions. Additionally, the report covers emerging trends and influences that affected the market in 2013, and it includes estimates for shipments and installed base through 2018. Note that this is not a vendor market share report (other than operating systems and processor types), but rather a fresh look at the state of POS technology in the world's fastest growing market.

Along with the general retail environment for each country/region, we discuss the country by country shipments, installed base, and forecasts for the following retail market segments:

- Food/Supermarket
- Drug Store
- Hypermarkets/Supercenters
- Department Stores
- Mass Merchants
- Specialty Stores
- Convenience/Gas
- Hospitality

For more information and to download a complete outline, see the product on our website.



Latin/South America POS Terminals

$3,495.00

ADD TO CART

Walmart and the World Cup are helping to drive POS adoption throughout Latin/South America. The market for POS grew at faster rate in 2013 than in recent years. Large western retailers continue to grow in the market, bringing new POS terminals with them. Yet not all the news is good news. Natural disasters, political unrest and economic issues threaten pockets of future growth. These trends and more are in our latest study.

Our Latin/South America POS terminal market study explores the market climate for POS terminals throughout the Latin/Central and South American region. More than just numbers without explanation, this report goes deep into discussion of retailing in the countries and segments to reveal the forces that are shaping POS purchase decisions. We believe it is important for our customers to not only see numbers, but understand the market behind the data so as to make more informed decisions for the future. The report includes country-by-country shipments, installed base, forecasts and trends for the electronic point-of-sale terminal market in LATAM. Note that this is not a vendor market share report (other than operating systems and processor types), but rather a fresh look at the state of POS technology in the world's fastest growing market.

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GEOGRAPHY
Latin America

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Along with the general retail environment for each country/region, we discuss the country by country shipments, installed base, and forecasts for the following retail market segments:

- Food/Supermarket
- Drug Store
- Hypermarkets/Supercenters
- Department Stores
- Mass Merchants
- Specialty Stores
- Convenience/Gas
- Hospitality

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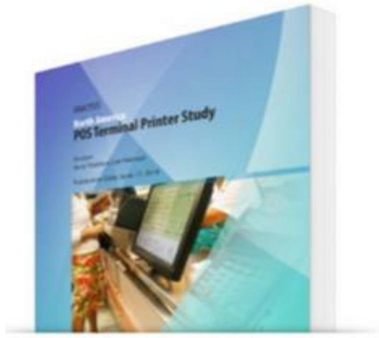

North American Retail POS Printers

$3,495.00

ADD TO CART

Packed with 98 figures, this study details the market share, distribution channels and installed base for the top POS printer vendors doing business in the region and provides for market projections based on changing technologies and changing distribution philosophies through the year 2017.

Vendors reviewed include Epson, IBM, NCR, TPG, Star Micronics, TransAct, Citizen, Bixolon, and others.

This report is designed for use by POS Printer Vendors, POS System Providers, Maintenance Providers, Paper Suppliers, EFT device vendors, Consulting Organizations, Retailers and others who might have a vested interest in the POS Printer Market.

For more information and to download a complete outline, see the product on our website.

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North American Self-Service Kiosks

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Transactions at Self-Service Kiosks are growing better than 7% per year in North America with transactions expected to grow past $1.0 Trillion per year through the devices by 2014.
Transactions at Self-Service Kiosks are growing better than 7% per year in North America with transactions expected to grow past $1.0 Trillion per year through the devices by 2014. This study looks at arguably one of the more dynamic yet most difficult areas to define in the IT sector – namely Self-Service Kiosks. Key to any review of Kiosks is a definition of what types of kiosks that are included. In this study we ventured beyond retail in the breadth of our discussion, but focused only on those devices where payment is currently or soon to be taken. As a result, we came up with the following 6 categories:

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- Self-Checkout Systems – Computerized systems that allow shoppers to purchase tangible products unassisted in a retail setting.
- Ticketing Kiosks – Those found at airports, amusement parks, bus terminals, parking, movie theaters and subway/train stations that enable a customer to purchase a ticket for a ride or attraction. These are different from the third category "Check-In" kiosks in that they are the first-contact in the transaction.
- **Check-In Kiosks** – These are kiosks that confirm previous payment. These are quite common in lodging and travel settings.
- **Food Ordering Kiosks** – These are devices that allow either fast food or casual dining customers to place their orders and make payment without input from employees who are then redeployed to order fulfillment.
- **Postal Kiosks** – These are the new kiosks installed in the US Postal Locations to handle the mailing of letters/packages.
- **Other Retail Kiosks** – This group consists of a wide variety of transaction kiosks that may be found in retail and hospitality settings.

SMB Sizing For Retail/Hospitality

Click picture to learn more

$2,000 - 4,800

There is no one size fits all for retail and for solutions. The needs differ by retailers size, by subsegment, and even by region. This research allows you to size and target the largest specific market opportunities, finding those most ripe for growth opportunities.

The information starts by looking at the entire ecosystem, the number of stores, the size of stores and then the type of store technology used. This product is ideal for vendors or private equity that are looking to understand if a market is large enough and what the indirect channel opportunities provide. This is quantitative analysis and is best used in conjunction with the regional POS Terminal Studies. And we have this information available by region (North America, Europe/Middle East/Africa, Latin/South America, and Asia/Pacific).

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The data is broken out by the following size of retailers:

- 1 Store Companies
- 2-9 Store Chains
- 10-49 Store Chains
- 50-100 Store Chains
- 101-300 Store Chains
- 301-500 Store Chains
- 501-1,000 Store Chains
- Over 1,000 Store Chains

For each of the segments and sizes track the number of stores, cashpoints and what is installed for the POS device in that environment. Finally, there is a component regarding the way that EFT/credit card payment is accepted at the lane.

Pricing is based on regions and number of segments.

For more information and to see examples, see the product on our website or contact us at ihl@ihlservices.com.

Stores Reinvented

$3,495.00

ADD TO CART

In our 11th Annual Store Systems Study with RIS News, we delve deeply into the impact of OmniChannel and Mobility on store systems and the impact of these trends on traditional vendors like IBM, NCR, Toshiba, Fujitsu, Motorola, HP, and others. Retail of 2018 will be vastly different than 2013 and retailers are racing to build those systems foundations to make this happen.

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North America

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With responses from many of the top retailers in North America, we have produced the results in a detailed, but very easy to read study. With 39 charts and graphs, the data is broken down by retailer size, by retail segments, and by other criteria such as desire for real-time integration with other retail systems, a single business logic across channels and devices, and phase 2 for implementation of mobile POS.

Included in this research is a detailed discussion of the purchase decisions for Mobile Platforms, and the effect Mobile POS is going to have upon POS shipments over the next three years. The impact of a desire of a single business logic on future POS decisions (hint: It's HUGE). We also include a detailed section on the store growth effect and how the cloud/analytics and SaaS are transforming retail in all channels. IT purchase decisions, especially in terms of what the IT Spend picture looks like for 2014.

For more information and to download a complete outline, see the product on our website.

Black Ops IT Spend: When IT Spend Starts Being Paid Outside of the CIO

$1,995.00

ADD TO CART

Gartner has forecasted that the IT Budget of the Chief Marketing Officer will be higher than that of the CIO by 2017. Does that hold in retail or hospitality? In fact in 2013 the CMO and other business unit heads generated over $11.6 Billion additional IT Spend. This represents nearly 35% of the total spend for Software, SaaS, and Services in North America. This study looks at the phenomenon of IT spending outside of the CIO budget and quantifies that opportunity for vendors and provides best practices for retailers as well as pitfalls to avoid.

Overall the CMO has added an additional $6.6 Billion in IT spending this year over just the CIO budget. This increased spend and access brings along a number of security risks and is sometimes hidden from the CIO.

Finally, this study recommends tactics and go-to-market strategies for vendors to consider if they have a solution targets towards the CMO.

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Inventory Distortion – Retail's $800 Billion Problem

$1,995.00

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Retailers historically rely upon their IT systems to tell them what their Out-of-Stock levels are. While this might be a satisfactory solution for the enterprise as a whole, it does not take into account the realities faced by retailers and consumers at the store level. A retailer's systems may cite a 6% Out-of-Stock level, but the consumer, having been in three of their stores before finding the item, sees an Out-of-Stock level that is often 3 or 4 times this figure. The difference is retail execution, (i.e. having the product available and accessible at the point of decision when the consumer wants to buy it). Anything else is a missed opportunity.

Likewise, for their Overstocks, retailers tend to rely upon their IT systems, which can provide a very different view from what the store manager or consumer is experiencing. The big issue here, however, is that the cost of those goods are lost forever; they provide a severely red contribution to the bottom line for these retailers.

Building upon previous research from IHL, this research study looks at the true cost of Inventory Distortion (Out-of-Stocks and Overstocks) to retailers. Beyond just looking at empty shelves or the discount rack, this report brings clarity on the size of the problem that heretofore had been missing in the industry.

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Lee Holman

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Mobile POS Hardware Vendor Market Share

Click picture to learn more

$4,000 - $24,000

The move to mobile for associates is the single fastest adopting trend we have seen since the rush to get stores Internet-enabled. This research looks specifically at those mobile devices being used for POS functions. How big is this market? How fast is it growing? Which vendors are winning? What screen format should you write the software for? This research will tell you.

This product provides market share information for shipments and installed base on a quarterly and annual basis for vendors such as Apple, Google, Motorola Solutions, Samsung, HP, Lenovo, Dell, Motion Computing, NEC and many others.

The data can also be purchased simply in aggregate by vendor worldwide or by individual region. Included are historical data back 2 years and projections forward for the next 6 quarters by vendor.

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Jerry Sheldon
Lee Holman

Data is available for 4 regions:

- North America (US and Canada)
- LATAM (Mexico, Brazil, Latin/South America and Caribbean)
- Europe/Middle East/Africa (includes Eastern Europe and Russia)
- Asia/Pacific (includes China and India)

We provide data for the top 5-7 vendors per the following retail segments:

- Food/Supermarkets
- Drug Stores
- Hypermarkets/Superstores/Warehouse Clubs
- Department Stores
- Mass Merchants
- Specialty Stores
- Convenience/Gas
- Hospitality (Pubs, Table Service/Family Restaurants, Fast Food)

Pricing is based on regions, number of segments and other factors. For more information and samples, see the product on our website or contact us at ihl@ihlservices.com.

Mobile POS Software Vendor Market Share

Click picture to learn more

$1,500 -$6,000

Mobile POS Software is one of the fastest growing areas in retail technology, but it is not growing at the same speed in all retail segments or even by the size of retailers.

This research tracks the market share in installs and shipments of software licenses in Mobile POS instances. It reviews the smaller retailers “mom and pop’s” that began the mobile POS trend and that are seeing tremendous technology disruption for traditional POS terminals. It also covers the forecast for the fast rise in adoption of Mobile POS in the enterprise retailers.

This product provides shipments and installed base on a quarterly and annual basis for vendors such as Square, Intuit, Shopkeep, Level Up, Paypal, Revel, NCR and Pay Anywhere at the SMB level, then Global Bay, Oracle, Starmount, Epicor, Toshiba, and many others for use of mobile devices for POS. We look at shipments and installed base by segment and tier. Currently this data is available for North America only.

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We provide data for vendors per the following retail segments:

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- Drug Stores
- Hypermarkets/Superstores/Warehouse Clubs
- Department Stores
- Mass Merchants
- Specialty Stores
- Convenience/Gas
- Fast Food/Quick Service Restaurants
- Bar and Table Service Restaurants
- Lodging
- Casinos and Cruise Ships
- Entertainment (Theme Parks, Museums, Theaters, Stadiums)

Pricing is based on regions, number of segments and other factors. For more information and samples, see the product on our website or contact us at ihl@ihlservices.com.

POS Terminal Hardware Vendor Market Share

Click picture to learn more

$4,000-29,000

This product provides market share detail in shipments and installed base for POS terminals on a quarterly and annual basis for vendors such as Toshiba Global Commerce (IBM), NCR, HP, Wincor-Nixdorf, Fujitsu, Dell, MICROS, Radiant, Digipos, and many others. It includes data on processors and operating systems historically and provides a forecast going forward. It is the only review of the POS market that includes the PC on Cash Drawer (PCOCD) market.

This is a very data intensive product and can go as deep as shipments by segment by region by operating system or processor-type. The data can also be purchased simply in aggregate by vendor worldwide or by individual region. Included are historical data back 2 years and projections forward for the next 6 quarters by vendor.

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Data is available for 4 regions:

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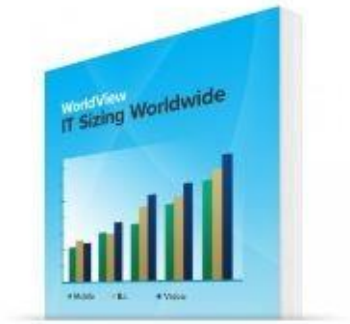
- Department Stores
- Mass Merchants
- Specialty Stores
- Convenience/Gas
- Hospitality (Pubs, Table Service/Family Restaurants, Fast Food)

Pricing is based on regions, number of segments and other factors. For more information and samples, see the product on our website or contact us at ihl@ihlservices.com.



WorldView – IT Sizing Worldwide

Click picture to learn more

$1,500 & Up

The retail and hospitality industries have suffered from a lack of viable and actionable information regarding IT Spending. Although there are studies that track certain components or "hot" technologies that are released each year, there has yet to be a comprehensive model that tracks IT Spending by line of business category, by segment, and by region of the world until now.

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WorldView forecasts on over 300 categories of hardware, software, SaaS, services, and labor/overhead, IHL has developed the most comprehensive IT sizing model in the retail industry.

It includes forecasts and growth rate for cloud solutions as well as sizing for mobile, EMV, Omnichannel and Big Data tools as well as traditional retail technology components.

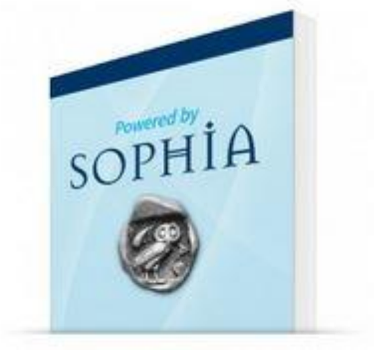
Information is available per region, per segment and can be completely customized to meet your specific data needs.

Don't base your forecasts only on internal projections! Get outside objective numbers.

Pricing begins at $1,500 and is dependent on the number of segments, number of categories, and number of years in the forecast.

This is a product that is best shown in a demo.

For more information, see the product on our website or contact us at ihl@ihlservices.com



Insight IT Spend – Powered by Sophia

Click picture to learn more

$2,000 - 8,000

Whether it is trying to understand your true addressable market for a product launch or simply to benchmark your IT Spend against other retailers, the new Insight IT Spend for Retail product provides the level of detail necessary to truly understand the market.

One of the greatest challenges in business development is being able to take the forecasts from the analyst firms that are at a high level and try to understand how the market might change when your product enters.

Or for retailers, in a fast moving world where technologies such as mobile, social media, and business intelligence are radically transforming retailers, how can you benchmark your spending verses your competition. Insight IT Spend for Retail does just that, providing you the data you need to make the right decisions the first time with the backup you need for your management.

GEOGRAPHY
Worldwide or by Region

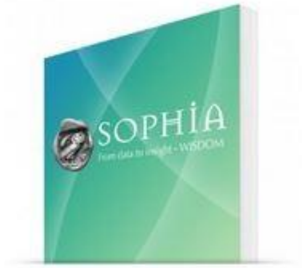
FORMAT
Microsoft Excel

LICENSE
Enterprise License Only

AUTHOR(S)
Greg Buzek
Jerry Sheldon

Insight IT Spend for Retail allows you to pick the size of retailer you are interested in as well as region and segment. So if you have a product that is best for Tier 2 Specialty Soft Goods retailers for North America and Europe, you can easily see the size of your potential market even down to the retailer level. No other third party analyst firm can provide this level of accuracy because the system is driven not only from our WorldView IT Model but to the detail of our data service Sophia.

For more information see the product on our website or contact us at ihl@ihlservices.com.



Sophia – Wisdom for IT

Click picture to learn more

$195 monthly - $2,000 annually per segment

Sophia is by far the most comprehensive source of not just validated leads, but key wisdom for smart decisions in the retail industry. It is the only lead generation system that links IT spend, to specific technology, to specific personnel, to specific financial results, tied together and backed by our advisory staff. Sophia provides insight into nearly 300 types of Hardware – Software – SaaS - Services and key personnel for over 7,500 retailers, restaurants and manufacturers.

With Predictive Analytics, the system allows for benchmarking against competitors, identifying which retailers are leaders in specific technologies, their projected IT spending plans in key categories(like Business Intelligence/Analytics, Merchandising/Supply Chain, ERP, and Store Systems), and which technologies they are likely to purchase in the next 24 months.

Sophia Core Benefits

Sophia Core Benefits Company Profiles – Complete profiles of companies on 300 different technologies they have deployed. Lead Generation – Over 250,000 validated contacts with emails.

Graphical Financial Benchmarks – Compare key financial metrics of retailers by segment and subsegment. Zoom in to review the financial metrics for the entire retail segment.

IT Spending Breakouts – Each SPA profile includes projected IT budget information for hardware, software, services in the following categories (Infrastructure, Store Systems, Core ERP, Application Development, Collaboration, Merchandising/Supply Chain, Commerce, BI/Analytics, Sales & Mktg, Legal/Real Estate).

Key Technology Leadership – Is the retailer a leader in particular technologies? We look at key financial metrics and the strength of the retailer and leadership in key technologies in each company SPA profile.

What's in Play - One of the key benefits of Sophia is the ability to see into the future for each retailer and see which systems are due for replacement and which game changing technologies they are likely to invest in within the next 24 months.

Key Vendor Influence – Every account has key vendors that have significant influence to enhance your opportunity or block your opportunity. The SPA profiles show you which vendors in the account are your friend or foe.

Data is available for the following industry segments:

Retail/Hospitality in North America and Europe/Middle East/Africa

- Food/Grocery Stores
- Drug Stores and Pharmacies
- Supercenters/Hypermarkets/Warehouse Clubs
- Mass Merchants
- Convenience/Gas/Forecourt Operations
- Department Stores
- Specialty Hard Goods
- Specialty Soft Goods
- Fast Food/Quick Service Restaurants
- Bar/Restaurant/Table Service Restaurants
- Lodging, Entertainment, Gaming, Travel

Manufacturing/CPG Segments that include the following:

- Food/Beverage/Tobacco
- Apparel, Shoes, Jewelry
- Electronics, Recreation
- Hard Goods
- Pharmaceuticals
- Automotive

Pricing is $195 per month per segment.
Total price is based on the duration of the contract and number of segments. Discounts provided with more segments and duration. This is an enterprise-level access for you company.

For more information and samples, see the product on our website.

Key Retail Decision Makers

Click picture to learn more

$750 & Up

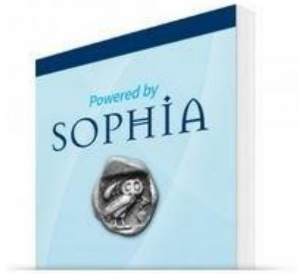
Need a Mailing List of Key Retail Technology Decision Makers? People like CIOs, VPs of MIS, Store Operations, CEOs, etc.?

For this exercise we leverage the Sophia system but for a single instance.
We can provide targeted lists using a variety of criteria such as:

- **Specific Titles** – CIO, Merchandising, Store Operations, etc.
- **Specific Technologies** – POS, Inventory Control, Supply Chain, etc.
- **Specific Vendors Installed** – IBM, NCR, Oracle, JDA, etc.
- **Within a Sales Range** – from $0 – $1Trillion Any Combination of the Above

We charge .40 per record for a custom query or mailing list. Our minimum query is $750.

For more information contact us at ihl@ihlservices.com.



Sophia Knows Your Trade Show

Click picture to learn more

$995

Need a Mailing List of Key Retail Technology Decision Makers? People like CIOs, VPs of MIS, Store Operations, CEOs, etc.?

For this exercise we leverage the Sophia system but for a single instance. The NRF show will be the next big show where we will provide names.

We can provide targeted lists using a variety of criteria such as:

- **Specific Titles** – CIO, Merchandising, Store Operations, etc.
- **Specific Technologies** – POS, Inventory Control, Supply Chain, etc.
- **Specific Vendors Installed** – IBM, NCR, Oracle, JDA, etc.
- **Within a Sales Range** – from $0 – $1Trillion Any Combination of the Above

We charge .40 per record for a custom query or mailing list. Our minimum query is $750.

For more information contact us at ihl@ihlservices.com.

RAPID POS

Click picture to learn more

$TBD

Developed in partnership with C-CORE Consulting Group, Inc., the RAPID POS Project Toolkit is a methodology to facilitate POS hardware and/or software replacement for retailers. As most retailers keep their POS systems 5-15 years, the people that were involved in the last POS planning exercise are usually no longer available for this next generation project. In addition there are undocumented features that have crept into the current system that need to be included and a new vision for what the latest technology can provide is required.

DATE OF PUBLICATION
October 1, 2014

GEOGRAPHY
North America

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Microsoft Excel

AUTHOR(S)
C-Core Consulting Group

The RAPID POS Project Toolkit is comprised of templates and tools for RAPID scope definition of a project, development of an RFP using the standard NRF-ARTS framework, vendor selection and project execution. In addition each license of the toolkit comes with 5 days of training and consulting from our team of POS experts. The combined offering of the toolkits and our team of experts will result in a typical 12 week reduction in the RFP process while ensuring all functional requirements and vendor selection occurs via a comprehensive and thorough process.

Typically, a POS engagement consists of two separate and distinct phases:

1. POS RAPID Project Toolkit – Scope and Objectives, requirements definition, RFP and vendor evaluation.

2. Deployment Rapid Project Toolkit – Project Launch, including project planning, phasing, pilot and deployment management.

You may choose to use us for either or both phases, to accelerate your project timelines and drive the POS application selection process from vendor evaluation to project planning to full deploy.

For more information contact us at ihl@ihlservices.com.

Fresh Item Mgt

Click picture to learn more

$TBD

The RAPID Fresh Project Toolkit provides retailers with the weapons to improve margins dramatically in perishables and Freshi Item Management that distinguish retailers from the supercenters. When done properly, an efficient fresh item management process not only saves cost in shrink, but helps increase sales through appropriate freshness and presentation. The RAPID Fresh Project Toolkit helps retailers define their core oppportunities and assist in the selection of the technologies to achieve great results.

Developed by grocers in partnership with C-CORE Consulting Group, the RAPID Fresh Project Toolkit has the most extensive set of fresh requirements in the business. The disciplined approach also keeps the business fully accountable for all phases of this challenging but essential project. From Shrink Capture to Production Plannning, Inventory Management and Suggested Orders, the opportunity to reduce shrink and improve margin and efficiency in the fresh departments is critical to a fresh-focused retailer's success.

For more information contact us at ihl@ihlservices.com.

DATE OF PUBLICATION
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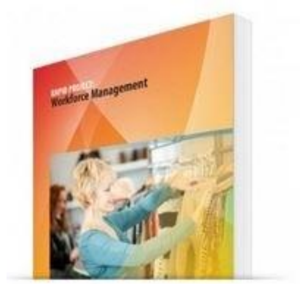
FORMAT
Microsoft Excel

LICENSE
Enterprise-Wide

GEOGRAPHY
North America, EMEA

AUTHOR(S)
C-Core Consulting Group



Workforce Management

Click picture to learn more

$TBD

The RAPID Workforce Management Toolkit gets at the heart of the store employee to retailer relationship, providing a comprehensive set of worksheets to quickly and effectively help you make a decision on the most appropriate management system for your largest variable cost – your labor at the stores.

For more information contact us at ihl@ihlservices.com.

DATE OF PUBLICATION
October 1, 2014

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Microsoft Excel

AUTHOR(S)
C-Core Consulting Group

Hardware Maintenance

Click picture to learn more

$TBD

Designed in partnership with C-CORE Consulting Group, the RAPID Maintenance Project Toolkit provides a systematic approach to managing your technology hardware assets. It is designed to reduce your maintenance costs, simply your contracts and process for vendor negotiations, and improve service levels.

Here are just a few of the metrics that customers have realized:

- Reduced internal labor per Help Desk incident, resulting in a savings of $1.50 per help desk call.
- Up to a 20% savings in overall maintenance costs through improved negotiations and recognition by both sides on what is driving costs.
- A 5% reduction in discounts through contract expansion and extensions by identifying core vendors.
- Overall savings of $4 Million in maintenance costs for one customer.

For more information contact us at ihl@ihlservices.com.

DATE OF PUBLICATION
October 1, 2014

FORMAT
Microsoft Excel

LICENSE
Enterprise-Wide

GEOGRAPHY
Worldwide or by Region

AUTHOR(S)
C-Core Consulting Group

Retail Technology Roadmap

Click picture to learn more

$TBD

While most organizations typically perform annual planning sessions, they usually fall short in building a well-designed and effective three year plan. This lack of long-term planning prevents the correct sequencing and prioritization of multiple strategic initiatives into a cohesive structure that delivers the following:

- Focus on key initiatives
- Understanding of cross functional impact on your organization
- Flexibility to adjust and re-prioritize as your strategy changes
- Balancing of business and IT resources and budgets

DATE OF PUBLICATION
October 1, 2014

GEOGRAPHY
Worldwide

LICENSE
Enterprise license for the Toolkit

FORMAT
Microsoft Excel

AUTHOR(S)
C-Core Consulting Group

Typical retail plans are a list of potential initiatives submitted by various business units. They are not prioritized across the enterprise so they lack a cohesive order. Worse, they are PowerPoint slides loaded with Industry buzzwords related to executive hot buttons that provides only a high level end state picture, not the journey to get there.

The roadmap is the properly sequenced set of initiatives that gets you to the desired end state efficiently, on time and within acceptable risk levels. It is the guide used to prioritize WHAT should be done, WHEN (initiative schedule and phases) and, by WHOM (Initiative Owners), and WHERE countries, regions, banners).

For more information contact us at ihl@ihlservices.com.

Custom Research

IHL offers a wide range of custom research and consulting services to fit your organization's specific needs. Key areas of expertise include the following areas:

- Market Analysis (Global or Domestic markets)
- Due Diligence/Acquisition Analysis
- RFP and Vendor Negotiations
- Services Marketing and Development
- Custom Research and Analysis

Projects are bid on a per project basis or time and materials as required. For more information, please contact us at ihl@ihlservices.com.

Speaker's Bureau

Do you need a keynote speaker who can address retail and technology trends? Are you looking for insight into new technologies and growth strategies? Are you looking for better understanding of who is competing well with Wal-Mart?

If so, let us introduce you to the IHL Consulting Group Speaker's Bureau.

IHL's leadership team addresses audiences of senior level industry executives at corporate events and trade association conferences throughout the year. Our team has presented at some of the largest trade shows in the industry.

Attendees come to hear what IHL consultants have to say about the latest research in retail trends and technologies. We present hard data from solid primary research so that our clients can make smarter decisions. We have a wealth of research data to pull from for the development of customized presentations for your company. We can also provide competitive reviews of the market and serve as a sounding board for your company's strategies in the market.

Contact us for more detail at +1.615-591-2955 or at ihl@ihlservices.com.

Analyst on Call

Sometimes you just need an outside voice/head to run your plans through. With the Analyst on Call function, it can work as an ad hoc event or on a monthly retainer (charged quarterly in advance).

Two options are available:
Ask the Analyst – Up to two hours (one time) for $500 (paid by credit card).

Analyst on Call – In blocks of 15 hours with one of our senior analysts. $3,000 for each block of 15 hours.

Platinum Subscription

The Platinum level subscription foregoes all the individual pricing and you get it all. Every syndicated research report and Sophia for North America and Europe (does not include WorldView, RAPID Project Toolkits or Analyst on Call.) Whenever IHL releases one of these reports, we send it directly to your organization. All reports and databases are enterprise-wide electronic licenses. Platinum Level subscribers also help us prioritize which segments and which technologies to evaluate and report on going forward. As with the other subscriptions, there is password access to all reports on our web site and the databases updated monthly

The Fine Print

All of IHL Group's generally available research products and databases are electronic licenses and can be shared freely within the purchasing organization and wholly owned subsidiaries. We only ask that this information not be shared with partners or others outside the purchasing company without authorization from IHL Group. The license does not extend to joint ventures or other partnerships. If the relationship is not a wholly-owned subsidiary, then both parties would need a license. Practically, this implies the following:

1. The purchasing company can use the reports worldwide internally as long as the international organizations are wholly owned subsidiaries of the purchasing company.
2. The research reports and databases cannot be distributed in whole or in part to partners or customers without express written approval from IHL Group. The exception to this is for a mailing list generated from the database that is being used for the exclusive use of fulfillment by an outside third party. In this case, the mailing list can be used by the third-party to fulfill the needs of the purchasing organization only.
3. The purchasing company may quote components of the data (limited use) in presentations to customers such as specific charts. This is limited to percentage components, not individual unit information. Unit data cannot be shared externally without express written approval from IHL Group. All references to the data in presentations should include credit to IHL Group for the data.
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5. All requests requiring written approval should be submitted to *ihl@ihlservices.com* and will be reviewed within one business day.

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☐	Insight IT Spend - Powered by Sophia	$2,000-8,000
☐	Sophia – Wisdom for IT	$195 - 2,000
☐	Key Retail Decision Makers	$750 & up
☐	Sophia Knows Your Trade Show	$995
☐	RAPID RFP Toolkit - POS	$TBD
☐	RAPID RFP Toolkit - Fresh Item Management	$TBD
☐	RAPID RFP Toolkit - Workforce Management	$TBD
☐	RAPID RFP Toolkit - Hardware Maintenance	$TBD
☐	RAPID RFP Toolkit - Retail Technology Roadmap	$TBD
☐	Ask the Analyst or Analyst on Call	$500-3,000
	Other ______________________	**Subtotal:** ____________
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