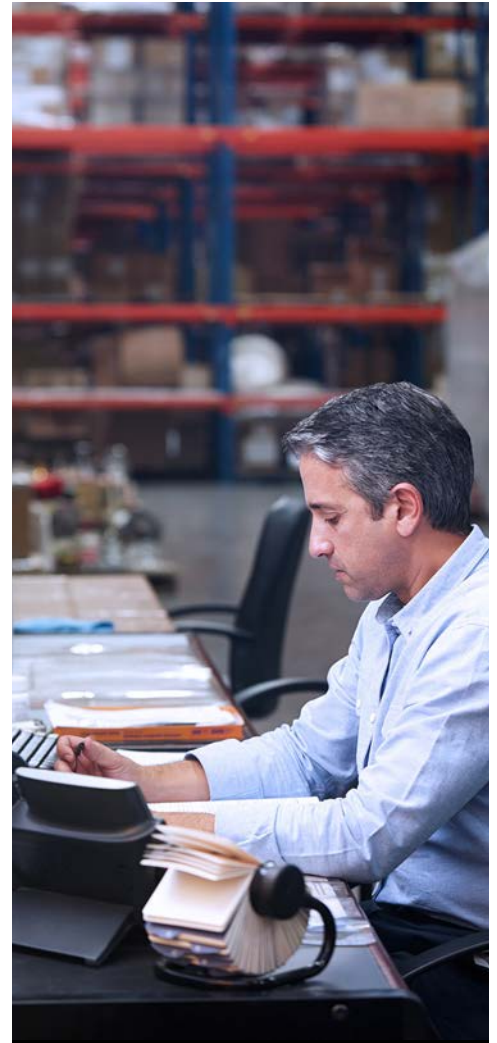
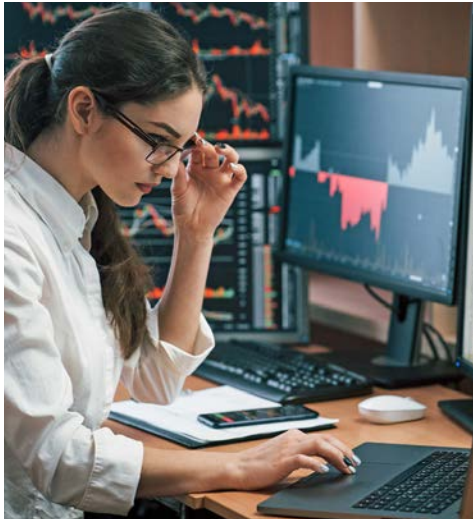


# 2021 LEADING VENDORS TO THE TOP 1000 RETAILERS

Ranking, data and analysis of the  
top ecommerce technology providers



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# OVERVIEW

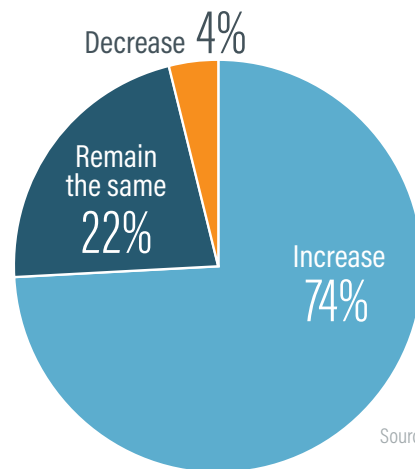
Sometimes, deciding what not to do is as important as deciding what to do. And many of the most successful online retailers today are learning that to thrive, they need to learn to delegate. That means turning to the pros for help with the range of technologies it takes to grow and maintain a successful ecommerce business in the current competitive environment. Those technologies range from new spins on marketing staples like email marketing, to the bones of an online business—the ecommerce platform—to more advanced technologies like marketing automation or artificial intelligence.

74% of retailers say they plan to spend more on ecommerce technology services over the next year, with only 4% planning to spend less, according to a September 2020 Digital Commerce 360 ecommerce technology survey of 121 retailers. The largest percentage of the retailers surveyed who plan to increase spending

(25%) plan to spend between 25% and 50% more on ecommerce technology services. And, 78% of retailers surveyed say they typically use a vendor when implementing new technology rather than build it in house. That's up from 65% in last year's survey of 160 retailers.

## 74% OF RETAILERS WILL INCREASE THEIR ECOMMERCE TECHNOLOGY SPENDING OVER THE NEXT YEAR

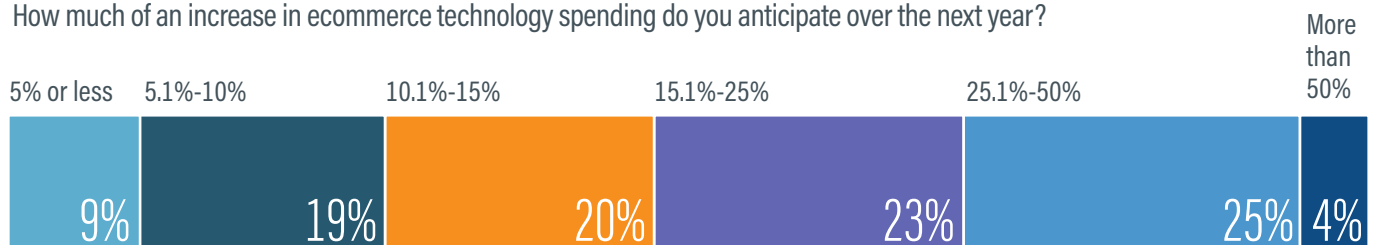
Will your spending on ecommerce technology and services increase, decrease or remain the same over the next year?



Source: Digital Commerce 360 survey of 121 retailers, September 2020

## NEARLY 30% OF RETAILERS THAT PLAN TO INCREASE ECOMMERCE TECHNOLOGY SPENDING WILL INCREASE IT BY MORE THAN 25%

How much of an increase in ecommerce technology spending do you anticipate over the next year?



Source: Digital Commerce 360 survey of 121 retailers, September 2020

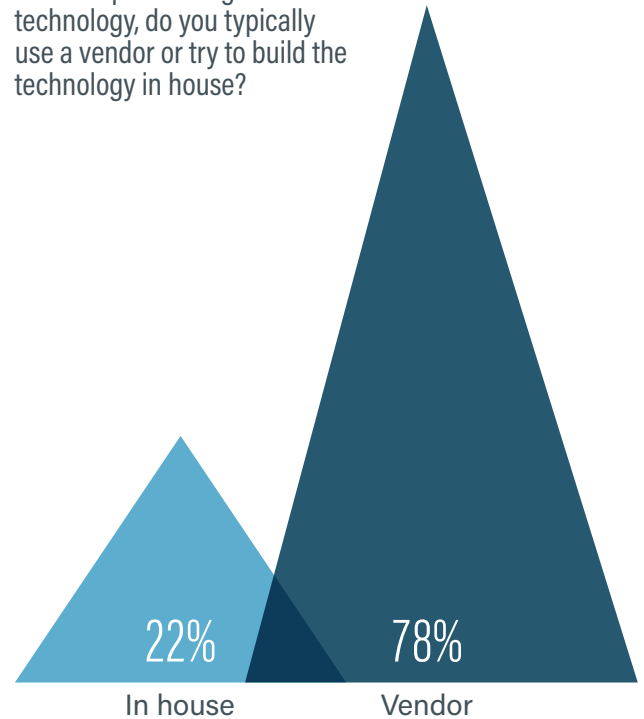
Retailers seek outside help from vendors because each has a specific niche in which they are experts. The majority of retailers, at 80%, say they choose a vendor because they don't have the expertise in house and 69%, the next-highest group, choose vendors because they are specialized in their specific fields. The third-most-popular answer, at 56%, is that vendors get the job done faster.

And, for the most part, vendors are delivering. 61% of retailers say their last project with a vendor went as expected, and only 9% say the last project went poorly.

When it comes to the reason retailers are implementing technology, it's all about customers. The top reason, selected by 78% of respondents, is to attract new customers, followed by retaining existing customers at 64%. The fourth most

## THE MAJORITY OF RETAILERS CHOOSE TO USE VENDORS WHEN IMPLEMENTING NEW ECOMMERCE TECHNOLOGY

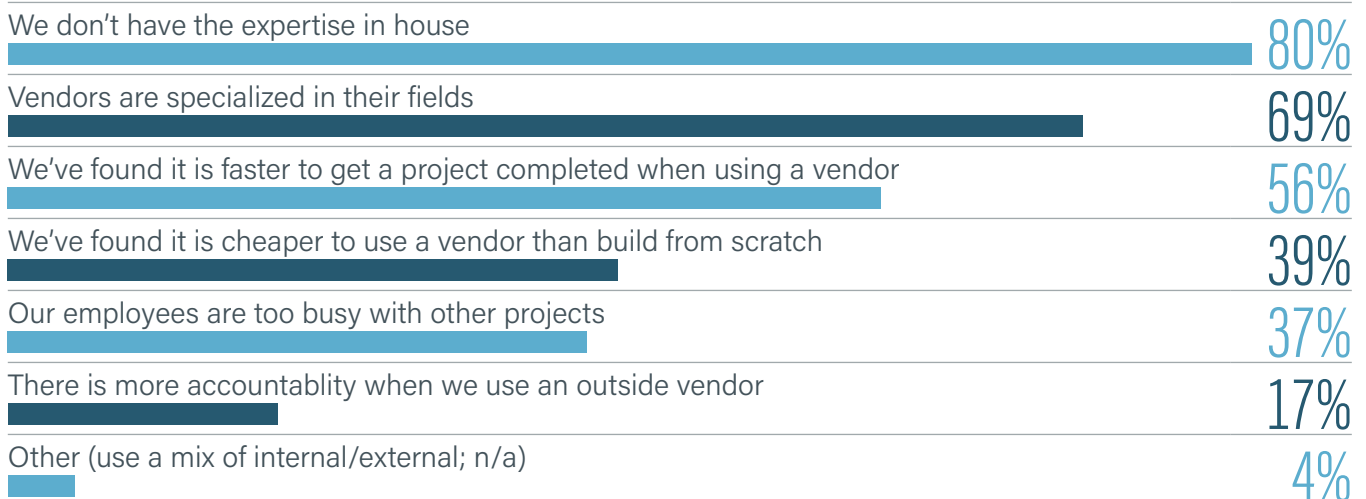
When implementing a new technology, do you typically use a vendor or try to build the technology in house?



Source: Digital Commerce 360 survey of 121 retailers, September 2020

## RETAILERS CHOOSE VENDORS FOR THEIR EXPERTISE AND BECAUSE THEY ARE EXPERTS AT WHAT THEY DO

What are your reasons for using a vendor? Select all that apply.



Source: Digital Commerce 360 survey of 121 retailers, September 2020

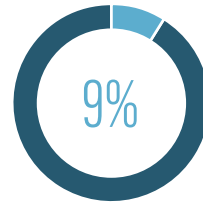
popular reason, at 54% of retailers surveyed, is generating more sales from repeat customers.

And when retailers are in the market for a vendor to help them achieve their goals, they seek vendors who are responsive. 73% say a responsive team is one of the main things they look for when selecting a vendor. This was followed by “works well with my other technology systems” at 66%, and “technology that is easy to implement and use” at 65%.

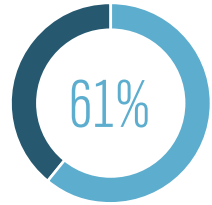
The pages in the report ahead explore the ecommerce vendor landscape across some of the most widely used and important ecommerce technologies today: ecommerce platforms, email marketing, and forward-looking technologies such as marketing automation

## VENDORS STILL HAVE ROOM FOR IMPROVEMENT

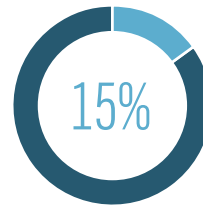
Thinking of your last project with a vendor over the past year, how did it go?



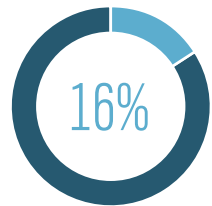
Went poorly overall



Went as expected



Went better than expected

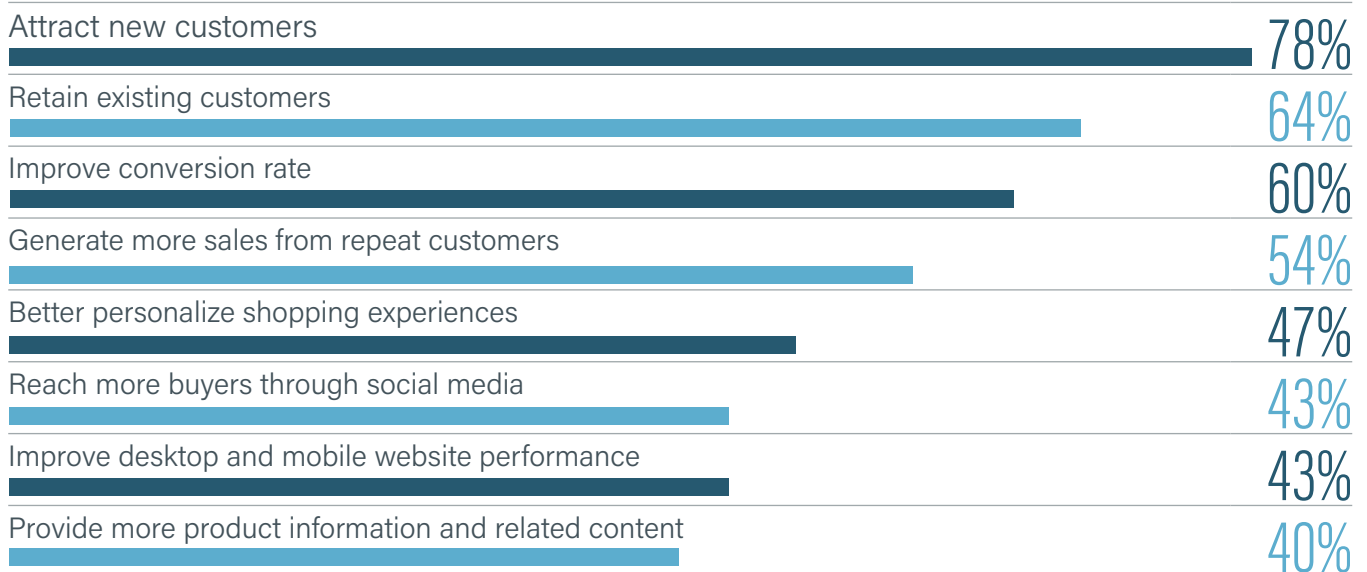


I haven't done any projects with outside vendors in the past year

Source: Digital Commerce 360 survey of 121 retailers, September 2020

## RETAILERS SPEND ON TECHNOLOGY TO ATTRACT NEW AND RETAIN CURRENT CUSTOMERS

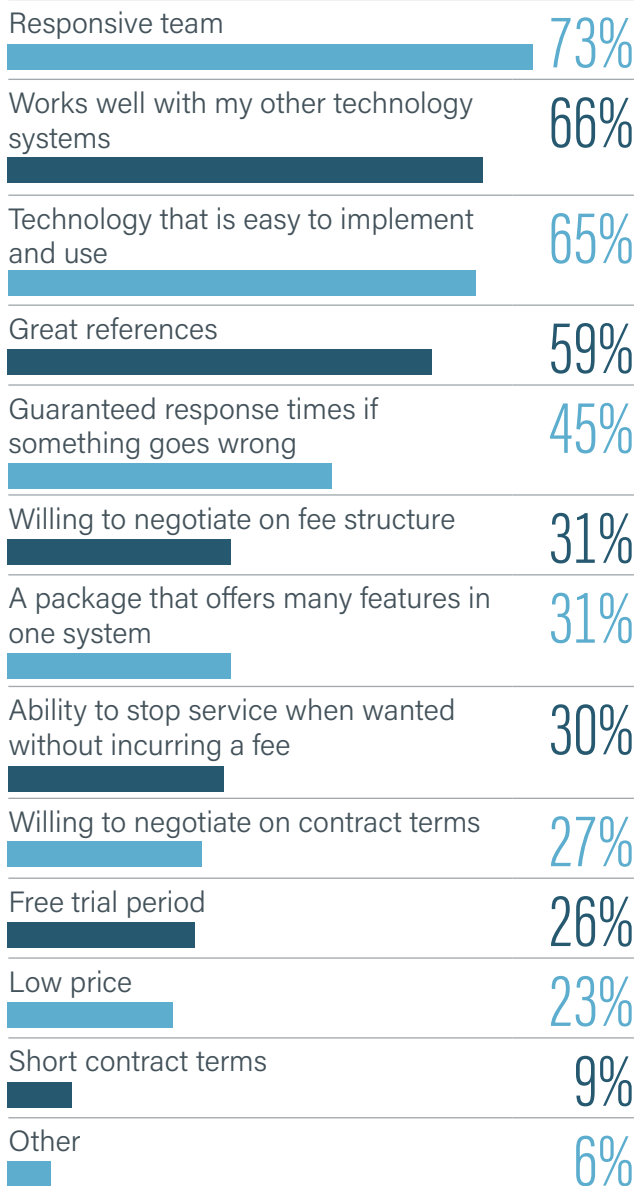
What are your main reasons for spending more on ecommerce technology over the next year? Select all that apply.



Source: Digital Commerce 360 survey of 121 retailers, September 2020

## VENDOR RESPONSIVENESS IS A TOP PRIORITY FOR RETAILERS

What are the main things you look for when choosing which vendor to work with? Select all that apply.



Source: Digital Commerce 360 survey of 121 retailers, September 2020

and artificial intelligence. The report covers vendor offerings and business developments and also includes case studies of retailers implementing various vendor services and the results they are generating. It also includes a section on how vendors are adapting their business models as a result of COVID-19 and a section on how one retailer is getting into the service provider market—a trend Digital Commerce 360 plans to carefully monitor. We also rank the top 10 vendors based on their number of clients in the Digital Commerce 360 Top 1000 across 24 different vendor categories to give readers a snapshot of the vendor leaders today.

The final product is a report that will give ecommerce executives an overview of the rapidly changing—and growing—ecommerce vendor industry.

Whatever the approach retailers take with vendors, there's no denying that good vendors can offer retailers a path to more customers, higher conversion rates and, ultimately, more sales. And, perhaps most importantly, a chance to get out of the technology business, freeing up more time for merchants to zero-in on the substantial challenges of online retailing. **LV**

# ECOMMERCE PLATFORMS: STRONGER FOUNDATIONS

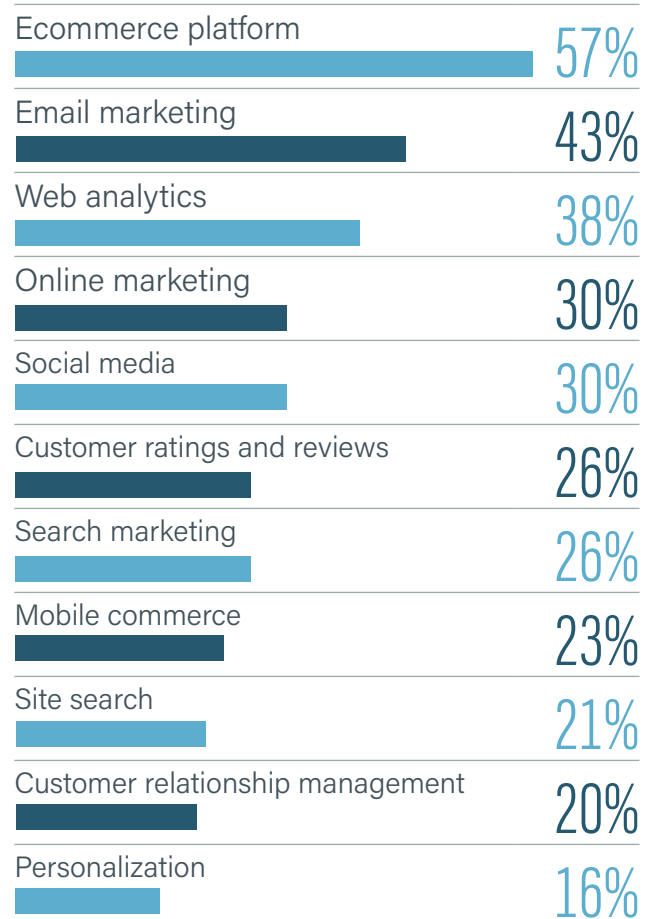
Ecommerce platforms are among the most basic fundamentals of an online retail business. But today, these platforms are far from basic. Vendors are enhancing the platforms they market, making it easier for non-technical retailer staff to make changes, integrating platforms with a wide range of other technologies, and enabling retailers to be more agile and make changes quickly to respond to customer expectations and market fluctuations.

And retailers are investing in these amped-up offerings. 51% of retailers list ecommerce platforms as one of their top three budget priorities over the next year, according to the September 2020 Digital Commerce 360 survey of 121 retailers. That's the most popular technology priority.

Plus, 57% of retailers say they have implemented ecommerce platform technologies from vendors over the past year, the most common implemented technology. And, 81% say investments in an ecommerce platform technology have been somewhat to very effective to improving conversions in 2020.

## ECOMMERCE PLATFORMS AND EMAIL MARKETING ARE THE TOP TECHNOLOGIES RETAILERS HAVE IMPLEMENTED RECENTLY

What technologies from vendors have you implemented over the past year? Select all that apply.



Source: Digital Commerce 360 survey of 121 retailers, September 2020



Ecommerce platform vendors have been busy this past year adding features to their offerings, making big business moves and helping implement new sites for merchants.

Here are some ways the ecommerce platform provider landscape changed over the past year, as well as case studies of retailers deploying these vendors' increasingly robust suites of services.

## BIGCOMMERCE MAKES ITS WALL STREET DEBUT

BigCommerce Holdings Inc., which ranks No. 6 among ecommerce providers used by the Digital Commerce 360 Top 1000 with 18 Top 1000 retailer clients, began trading as a public company early August, after pricing its \$216 million initial public offering above its targeted range.

Shares of the company began trading 183% higher than its IPO price. At the time, it was the second-biggest gain this year on a U.S. exchange at the opening bell for a newly public company raising at least \$100 million, according to data compiled by Bloomberg.

BigCommerce plans to use the influx of cash to further develop its cloud-based, software-as-a-service offerings for retailers. In addition, it plans to expand into such new and emerging markets as business-to-business ecommerce, "headless" commerce technology and attract

larger enterprise clients, it said in its S-1 filing with the SEC. It also says that it plans to retain and acquire more retail and B2B customers in the United States and internationally.

Headless commerce technology is designed with heavy use of application programming interfaces (APIs) to make a customer-facing front end independent of the ecommerce engine; this is an increasingly common approach for building flexibility into how companies use ecommerce to interact with customers through multiple interfaces, including mobile apps and online display ads, as well as conventional websites.

Founded in 2009 in Sydney, Australia, BigCommerce, now based in Austin, Texas, says it has garnered \$200 million in funding to date, has more than 600 employees and more than 5,000 technology partners.

BigCommerce noted in its filing that, as of June 1, it "served approximately 60,000 online stores across industries in approximately 120 countries." Its software suites for small and mid-sized companies range in price from about \$30 to \$300 per month, according to its website; it doesn't publish information on enterprise software for large companies.

Its customers' retailers ranked in the 2020 Digital Commerce 360 Top 1000, include BlissWorld, Char-Broil, Rock Bottom Golf, SkullCandy and The Bon-Ton Stores.

BigCommerce—headed since 2015 by CEO Brent Bellm, an internet veteran who was formerly chief operating officer at the Home Away online travel service now known as VRBO—has shown strong growth in recent financial periods.

BigCommerce has been hitting the ecommerce technology market on several fronts as it rolls out new features and targets more large companies as clients. The most recent payoff was a 33% year-over-year increase in revenue—the highest quarterly growth rate in the past 12 quarters—for its second quarter ended June 30 2020, its first quarter as a public company.

But even though it has yet to report a profit—it incurred net losses of \$4.0 million in Q1 2020 and \$42.6 million for all of 2019—it figures it's primed

for growth with the right amount of capital to fund investments in technology, customer acquisition and geographic expansion.

With the capital raised through the IPO, BigCommerce will be in a position to build on the technology investments it has been making and to emerge as a more important vendor, particularly to midsize companies, industry analysts say. Along with its investments in technology, BigCommerce has built out a strategy of integrating its ecommerce software through APIs with complementary technology, including customer relationship management and enterprise resource planning (ERP) systems, from other vendors.

BigCommerce cites that strategy in its IPO filing, asserting that integrating with outside vendors differentiates it from other ecommerce software vendors that build their own CRM, ERP and other applications.

“We believe we possess one of the deepest and broadest ecosystems of integrated technology solutions in the ecommerce industry,” it says in the filing. “We strategically partner with, rather than compete against, the leading providers in adjacent categories, including payments, shipping, POS [point-of-sale], CMS [content management system], customer relationship management (CRM) and enterprise resource planning (ERP). Our partner-centric strategy stands in contrast to our largest competitors,

**60,000** The number of online stores BigCommerce has served across industries in approximately 120 countries, as of June 1.



which operate complex software stacks that compete across categories.”

Jordan Jewell, an analyst covering ecommerce technology at research and advisory firm IDC, says BigCommerce has “a good foundation to move up-market” to serve large enterprise companies as well as small and mid-size ones. But, he adds that it will likely make “significant changes” to its technology to effectively meet the needs of large companies. “Right now, their product development efforts are still catering primarily to small and midsized businesses,” he says.

BigCommerce is rapidly increasing its revenue from large enterprise customers, Bellm says.

As of its second quarter, revenue from enterprise accounts is increasing at a rate of 44% year over year, compared with 32% a year ago, “reflecting our continued momentum serving the needs of mid-market and large enterprise businesses,” Bellm said on a conference call with investment analysts, according to a transcript of the call from Seeking Alpha.

Bellm gave several examples of why businesses recently launched ecommerce sites on BigCommerce:

- LaPerla, an Italian luxury apparel company, chose it to launch its cross-border and multi-currency capabilities.
- The National Baseball Hall of Fame’s merchandise store chose it to integrate its online payment gateway with its physical store point-of-sale software.
- Mountain bike manufacturer Yeti Cycles used the platform’s headless commerce APIs to integrate the ecommerce engine with Yeti’s existing content management system.
- Tree-care products merchant SherrillTree chose the platform for its ability to handle both B2B and retail customers on the same website.

Bellm also said that BigCommerce recently added to its SaaS ecommerce platform features, including more drag-and-drop merchandising capabilities in its Page Builder tool and the ability to design online stores with Italian and Spanish language content.

BigCommerce also recently signed two new technology partners: System, which provides visibility into an online merchant’s inventory, orders and inventory records, and BundleB2B, which lets B2B sellers review data on sales transactions and manage customer accounts.

## MAGENTO HELPS TWEEZERMAN GROOM ITS ECOMMERCE SITE

Adobe Inc.’s Magento ecommerce platform has also been busy as of late, adding more clients and

working with retailers and technology providers to help brands improve their ecommerce platforms. A retailer client of Magento that recently implemented one of the newest iterations of the Magento platform is consumer brand manufacturer and retailer Tweezerman.

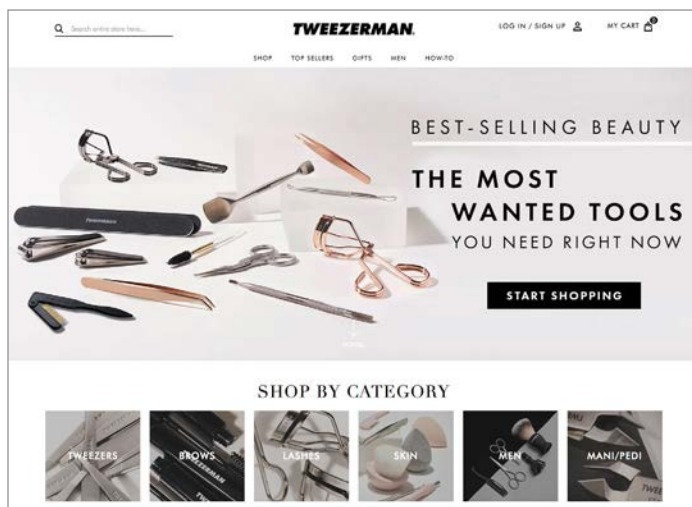
For Tweezerman, competing in the online cosmetics category and keeping shoppers coming back to its site takes some marketing finesse. The personal grooming tools manufacturer is a bit of a different animal compared with other beauty brands. Tweezerman products come with free sharpening and repair services for life, so consumers don't need to replenish them the way they would a lip stain or under-eye cream.

But Tweezerman has been making changes and thinking creatively to develop a brand following for its products and drive online sales. It recently relaunched its site on a more agile version of

the Magento ecommerce platform and with the time savings and technology upgrades from the move, it has been able to beef up its site with content, such as videos and tutorials, and improve its personalization.

The 40-year-old brand began selling online directly to consumers in 2011. For the past several years, it was using Magento 1 as its ecommerce platform to sell online to shoppers in the United States, Germany and the United Kingdom. Following Adobe's acquisition of Magento in 2018, Tweezerman decided to upgrade to the cloud-based version of Magento, Magento 2.3, says Patricia Chen, global ecommerce manager at Tweezerman. Magento is No. 1 among ecommerce providers used by the Digital Commerce 360 Top 1000 with 104 Top 1000 retailers.

Tweezerman relaunched its U.S.-based site in fall 2019 using Magento systems integrator and developer Redstage.com and rolled out



Page views have increased nearly 160% and sales have increased 87% for Tweezerman since moving to the cloud-based version of Magento.

the upgraded site to the U.K. and Germany in November 2019.

One of the main reasons for moving from the older, on-premise version of Magento to the Magento cloud platform was to save time. Hosting its site in the cloud enables Tweezerman to make one change and have it pushed out to all three country-specific sites rather than have to make a change three times over.

“Because our original platform wasn’t cloud-based, every time we made a change to one site, it had to be replicated on every other site,” Chen says. “We wanted a more aligned global approach.”

Employees who once spent significant time duplicating their work for every online storefront can now work on projects that drive sales.



After upgrading to the newest iteration of Magento, mobile sessions climbed 48.5% and new mobile users increased 51% at Tweezerman.

The team is working on a project to optimize checkout on mobile devices to reduce shopping cart abandonment. And the company is able to spend more time on A/B testing its ads and other projects, says Christine Pascullo, vice president of marketing and digital for Tweezerman.

The changes are paying off. After moving to the new iteration of Magento, page views have increased nearly 160% and sales have increased 87%, Tweezerman says.

With the new site, Tweezerman is not only able to turn on updates quickly for each region-specific site, but also hold off if it wants to wait and see how a feature works or make country-specific tweaks. For some new features, Tweezerman opts to roll out the change to the U.S. site first, work out the kinks and decide if it’s going to work before turning it on in the U.K. and Germany.

For example, Tweezerman only offers engraving in the U.S., so it wouldn’t want to build out a promotion for engraving for its U.K.-based customers.

Tweezerman used the time it saved on maintaining its ecommerce site to optimize its checkout for mobile. It removed the typically unnecessary field “Company,” as most consumers are shopping for themselves. That one change resulted in a 13.59% increase in revenue per mobile visit from when it migrated to the new version of Magento in September

2019 to mid-May 2020. It also is testing removing the back button to keep shoppers in the checkout path. After upgrading to the newest iteration of Magento, mobile sessions climbed 48.5% and new mobile users increased 51% from September to May.

The upgrade also freed up resources for Tweezerman to add educational content to its site, including videos and tutorials from influencers to keep shoppers coming back. “We’re in the beauty space, but we don’t have the benefit of color cosmetics’ seasonality,” Pascullo says. That means Tweezerman has to be savvy about how to keep shoppers coming back and how to cross-sell other products.

“We’ve added videos really spelling out our products, and we’ve been investing in really humanizing them. So, you can read about one of our tools, see a video about it and feel confident using it,” Chen says.

Content includes tips on how to hold its tweezers correctly. “We want to be considered a beauty tool expert. While we want to sell on the site, we also want Tweezerman to be the place to learn about the products,” Chen says.

One particular Magento feature saving Tweezerman time is Page Builder, which helps Tweezerman quickly build landing pages. Magento’s Page Builder is a drag-and-drop editing tool for building web pages using

columns, grids, text boxes and photos. It’s designed to help merchants update their sites without needing to know coding or hire specialized Magento developers.

The tool has, in particular, helped Tweezerman rapidly build landing pages for a new campaign “At Home with the Tweezerman Team,” which features Tweezerman employees taking and posting photos of themselves and producing content about how they are using Tweezerman products while stuck at home during the coronavirus pandemic. As of mid-May, more than 1,000 shoppers have visited At Home with the Tweezerman Team landing pages from emails, Tweezerman says.

“It’s simple. It’s just staffers taking selfies,” Chen says. “It’s male colleagues. Female colleagues. And it’s fresh content from them, such as their favorite self-care beauty tools.”

## SHOPIFY KEEPS BUSY AMID THE PANDEMIC

As online shopping continues to spread in part due to the coronavirus, ecommerce platform Shopify Inc. is gaining more business. New stores created on the Shopify platform grew 71% in the second quarter compared with the first quarter. Plus, large sellers continued to migrate to the higher-end Shopify Plus designed for larger merchants, resulting in a record quarter for new merchant additions to the platform. Shopify is No. 4 among ecommerce

providers used by the Digital Commerce 360 Top 1000 with 38 Top 1000 retailers.

Shopify nearly doubled its revenue in the second quarter of 2020 as merchants moved their businesses online during the coronavirus pandemic. Sales grew 97% to \$714.3 million from the same quarter a year ago and gross merchandise volume, a key metric that represents the value of all goods sold through Shopify's platform, surged 119% from a year earlier or to \$30.1 billion.

New stores growth was driven in part by the company's decision to extend the free-trial period on standard plans from 14 days to 90 days.

**71%** The percent new stores created on the Shopify platform grew in the second quarter compared with the first quarter.



Additionally this year, Shopify signed deals with Walmart Inc. to expand its third-party marketplace site. With the deal, Walmart says it plans to add 1,200 Shopify sellers to its marketplace in 2020. It also signed a deal with Affirm Inc. to allow consumers to break purchases into a series of smaller payments. Also in 2020, the company launched a redesigned point-of-sale service that brings online and offline sales together, offers curbside pickup and local delivery options and greater flexibility to move inventory between various locations.

In May, Shopify integrated with photo-based social media company Pinterest to turn client product catalogs into shoppable “product pins,” or pins that allow retailers to update price, availability and product descriptions in their Pinterest accounts. The feature allows Shopify retailers to upload their product catalogs and publish in-stock products from the Pinterest app that is integrated with Shopify.

Once the Pinterest app is installed to a Shopify site, retailers can add tags to their Pinterest accounts, which allow consumers who search for a product or category to discover those brands. Additionally, a “shop” tab will appear on the retailer's Pinterest profile, and Shopify retailers can promote their pins as paid ads. Merchants can also edit their Pinterest listings through their Shopify dashboards.

Meanwhile, Veteran dress designer Meghan Noland and her brand, Meghan Fabulous, which sells boldly patterned dresses and chunky jewelry, in June moved to the Shopify platform in part for Shopify's integrations with Facebook.

The Shopify technology allows the brand to sell an item featured on MeghanFabulous.com directly on the Meghan Fabulous Facebook page, where she has 6,000 followers.

Previously, the brand could show items on Facebook and refer shoppers back to the website, but now consumers can buy directly through the social apps. Plus, Shopify provides details on where consumers bought and enables the apparel retailer to accept Apple Pay and other fast-checkout options for purchases.

### HCL ECOMMERCE PLATFORM TECHNOLOGY HELPS FOLLETT ACE CONVERSIONS

Follett Higher Education has a lot of moving parts to its business. The collegiate book and campus store retailer manages 1,800 ecommerce sites for about 1,250 colleges across the U.S. and Canada, ranging from Stanford to Texas Christian University. Each site not only sells widely different products, but also has numerous other nuances—such as the types and forms of financial aid payments accepted, to specific campus cards that can be used for online purchases.

Follett manages the ecommerce sites for the schools it works with, but collaborates with each college for pulling in content and products specific to each school.

Nearly three years ago, Follett realized its current platform—built on International Business Machine Corp.'s WebSphere Commerce, but hosted on Follett's own servers—needed an upgrade, says Lori Krzyzewski, senior vice president of ecommerce for Follett Higher Education. Follett wanted the ability to deploy changes faster by using an agile approach that would let it push out site updates continually as needed.

Additionally, the retailer's servers needed what the company describes as a “multimillion dollar” upgrade. It wanted to explore moving to the cloud, which offers computing power for storing and processing data very quickly—power that would be expensive and time consuming to build out, buy and maintain in house using its own servers. Hosting on the web in the cloud enables retailers to mine and process data—from shopper contact information to inventory information and more—much faster and for less money than on their own. The cloud also allows retailers to scale their capacity up and down and pay only for what they need when they need it.

“We had servers coming of age,” says Roe McFarlane, president of Follett Higher Education. “We had to decide if we should double-down our on-premise model or move to the cloud.”



The retailer spent 18 months researching ways it could upgrade its ecommerce technology and weighing its hosting options with the assistance of consulting firm Accenture. In the end, Follett decided to migrate to the most recent version of the ecommerce platform it was on from IBM Corp.—HCL Commerce V9—but move to cloud hosting rather than upgrading its servers. (India-based HCL Technologies Ltd. purchased several IBM products, including IBM WebSphere, in July 2019 for \$1.8 billion.) HCL is No. 5 among ecommerce providers used by the Digital Commerce 360 Top 1000 with 36 Top 1000 retailers.

The \$50 million ecommerce technology investment was a massive undertaking,

From April 1 to mid-August, 2020, desktop conversions are up 47%, tablet's are up 32% and mobile 60% at Follett compared with a year earlier.



McFarlane and Krzyzewski say, and included a new content management system—Adobe Experience Manager—as well as moving to a responsive design and mobile-first approach to its website design. With responsive design, a single website adjusts to the size of the screen the visitor is viewing and only requires that the retailer maintain one codebase and one set of web content. Mobile-first is a design approach that starts with designing for a smartphone screen then scales up for desktop. Proponents say this is a smarter way to design a single site for mobile and desktop, as scaling up for a larger screen is typically easier than shrinking a site for a smartphone. Follett also added several new features and functions. For example, it added PayPal as a payment option, and shoppers can now create and share wish lists.

Another big piece of the overhaul was to move to a microservices site architecture. Microservices, which have the same principal features as headless ecommerce platforms, are growing in popularity as a way to build and manage ecommerce sites. They consist of individual components or independent services that can be swapped out with ease to keep an ecommerce business current, more agile and able to deploy faster. A microservice can be any application or feature on a website—such as a site search tool, for example—and it will use an application programming interface as a calling card of sorts to connect with and pull data from a separate application, such as a product database. This

approach, proponents say, enables businesses to be more agile and constantly iterate to better serve shoppers.

The project was “mammoth in size due to the complexity and size of transformation,” Krzyzewski says. Beyond the 18-month research and planning phase, the overhaul took an additional 18 months to complete, she says. It required more than 275,000 developer hours, 8,000 user testing hours and 7,000 pages of business requirements. 250 engineers outside of Follett worked on the project, and individuals working on the overhaul spanned Canada, the United States, China and India.

The transformation, which went live mid-2019, has paid off in several ways, Follett says. For example, the platform’s customizable user interface supports faster releases and allows Follett to quickly update its school ecommerce sites with localized content for each campus, McFarlane says. With the old platform, Follett

deployed updates six or seven times a year. Now, it’s deploying new code to improve sites on an ongoing basis. Fiscal year to-date—from April 1 to mid-August, 2020 compared with a year earlier—desktop conversions are up 47%, tablets are up 32% and mobile 60%.

A big benefit of the new platform is the ability to spot areas where the platform can improve and make changes more quickly. For example, Follett uses IBM’s Tealeaf analytics software, which captures website interactions of shoppers, to help it identify where they might be having trouble or frustrations navigating a site.

Now, if Follett sees an area or feature it needs to modify, remove or add, it can do so more quickly because of the new cloud and microservices-based platform. For example, under the new technology, it trimmed the checkout process from several pages to a single page. Plus, it cut in half the number of clicks required to find and purchase a textbook. **LV**

# EMAIL MARKETING: MAKING EMAIL WORK HARDER

With a little facelift, older marketing channels can work in new ways. And that's what's happening with email. Several vendors are helping retailers upgrade their emails to squeeze a better ROI out of the longstanding marketing channel.

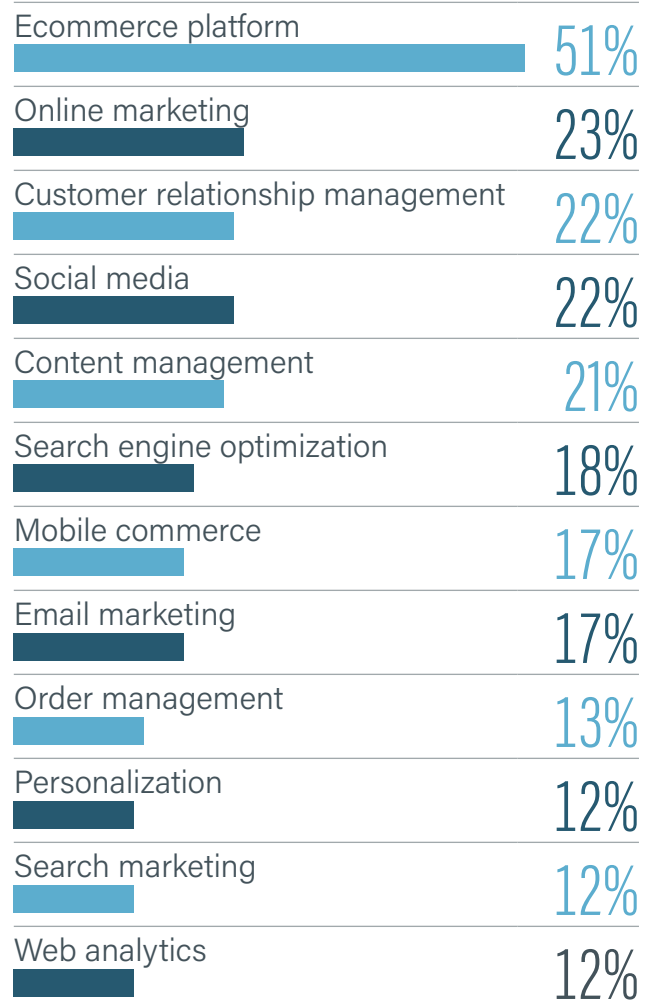
Retailers are still investing in email. For example when asked 'What technologies have you implemented from vendors over the past year?' 43% of retailers said email, the second-most popular response behind ecommerce platforms, according to the September 2020 Digital Commerce 360 survey of 121 retailers. And 17% say email marketing is one of their top three budget priorities over the next year.

Esme Hovekamp, director of marketing at high-end home furnishing brand Jonathan Adler, says email is one of the merchant's strongest digital marketing channels. "Everyone talks about how email is dying," Hovekamp says. "But for us, we're getting a really huge lift right now from email. It's one of our top-top performing channels."

Jonathan Adler launched its first flagship store in Soho in New York City in 1998 and now operates eight stores in the U.S and London, as well as ecommerce sites in the United States and the U.K.

## ECOMMERCE PLATFORMS AND ONLINE MARKETING ARE TOP TECHNOLOGY SPENDING PRIORITIES FOR MERCHANTS

What are your top three ecommerce technology budget priorities over the next year? Select only three.



Source: Digital Commerce 360 survey of 121 retailers, September 2020

The merchant, which began using email marketing technology firm Listrak in October 2019, has generated an 85% increase in traffic from email to its site since employing the vendor. Listrak ranks third among email providers to the Top 100 with 97 Top 1000 email retailer clients. Additionally, conversions from email are up 10% and revenue from email have grown 98%. Much of that lift stems from email personalization, Hovekamp says.

Many email vendors are putting new spins on the longtime marketing workhorse and helping retailers generate impressive results. Many are helping retailers uncover new ways to personalize email messages by adding tailored product recommendations to auto-generated emails. Others are aiding merchants with tweaking loyalty program emails. With help from technology providers, many merchants are

finding email remains a sales powerhouse—if they are willing to refine campaigns to send just the right messages tailored to each shopper.

Retailers like Jonathan Adler are still investing in email because it's still paying off. 54% of retailers spend more than 10% of their marketing budgets on email, according to a Digital Commerce 360 survey of 105 online retailers conducted in May and June 2020. Additionally, 76% say email is somewhat to very effective, 53% list email as one of their top three customer acquisition marketing tactics and 58% plan to spend more on email next year.

One tactic that has worked especially well for Jonathan Adler is adding product recommendations to its browse-abandonment emails. These messages are sent to shoppers who viewed products but didn't purchase them. About three months ago, Jonathan Adler began not only showing the specific product that the shopper looked at in those messages, but also added in several other recommended items that are similar to the product she abandoned or that the retailer thinks she might like based on what she has purchased, browsed or clicked on in the past.

“Those emails have the strongest average order value out of all our automated emails,” Hovekamp says. “And they are one of the few automated messages where we don't offer a discount.” For example, she says Jonathan Adler's cart-abandonment email offers a discount.

**85%** The increase in traffic from email to Jonathan Adler's site since using Listrak.





**54%**  
of retailers spend more than 10% of their marketing budgets on email.

Source: Digital Commerce 360 survey of 105 online retailers conducted in May and June 2020

Erin Vitero, director of CRM for TechStyle Fashion Group, which owns subscription apparel and accessories retailer JustFab.com, says her company is using email marketing vendor Sailthru to put a personal twist on automated email and it is paying off. Adding personalized product recommendations to the shipping confirmation email resulted in 31% more revenue per email sent for JustFab and a 15% increase in conversion rate.

“This was a win because we did not typically consider this a ‘shopping email’ but given its high open rates, we gave our customer another chance to shop our products,” Vitero says.

JustFab also is peppering product recommendations into other emails such as abandon-cart emails and general promotion emails such as messages about sales. JustFab tested the tweak with an email promotion during the 2018 holiday season by including personalized product recommendations in abandon-cart emails. That change resulted in

a 57% increase in revenue per email and a 27% increase in conversions. Since then, JustFab also added recommendations to its refer-a-friend emails with positive results.

“In the past, we had our main call-to-action [in those emails] to our referral program without any product recommendations below, and we would see that email not drive as much as revenue as others,” she says. When JustFab added customized product recommendations, it increased revenue from those campaigns by 150%, Vitero says. “It became one of our top-performing email campaigns [in terms of revenue] instead of one of our lowest performing,” Vitero says.

JustFab also has made other small modifications to personalize the messages it sends. For example, the beginning of the month is a key selling time for the retailer. That’s because JustFab members must visit the site between the first and fifth of the month to purchase or skip the month. If they don’t take one of those actions, they are charged \$39.95, which goes into an account that they can spend from when they find something they like. That deadline means many shoppers visit the site in the first few days of the month.

Early in the month, JustFab sends an email to members showcasing new arrivals and reminding shoppers to visit the site. Previously, that email always featured shoes first—because footwear

is the retailer's most popular product category—followed by clothing and then bags. But the retailer knew, based on customer browsing and purchase data, that some shoppers mainly (or only) seemed to be interested in bags or apparel. In 2018, JustFab switched up the monthly email to prominently feature the type of products it thought each specific customer might be most interested in based on what it knew about her. That minor adjustment led to an 11% increase in revenue from that email, a 6% increase in click throughs and a 7% increase in conversions compared with when it always led with shoes.

In 2019, it went a step further by adding the category the customer was likely most interested in to the subject line and tested that against a generic new arrivals subject line—such as “New Shoes/Bags/Clothes You Can’t Live Without” vs. “New Arrivals You Can’t Live Without.” The personalized version had a 5% higher open rate and generated 7% more revenue.



When JustFab added customized product recommendations to its refer-a friend emails, it increased revenue from those campaigns by 150%.

The retailer says selecting the right vendor for email help has saved it considerable time and resources. For example, before using Sailthru for dynamic product recommendations, its ecommerce merchandising team would manually select products to highlight in emails. Using Sailthru technology to automatically populate emails with product recommendations tailored to each shopper has saved JustFab staff time on custom designing and inserting products into emails. Sailthru's base email pricing, which includes personalization and automation capabilities, is based on the number of emails its clients send.

“The number of data points we have on each customer varies depending on customer activity on our site, but we can have more than 50 data points on each customer available for us to use for segmentation or personalization,” Vitero says. Those data points include factors like purchase frequency, when the customer last made a purchase and lifetime value of each shopper. “I’ve never seen so much robust [customer] data as what we have at TechStyle,” she says.

Some of that hyper-specific customer data comes in extra handy a few times a year. “There’s been a couple instances where we’ve used it to get extremely targeted,” Vitero says. “Like when we’ve had a very specific type of product we need to sell through quickly. It lets us target very specific customers.”

'Non-technical staff can create emails without needing to know any coding. I'm not a coder by any means but on occasion even I have sent emails out.'

—Esme Hovekamp, director of marketing, Jonathan Adler

Hovekamp also says selecting the right email service provider is key to strong email marketing performance. She says Listrak makes reporting and analytics clear and easy to understand. “I can quickly see how campaigns are performing,” she says.

Listrak's conversions dashboard can help her determine how emails are performing based on type of campaign, such as marketing, promotional or automated. Listrak charges its clients a flat fee for using its platform and a fee per 1,000 emails sent.

The technology is also easy to use, Hovekamp says. “We're a very small team, and Listrak is a user-friendly platform. Non-technical staff can create emails without needing to know any coding. I'm not a coder by any means but on occasion even I have sent emails out,” she says.

Brand manufacturer and retailer Vitamix, which sells high-end blenders and accessories direct online and through retailers in store and online such as Target Corp., Costco Wholesale Corp. and

Williams Sonoma Inc., also has been focusing heavily on tying its loyalty program to its email campaigns, says Jimmy Wojtila, associate manager of email marketing. The retailer, which uses Adobe Campaign Standard as its email service provider and Movable Ink for email personalization, launched its loyalty program in June 2019 and currently has nearly 120,000 loyalty club members.

In Adobe, Vitamix can see if each customer is part of its loyalty club and each member is assigned a unique ID, which can automatically pull in that customer's total points earned over time, how many she has spent over time and how many points she currently has to use. Once a month, Vitamix sends an email with that data to its loyalty club, and reward redemptions spike immediately, Wojtila says. In June, Vitamix received 2,000 rewards redemptions from that email, Wojtila says.

Adobe charges Vitamix a flat fee based on the number of Vitamix's email subscribers and the duration of the contract. Movable Ink charges

Vitamix based on the number of emails the retailer sends that are opened.

Members can redeem points for products from several brands that it partners with, such as smoothie, soup and health food company Daily Harvest, and Coconut Bowls, which makes bowls, spoons and straws out of coconut shells and bamboo. Vitamix is working on making those point emails more personalized by including the products each shopper can get with his available points or how many points he needs to unlock other rewards.

Vitamix also ties each consumer's loyalty ID to the refer-a-friend messages it sends its members. Members receive a "hefty" reward for referring a friend who makes a purchase, he says. In its refer-a-friend emails, Vitamix includes a link that the member can email or share on Facebook or Twitter that will automatically credit the member's account when a friend clicks that link to make a purchase, Wojtila says.

Using Movable Ink, Vitamix also can dynamically change an email based on when the shopper opens it. For example, it places countdown clocks for flash sales that update depending on when the email is viewed. If a shopper opens the message after the sale has ended, it will let her know the promotion is over and suggest other pre-selected products for her to view.

Vitamix, which plans to launch additional new products this year, in June launched its second new item, the FoodCycler FC-50 countertop composter that turns food scraps into fertilizer. Vitamix is using Movable Ink to show shoppers in real time the number of shoppers currently viewing the product based on how many have clicked to view it from the promotional email.

20-year-old meat purveyor US Wellness Meats is using email marketing vendor Bluecore to segment emails by customer types—like foodies, moms and customers. It also allows the retailer to tailor its communications to a customer's interaction with specific products, such as if



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she just viewed a product or abandoned a cart or her replenishment pattern for specific items over time.

As of late September, the retailer generated a 16% conversion rate average for back-in-stock-triggered email, 29% for cart-abandonment email and 12% for product-abandonment (meaning the shopper made it to product page but didn't add a product to her cart or buy).

As of September 2020, conversion rates from email are around 8%. "Email is by far our top revenue generator and has been for nearly four years, generating approximately 35%, where paid search accounts for 8%-9% of revenue on average," says US Wellness Meats CEO John Wood.

Wood has also been using Bluecore's Smart Promo, an automated email marketing

campaign that offers product recommendations for individual customers based on purchasing habits, browsing, search patterns and more. The program allows US Wellness Meats to send very specific messages to each individual customer, he says. The Smart Promo campaigns have generated a very competitive open rate, click-through rate and conversion rate, Wood says, without being more specific.

Small tweaks to add personal touches to email messages can add up to big benefits for retailers. Taking the time to step back and think about how to better to talk to each individual shopper through email can be worth it. And retailers who do it just might find what Hovekamp of Jonathan Adler found. Email is far from dead. It's alive and can thrive if retailers work with vendors to put in the effort to give the channel an extra personal twist. **LV**

# FORWARD-LOOKING TECHNOLOGY

Retailers are turning to vendors for help with advanced technology such as marketing automation and artificial intelligence to gain more new customers and sales for less money and less work.

The digital marketing landscape has grown increasingly complex. From paid search to social, affiliate to retargeting—and the buffet of marketing flavors available today, along with all the levers retailers can pull within those channels, can be overwhelming for

Harman's direct online sales grew 25% in 2019, and it is projecting 27% growth this year.

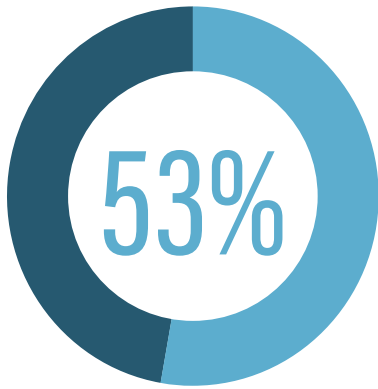


many merchants. That's leading many retailers to turn to vendors to help them automate their marketing and use artificial intelligence to gain new customers at the lowest cost possible.

In fact, 85% of retailers say they use at least one marketing platform or marketing software technology, according to a Digital Commerce 360 survey of 105 online retailers conducted in May and June 2020. What's more, 44% say they use three platforms or more. And, many are turning to more advanced tactics. 53% of retailers use artificial intelligence to target ads, according to the survey.

Harman International is one brand constantly refining the way it gains new customers to ensure it's getting the best return on investment possible. The retailer and manufacturer, owned by Samsung Electronics America Inc., sells the popular JBL speakers and Harman Kardon soundbars.

And Harman is working on a few advanced automated marketing strategies through its connected Salesforce Commerce, Service



Percentage of retailers who used artificial intelligence to target ads.

Source: Digital Commerce 360 survey of 105 online retailers conducted in May and June 2020.

and Marketing clouds that it hopes will further amplify its ecommerce sales through personalization. “It’s essential to find a way to talk to customers like the individuals they are,” says Dave Spinato vice president of global ecommerce for the brand.

Its strategy seems to be working. The manufacturer is increasingly striking a chord with music fans online. Harman launched its direct-to-consumer ecommerce business in the U.S. in 2015 and today operates 72 ecommerce sites in 42 countries and 17 languages that sell its home audio equipment. Plus, large retail chains including BestBuy.com Inc., Target Corp. and Guitar Center also sell its products online.

Online sales via its ecommerce sites or its wholesalers now account for about 40% of the company’s total home audio sales. In 2019, Harman’s direct online sales grew 25%, far above U.S. ecommerce sales growth of 14.9%,

according to a Digital Commerce 360 analysis of U.S. Department of Commerce data. And the manufacturer is projecting 36% growth this year.

A key to that ecommerce success, Spinato says, is to fine-tune its marketing to attract new shoppers—without spending too much time or money.

Harman turned to Salesforce to help it automate its marketing. Harman in September finished a project to tie its Salesforce Service, Marketing and Commerce clouds together to automate sending relevant, customized marketing messages to shoppers.

“If a customer calls us about our portable speaker, that lights up in Service Cloud [and] then Marketing Cloud can use that data to send an automatically triggered email to that individual about portable speakers,” Spinato says. It also uses Salesforce to deploy cookies so that if a customer who is not registered on one of the retailer’s ecommerce sites places an item in his cart and then visits another site, such as Facebook, he will be presented with ads for that product, enabling Harman to remarket to the shopper without collecting his email address.

But email isn’t the only automation lever retailers can pull. For example, Harman is working on a project to dynamically change the ecommerce homepages of its sites to display

products based on the ad the shopper clicked on, such as wireless JBL headphones. Spinato says Harman will be done with the project late this year or in early 2021.

It's important for retailers considering implementing automated marketing to understand that it takes groundwork and a clear, well-planned-out strategy to reap rewards from such platforms, says Rebecca Lieb, analyst and founding partner at research and advisory firm Kaleido Insights.

“Marketing automation can indeed help a business in myriad ways. What I don't like about the phrase, however, is the word ‘automation,’”

she says. “Without solid content and technology strategies, as well as sophisticated use of data, these platforms are just another element in the marketing technology stack.”

Lieb says retailers still need to do their research when selecting vendors to see how they will fit with their business and current technologies, integrate them with existing technology and constantly monitor, analyze and update them. For example, some programs need to be refreshed with different customer segments and tweaked for sales, promotions and seasonality. “All the data they collect must be analyzed and those findings must be used to optimize efforts going forward. Without this level of dedication,

## MARKETING AUTOMATION GARNERS THE BEST FORWARD-LOOKING TECHNOLOGY RESULTS, BUT STILL HAS AMPLE ROOM FOR IMPROVEMENT

Thinking about some of the newer technologies to come to market, which describes your current interest level?

CATEGORY	USING WITH GOOD RESULTS	USING BUT LIMITED RESULTS	CONSIDERING FOR 2021	NO PLANS TO INVEST IN TECHNOLOGY
Artificial intelligence (AI)	10%	14%	40%	36%
Marketing automation	18%	27%	38%	17%
Machine learning	10%	13%	36%	41%
Voice commerce	7%	7%	27%	59%
Internet of things (IoT)	7%	9%	20%	64%
Augmented reality	3%	5%	17%	75%
Virtual reality	3%	5%	17%	75%

Digital Commerce 360 survey of 121 retailers, September 2020

‘Our in-house marketing resources are limited and there are so many places to focus and be; we found ourselves just reacting and doing. Albert offered us structure, focus and an extra team member.’

— John Wood, CEO, US Wellness Meats

marketing automation platforms will quickly cease to be quite so ‘automated,’” she says.

Indeed, just 18% of retailers say they are using marketing automation with good results, according to the September 2020 Digital Commerce 360 survey.

However, when implemented and managed correctly, potential payoffs include better data, better customer relationships, higher sales, customer retention and more precise personalization, Lieb says.

Smaller players are also reaping the time-saving benefits of marketing automation and AI. US Wellness Meats is one such retailer. In 2017, it began using autonomous marketing firm Albert Technologies Ltd. and marketing vendor Bluecore to automate finding new audiences, reduce customer acquisition costs and maintain its relationship with existing customers through artificial intelligence.

Albert is a marketing platform that uses AI to automate retailers’ digital advertising programs.

US Wellness Meats, which generates several million in online sales, first tasked Albert with creating new awareness and demand for its products among its three primary customer types: moms, foodies and consumers following special diets, such as Keto and Paleo. Albert began by conducting large-scale lookalike campaigns on social media and in paid search advertising and autonomously testing multiple creative combinations across hundreds of audience segments. Once it identified the characteristics of its highest-value audiences and which creative combinations each responded to, it scaled its autonomous targeting efforts using the most valuable combinations.

“We chose Albert for its ability to autonomously run our paid social media and search

campaigns and help us focus on high-value audiences and the right creative,” says CEO John Wood. “Our in-house marketing resources are limited and there are so many places to focus and be; we found ourselves just reacting and doing. This was not a strategy, just a bunch of tactics. Albert offered us structure, focus and an extra team member, if you will,” he says. Wood says Albert helped US Wellness Meats find and invest in marketing to audiences with the highest ROI. “We don’t have marketing dollars to waste so we do our best to develop a loyal customer base,” he says.

The retailer’s conversion rates from paid search as of September 2020 were approximately 10% and paid search is the retailer’s top converting marketing channel, Wood says.

With the insights provided by Albert, US Wellness Meats now gets a much fuller view of each shopper. “We now understand their historical buying patterns and cadence down to every product they’ve ever looked at, interacted or bought—and what prompted them to the site,” Wood says. “Was it one of our emails? A Google search? Social media? A promotion?” Knowing what brought a customer to the site helps US Wellness Meats identify the best marketing channels, Wood says.

“We’re sold on machine learning and AI,” Wood says. “We could have an office building full of marketing professionals and it wouldn’t be as productive as what we’re using. Instead of laboring over demographics, messaging, and politics, we let the algorithms do the work.” **LV**

# A HEALTHY ECOMMERCE MARKET

Ecommerce vendors respond to—and benefit from—the viral surge in online shopping amid the coronavirus.

While the coronavirus has spread, so has the prevalence of online shopping.

U.S. ecommerce sales grew a record 44.4% in Q2 as the pandemic sent shoppers online, according to figures released from the U.S. Department of Commerce. Consumers spent \$200.72 billion online with U.S. retailers in Q2 2020, up from \$138.96 billion for the same quarter the prior year. That means more than \$1 in every \$5 spent came from orders placed on the web during the April-June period.

Merchants are adapting quickly to consumer demand for social-distance shopping and delivery, and vendors are stepping in to help them—and gaining new business.

In May, ecommerce platform provider Shopify said that 26% of its brick-and-mortar merchants in its English-speaking geographies were using some form of the vendor's local in-store/curbside pickup and delivery services, compared with 2% at the end of February.

In response to the pandemic, Shopify launched a resource center for merchants, with links to apply for government funding, tutorials for Shopify store point-of-sale merchants on implementing in-store and curbside pickup, and information on how to set up local delivery options. Shopify also added digital gift card selling to all Shopify plans on March 20. Additionally, Shopify is lending \$200 million additional dollars through its Shopify Capital arm to merchants and expanded those loans beyond the U.S. to merchants in the U.K. and Canada.

Shopify says its U.S. merchants had Black Friday-type of traffic in the months after the coronavirus was deemed a national emergency in the U.S. on March 13. It added “thousands” of businesses to its platform amid the outbreak, it says. Many brick-and-mortar businesses have used Shopify to keep their companies afloat as nationwide lockdowns force retail store closures across the world, the company says.

In late March, Shopify began offering free three-month trials of its standard ecommerce platform.

“Brick-and-mortar-only retailers have lost their only channel, the street, if these businesses are going to survive, it's mission-critical to get online and we're giving them more time to do exactly that. This change is also helpful to anyone finding themselves with more free time or wanting to generate supplemental income,” chief operating officer Harley Finkelstein said on an earnings call earlier this year.

Shopify also said it's seeing a notable increase in online store creation since the pandemic, some of which are established brands that are likely losing sales because of consumers visiting grocery stores less frequently. In April, CPG brand Hines signed onto the vendor's Shopify Plus platform designed for larger merchants and launched ecommerce seven days later, while chocolate maker Lindt launched in five days.

Meanwhile carrier vendors such as UPS Inc., United States Postal Service and FedEx Corp. are feeling the heat from increased package strains, and that's creating opportunities for other logistics service providers to gain more prominent roles in the fulfillment playing field.

In March 2020, 85% of packages were delivered on time, according to last-mile technology vendor Convey Inc. Convey's data is based on tens of millions of packages shipped from more than 500,000 locations in North America. This on-time percentage decreased to 76% in April,

72% in May and 71% in June, with a slight uptick in July at 77%. Comparatively, in 2019, 88%-89% of packages were delivered on time during these same months.

Convey determines if a package is on time if the carrier delivered the package by the date it originally provided to the retailer and the customer. Shipping carriers UPS, USPS and FedEx have all posted year-over-year decreases in on-time percentages in the last few months, according to Convey.

“Since COVID, retailers have been racing to get products into the hands of their customers while limiting contact,” says Davis Kiyoo CEO and founder of marijuana accessories retailer Myster. “This is typically done through delivery and curbside pickup. This has been a boon to

26% of Shopify's brick-and-mortar merchants in its English-speaking geographies were using some form of local in-store/curbside pickup and delivery in May, compared with 2% at the end of February.





major conglomerates like Amazon and Walmart who already have the infrastructure for fast home delivery.” But, he says, many medium-to small-sized businesses are relying on vendors like Haultail, an on-demand last mile delivery service that picks up and delivers items from stores, he says.

Other fulfillment services are upping their games. In August, app-based delivery company DoorDash Inc. added grocery delivery to its app, making itself the latest competitor in a same-day delivery vendor segment dominated by Instacart Inc. In its August announcement, DoorDash said it planned to offer more than 75 million Americans access to its grocery delivery service within the next few weeks. Other on-demand delivery services are moving fast with the pandemic, seeking to capitalize on the influx of online orders. Ride-sharing and delivery service Uber Technologies Inc., for example, in July announced it would buy Postmates Inc., another on-demand delivery

In March 2020, 85% of packages were delivered on time. That percentage dropped to 77% in July.



Source: Convey

vendor, for \$2.65 billion. The deal is expected to close in the first quarter of 2021.

Another retailer expanding its work with a fulfillment vendor during the crisis is Tractor Supply. During the pandemic, the retailer was able to expand its existing deal with crowdsourced delivery company Roadie Inc. in less than three weeks, says Rob Mills, chief technology officer, digital and strategy.

The retailer had plans to increase the number of stores offering Roadie delivery over the next 12 months, Mills says. Tractor Supply moved up this timetable dramatically, as more shoppers demanded contactless delivery options as the virus escalated, he says.

“It was a very smooth and seamless transition,” Mills says, because Roadie was already serving about 400 Tractor Supply stores and the retailer had already integrated Roadie into its systems as an option a consumer could choose at checkout. That helped accelerate the process of rolling out Roadie delivery at an additional 1,462 locations in less than three weeks. The service is now available at all of its stores.

Roadie uses a network of more than 150,000 independent drivers that operate vehicles of all kinds. The company says it can offer same-day delivery to 89% of U.S. households. Mills says Roadie’s flexibility and large footprint made it a good fit. For large shipments, he says, Roadie

drivers with SUVs or light trucks can use store-supplied trailers to deliver large, heavy items such as lawn tractors.

Other logistics service providers are taking steps to keep orders moving through warehouses and truckers on the road.

FreightWise LLC, for example, is working with online retailers to manage shipments of more products more efficiently, and Next Trucking Inc. is listing on its online marketplace opportunities for carriers to return empty containers to a shipping port to help get the containers back to shippers. Next Trucking's marketplace connects retailers with carriers based on a driver's availability, load capacity and location. Shippers can see a shipment's status in real time.

Meanwhile, to boost warehouse productivity as orders surge during the pandemic, adult diaper retailer NorthShore Care Supply has implemented autonomous mobile robots (AMRs) from robotics vendor Waypoint Robotics at its new fulfillment center. The robots drive the

retailer's customized carts that carry products to be picked onto. Those carts can carry 28 orders and up to 700 lbs. "[Such large carts are] difficult for a person to safely maneuver around the warehouse, but these GPS-guided robots can safely maneuver them around the aisles," says owner Adam Greenberg.

Additionally, a new voice-picking system at the facility from The Numina Group also allows the retailer's order management system to sync between voice headsets and robots to ensure there is a constant assembly line of robots and carts. Greenberg says the robots are especially efficient because they are customized to handle the retailer's unique products, which can be large.

To satisfy shoppers' online demands during the coronavirus pandemic, campus bookstore operator Follett Higher Education used a vendor to make its order management system more flexible. The retailer is using the IBM Sterling order management system to fulfill orders from a variety of different fulfillment locations, such as its 1,200 physical stores, regional distribution centers or one of its drop-ship vendors. "The end result is that we don't have stale orders waiting to be fulfilled," says Lori Krzyzewski, senior vice president of ecommerce for the retailer.

It's also worked to cut shipping costs by switching carriers. "We expect overall freight costs to double due to the surge in online orders

# 89%

The percentage of U.S. households Roadie offers same-day delivery to.

and so we need to squeeze out as much of the freight costs as possible,” says Roe McFarlane, president, Follett Education Group.

Based on trends from the start of COVID-19, Follett says it knew many back-to-school orders would move from in-store pickup to the consumer choosing to have them shipped, increasing freight costs for direct-to-consumer orders. “We moved from FedEx to UPS and realized significant savings,” Krzyzewski says. “We’re also testing a variety of [shipping options] within UPS. Our goal is to not adversely affect delivery times, but pull down freight costs where we can.”

Meanwhile, furniture retailer Wayfair.com is leaning on work-from-home technology from vendors for its 3,400 customer service employees. Many were working from home before the pandemic and now 100% are, a spokesman says. Google Meet video conferencing and online courses that help train new hires have kept “productivity and service levels high as we transitioned completely to remote service,” a Wayfair spokesman says.

All of Wayfair's 3,400 customer service employees are working from home.



## NEWEGG CRACKS INTO THE ECOMMERCE SERVICES MARKET

Newegg Inc. is more than just an electronics e-retailer and ecommerce marketplace these days. Lately, it has transformed into an ecommerce service provider, selling the expertise it’s gained from nearly 20 years in ecommerce to help merchants with fulfillment, customer service and staffing.

Newegg has learned quite a bit about ecommerce since its launch in 2001, says Jamie Spannos, global chief operating officer for Newegg. And so it made sense for the company to start monetizing its knowledge and infrastructure.

“There’s been a pivotal shift [at Newegg], and more and more we are focusing on the services we can offer,” Spannos says. Today, the number of employees working for Newegg’s services offerings is fast approaching 1,000—or about half of Newegg’s total workforce.

### Newegg's multiple business units

Newegg operates multiple businesses. That gives it a broad range of knowledge that it says can be useful to other merchants. It sells consumer electronics and technology products direct to consumers and also operates a marketplace. That marketplace, which is available to retailers by invitation only, takes between a 5% and 18% commission on sales depending on the product, Spannos says.

Newegg also operates a business-to-business unit, selling consumer electronics to organizations such as government agencies and schools. It also sells direct to consumers globally, with operations in 20 countries including Canada and Saudi Arabia—its two biggest international markets. Lastly, it owns several white-label brands such as Rosewill, which sells computer accessories such as keyboards and headsets. It sells those products on Newegg as well as Amazon.com Inc. and eBay Inc.

“It takes a lot of infrastructure to run all these business channels,” Spannos says. “Since we have the infrastructure, we’ve decided to use it to provide a broad range of ecommerce service offerings.”

### Help with logistics

Newegg’s third-party logistics business, which launched in 2017, is growing in new directions, Spannos says. The company also recently announced another ecommerce services business, Newegg Staffing, a staffing agency that’s helping other companies quickly hire both temporary and permanent employees. Additionally, it just launched and expanded Newegg Bridge, which offers customer service support for retailers.

Newegg Logistics accepts and distributes inbound freight, ocean and air shipments of products for retailers. It also provides a range of

Today, the number of employees working for Newegg’s services offerings is fast approaching 1,000—or about half of Newegg’s total workforce.



additional services under its logistics umbrella, including UPC and barcode tracking to help retailers monitor inventory levels and better understand how products are selling based on factors like geographic region and platforms such as a direct ecommerce site or Amazon.com.

Newegg Logistics includes dashboards to help merchants analyze how products are selling and advises retailers on the inventory assortments that can deliver the best ROI. Merchants can also use Newegg Logistics to pick, pack and fulfill their orders through Shipped By Newegg, or SBN—a program similar to Fulfillment by Amazon, Spannos says. Newegg operates three fulfillment centers in the Los Angeles area that together total more than one million square feet—a “highly automated” center in Indianapolis and centers in New Jersey and Toronto. About 50% of Newegg’s fulfillment center space is dedicated to its clients’ products, Spannos says.

More than 10,000 sellers use Shipped By Newegg—ranging from small retailers selling only a couple of products a month, to larger merchants selling much more than that. “In many cases, we are fulfilling for eBay sellers who have gotten too big to do fulfillment themselves,” Spannos says. Newegg Logistics also offers transportation management services, including shipment tracking, and advises retailers on the best mix of carriers to use—in regards to delivery times and price—such as UPS or FedEx or regional players like OnTrac on the West Coast.

It wasn’t long after Newegg started offering retailers logistics services that clients began asking for help with other aspects of their business, including customer service and staffing help, Spannos says. “Immediately after offering fulfillment services we got retailers asking us if we could help them in other ways,” Spannos says.

### Staffing and customer service

To answer customer demand for those services, Newegg recently launched Newegg Bridge and Newegg Staffing.

Newegg Bridge, which launched in May, offers customer service via remote agents who work from home. It provides inbound and outbound customer service phone calls and automatic call routing, Spannos says. The latter helps agents more efficiently and quickly handle customer service calls by assigning calls to agents trained to answer specific questions, Spannos says. For

example, if a customer notes at the beginning of the call that she is calling for warranty information, that call could be sent to a team of agents whose full-time jobs are to answer questions about warranties across hundreds or thousands of products. Newegg Bridge also offers live chat via both agents and bots across 100 different languages, Spannos says.

Newegg Staffing launched in April 2020 to help logistics, manufacturing, clerical and supply chain management companies hire employees. It works with companies of all sizes and helps with direct hires, temporary roles, executive positions and seasonal help. It also provides staffing services, including recruiting, background checks and drug testing, Spannos says. While Newegg won’t disclose the companies it has worked with for staffing services, the organization demonstrated steady growth since its inception, with weekly revenue in late-June up nearly 2,000% compared with early April.

Newegg in August expanded its staffing agency to the Midwest and the East Coast. Headquartered in the Los Angeles area, Newegg Staffing recently

# 10,000

The number of sellers who use Shipped By Newegg. About 50% of Newegg’s fulfillment center space is dedicated to its clients’ products.

opened additional locations in Indianapolis and Edison, New Jersey. Now with three offices in different parts of the United States, Newegg says it is poised to help ecommerce companies scale-up their workforces for the holidays.

“Early success of our Southern California staffing operation caused us to accelerate our timeline to establish locations in other parts of the country,” said Anthony Chow, global CEO of Newegg. “Our strong foothold in three major distribution hubs uniquely positions Newegg Staffing to help ecommerce companies scale their workforces quickly and carefully.”

Newegg Staffing generates revenue by charging a markup on top of the hourly pay rate, or by charging a percentage of a candidate’s annual salary for direct hires, says Marina Berber, Newegg’s director of staffing.

“Having fine-tuned the staffing process internally for nearly two decades, Newegg is uniquely qualified to help other companies navigate the challenges associated with

employee recruitment,” says Berber, who joined Newegg earlier this year to establish Newegg Staffing’s Los Angeles facility and to manage the organization’s expansion. “By scaling Newegg Staffing quickly in locales where we are already familiar with the local workforce, we offer a distinct advantage to our clients who want to attract highly qualified candidates.”

“Many of our clients are turning to us to help them quickly hire large numbers of people—often hundreds—for seasonal work,” Spannos says. “And they maybe only need them for a few days or a week.”

The staffing service also offers analytics to help businesses manage overtime reporting, costs, headcount and worker productivity, he says. Newegg is currently working on a mobile app for Newegg Staffing that will enable businesses to request workers. “A requester who needs 22 people tomorrow will soon be able to ask for it via the app,” Spannos says.

Newegg isn’t the first online retailer to see the opportunity in selling services and technology. U.K. online grocer Ocado Plc., for example, operates an Ocado Technology unit that develops and sells robotics, machine learning, simulation, data science, forecasting and routing systems to other online grocers including U.K.-based Morrisons, Canada’s Sobeys Inc. Groupe Casino in France and The Kroger Co. in the U.S. [LV](#)

# 2,000%

The percentage weekly revenue went up in late-June compared with early April for Newegg Staffing.

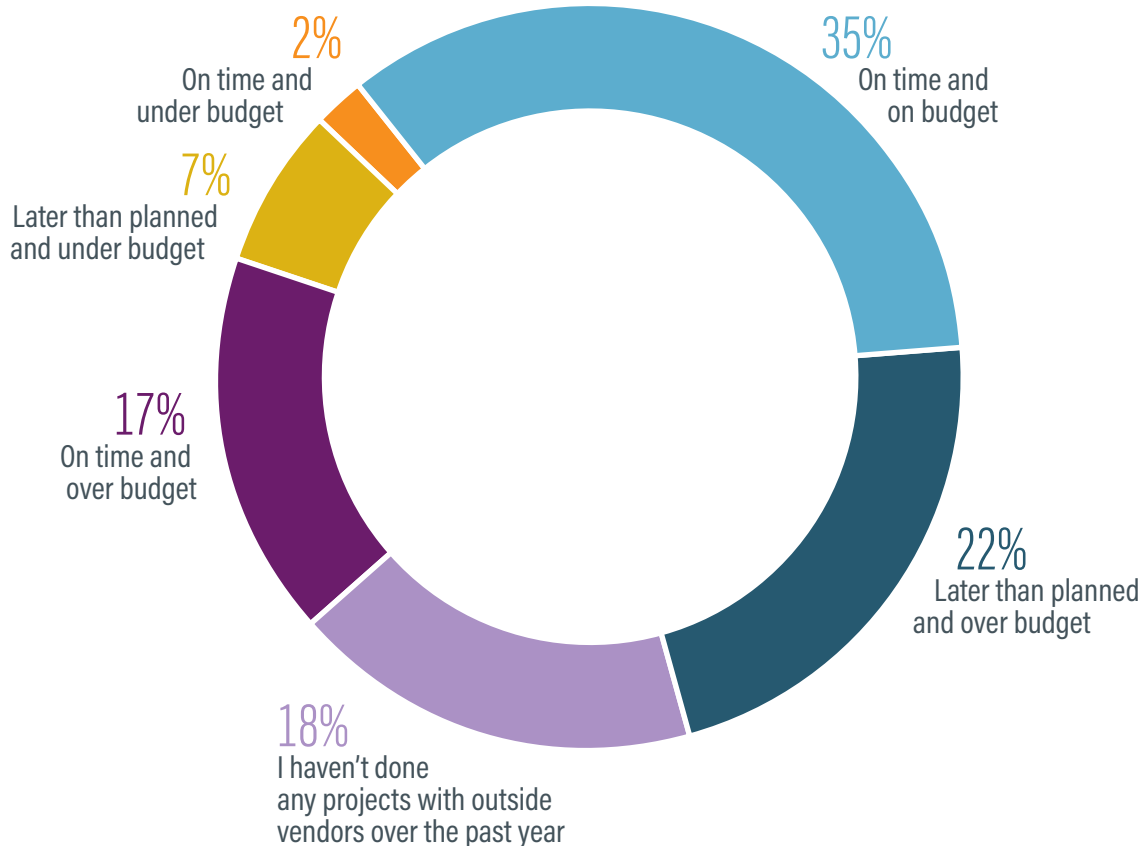
# CONCLUSION

Outsourcing is in. More retailers are getting on board the delegation train—letting the experts that are pros in their niche areas do what they do best. And it is working. Based on the examples above, vendors are helping retailers improve their businesses in a myriad of ways—from saving time to increasing conversions to

lifting sales and more. And vendors are adapting to the changing times by being agile in their offerings in response to COVID-19, offering automated services that use artificial intelligence to take strains off teams, boosting fulfillment services and more.

## JUST OVER ONE-THIRD OF RETAILERS SAY THEIR LAST VENDOR PROJECT WAS ON TIME AND ON BUDGET

Thinking of your last project with a vendor over the past year, how did it go in terms of timelines and budget?



Digital Commerce 360 survey of 121 retailers, September 2020

Vendors are evolving and improving because ecommerce is booming, and they want to capitalize on working in a healthy industry.

Q2 2020 marked the highest year-over-year online sales growth for any recorded second quarter and the second-highest rate of any quarter or year overall going back to when the U.S. Department of Commerce first started breaking out ecommerce data in Q4 1999. Q2 2020's striking performance also was more than triple the ecommerce growth registered in Q2 2019 as well as Q1 2020. Ecommerce penetration hit 20.8% in Q2, up 41.4% or 6.1 percentage points from 14.7% for the same period in 2019. No other quarter or year has increased this metric by even two percentage points year over year. And the 20.8% penetration in Q2 2020 was a sizable uptick from 16.2% in Q1 2020.

The current pandemic plays a large role in the big numbers. However, industry observers

say many of these new citizens of the online shopping world will become ecommerce converts for good.

In short, it's a good time to be a vendor and, in many cases, an online retailer.

But vendors and retailers can work better together to improve. For example 35% of retailers said their last project with a vendor was completed on time and on budget, while 46% said the project missed the mark by being over budget, late or both, according to the September 2020 Digital Commerce 360 survey of 121 merchants.

Retailers that evaluate their needs and goals and spend the time doing their homework to find vendors that fit their businesses will often benefit from service providers' offerings—by saving more time, making more money, and in many cases, both. **LV**



## PEPPERJAM

RANK IN  
AFFILIATE  
MARKETING  
CATEGORY

2

pepperjam®

2020  
TOP 1000  
RETAIL  
CLIENTS

101

Pepperjam is a performance marketing technology and service provider powering growth for acquisition marketers who seek a scaled alternative to their primary sales and marketing channels. Ascend, Pepperjam's cloud-based affiliate marketing lifecycle platform, delivers fully integrated partner discovery, recruitment, tracking, payment, and a brand safety and fraud prevention suite, automating the full affiliate lifecycle and powering over \$1 billion in gross merchandise sales. Marketers using Ascend are supported by a comprehensive service team, including an unparalleled in-sourcing practice.

PRIMARY URL

Pepperjam.com

YEAR  
LAUNCHED

1999

TOTAL 2020 TOP 1000  
CLIENT WEB SALES

\$49.95 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: **33** Chain: **17** Manufacturer: **41** Catalog/Call Center: **10**



TOP 1000 CLIENTS BY WEB SALES

\$40M or less: **17** \$40-125M: **46** \$125-500M: **28** \$500M or more: **10**



KEY CLIENTS

Burlington Stores  
Fathead  
Nordstrom  
Renovation Brands  
Signature Hardware  
Zenni Optical

PRODUCTS & SERVICES

Performance marketing technology and services for brands, partners, influencers and agencies.

**Pricing:** Flexible model including SaaS, performance and agency fee structures.

Source: Digital Commerce 360 2021 Leading Vendors to the Top 1000.

Note: Category leaders are ranked on the total number of clients they have in the 2020 Digital Commerce 360 Top 1000. Only parent companies of retailers are included. The information on this page is sponsored by the vendor but all data originated from the Top 1000 and editorial content was supplied by Digital Commerce 360.

CORPORATE

555 E. North Lane, Suite 5045  
Conshohocken, PA 19428  
877-796-5700

MANAGEMENT

Matt Gilbert, CEO  
Tom Szymanik, SVP, Finance  
Maura Smith, SVP, Marketing & Communications

# Q&A

Affiliate marketing lets retailers be omnipresent across the consumer journey cost-effectively

An executive conversation  
with **Maura Smith**,  
Chief Marketing Officer,  
Pepperjam



Today's ecommerce shoppers are in the driver's seat. That means it's more important than ever for retailers to be everywhere their customers are—and remain omnipresent throughout the entire consumer journey. To discuss how affiliate marketing provides a unique combination of scale, automation and outcome-based pricing models—advantages that give retailers what they need to stay in play across all channels—Digital Commerce 360 spoke with Maura Smith, chief marketing officer at Pepperjam.

## How would you describe the current state of affiliate marketing?

According to a recent study by Forrester Consulting and Pepperjam, the affiliate channel is responsible for 16% of digital revenue and is poised to top \$8 billion in spending by 2022—up from \$6 billion in 2018. The Performance Marketing Association recently reported that executive-level marketers also cite it as the No. 1 channel for customer acquisition and, on average, it has a 12:1 return on ad spend.

Despite these statistics, affiliate marketing is not given proper consideration as a primary sales and marketing channel—a perception driven by a misunderstanding that has led to a historical prioritization of other channels.

The reality is that affiliate marketing has evolved. Today, affiliate marketing offers the unique combination of diversified scale, automation and outcome-based pricing models that power marketers to deliver personalized messages across the consumer journey at a cost they can control—outcomes that no other channel can offer.

## What are the biggest affiliate marketing challenges retailers face?

For too long, marketers have allowed historical biases to guide their marketing strategy, creating an overreliance on channels like paid search and paid social, which are only becoming increasingly expensive. The reality is that with affiliate marketing, marketers can tap a diverse partner base, achieving the scale they desire, with outcome-based pricing models. Affiliate marketing can be a substantial part of the marketing mix if marketers eradicate themselves from historical perceptions of the channel.

## What role does affiliate marketing play in achieving omnipresence?

The affiliate channel makes the discovery of right-fit partnerships effortless and automates rewards for these partners based on the assigned value they provide to the consumer journey. Affiliate marketing lives at all stages of the buyer journey and across all marketing channels and mediums; from paid search to content to influencers to savings destinations. It's ultimately the channel's versatility that lets marketers expand their reach without sacrificing marketing dollars with its performance-based model. These capabilities allow marketers to create diverse partnerships and leverage unique promotional methods that enable omnipresence in the consumer journey at a cost they can control.

## How can retailers generate operating leverage to stay in play across all channels?

Operating leverage means having options to counter the challenges they face, specifically as it relates to finding new digital channels, at scale, to combat the expensive price tags on Google, Facebook and other online channels. Affiliate marketing offsets other channels' rising costs because it offers scale, automation on a performance-based pricing model, a combination that effectively funds primary sales and marketing channels like paid search and social. With affiliate marketing's ability to transcend all digital forms, marketers can use the channel to stay in play across all channels with more predictable spending.

## What strategies can retailers implement to address these challenges?

Marketers that utilize affiliate marketing must learn to effectively communicate quantifiable, measurable value of the channel to stakeholders that control budget and prioritization. The channel requires internal champions who have cultivated enough channel knowledge to educate others within their organization. And affiliate marketing is not a "set it and forget it" channel. It requires an investment of time and resources to truly unlock value.

pepperjam®

# pepperjam®

## Pepperjam powers 30% YoY revenue growth for brands.\*



It's true. Marketers on Pepperjam's Ascend™ Affiliate Cloud platform experienced revenue growth outpacing forecasted ecommerce growth of 18%\*. Can you say the same about your affiliate provider's performance? Join a leader in affiliate technology solutions backed by the category's only in-house support team and change your affiliate future today.

\*eMarketer US Retail Ecommerce Sales Forecasts, Estimates and Historical Data

Interested in  
learning more about  
platform performance?

[Download our Sales Index](#) →



# 2021 LEADING VENDORS TO THE TOP 1000

## METHODOLOGY

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The coming pages identify the Leading Vendors to the Top 1000, a ranking of the ecommerce technology and service companies that the Top 1000 e-retailers in North America rely on the most. To determine each vendor's ranking, Digital Commerce 360 compiled a list of clients each vendor serves among the retailers ranked in the 2020 Digital Commerce 360 Top 1000, totaling the number of clients across 24 categories. Rankings are based on the number of Top 1000 clients held by each company in each technology category and include both technology platforms and agencies. Only parent companies of retailers are included.

Digital Commerce 360 identifies merchants'

technology providers by confirming them directly with retailers, through a third-party data source such as BuiltWith or Ghostery, or via the vendor.

Charts and rankings take into account consolidation among ecommerce technology providers, unless otherwise noted. Client counts for some vendors in the rankings include the services provided by companies they've acquired or merged with in recent years.

Full-page company profiles are paid by advertisers. However, the rankings and the content itself were compiled by Digital Commerce 360 researchers and editors. **LV**

## AFFILIATE MARKETING

Affiliate marketing is one of the oldest online marketing strategies in ecommerce, but it can be one of the most effective, too, as it's easy to measure success and failure. Easier to measure than, for example, television commercials or billboards, where tracking an advertisement to a final sale is murky. Affiliate marketing, which means paying publishers to mention your brand and/or link back to your site, can be less risky than other forms of online advertising in terms of cost since most retailers arrange a cost-per-acquisition payment structure, where retailers only pay a publisher if the traffic from a particular ad drives a sale. Some retailers choose to operate their own affiliate networks and manage the multiple affiliate links to their site from blogs, forums or social channels, while others work with major affiliate network operators who manage those relationships for them.

- 1 CJ Affiliate<sup>1</sup>
- 2 Pepperjam<sup>2</sup>
- 3 Impact 
- 4 Rakuten
- 5 Awin Group
- 6 Gen3 Marketing (OPM Pros)
- 7 AvantLink
- 8 Acceleration Partners
- 9 ForwardPMX
- 10 Streamline Marketing

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

1. CJ Affiliate is owned by Publicis Groupe. 2. Pepperjam is owned by Partnerize.

## IMPACT

RANK IN  
CATEGORY

3



2020  
TOP 1000  
RETAIL  
CLIENTS

90

Impact was founded in 2010 to deliver real-time actionable insights across marketing channels and devices, developing a digital marketing platform with buyer journey insights, attribution modeling, built-in ad fraud detection and the automation of marketing workflows. In 2019, Impact launched its Impact Partnership Cloud to address the technology needs of marketers and business development leaders for partnership automation. With its partnership automation platform, retailers can manage their different types of partnerships in one place. Impact's platform gives retailers access to performance metrics, actionable insights and custom tracking solutions, as well as tools to identify and block fraudulent partners.

PRIMARY URL

Impact.com

YEAR  
LAUNCHED

2010

TOTAL 2020 TOP 1000  
CLIENT WEB SALES

\$105.61 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: **31** Chain: **22** Manufacturer: **29** Catalog/Call Center: **8**



TOP 1000 CLIENTS BY WEB SALES

\$40M or less: **9** \$40-125M: **28** \$125-500M: **32** \$500M or more: **21**



KEY CLIENTS

Ace Hardware  
Blue Apron  
Kohl's  
Harry's  
Target  
Walmart

PRODUCTS & SERVICES

Affiliate and influencer marketing, mobile partnerships, business development, analytics and attribution, and fraud protection services.

**Pricing:** Pricing and fees vary.

Source: Digital Commerce 360 2021 Leading Vendors to the Top 1000.

*Note:* Category leaders are ranked on the total number of clients they have in the 2020 Digital Commerce 360 Top 1000. Only parent companies of retailers are included. The information on this page is sponsored by the vendor but all data originated from the Top 1000 and editorial content was supplied by Digital Commerce 360.

CORPORATE

350 Fifth Ave., 36th floor  
New York, NY 10118  
917-720-2883

MANAGEMENT

David A. Yovanno, CEO  
Per Pettersen, Chief Strategy Officer

# Q&A

Retail partnerships: A detailed look at how automation drives growth throughout the customer journey

By **Jaime Singson**,  
senior director of  
product marketing,  
Impact



Influencers, bloggers, commerce content publishers, coupon sites—the universe of partners that retailers now rely on to bring in referrals and drive growth is expanding all the time. Especially during the pandemic, partnerships have proven to be a resilient and efficient way to generate incremental revenue when other channels fell short.

But as the partnership channel grows, so does the need for technology to manage the partnership life cycle, from recruiting new partners to tracking performance. It turns out the retailers who do the best job of automating also get the best results from their partner programs (Forrester Consulting 2019).

A Forrester Consulting study, commissioned earlier in 2020, explores the specific tactical differences between high- and low-maturity companies with partnership programs. For retailers that want to move up the maturity ladder to grow faster, the study offers practical recommendations about using technology to facilitate partnerships.

## How the best referral programs automate the partner journey

The Forrester study looks at the partnership life cycle as a journey. Throughout that journey, automation plays a role in how well the retail organization can scale and optimize relationships.

Here are a few examples:

**Discovery and recruitment** Dozens of variables come into play as a retailer builds a partnership roster, from product to geography, industry, sector, size, and partner business model. Given that complexity, it's surprising that 25% of the study's survey respondents report that their companies still do it mostly manually. On the other hand, top-performing programs establish clear criteria and then automate and scale application and agreement processes to streamline workflows.

**Contracting and payouts** Partners can come in many different forms: an affinity partner, affiliate, advocate, ambassador, an alliance, digital influencer, or super-connector. There are more than a dozen ways to pay them. A retailer may also have segment-specific terms and multiple global currencies and tax systems to consider across partners and geographies. Technology that can automate that complexity for the retailer provides scalability, efficiency, and accurate and timely payouts for partners.

## Tracking and measuring success

The Forrester study revealed that tracking is typically the most automated phase of the partnership journey. High-maturity companies are more than three times as likely to have this phase "mostly automated" (67% compared to 20% of low-maturity companies).

During the tracking phase, the retailer must make critical decisions about which metrics are most important, how to measure them, and how to report them. Most metrics do not require real-time or near-real-time measurement (except during seasonal events like Black Friday). Still, the retailer may want to check some daily and others weekly or monthly — and why the ability to automate and scale measurement becomes vital.

## Ongoing partner engagement

The engagement phase is least likely to be "mostly automated" because it is usually considered a high-touch activity. However, there are opportunities to automate some key tactics, such as setting up drip engagement campaigns, personalization, education, training, and certifications.

## Monitoring for fraud

Retailers must always be cautious of overpayment and fraud in their partnership programs. Technology can help identify suspicious devices and device farms, flag anomalous conversion paths, reverse-engineer fraud techniques, and detect session-level spoofing. Retailers should look for opportunities to automate processes and workflows that can be governed with strict business rules and audited for compliance.

Like CRM and marketing automation systems before them, partnership automation platforms are becoming essential tools for retailers who want to participate fully in the partnership economy. Among the characteristics of the most mature programs that deliver the biggest business benefits, partnership automation stands out as essential for scalability and growth.



partnership  
cloud

# Retailers with mature partnership programs grow 2X faster

*How they do it is no longer a secret*

Learn more

• • • • •

Influencers, affiliates, premium publishers: your partnerships can be your ticket to faster growth and better overall business performance — if you know where to invest your time and money.

## **Discover seven practical tactics to grow your business**

Check out the Impact-commissioned study with Forrester Consulting, “Smooth the partnership journey by learning from high-maturity companies”. Dive into the “how” of strong partnership programs with seven key tactics at [www.impact.com/smooth](http://www.impact.com/smooth).

 impact

Find out more — contact us at [grow@impact.com](mailto:grow@impact.com)





## CHANNEL MANAGEMENT

Many retailers choose to manage their own data feeds to the sites—often marketplaces—they sell on outside of their own ecommerce sites and upload images, pricing, product details, reviews, etc. Others, however, choose to work with a vendor that can manage these feeds on retailers' behalf. Selling on online marketplaces is becoming a bigger part of retailers' ecommerce strategies. While there are benefits to diversifying channels, this strategy can be complex when managing different inventory, sales and advertising requirements on different marketplaces. Channel management helps retailers and brands manage marketplace sales with such features as adjusting product pricing, SKUs and fulfillment on many marketplaces via one dashboard. This enables sellers to view their entire marketplace portfolio in one spot.

■ Indicates a ranking tie

- 1 ChannelAdvisor 
- 2 CommerceHub
- 3 CNET Content Solutions
- 4 ForwardPMX<sup>1</sup>
- 5 MerchantAdvantage
- 6 Merkle<sup>2</sup>
- 6 SingleFeed<sup>3</sup>
- 6 ROI Revolution
- 6 Tinuiti
- 10 GoDataFeed

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

## CHANNELADVISOR

RANK IN  
CATEGORY

1

channeladvisor® 

2020  
TOP 1000  
RETAIL  
CLIENTS

147

ChannelAdvisor is a leading provider of cloud-based ecommerce solutions. Since 2001, ChannelAdvisor has helped brands and retailers worldwide expand sales channels, connect with consumers around the world, optimize their operations for peak performance, and provide actionable analytics to improve competitiveness. Thousands of customers use ChannelAdvisor to help solve their multi-channel marketplaces, digital marketing, direct-to-consumer, first-party retail, drop ship and fulfillment needs - all within a single, centralized platform. ChannelAdvisor also provides consulting and managed services to brands and retailers seeking additional strategic insight and operational expertise.

PRIMARY URL

ChannelAdvisor.com

YEAR  
LAUNCHED

2001

TOTAL 2020 TOP 1000  
CLIENT WEB SALES

\$357.69 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: **47** Chain: **36** Manufacturer: **39** Catalog/Call Center: **25**



TOP 1000 CLIENTS BY WEB SALES

\$40M or less: **6** \$40-125M: **61** \$125-500M: **47** \$500M or more: **33**



KEY CLIENTS

Costco  
HP  
Lululemon Athletica  
Office Depot  
Pharmapacks

PRODUCTS & SERVICES

Platform that automates marketplaces, dropship, product feeds, digital marketing campaigns, shoppable media, brand analytics, and fulfillment needs.

**Pricing:** Pricing and fees vary.

Source: Digital Commerce 360 2021 Leading Vendors to the Top 1000.

Note: Category leaders are ranked on the total number of clients they have in the 2020 Digital Commerce 360 Top 1000. Only parent companies of retailers are included. The information on this page is sponsored by the vendor but all data originated from the Top 1000 and editorial content was supplied by Digital Commerce 360.

CORPORATE

3025 Carrington Mill Blvd., Suite 500  
Morrisville, NC 27560  
919-228-4700

MANAGEMENT

David Spitz, CEO  
Paul Colucci, VP, Global Sales & Business Development  
Mike Shapaker, CMO

# Q&A

Automation technology helps brands and retailers manage their sales channels better

An executive conversation with **Mike Shapaker**, chief marketing officer, ChannelAdvisor



The boom in marketplaces, search engines and social sites means there are more places for consumers to discover and purchase products. While this is a more complex ecommerce landscape for retailers and brands to navigate due to the additional channels, they need to cover to reach consumers. There are fewer barriers to entry for new businesses or new products. But just being there isn't enough. To discuss how retailers and brands can use technology to manage their sales channels better, Digital Commerce 360 spoke with Mike Shapaker, chief marketing officer of ChannelAdvisor.

## How has the pandemic impacted retailers' and brands' channel management efforts?

The initial lockdowns due to COVID-19 made clear that some brands and retailers were too concentrated in certain channels. For example, brands that depend exclusively on mall-based retailers have suffered. Even those that sell mostly online, but were dependent on one means of fulfillment, were impacted when logistics delays affected inventory and delivery times. COVID-19 has accelerated digital transformation and forced brands and retailers to focus on the diversification of their supply chains, routes to customers and fulfillment operations.

## What other channel management trends are they experiencing?

A lot of brands are interested in selling direct-to-consumer. Most are not abandoning their retail channels; they're just adding a more direct route to people who want their products. Many retailers are increasingly focused on developing their own brands—not just generic private labels but brands with differentiated value propositions. And many have transitioned their websites into third-party marketplaces to expand product selection. Over the past several years, there has also been an influx of marketplace sellers from overseas.

The result of all of this is more intense competition on all sales and marketing channels. Thus, brands and retailers need to take proactive measures to stand out on these channels, such as content optimization and advanced advertising campaigns.

## What common channel management mistakes do retailers and brands make?

They often worry about their own sites but neglect how their products are represented elsewhere. Retailers and brands want a consistent, high-quality experience for consumers across all their digital touchpoints, including retail partners and your own content.

Another potential pitfall for some brands and retailers is not spending enough time upfront considering how backend operations impact sales on marketplaces. Most marketplaces, such as Amazon, are hyper-focused on maintaining a good customer experience. That translates into strict shipping requirements for those that manage their own fulfillment. If a retailer or brand can't keep up with those requirements, their seller ratings can get dinged.

## How can they overcome these challenges?

A lot can be automated to help save time and resources. For example, technology can monitor partner sites for pricing information, content or reviews, and alert the brand when there are issues. When selling through channels, technology can also manage inventory allocation or adjust product content to account for the correct color abbreviation or route orders or manage ad schedules, allowing brands and retailers to manage other aspects of their businesses strategically.

ChannelAdvisor's platform, for example, helps brands and retailers reach hundreds of channels and automates many important but mundane tasks. It helps brands collaborate with retailers on optimizing their brand presence on retail sites, turning digital campaigns into shoppable experiences and enabling connections to dropship programs, among others. It also helps brands and retailers manage direct-to-consumer sales on marketplaces and drive traffic from search engines and social sites.

# ASICS SEES YoY REVENUE GROWTH SOAR 72% WITH ASSISTANCE FROM CHANNELADVISOR

For decades, ASICS America Corp. has been synonymous with performance at the highest level.

From trail running and track to tennis, volleyball and wrestling, ASICS is *the* go-to sports footwear brand for millions of consumers worldwide. Still, it wasn't long ago that the company was still figuring out how to navigate the changing ecommerce landscape. After combining multiple websites into one seamless experience across a full range of performance shoes and lifestyle brands, the ASICS website is now a one-stop-shop for a personalized path to purchase. But the shopping journey doesn't end there; it continues on Amazon, eBay, Google Shopping and other essential channels.

Even amid these impressive developments, the company hasn't been immune to the unpredictability of an ever-evolving industry. With ecommerce in a constant state of change, ASICS has faced some significant challenges along the way.

## The situation

Like all big brands, ASICS has long understood the importance of building a strong ecommerce presence. As consumers continually seek new ways to interact with their favorite manufacturers, direct-to-consumer (DTC) channels are key. But in an industry where wholesale and resale played such a central role for so long, embracing new methods on marketplaces also meant coming up with new strategies.

"Organization was an issue," says ecommerce marketplace manager Rebekah Darsch. "We had a large product cataloge. One person managing that every day was unsustainable."

There were other challenges, too. Especially when it came to consolidating multiple websites into one big-brand URL.

So, the team decided to ramp up its efforts with ChannelAdvisor.

## The solution

For a while, ASICS had been using the ChannelAdvisor ecommerce platform to manage marketplaces such as eBay and Rakuten. But as the ASICS DTC business expanded, it became clear that more support would be needed to tackle two crucial areas of need: marketplace management and digital marketing.

After visiting ChannelAdvisor headquarters, the ASICS team decided to expand to Managed Services for Marketplaces and Managed Services for Digital Marketing.

"We met with the team at ChannelAdvisor, our account manager and other team members," says Kyle Boucher, senior manager, demand generation. "We spent our time learning what ChannelAdvisor could offer us."

It didn't take long for ASICS to decide that leveraging the company's marketplace and digital marketing specialists "just made sense."

"The big piece for our search program was to improve the way we were messaging our customers ... based on age, gender and keyword

interest," explains Boucher. "And there was only so much I had the ability to do when I did it on my own."

Darsch echoed his sentiments on the marketplace side.

"Just being able to use ChannelAdvisor's platform to help us with the Amazon integration to pull in orders and sales helped us grow quickly," she says.

## The results

So, what happened next? ASICS' demand generation manager describes it best:

"We just kept crushing goal after goal."

Thanks to ChannelAdvisor successfully launching them on Amazon, ASICS reports that its year-over-year revenue growth shot up 72%.

ASICS' digital marketing campaigns were equally rewarding. After setting an original goal for return on ad spend (ROAS), the team watched the actual number climb to a new record.

"Once we partnered more with ChannelAdvisor and optimized our programs, we ended up with an impressive ROAS at the end of the year," says Boucher. "In terms of revenue, we finished with 41% above where we were [a year ago]."

That's not even the best part.

In the five days between Thanksgiving and Cyber Monday, ASICS watched year-over-year growth swell by 150%. According to ASICS, it was the company's most successful Cyber 5 holiday selling season ever.

"We more than doubled our demand, which is incredible," Darsch says. "And 81% of our marketplace revenue during Cyber 5 came from Amazon. We were so excited because that was a new marketplace ChannelAdvisor helped us to launch on."

"Working with ChannelAdvisor," adds Boucher, "We were able to do a lot of things during the holidays including features and promotions."

"[Without ChannelAdvisor], our program would be much different," Boucher says. "We would've had to find a lot of alternative methods to do what we do. We're currently advertising across three different search engines. There would be no real way we could manage that. There wouldn't be much of a program without ChannelAdvisor's robust platform."

Darsch agrees.

"I can't even imagine what it would be like without ChannelAdvisor," she says. "I would definitely recommend ChannelAdvisor to other sellers, especially those that are just starting out on marketplaces. ChannelAdvisor is not only a service to help with our feeds but also a resource on how to sell on marketplaces and how to grow."



## CONTENT DELIVERY NETWORK

Content delivery networks intend to speed up websites, apps and mobile sites and improve overall performance by strategically locating groups of computer servers around the world to deliver content to website visitors from the closest server. By sending web content from servers close to site visitors, those visitors typically experience a faster site. This can decrease bounce rates for retailers and facilitate a better website user experience. CDNs also use caching to decrease the amount of data the origin server must send, which can reduce bandwidth costs for merchants.

- 1 Amazon Web Services
- 2 Akamai
- 3 Cloudflare
- 4 Salesforce
- 5 Rackspace
- 6 Limelight Networks
- 7 Fastly
- 8 Verizon Media
- 9 Cloudinary
- 10 Microsoft

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

## CONTENT MANAGEMENT SYSTEMS

Content management systems are software applications that help merchants create and manage digital content. In online retail, many ecommerce platform systems have built-in content management tools or offer integrations with content management systems. Some content management providers allow retailers to manage their web and mobile apps, sites and marketing campaigns from one location to ensure that product information, blogs and other web content adapts to the device the consumer is using, such as a desktop computer, tablet or smartphone.

1	CNET Content Solutions
2	Oracle
3	Adobe
4	WordPress
4	Oracle NetSuite <sup>1</sup>
6	Nativo
7	Guidance
8	SAP
8	HP
10	Bloomreach
10	Broadleaf Commerce
10	Sitecore
10	Zmags

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

## CUSTOMER RELATIONSHIP MANAGEMENT

■ Indicates a ranking tie

Even as customer relationship management (CRM) tools become more central to many industries' success, some retailers are content to employ the most basic version they find. CRMs are useful, not just because they simplify keeping track of customers and sales, but because of their versatility and customizability. Most existing platforms offer the ability to integrate with other tools that can upgrade and augment existing business processes. The top CRM suites include tools designed to enhance functions and cover important gaps in retailers' operations. Connecting an organization's CRM to communication tools such as email and customer service, for example, can help retailers properly record new lead information and handle their initial contact with a customer. Connecting a CRM to a business intelligence system, meanwhile, can offer a useful data stream that can convert data into better insights.

1 Oracle

1 Oracle NetSuite<sup>1</sup>

3 Salesforce

3 Talkable

5 FriendBuy

5 HubSpot

7 Microsoft

8 Zeta

8 Zendesk

10 Epicor

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

1. In November 2016 Oracle acquired NetSuite; their solutions continue to operate independently.

## CUSTOMER RATINGS & REVIEWS

■ Indicates a ranking tie

Ratings and reviews can help inform a retailer's business and product decisions. Retailers can harness customer feedback to ensure they are satisfied and improve upon any issues. Vendors can enable retailers to have a ratings and reviews platform on their product detail pages with comments, as well as photos, to better inform both the retailer and other customers who are shopping for the same, or similar, products. Retailers can also use social media posts to gather customer feedback and data about products.

- 1 Bazaarvoice
- 2 Bizrate Insights
- 3 TurnTo
- 4 Trustpilot
- 5 PowerReviews
- 6 Verint
- 7 Yotpo
- 8 ResellerRatings
- 9 Shopper Approved
- 10 Sprinklr
- 10 Practical Data

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 Digital Commerce 360 Top 1000.



## CUSTOMER SERVICE SOFTWARE & SUPPORT

■ Indicates a ranking tie

Ecommerce customer service software providers seek to make it easier for online retailers to answer customer questions, shift gears to meet changes in consumer demand and solve problems for consumers. In addition to software, these vendors provide data that merchants can use to better understand their customers and anticipate their needs, or the means to collect such data on their own. Retailers care about these things because customers care about them. Customer service software vendors help merchants communicate with their customers via live chat and/or create self-service and other agent-assisted help channels via email, messaging and social media. This can include chatbots—interactive software that uses artificial intelligence to simulate human conversation.

1 Zendesk

2 Narvar

3 LivePerson

4 LiveChat

5 Oracle

6 Bold360<sup>1</sup>

7 Olark

8 Verint

9 Moxie

10 Radial<sup>2</sup>

10 SnapEngage

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

## ECOMMERCE PLATFORM

■ Indicates a ranking tie

Ecommerce platforms comprise technology tools that allow online merchants to create customer-facing websites for selling products and services. They are the digital welcome mats for shoppers and the backbones of an online retail operation. Ecommerce platforms can provide checkout and payment processing services, website layouts and themes, marketing tools to promote products and a full content management system, depending on the provider.

1 Adobe(Magento)

2 Oracle

3 Salesforce

4 Shopify

5 HCL

6 BigCommerce

7 SAP

8 Oracle NetSuite<sup>1</sup>

9 Guidance

9 Kibo

1. In November 2016 Oracle acquired NetSuite; their solutions continue to operate independently.

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

## FULLFILLMENT SERVICES

■ Indicates a ranking tie

Responding to the precedents set by ecommerce powerhouses, such as Amazon and Walmart, retailers are working hard to meet consumers' expectations for merchants to deliver products quickly and efficiently. Vendors that offer fulfillment services can help merchants meet shoppers' demands. Some vendors will house inventory for retailers, as well as handle the entire supply chain of fulfilling products to delivering them to the customer's doorstep. Some fulfillment vendors provide retailers with the necessary technologies, such as conveyor belts, robotics or picking services, to enhance their own warehouse operations.

1	Radial <sup>1</sup>
2	Pitney Bowes
3	Amazon Web Services
4	Saddle Creek Logistics Services 
4	UPS
6	GEODIS
6	ID Logistics
6	PFSweb
9	Bastian Solutions <sup>2</sup>
9	Dotcom Distribution

1. Radial is owned by bpost. 2. Bastian Solutions is owned by Toyota Advanced Logistics.

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

## — SADDLE CREEK LOGISTICS SERVICES —

RANK IN  
CATEGORY

4  
(TIE)



2020  
TOP 1000  
RETAIL  
CLIENTS

5

Saddle Creek is a third-party logistics provider, specializing in designing and delivering omnichannel supply chain services for retailers. The company offers order fulfillment, warehousing and transportation services as stand-alone offerings, or as part of an integrated logistics service. Retail clients have access to a nationwide network of strategic fulfillment locations, and a full range of transportation capabilities including a large private fleet, brokerage services and extensive relationships with all major parcel providers. Saddle Creek also offers robust technologies for advanced visibility and order processing; scalable resources to handle seasonal or promotional fluctuations; value-added services such as kitting and engraving; the ability to pick, pack, and ship orders B2B or B2C or through marketplace sites; and same-day shipping for most orders received by 2 p.m.

PRIMARY URL

SCLogistics.com

YEAR  
LAUNCHED

1966

TOTAL 2020 TOP 1000  
CLIENT WEB SALES

\$4.70 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: **1** Chain: **3** Manufacturer: **1** Catalog/Call Center: **0**



TOP 1000 CLIENTS BY WEB SALES

\$40M or less: **0** \$40-125M: **3** \$125-500M: **1** \$500M or more: **1**



KEY CLIENTS

Bealls  
Ipsy  
Lovesac Furniture  
Lowe's Cos.  
Rack Room Shoes

PRODUCTS & SERVICES

Logistics services for omnichannel fulfillment, warehousing and transportation, as well as other value-added services like packaging, kitting, display building, embroidery and engraving.

**Pricing:** Pricing and fees vary.

Source: Digital Commerce 360 2021 Leading Vendors to the Top 1000.

*Note:* Category leaders are ranked on the total number of clients they have in the 2020 Digital Commerce 360 Top 1000. Only parent companies of retailers are included. The information on this page is sponsored by the vendor but all data originated from the Top 1000 and editorial content was supplied by Digital Commerce 360.

CORPORATE

3010 Saddle Creek Road  
Lakeland, FL 33801  
863-665-0966

MANAGEMENT

Mark Cabrera, CEO  
Tom Patterson, SVP, Warehouse Operations  
Donna Slyster, CIO

# Q&A

Managing rising fulfillment costs through the pandemic with the help of 3PLs

An executive conversation with **Mike Jennison**, vice president of supply chain engineering, Saddle Creek Logistics Services



Trying to contain fulfillment costs while getting orders to customers quickly and efficiently is not a new challenge for retailers. But the pandemic has certainly added to the complexity. As labor shortages persist and carrier availability and costs remain in flux, retailers are scrambling to make good on their promise to deliver satisfying shopping experiences for their customers from start to finish.

To discuss how third-party logistics providers (3PLs) can step in to alleviate that fulfillment burden and reduce costs, Digital Commerce 360 spoke with Mike Jennison, vice president of supply chain engineering at Saddle Creek Logistics Services.

### **Why is it difficult for retailers to control fulfillment costs?**

Order fulfillment can take a toll on retailers' operational budgets. Costs for warehouse space, labor and shipping add up, particularly when online sales volume increases. Because it requires piece-picking a high volume of individual orders, ecommerce fulfillment tends to be more labor-intensive than traditional warehousing operations.

Ecommerce operations typically require more storage space as well. Many companies are also adding distribution centers in closer proximity to their customers to save on transit time and cost. Light-industrial space is priced at a premium in many markets due to growing demand. Of course, efficient deliveries and returns come at a cost as well—especially as parcel shipping rates continue to rise.

### **How has COVID-19 impacted fulfillment costs?**

The coronavirus has only intensified cost concerns. Labor shortages, new safety protocols, facility shutdowns due to outbreaks, pressures on inventory—whether too much or too little—and parcel carrier capacity issues are just a few of the factors driving up fulfillment expenses.

### **How can a 3PL help retailers reduce space and labor costs?**

Experienced third-party providers have the resources and expertise to help retailers manage costs in a number of

ways. Utilizing a 3PL's conveniently located, fully staffed distribution facilities can be more cost-effective for retailers than investing in the permanent infrastructure themselves. They'll have access to flexible space and labor but pay only for the resources they use. This is especially helpful when business fluctuates dramatically, as it has during the pandemic.

3PLs also can optimize fulfillment operations to ensure peak efficiency. They will often build out space with higher ceilings, narrow aisles, and customized racking solutions to increase storage density and maximize picking capacity. Automated fulfillment and material handling solutions can also help to enhance order velocity.

### **What can a 3PL do to help retailers control parcel shipping costs?**

Retailers can tap 3PLs' expertise and robust technologies to help manage and streamline the shipping process without a major overhead investment. By utilizing order management systems (OMS), parcel analytics tools and rate-shopping software, 3PLs can help to determine the most economical solution to meet end customers' transit expectations.

3PLs also can help retailers optimize their network configuration to move products closer to end customers. With strategically located distribution centers, it is often possible to deliver products in two days using ground service instead of air to help reduce costs.

### **Why is continuous improvement critical for managing fulfillment costs?**

To be competitive in the marketplace, retailers must continually seek out ways to satisfy their customers more cost-effectively. A 3PL is always on the lookout for opportunities to drive costs down. By utilizing quality management methodologies such as Lean Six Sigma, they can help streamline operations, improve accuracy, increase productivity and control costs.



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 **SaddleCreek**  
LOGISTICS SERVICES

## FULFILLMENT SOFTWARE

Fulfillment software vendors can help retailers manage their fulfillment operations much more efficiently. For example, some fulfillment software can give retailers a single view of inventory across stores and ecommerce, help retailers offer store returns for online purchases or help retailers manage multiple delivery options, including buy online pickup in store. Those services can also include ways to help merchants find the most cost-effective route to fulfill an order, such as shipping an online order from a store that is closer to a consumer's home.

■ Indicates a ranking tie

1	Logistyx Technologies	
2	Manhattan Associates	
3	Blue Yonder <sup>1</sup>	
4	CommerceHub	
5	Oracle	
5	Kibo	
7	SnapFulfil <sup>2</sup>	
8	Amazon Web Services	
8	Oracle NetSuite <sup>3</sup>	
10	Körber	
10	Speed Commerce	
10	Microsoft	

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

1. In February 2020 JDA Software rebranded as Blue Yonder. 2. SnapFulfil is owned by Synergy NA.  
3. In November 2016 Oracle acquired NetSuite; their solutions continue to operate independently.

## LOGISTYX TECHNOLOGIES

RANK IN  
CATEGORY

1



2020  
TOP 1000  
RETAIL  
CLIENTS

91

Logistyx Technologies provides transportation management for parcel shipping, providing a SaaS-based transportation management solution. It offers an integrated global carrier network of more than 8,500 carrier services. Logistyx provides rate shopping and simulation tools to help businesses determine the ideal combination of carriers in real time, based on factors such as price, capacity, service requirements and performance. It offers user-friendly dashboard reporting to help with exception management and carrier performance monitoring. From fulfillment managers to customer service representatives, teams monitor and manage all carriers in one solution. Advanced freight audit capabilities allow companies to verify invoice accuracy before issuing payment and find potential savings. In addition, automatic cost allocation down to the SKU level reduces the workload in finance departments and improves cost accounting accuracy. Logistyx integrates with existing systems including ecommerce, omnichannel, order management systems and more.

PRIMARY URL

Logistyx.com

YEAR  
LAUNCHED

2017

TOTAL 2020 TOP 1000  
CLIENT WEB SALES

\$57.77 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: **24** Chain: **33** Manufacturer: **20** Catalog/Call Center: **13**



TOP 1000 CLIENTS BY WEB SALES

\$40M or less: **10** \$40-125M: **44** \$125-500M: **20** \$500M or more: **16**



KEY CLIENTS

L Brands  
Academy Sports + Outdoors  
Bose  
Office Depot  
Walgreens Boots Alliance

PRODUCTS & SERVICES

Global, multi-carrier parcel transportation management software.

**Pricing:** Pricing and fees vary.

Source: Digital Commerce 360 2021 Leading Vendors to the Top 1000.

Note: Category leaders are ranked on the total number of clients they have in the 2020 Digital Commerce 360 Top 1000. Only parent companies of retailers are included. The information on this page is sponsored by the vendor but all data originated from the Top 1000 and editorial content was supplied by Digital Commerce 360.

CORPORATE

1701 Golf Road, Suite 1-1100  
Rolling Meadows, IL 60008  
877-755-2374

MANAGEMENT

Geoffrey Finlay, CEO  
Ken Fleming, President/Chief Sales Officer  
Bill Owen, CTO



# Q&A

Multicarrier shipping technology helps retailers solve today's fulfillment challenges

An executive conversation with **Ken Fleming**, president, Logistyx



Accurately predicting how many deliveries a retailer will need its parcel carrier to make in the coming year is a challenge. As part of their contractual agreements, carriers often require retailers to forecast the amount of business they will get from them. And if they go over or under, the retailers may have to pay penalties. If unforeseen circumstances arise, it's essentially impossible to get it right. To discuss how implementing a multicarrier strategy will help retailers get packages to customers quickly and efficiently during peak seasons and pandemics, Digital Commerce 360 spoke with Ken Fleming, president of Logistyx.

## **Describe the current state of fulfillment and delivery.**

Early in the pandemic, when stores closed, consumers began shopping online for everything. Because they were stuck at home, they were buying products to make their home life more comfortable, like gardening products and electronics. Now, we're seeing stores opening back up, but that consumer online shopping behavior hasn't changed. No one is out in stores casually shopping. They're still shopping online more than ever—and that behavior is here to stay. Our client base's shipping volume has increased by 20% in the past quarter—and this is directly related to COVID-19.

## **What are the biggest fulfillment challenges retailers are facing because of the pandemic?**

Clearly, there's been a huge increase in consumers shopping online. There's also been an increase in ecommerce activities related to businesses shipping more essential goods to their stores. On top of these changes in fulfillment, retailers are confronting the holiday shopping season—expected to be the biggest ever—during a pandemic. It's the perfect storm.

Now, retailers must ask themselves if they're prepared. Have they secured the capacity they'll need with their parcel carriers to deliver goods to customers? Some parcel carriers are at capacity and can't take on more. In

this case, retailers might need to find other fulfillment and delivery options. They need to ask themselves if they have the multicarrier management technology in place to handle all of this.

## **What benefits do retailers get from using multicarrier technology?**

Multicarrier shipping solutions give the retailers choices. They have access to multiple carriers when they need to ship goods. They aren't tied to one carrier who may already be over capacity for the year and unable to deliver their products. By implementing multicarrier technology, retailers can solve the challenges they are faced with in this perfect-storm-culmination of peak holiday shopping seasons and pandemics.

Logistyx, for example, provides a SaaS-based multicarrier solution with business intelligence and a global carrier network of more than 8,500 carrier services. This empowers companies to achieve on-time delivery worldwide while improving profits per shipment.

## **For those retailers that haven't yet prepared for this influx in fulfillment needs, is it too late?**

Retailers that don't already have multicarrier technology need to implement it now. It may be too late to help with the upcoming holiday shopping season. But the increase in retail volumes we've experienced since the pandemic hit are here to stay. It's not too late to prepare for the future of fulfillment. Retailers need to position themselves for the aftermath of peak season. They need to have a clear strategy to create the support for the diversity in fulfillment they will need going forward.

# A CLOUD TMS TO POWER GLOBAL PARCEL SHIPPING



STREAMLINE  
CROSS-BORDER  
PARCEL SHIPMENTS

Access a built-in, global parcel carrier network. Easily connect to customers worldwide.



CONSOLIDATE  
PARCEL SHIPMENTS

Make smarter parcel shipping decisions. Reduce parcel shipping spend.



GAIN 100%  
SHIPMENT VISIBILITY

Provide best-in-class customer service. Monitor carrier performance.



DECREASE PARCEL  
SHIPPING COSTS

Maximize profits per parcel shipment. Achieve savings of up to 25%.

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Supply Chain Management

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E-Commerce Parcel Shipping  
Software Requirements

Watch the Video



Managing the Rise (and Cost)  
of Returns

Get the eBook

# #1

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to Internet Retailer's Top 1000 Retailers

- Leading provider of global, multi-carrier parcel transportation management systems
- FedEx® Diamond/Platinum Compatible Solution Provider and EU & APAC FedEx® certified
- UPS® Global Platinum Partner
- One of the industry's largest multi-national, global, major and regional carrier networks
- A robust portfolio of products, solutions and expertise

**Logistyx**  
TECHNOLOGIES

[logistyx.com](https://logistyx.com) | Free Analysis

## INTERNATIONAL ECOMMERCE SERVICES

■ Indicates a ranking tie

International ecommerce service vendors help online retailers take advantage of overseas demand.

These vendors offer software and services such as those that can help retailers navigate complicated duty and tax rules, foreign parcel delivery, currency conversions and managing returns from non-U.S. customers, among other things.

1 Pitney Bowes

2 eShopWorld



3 FedEx

4 UPS

5 Guidance

6 MyUS.com

7 Radial<sup>1</sup>

7 USPS

9 Oracle NetSuite<sup>2</sup>

9 Amazon Web Services

1. Radial is owned by bpost. 2. In November 2016 Oracle acquired NetSuite; their solutions continue to operate independently.

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

## ESHOPWORLD

RANK IN  
CATEGORY

2


  
formerly eShopWorld
2020  
TOP 1000  
RETAIL  
CLIENTS

14

eShopWorld powers cross-border ecommerce for many of the world's best-known brands, creating safer, simpler, and faster shopping experiences for consumers all around the globe. ESW optimizes the entire shopper journey with a combination of technology and expert guidance, from demand generation to checkout, through shipping, customer service and returns. With configurable end-to-end solutions available in more than 200 markets worldwide, ESW fully manages payments, compliance, data security, fraud protection, taxes, and tariffs, helping retailers enter new markets in as few as 6 weeks, and improve results in current markets. Bringing together more than 400 experts across multiple disciplines, the ESW team delivers profitable growth for retailers and brands worldwide.

PRIMARY URL

eShopWorld.com

YEAR  
LAUNCHED

2010

TOTAL 2020 TOP 1000  
CLIENT WEB SALES

\$15.89 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: **1** Chain: **4** Manufacturer: **7** Catalog/Call Center: **2**

TOP 1000 CLIENTS BY WEB SALES

\$40M or less: **1** \$40-125M: **2** \$125-500M: **2** \$500M or more: **9**

KEY CLIENTS

PVH  
Movado  
Tarte  
Nike  
Estee Lauder

PRODUCTS &amp; SERVICES

Crossborder ecommerce services for customer acquisition, market-specific pricing, checkout, shipping, returns and customer support.

**Pricing:** ESW uses a shared success model, taking a percentage of retail sales made through their platform.

Source: Digital Commerce 360 2021 Leading Vendors to the Top 1000.

*Note:* Category leaders are ranked on the total number of clients they have in the 2020 Digital Commerce 360 Top 1000. Only parent companies of retailers are included. The information on this page is sponsored by the vendor but all data originated from the Top 1000 and editorial content was supplied by Digital Commerce 360.

CORPORATE

1330 Ave. of the Americas, Suite 23  
New York, NY 10019

MANAGEMENT

Tommy Kelly, CEO  
Ahmed Naiem, Chief Commercial Officer  
Mark Kirschner, CMO

# Q&A

Enabling cross-border e-commerce is a must during the pandemic

An executive conversation with **Tommy Kelly**, CEO, eShopWorld



COVID-19 has forced customers around the world indoors. Shoppers who had traditionally shopped in stores now rely on ecommerce for both essential and discretionary purchases. This shift has created an unexpected rise in cross-border ecommerce sales. Furthermore, popular social media platforms, such as TikTok and Instagram, have introduced consumers to brands from around the world. Retailers that were able to acquire new international customers and deliver positive customer experiences to them during the early days of the pandemic have now established long-lasting brand loyalty. To discuss how enabling cross-border ecommerce will help retailers persevere during COVID-19, Digital Commerce 360 spoke with Tommy Kelly, CEO of eShopWorld.

## How would you describe the current state of global ecommerce?

Cross-border is here to stay. Over the past few months, our own internal data has shown ecommerce growth of up to 600% from brands that have just scratched the surface of cross-border selling but haven't even fully adapted to shopper preferences by country. Those are peak-level increases. Retailers must provide a seamless and consistent user experience, no matter where the customer is and how or when they engage with a brand. Shopping overseas should feel as safe and convenient as shopping from a store down the block. With most U.S. brands seeing only about 20% of sales coming from the international market, there is a tremendous upside. Establishing a strategic cross-border solution to execute global sales efficiently provides an enormous opportunity for retailers today.

## What are the biggest challenges retailers face regarding their global businesses because of COVID-19?

As retailers began to understand both the obstacles and the ecommerce opportunities the pandemic created, many rushed to market with inadequate cross-border solutions. These self-service platforms lacked the human support and functionality needed to offer a seamless, user-friendly cross-border solution. Furthermore, many brands found that they did not have the experience and expertise required to expand into new international markets using technology alone.

Another challenge is acquiring data needed to support expansion decisions. Retailers must have reliable data to understand the intended market and its customers and to inform these important decisions.

## What mistakes have retailers made trying to enter global markets?

As online demand during the pandemic skyrocketed, retailers recognized the potential of expanding globally. However, many lacked the tools needed to execute a genuinely global ecommerce strategy properly. They simply localized the currencies and added duties and taxes, but still presented a U.S. experience in a foreign market. This half-baked approach results in a below-average shopper experience and low conversion rate.

## How can they overcome these challenges?

Executing a seamless, omnichannel, cross-border customer experience is extremely complex for retailers. Every market into which they expand is different. There simply isn't a one-size-fits-all solution for cross-border commerce, and solutions need to be configurable.

In all cases, retailers must start by establishing a presence or having a partner with boots on the ground in each prospective region to fully understand the local consumer and the behavior of each market. They need sophisticated, cloud-based order management systems enabling ship-from-store or warehouse inventory to expedite shipping times and reduce costs. They also need user-friendly fulfillment options, such as buy online, pickup in store, and simple returns, as well as localized communications. eShopWorld, for example, helps retailers do this by using local data to analyze the behavior of each market and the buying habits of the local consumers. We configure a quick-to-market, proven solution upon which retailers control the entire customer journey—from communications and promotions to inventory management and supply chain and ultimately, sales and fulfillment.

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**esw.**  
formerly eShopWorld

## MARKETING AUTOMATION PLATFORM

■ Indicates a ranking tie

The digital marketing landscape has grown increasingly complex. The amount of marketing automation options and the multitude of accompanying tools these services offer can be overwhelming for many merchants. This is leading many retailers to turn to vendors to help them automate their marketing to gain new customers at the lowest cost possible. Such vendors can help retailers implement, run and optimize marketing channels such as email, apps, web and text channels automatically, requiring less work from retailers.

- 1 Mailchimp
- 2 Oracle NetSuite
- 3 Listrak
- 4 Oracle
- 5 Experian
- 6 Twilio Sendgrid
- 7 Bluecore
- 7 TowerData
- 9 HCL
- 10 Salesforce

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

## ONLINE ADVERTISING

Marketing and advertising vendors help retailers promote their products or website and drive sales and conversions via a variety of marketing channels or advertising avenues. Some of these services could include customer targeting, sponsored products, dynamic retargeting, direct bidding and audience matching.

- 1 Google
- 2 Criteo
- 3 Rubicon Project
- 4 AdRoll
- 5 ChannelAdvisor
- 6 MediaMath
- 7 Acxiom
- 8 Tapad
- 9 PubMatic
- 10 SteelHouse

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.



## ORDER MANAGEMENT

Order management technology is especially important for retailers that operate both stores and ecommerce websites. A good order management system provides better inventory visibility for consumers, which can help generate sales. For example, some order management systems are designed to allow shoppers to see if a product is available in a store near them. Others tell retailers which locations should fulfill an order based on efficiency, and in which priority orders should be fulfilled. Systems can change this logic based on the type of product as well—such as boots vs. jeans vs. T-shirts and so on. Many order management systems offer greater transparency into inventory across channels, all the way down to the individual store or warehouse level. Some retailers allow a customer to reserve a product, pick it up at the store of their choosing and pay for it.

■ Indicates a ranking tie

1	Radial <sup>1</sup>	 <b>Radial</b> a bpost company
2	Oracle	
3	Blue Yonder <sup>2</sup>	
4	Oracle NetSuite <sup>3</sup>	
5	IBM	
6	Manhattan Associates	
7	Microsoft	
8	Kibo	
9	SAP	
9	Monsoon	

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

1. Radial is owned by bpost. 2. In February 2020 JDA Software rebranded as Blue Yonder. 3. In November 2016 Oracle acquired NetSuite; their solutions continue to operate independently.

## RADIAL

RANK IN  
CATEGORY

1

2020  
TOP 1000  
RETAIL  
CLIENTS

41

Radial is the leading provider of omnichannel commerce technologies and operations that offers retailers omnichannel technology including order management, fulfillments and shipping, customer care, and payments and fraud management. Its suite of services enables retailers to profitably exceed customer expectations by transforming the complexity of an omnichannel retail business into a seamlessly orchestrated customer experience. Their scalable technology is fit for retailers and brands looking for a partner to help them grow.

PRIMARY URL

Radial.com

YEAR  
LAUNCHED

1999

TOTAL 2020 TOP 1000  
CLIENT WEB SALES

\$21.07 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: **2** Chain: **18** Manufacturer: **11** Catalog/Call Center: **10**

TOP 1000 CLIENTS BY WEB SALES

\$40M or less: **1** \$40-125M: **18** \$125-500M: **12** \$500M or more: **10**

KEY CLIENTS

Colony Brands  
Costco Wholesale  
Guitar Center  
Hallmark Cards  
Ralph Lauren  
Uline

PRODUCTS &amp; SERVICES

Omnichannel technology, supply chain services, transportation, payments, fraud and customer care services.

**Pricing:** Pricing and fees vary.

Source: Digital Commerce 360 2021 Leading Vendors to the Top 1000.

*Note:* Category leaders are ranked on the total number of clients they have in the 2020 Digital Commerce 360 Top 1000. Only parent companies of retailers are included. The information on this page is sponsored by the vendor but all data originated from the Top 1000 and editorial content was supplied by Digital Commerce 360.

CORPORATE

935 First Ave.  
King of Prussia, PA 19406  
877-255-2857

MANAGEMENT

Ilias Simpson, CEO  
Devang Patel, CTO  
Gary Crowe, CFO

# Q&A

Omnichannel technology provides the consistent, seamless experiences customers demand

An executive conversation with **Prashant Bhatia**, senior vice president of technology, Radial



Putting the customer experience first is imperative for retailers today. In these uncertain times, retailers must provide the seamless experience customers demand—and that means offering them a wide variety of purchasing options. To discuss how best-in-class omnichannel technology is necessary for retailers to remain agile and flexible in their fulfillment offerings to provide seamless customer experiences, Digital Commerce 360 spoke with Prashant Bhatia, senior vice president of technology services at Radial.

## Why is omnichannel technology so important to a retailer's business?

Omnichannel technology provides systems that make omnichannel retail comprehensive and connected for customers to buy what they want, where they want. It influences customer retention. And customer retention is among the biggest challenges retailers face—not only because acquiring new customers is significantly more expensive than keeping current ones, but also because customers' expectations continue to increase. There's little room for error.

Now, as in-store purchasing has given way to online buying, in-store pickup, ship-from-store, and curbside pickup, retailers are scrambling to ensure they're meeting demand while providing unified retail experiences across each touchpoint.

## How does omnichannel technology work with other lines of business to create seamless customer experiences?

A customer in an omnichannel experience should feel that no matter how or where they reach out to your business, they'll get the same experience of your brand. Omnichannel technology lets consumers enjoy the brand experience across channels and at every stage of the buying journey. From purchase to delivery, your in-store and online customers should receive their goods in the same packaging. Your fulfillment department can ensure the packaging is consistent with your brand, and customer service can resolve or assist customers the same as in-store. Consistency is key.

## Why is best-in-class technology important for retailers to remain agile?

The pandemic has placed immense strain on OMSs. Most are homegrown systems or customized enterprise resource planning systems (ERPs) that aren't built to scale and often get delayed feeds of inventory and point-of-sale activity. These discrepancies often cause frustration with out-of-stocks, faulty orders and inaccurate inventory counts—not to mention frustrated customers.

Best-in-class technology safeguards against not having the inventory available at the time promised. With a robust order management system, retailers can accurately pinpoint what inventory they have, where it is and how quickly it can arrive at the designated shipping location.

As a bonus, an OMS helps retailers become more flexible, especially with inventory segmentation. Previously, retailers placed their inventory in buckets: in-store and online. They created the buckets based on predictions of store traffic and online traffic. Through the evolution of omnichannel, especially since COVID, brands have had to look at inventory holistically across channels. Retailers have had to get creative about moving inventory stuck in areas that couldn't sell or ship products—rather than sell them in stores—due to restrictions.

## How can retailers scale up their omnichannel capabilities quickly?

They should seek out a fulfillment partner with multi-node distribution models. Radial's multi-node distribution ensures that inventory can be more readily available and closer to the consumer to reduce shipping times while supporting contingency planning. It makes pivoting and adjusting inventory easier when consumer habits shift. Multiclient fulfillment centers can also help retailers scale up ecommerce operations faster than they could on their own. The key is to complement the fulfillment models with a flexible OMS that allows retailers to scale and flex as the buying environment evolves.





# Connecting All Demand to All Supply

## Keys to Omnichannel Success

**Consumer preferences drive strategy.** By offering multiple purchasing channels, consumers can follow the path to purchase they prefer.

Retailers who embrace **omnichannel strategies** can simplify complex order fulfillment scenarios, gain a single view of supply and demand and provide flexible shopping options to keep customers coming back.

Radial has helped hundreds of brands and retailers optimize inventory management to improve customer experiences and scale on demand.

A partner you can trust, we're here for you.  
[radial.com/omnichannel-ecommerce](https://radial.com/omnichannel-ecommerce) | +1 877 255 2857



## PAYMENT PROCESSING

A payment processor is a company that a merchant works with to handle transactions from various payment types, such as credit and debit cards. Payment processing vendors enable shoppers to pay for items on a retailer's website, either directly on the checkout page or through a redirect to pay via a third-party website.

■ Indicates a ranking tie

- 1 PayPal
- 2 Chase Merchant Services
- 3 Cybersource<sup>1</sup>
- 4 Authorize.net<sup>2</sup>
- 5 FIS
- 6 Amazon Web Services
- 7 Fiserv
- 8 Radial<sup>3</sup>
- 9 Affirm
- 9 CardinalCommerce<sup>4</sup>

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

1. Cybersource is owned by Visa. 2. Authorize.net is owned by Visa. 3. Radial is owned by bpost. 4. Cardinal Commerce is owned by Visa.

## PAYMENT SECURITY/FRAUD PREVENTION

■ Indicates a ranking tie

Many online retailers look to vendors for technology to help protect themselves from cybersecurity threats and fraudulent transactions. These vendors help merchants update their fraud prevention technology, ensure consumers who sign up for an account or make purchases are not fraudsters, differentiate their fraud prevention strategies for desktop and mobile devices, and ensure their vendor partners have the necessary security measures in place. Some fraudulent activity can be combatted simply by updating or changing security software, and vendors can assist with as well.

- 1 Cybersource<sup>1</sup>
- 2 McAfee
- 3 Accertify<sup>2</sup>
- 4 ClearSale
- 5 PayPal
- 6 Radial<sup>3</sup>
- 7 Chase Merchant Services
- 8 Authorize.Net<sup>4</sup>
- 9 Forter
- 9 Riskified

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

1. CyberSource is owned by Visa. 2. Accertify is owned by American Express.  
3. Radial is owned by bpost. 4. Authorize.net is owned by Visa.

## PERSONALIZATION

A large advantage ecommerce sites have over their brick-and-mortar competitors is their ability to show a customer products she might like based on past site behavior and purchases. Personalization vendors enable merchants to show customers products they're more likely to buy through a range of marketing channels, such as targeted emails and recommended products. Even with consumers wary of providing too much data, the benefits of making them feel unique can be dramatic. Combining buying history, demographic information, geographic details and pricing data together can connect customers with products they want to buy. Pain points in personalization include data gathering, analyzing trends to determine the right personalization mix and creating personalized marketing materials. Data vendors can provide customer data and demographics to help inform trends, while A/B testing helps to find the most effective marketing options. Automation and artificial intelligence are playing a growing role in determining how companies spend their time personalizing the shopping journey for consumers.

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

■ Indicates a ranking tie

1 Certona(Kibo)<sup>1</sup>



2 Monetate(Kibo)<sup>2</sup>

3 Salesforce

4 RichRelevance

5 Nosto

6 GroupBy

7 Reflektion

8 Adobe

8 TowerData

10 Deloitte

1. Certona is owned by Kibo. 2. Monetate is owned by Kibo.

## KIBO

RANK IN CATEGORY

1&2



2020 TOP 1000 RETAIL CLIENTS

123

Kibo, which also owns personalization vendors Certona and Monetate, enables brands and sellers to manage all their B2B and B2C channels—or go 100% headless commerce—with a single, cloud-based SaaS platform. It offers personalized, seamless shopping experiences and enables companies to manage merchandising, promotions, SEO and more, without having to be a coder. Built on an API-first microservices architecture with AI at its core, its personalized platform brings together the most essential commerce solutions on a single platform, including personalization, ecommerce, mobile point-of-sale and personalization. Kibo acquired Certona in February 2019. Certona’s patented personalization technology leverages machine learning and predictive analytics to deliver optimized content and messaging to increase engagement and conversions across all customer touchpoints. Kibo also acquired Monetate in October 2019. Monetate offers testing and optimization software, such as A/B testing, content personalization and audience building and targeting.

PRIMARY URL

KiboCommerce.com

YEAR LAUNCHED

2016

TOTAL 2020 TOP 1000 CLIENT WEB SALES

\$379.02 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: **20** Chain: **56** Manufacturer: **23** Catalog/Call Center: **24**



TOP 1000 CLIENTS BY WEB SALES

\$40M or less: **10** \$40-125M: **45** \$125-500M: **34** \$500M or more: **34**



KEY CLIENTS

Bed, Bath & Beyond  
Eileen Fisher  
Harbor Freight Tools  
New Balance  
Qurate Retail Group  
VF Corp.

PRODUCTS & SERVICES

All-in-one personalization platform with applications focused on discovery, search, recommendations and content.

**Pricing:** Pricing and fees vary.

Source: Digital Commerce 360 2021 Leading Vendors to the Top 1000.

Note: Category leaders are ranked on the total number of clients they have in the 2020 Digital Commerce 360 Top 1000. Only parent companies of retailers are included. The information on this page is sponsored by the vendor but all data originated from the Top 1000 and editorial content was supplied by Digital Commerce 360.

CORPORATE

1717 N. Harwood St., Suite 1900  
Dallas, TX 75201  
877-350-3866

MANAGEMENT

David Post, CEO  
Meyar Sheik, President/Chief Commerce Officer  
Ram Venkataraman, Chief Product & Technology Officer



# Q&A

Comprehensive personalization strategies help retailers survive the pandemic

An executive conversation with **Meyar Sheik**, president and chief commerce officer, Kibo



Gone are the days when personalization was a nice-to-have for retailers. Today, personalizing the shopping experience for customers is a must—and this is especially true in the wake of COVID-19. As more shoppers flock online to buy everything from basic needs to discretionary products, the onus is on retailers to provide them a seamless, personalized experience or risk losing them to competitors. To discuss how an excellent personalization strategy will help retailers attract and retain customers, Digital Commerce 360 spoke with Meyar Sheik, president and chief commerce officer at Kibo.

## What have been the biggest personalization challenges confronting retailers during the pandemic?

COVID-19 caught retailers off guard. Even if they had a solid personalization vision, most suffered from a lack of resources—and they just had to try to survive. This is where relying on a reputable solutions provider to handle the heavy lifting involved with personalization initiatives and strategies could help.

COVID-19 aside, any personalization strategy is only as good as the data that goes into it. Personalization is like an engine, and data is the fuel. Many retailers struggle to collect and utilize that data—so their personalization strategies don't perform well.

## Why is personalization particularly important in today's ecommerce environment?

There's been a surge of sales with Amazon, Walmart, and other large chains throughout this pandemic. The big getting even bigger has only put more pressure on an already-challenged group of retailers trying to compete—even pre-COVID-19.

By utilizing data to get to know the customer, retailers can deliver the personalized, frictionless experience that today's customers expect. And that's the biggest differentiator they can have because they can't out scale or outprice the bigger players.

## How does testing and optimization help retailers with their personalization strategies?

Personalization is a combination of art and science. The science is where you rely on that high-fidelity data about the customer—

their browse behavior, what they did in each channel and what products they purchased. The art is merchandising, where retailers rely on their own intuition to decide what products to promote and how to make the customer's experience good. Testing and optimization validate those intuitions.

For example, a retailer takes a percentage of its traffic and assigns it to a test group and compares it against a control group to see how conversion or click-through rates measure. It doesn't replace the retailer's intuition, but it helps validate it quickly.

## How are BOPIS and BOPAC helping retailers manage these challenges?

Because of store closures, a lot of retailers' revenues have plummeted. Those that offered flexible fulfillment options like buy online, pickup in store (BOPIS) and buy online, pickup at curbside (BOPAC) could leverage their stores as local warehouses and mini distribution centers. Retailers often personalized those experiences by making recommendations, based on that customer's order, for other products they had in stock at that store. With the pandemic, these touchless, frictionless options like BOPAC are important to satisfy customers and boost revenues. And in a lot of cases, BOPAC is even faster than Amazon.

## How steps should retailers take to implement a personalization strategy quickly?

First, retailers should know that personalization is not technology. It's their customer retention strategy. They should find a technology partner that understands that and offers a comprehensive personalization platform.

Kibo, for example, helps retailers collect and understand that critical data. And our platform offers testing, autonomous optimization and content personalization. Retailers that approach personalization as a strategy—not a "check the box on a feature"—are the ones that do well.



Powered by  monetate +  CERTONA



Powered by  monetate +  CERTONA



# 1-TO-1 PERSONALIZATION

## Advanced Personalization that Drives Real Results

Powered by Certona and Monetate, the two leading personalization providers for the IR 500, Kibo Personalization enables brands to deliver personalized and optimized experiences across the entire customer journey. With patented AI technology at its core, Kibo Personalization enables brands to build better customer experiences that deliver real results.

- TESTING AND EXPERIMENTATION
- SEGMENTATION AND DISCOVERY
- 1-TO-1 PERSONALIZATION
- RECOMMENDATIONS
- PERSONALIZED SEARCH
- AUTOMATED PRODUCT DISCOVERY

[www.kibocommerce.com](http://www.kibocommerce.com)

## SEARCH ENGINE MARKETING

Search engines make the vast library of online content accessible, serving up the most relevant content to user queries. But to make money, search engines all sell slots in those search results as ads, helping retailers target potential customers based on what they search for—this is called keyword bidding. Search engine marketing has become a quick way to not only advertise a product, but also A/B test landing page copy, acquire customers and even show up in competitors' search results. While traditional advertising agencies will incorporate search marketing into many campaigns, some agencies will help retailers constantly evaluate search engine marketing opportunities via software and human help. Marketing software platforms also have built-in search engine marketing tools to allow easy expansions of campaigns. The practice is closely linked to search engine optimization, which involves crafting copy and altering site metadata to rank higher in search engine algorithms. Both require keeping a close eye on popular search terms and proper practices as outlined by various search engines. However, they are also highly susceptible to changes in algorithms and advertising standards by search engines.

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

■ Indicates a ranking tie


- 1 Kenshoo
- 2 Marin Software
- 3 ChannelAdvisor
- 3 ForwardPMX
- 5 Merkle<sup>1</sup>
- 6 iProspect<sup>2</sup>
- 7 Google
- 8 Adobe
- 8 ROI Revolution
- 10 Performics<sup>3</sup>

1. Merkle is owned by Dentsu Aegis Network. 2. iProspect is owned by Dentsu Aegis Network. 3. Performics is owned by Publicis Groupe.

## SHIPPING CARRIER

Shipping carriers make the online selling of physical goods feasible. These are the companies that get products from a seller's warehouse to the customer's door. They handle the logistics in between, ensuring on-time delivery and minimize costs for retailers and shoppers by operating at scale. Shipping carriers allow retailers to deliver packages to almost anywhere on the planet. Many of these services also offer tracking options to keep customers informed of delivery dates, integration with inventory software to quickly print accurate labels and return services to satisfy customers unhappy with their purchases. While many of these shippers may seem similar on the surface, details like shipping speeds, coverage areas and unique packaging needs can help vendors stand out.

■ Indicates a ranking tie

- 1 UPS
- 2 USPS
- 3 FedEx
- 4 Pitney Bowes
- 5 DHL<sup>1</sup>
- 6 Canada Post
- 7 OnTrac
- 8 Metapack   
Trusted eCommerce delivery
- 9 NSD
- 9 Ryder
- 9 R+L Carriers

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

## METAPACK

RANK IN  
CATEGORY

8

2020  
TOP 1000  
RETAIL  
CLIENTS

4

Metapack provides delivery management technology to enterprise retailers and brands. Its platform works with over 400 global carriers and 4,900 types of delivery services such as next day, buy online pick up in store, locker pickup and international delivery—ensuring that retailers and brands can offer delivery options and convenience for their customers. Metapack's services identify the most appropriate delivery service for each customer, providing a seamless and personalized delivery experience, while also removing manual and time-consuming processes in retailers' warehouses.

PRIMARY URL

Metapack.com

YEAR  
LAUNCHED

1999

TOTAL 2020 TOP 1000  
CLIENT WEB SALES

\$3.65 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: 0 Chain: 0 Manufacturer: 4 Catalog/Call Center: 0

TOP 1000 CLIENTS BY WEB SALES

\$40M or less: 0 \$40-125M: 0 \$125-500M: 1 \$500M or more: 3

KEY CLIENTS

Capri Holdings  
The Estee Lauder Cos.  
VF Corp.  
PVH Corp.

PRODUCTS &amp; SERVICES

Delivery management software-as-a-service that offers personalized delivery services, from global order tracking to return procedures through a catalog of 400 carriers.

**Pricing:** Pricing and fees vary.

Source: Digital Commerce 360 2021 Leading Vendors to the Top 1000.

*Note:* Category leaders are ranked on the total number of clients they have in the 2020 Digital Commerce 360 Top 1000. Only parent companies of retailers are included. The information on this page is sponsored by the vendor but all data originated from the Top 1000 and editorial content was supplied by Digital Commerce 360.

CORPORATE

1990 E. Grand Ave.  
El Segundo, CA 90245

MANAGEMENT

John Clem, GM  
Bruce Fair, CRO  
Steve Homan, CTO  
Tom Forbes, SVP, Carriers

# Q&A

A multiple carrier ecosystem is key to coping with rising delivery demand

An executive conversation with **John Clem**, GM, Metapack



Over the past few years, ecommerce has begun to dominate the retail industry. And COVID-19 has only accelerated this shift. With more people shopping online than ever before and customer experience expectations on the rise, ecommerce has become the most important revenue channel for retailers. And delivery has become the primary method of obtaining goods. To discuss how the right technology can help retailers deliver packages in a way that meets growing customer expectations, Digital Commerce 360 spoke with John Clem, GM of Metapack, a provider of delivery management technology to retailers.

## How has delivery changed for retailers recently?

Shipping has evolved to meet the changing needs of the modern consumer. Consumers want the same seamless experience in their homes that they've gotten from physical stores. A bad shipping experience means a bad consumer experience. Offering consumers convenience is critical. According to Metapack's Global Ecommerce Consumer Report, 55% of consumers said they bought goods from one retailer over another simply because that retailer provided more shipping options and the ability to choose when, where and how they receive their packages.

## What other trends around delivery are impacting retailers?

The post-purchase experience is an area that retailers need to invest in—from the moment a customer purchases a product to the minute the customer receives it and is satisfied. According to Metapack's Delivery Benchmark Report, two-thirds of consumers said the ability to track their order is one of their top three considerations when buying a product. The rise in returns is also another trend impacting retailers. As more consumers turn their homes into dressing rooms, they often get frustrated if returning an item isn't easy. It should be just as simple and straightforward as the initial purchasing process.

## What are the biggest shipping challenges retailers are facing because of COVID-19?

Carrier capacity is a huge challenge. April, May and June saw online sales volumes break records while carriers struggled

to cope with the surge in demand. Even now, they're still struggling to control the backlog of deliveries. Retailers with critical dependencies on individual carriers are at greater risk of suffering from major disruption as they're unable to spread the load across multiple carriers.

## How should they respond to these challenges?

It's all about retailers having the right technology and carrier network in place. The biggest disaster for retailers this holiday peak is if their carriers fail, become overburdened and are unable to cope with the demand. Retailers need to integrate to more than one carrier to ensure business continuity. Multiple carrier integrations provide retailers with additional layers of protection and enable them to access remote inventory, navigate cross-border concerns and help safeguard their delivery services.

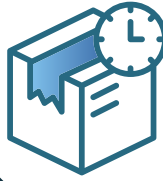
The most efficient and cost-effective way to do this is for retailers to use a technology partner, such as Metapack, that connects them with multiple carriers—giving customers more choice when it comes to delivery and returns. Having multiple integrations prevents over-reliance on just one or two carriers and offers retailers the added security of spreading their volume across different carriers. Different carriers have different capabilities, from next-day delivery to pick-up locations. And yet, retailers have typically struggled to leverage the full range of services because they need to create individual integrations for each carrier—which is expensive, time-consuming and ultimately limiting.

Having a multiple-carrier ecosystem will be essential as it will ease the strain on carriers to cope with rising delivery demand and provide consumers with more choice.



Trusted eCommerce delivery

METAPACK



# Yes. Global ecommerce delivery can be effortless.

Deliver simple yet powerful experiences for your customers, and your team.



Metapack is on a mission to make ecommerce effortless, for retailers and for their customers alike. Our solutions integrate front-end promises with back-end practicalities, resulting in simple yet powerful experiences across the entire ecommerce fulfillment journey. That means more delivery options at checkout, more dependable delivery timeframes, more user-friendly tracking and simpler returns options. Our technology is underpinned by the world's largest delivery partner ecosystem comprising 400 carriers and 4,900 global delivery services.

Discover effortless ecommerce solutions  
[www.metapack.com](http://www.metapack.com) | [info@metapack.com](mailto:info@metapack.com)



## SITE DESIGN & DEVELOPMENT

■ Indicates a ranking tie

Site design can be complicated.

Retailers must balance clear product visuals, easy navigation, engaging content and web performance.

Site design vendors can keep development costs down for retailers and help merchants be more agile with their site design by staying on top of trends like responsive design, integrated videos and shoppable content, keeping load times low and maintaining an easy purchasing process. Vendor solutions range from professionally designed and updated sites to software programs that convert designs into code for ecommerce storefronts. Site design can also inform mobile apps, marketing materials, customer emails and advertising campaigns. Site design also involves rich media elements, which can be a headache for some merchants that need to digitize a paper catalog of products. Adding elements like 360-degree product views, videos of items in use or even augmented reality can give web shoppers nearly as much detail as they would get shopping in store.

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

- 1 Adobe
- 2 Snap36
- 3 Syndigo
- 4 Industrial Color
- 5 Brightcove
- 6 Oracle
- 7 Wistia
- 8 Vimeo
- 8 Guidance
- 10 Blue Acorn iCi



## SITE SEARCH

Ecommerce sites' search bars help shoppers quickly get to what they want. The feature's success at leading to a sale depends largely on its ability to recognize the consumer's request and deliver the most relevant results. Vendors and retailers alike say site search plays a big role in retaining customer loyalty. If a customer can't quickly find what she's looking for, she's likely to move onto a competitor's site. If done well, site search can lead to better product discovery and result in more sales. Retailers can invest in upgrades to enhance site search with intelligent auto-complete that pulls up suggested terms as a shopper types a query, typo detection that predicts the meaning of a misspelled word and still yields the correct results, improved synonym matching, photo components and personalized results based on search, order and browsing history. Some retailers are also dabbling in search features that derive product matches via voice command or consumer-submitted photos of a similar product.

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

■ Indicates a ranking tie

1 Oracle

2 Salesforce

3 SLI Systems<sup>1</sup>

4 Algolia 

5 Apache Solr

6 GroupBy

7 Adobe

8 Hawksearch

8 Bloomreach

10 Lucidworks

1. SLI Systems is owned by Avolin.

## ALGOLIA

RANK IN  
CATEGORY

4



2020  
TOP 1000  
RETAIL  
CLIENTS

36

Algolia is a search-as-a-service platform that enables companies of all sizes to deliver fast and relevant digital experiences that drive real results. With Algolia, consumers are able to find and discover what they want easily across web, mobile and voice. Algolia allows developers and business teams to build and optimize search and discovery experiences that increase online engagement, conversion rates and revenue. More than 9,500 companies, including Under Armour, Lacoste, Birchbox, Stripe, Slack, Medium and Zendesk use Algolia to manage more than 95 billion search queries a month. Algolia is headquartered in San Francisco with offices in Paris, London, Tokyo, New York and Atlanta.

PRIMARY URL

Algolia.com

YEAR  
LAUNCHED

2012

TOTAL 2020 TOP 1000  
CLIENT WEB SALES

\$21.84 BILLION

TOP 1000 CLIENTS BY CATEGORY

Web Only: **18** Chain: **4** Manufacturer: **10** Catalog/Call Center: **4**



TOP 1000 CLIENTS BY WEB SALES

\$40M or less: **1** \$40-125M: **18** \$125-500M: **11** \$500M or more: **6**



KEY CLIENTS

Birchbox  
Everlane  
Nuts.com  
The RealReal  
Under Armour  
Weight Watchers

PRODUCTS & SERVICES

Search-as-a-service platform that increases online engagement, conversion rates and revenue.

**Pricing:** Pricing based on number of units used/month; 1 unit equals 1000 search requests. Free plan includes up to 10 units/month; Standard plan is \$1 per unit/mo. and includes analytics; Premium plan is \$1.50 per unit/mo. and includes advanced conversion features. 20% savings when purchased annually.

CORPORATE

301 Howard St., 3rd Floor  
San Francisco, CA 94105

MANAGEMENT

Bernadette Nixon, CEO  
Julien Lemoine, Co-Founder/CTO  
Ashley Stirrup, CMO

Source: Digital Commerce 360 2021 Leading Vendors to the Top 1000.

Note: Category leaders are ranked on the total number of clients they have in the 2020 Digital Commerce 360 Top 1000. Only parent companies of retailers are included. The information on this page is sponsored by the vendor but all data originated from the Top 1000 and editorial content was supplied by Digital Commerce 360.

# Q&A

Best practices for applying AI to search for retailers

An executive conversation with **Ashley Stirrup**, chief marketing officer, Algolia



Site search is an essential component of any ecommerce website. When customers land on a retailer's site, they want to find the product they are looking for quickly and easily. But often, retailers fail to prioritize search—a dangerous oversight in an increasingly competitive ecommerce landscape. To discuss how retailers can implement artificial intelligence (AI) technology and other strategies to improve the search function on their ecommerce sites, Digital Commerce 360 spoke with Ashley Stirrup, chief marketing officer at Algolia.

## How important is search for retailers?

Companies are recognizing that a great search experience delights customers and grows revenue. Algolia retail customers often see three times higher conversion rates from customers that use search on a desktop device, and four times higher conversion rates on mobile devices. On the flip side, a poor experience can rapidly erode market share.

## What site search challenges are retailers facing as a result of COVID-19?

Retailers saw massive swings in demand. Many saw online demand double, triple or more. In some cases, they had to deal with significant stock-outs that forced them to improve how they handle stock-outs on their website and mobile apps. This meant they needed to be better at recommending alternative products in search results. In other cases, brick-and-mortar retailers needed to move online for the first time. Either way, online channels became significantly more important to retailers.

All of this increased the importance of search and the need to invest. Areas in which retailers need to improve include infrastructure and uptime, faster catalog indexing, near real-time inventory updates, and tools for the business to act quickly based on new search trends.

The pandemic aside, technological innovation is mandating a constant focus on search. Advances in AI, personalization, voice, mobile and conversational search all make for a very competitive landscape when offering consumers ways to discover products.

## What common mistakes do retailers make regarding their site search strategies?

First, merchandisers and digital teams—those most invested in optimizing and profiting from site search—lack the tools to directly analyze and manage the search experience. This slows iteration and testing exponentially and as a result it can take retailers years to improve their search instead of weeks.

Another mistake is retailers handing over relevance to black-box AI technologies. Without fully understanding how and why optimizations and changes are made to core relevance, it becomes impossible for retailers to effectively tune their relevance strategy across millions of search terms. Instead, fixing one problem often leads to other problems.

## How can they overcome these challenges and correct mistakes?

First, they should empower their business teams and free up their IT. Give merchandisers and digital teams easy to use tools to analyze, A/B test and optimize their search on the fly.

Next, AI in search is a must. But retailers should ensure to supplement it with a level of control and understanding of what the AI is doing. This way, they can respond to user needs with the agility required by today's standards.

Algolia, for example, empowers retailers to offer rich, relevant and personalized search and discovery experiences to their users. Our AI-powered platform is fast, powerful, and easy to implement and maintain. Our cloud architecture takes much of the IT complexity out of search development. Most importantly, it is easy to use and optimize for anyone on the ecommerce team, enabling retailers to quickly grow their business.





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EVEN WHEN THEY  
TYPE QUICKLY

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DIOR

## SOCIAL MEDIA MARKETING

■ Indicates a ranking tie

Social media marketing is a vehicle for building brand awareness, gaining web traffic, promoting products and expanding a customer base. The opportunity for retailers to boost their marketing efforts via social media sites is enormous, and investments in this arena are paying off. Social networks have also added a steady stream of ad options to help merchants connect the dots from their marketing efforts to conversions. Reaching a target audience in the right place at the right time with a message that resonates is a golden tenet of social media marketing.

1	Kenshoo
2	Sprinklr
3	ForwardPMX
4	AddThis <sup>1</sup>
5	SAP
6	Olapic <sup>2</sup>
7	Curalate <sup>3</sup>
8	Hoosuite
8	Wpromote
10	Zinrelo

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

1. AddThis is owned by Oracle. 2. Olapic is owned by Monotype. 3. Curalate is owned by Bazaarvoice.



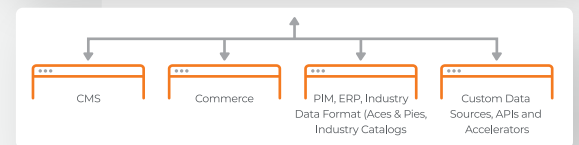
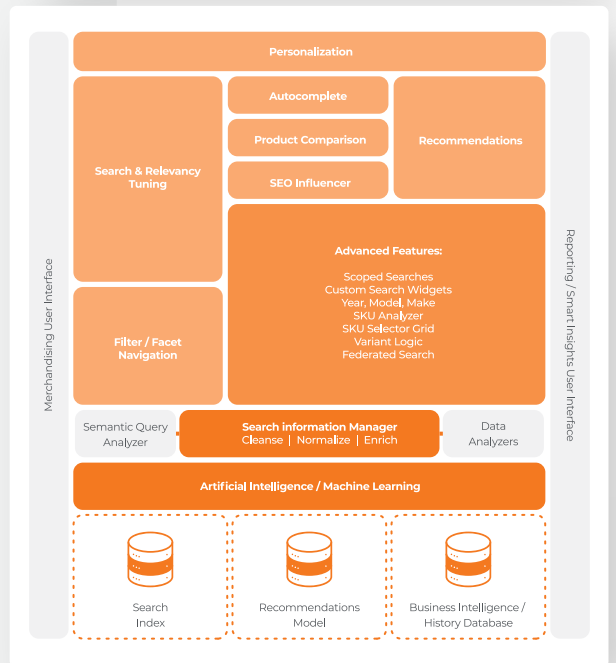
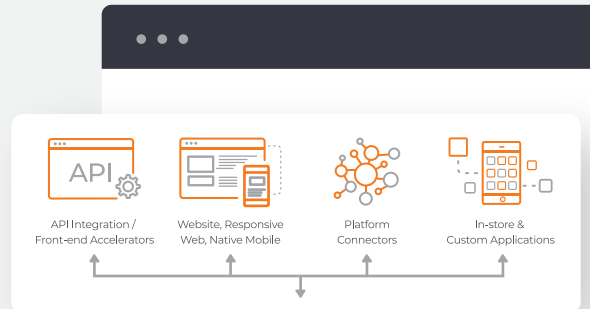
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## WEB HOSTING/CLOUD SERVICES

■ Indicates a ranking tie

Web hosting vendors provide storage space and access for websites—essentially storing a website on servers or in the cloud and delivering the sites to customers’ browsers. Servers either are owned by retailers themselves or by vendors that lease them for client use. Services in this arena vary in terms of features, as well as payment structures. A shared hosting setup means a provider houses multiple websites, which is inexpensive since the participating sites are splitting the costs, but traffic surges on a given site can impact the performance of another client. Virtual private server (VPS) hosting still accommodates multiple sites, but each site has its own individual resources, so traffic spikes for one site don’t have repercussions on other tenants. Dedicated hosting indicates that a retailer’s site is the lone occupant on a service, so it taps the server’s full power. Servers typically are housed in data centers, where remote storage, processing and distribution of large amounts of data occur. There has been a recent shift in this industry as vendors race to move corporate computing to the cloud, which offers nearly limitless capacity and ability for retailers to pay only for the capacity needed at any given time.

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

1	Rackspace
2	Amazon Web Services
3	Cloudflare
4	Salesforce
5	Akamai
6	CenturyLink
7	INAP
8	Aptum
9	AT&T
9	HCL
9	Oracle

## WEB PERFORMANCE

Rich media and real-time updates are crucial to enriching the customer experience online, but they can also significantly slow webpage load times, which leads to increased bounce rates. Performance monitoring tools from vendors often conduct an audit of on-site plugins and widgets, identify bottlenecks and make suggestions on adjustments to speed websites. Website testing and optimization are important to retailers as they evaluate their online stores' usability. Seeing which calls to the server are taking the longest—and why—is crucial so that web teams can isolate and tweak problematic features and ensure load times remain within an acceptable threshold. To combat slow site speeds and improve performance, retailers often are forced to minimize rich images or third-party plugins. But optimization vendors can help accelerate web performance without cutting content that's necessary to engage shoppers. These vendors can automate and accelerate the loading of static and dynamic content, manage the order in which content appears to shoppers and make user experiences more seamless and consistent across devices.

Source: Digital Commerce 360

Category leaders are ranked on the total number of parent/primary URL clients named by retailers in the 2020 edition of the Top 1000.

- 1 New Relic
- 2 Rackspace
- 3 Optimizely
- 4 Dynatrace
- 5 Monetate(Kibo)<sup>1</sup>
- 6 Adobe
- 7 SmartBear
- 8 Pingdom<sup>2</sup>
- 9 SiteSpect
- 10 vwo

1. Monetate is owned by Kibo. 2. Pingdom is owned by SolarWinds.



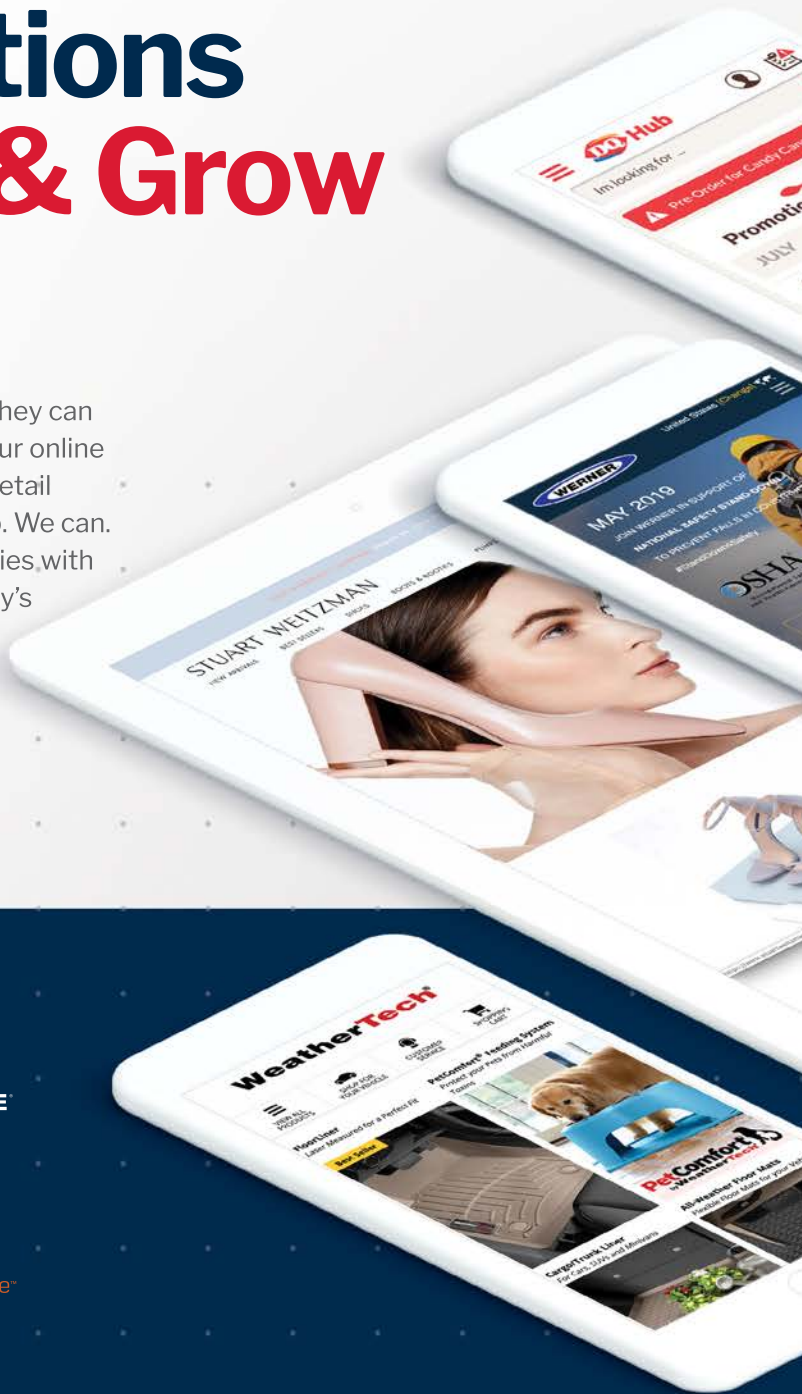


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## ABOUT THE AUTHOR

Katie Evans is chief technology editor at Digital Commerce 360, where she leads tech-related coverage, strategy, writing and reporting for the Digital Commerce 360 website, magazine and reports, including the Leading Vendors to the Top 1000 and the Guide to Ecommerce Platforms. She also researches and writes custom content for Digital Commerce 360 clients. Katie is a frequent speaker and moderator at industry events. Katie holds a B.A. in journalism from Bradley University and is a Fulbright Journalism Scholar, completing studies at the University of Ljubljana and University of Maribor in Slovenia.



Katie Evans  
Chief Technology Editor  
katie@digitalcommerce360.com  
312-572-6260

## DIGITAL COMMERCE 360 RESEARCH

### FAREEHA ALI

Research & Editorial Director  
fareeha@digitalcommerce360.com  
312-946-2048

### LAURA BERRIGAN

Project Manager, Research  
laura@digitalcommerce360.com  
312-572-6261

### TABITHA CASSIDY

Content Manager & Analyst, Research  
tabitha@digitalcommerce360.com  
312-572-6252

### LAUREN FREEDMAN

Senior Consumer Insights Analyst  
lfreedman@digitalcommerce360.com  
312-572-7004

### JESSICA YOUNG

Senior Research Analyst  
jessica@digitalcommerce360.com  
312-362-0104

### JONATHAN LOVE

Associate Data Analyst  
jon@digitalcommerce360.com  
312-262-0069

### BRENDAN REILLY

Research Analyst  
brendan@digitalcommerce360.com  
312-362-0076

### JAMES RISLEY

Research Analyst  
jrisley@digitalcommerce360.com  
312-572-7005

### JILL SUCHOMEL

Data Assistant  
jill@digitalcommerce360.com  
312-362-0273

## ABOUT US

### Digital Commerce 360 Research

At Digital Commerce 360 Research, our goal is to provide data and information about ecommerce that helps retail companies, investors and technology providers prosper.

The team tracks hundreds of metrics on thousands of online retail companies around the world, including such sought-after data points as web sales and traffic, conversion rates, average order value and key technology partners used to power their ecommerce businesses. We sell this data in its raw format in our multiple online databases, and we dig deeply into these numbers to help inform our 30+ exclusive analysis reports we publish each year on key ecommerce topics, including online marketplaces, cross-border ecommerce and omnichannel retailing. In-depth, data-focused reports are also available on key categories of online retail like apparel, housewares, food and luxury. We also have a robust custom research department, which provides tailored research products—in-depth reports, exclusive surveys, raw data pulls and other products—for top retail companies, consultants, financial analysts and technology companies.

**Digital Commerce 360** is a leading media and research organization that delivers daily news and competitive data across e-retailing, B2B ecommerce, and digital healthcare. Building on the reputation of Internet Retailer® which we introduced in 1999, Digital Commerce 360 is an expert in digital strategies and publishes a wide range of products including reports and newsletters, Internet Retailer® magazine, webinars, and data on thousands of global ecommerce companies through its Digital Commerce 360 Research brand. In 2018, we also co-founded B2B Next, the premier conference for B2B executives embracing ecommerce.

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