

RIS SOFTWARE LEADERBOARD '21

Zebra and Reflexis Deliver Diverse Strengths to Retailers

THE COMBINATION OF ZEBRA AND REFLEXIS CREATES A POWERFUL PRESENCE IN LEADERBOARD RANKINGS AND THE RETAIL MARKETPLACE

When Zebra acquired Reflexis Systems in 2020 it created a powerful alliance that promised a new level of optimization for essential retail workers. The broad portfolio of solutions created by the acquisition offers retailers a way to optimize store operations, maximize inventory management, and improve supply chain efficiency.

It also achieved a coupling of two companies that have historically performed well in the RIS Software LeaderBoard, which means they deliver one of the most valuable and elusive qualities in retail technology – customer satisfaction.

Reflexis for example, has been a member of an exclusive club of software providers that have consistently achieved stellar rankings year after year in the report. Over the last two decades, Reflexis has achieved an enviable record of number-one rankings across a broad range of customer satisfaction criteria. Also, in an even more singular achievement, it is one of the few vendors to ever

2021 RIS Software LeaderBoard Top 20

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
6	Zebra	38.5	38	5	81.5
20	Reflexis	46.2	10	3	59.2

2021 Large Vendors (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
3	Zebra	38.5	38	5	81.5

2021 Grocery Vendor Leaders (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
3	Zebra	37.3	38	5	80.3

2021 Specialty Vendor Leaders (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION.	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
4	Zebra	40.0	38	5	83.0

2021 Top Vendors in Retail Concentration

RANK	VENDOR	RETAIL CONCENTRATION
4	Zebra	38

2021 Apparel Vendor Leaders (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION.	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
5	Zebra	39.8	38	5	82.8

achieve at least one perfect score in one of the report's many break out charts.

Zebra, too, has scored well in LeaderBoard rankings since it made its first appearance in 2017. However, this year's report will offer a unique opportunity for both Zebra and Reflexis to appear separately even though the companies have combined.

The reason for this unique arrangement is due to the date of acquisition, which occurred mid-year. This means that during the period of evaluation and data collection for the LeaderBoard, the two companies operated independently. Even though the acquisition is now complete, it was not for most of 2020. When this occurs, it is standard procedure for both companies to appear in LeaderBoard lists if their scores are high enough.

Examining the rankings of both companies in this year's report reveals that each software provider brings a diverse range of strengths to the retail marketplace.

MAKING THE MASTER LIST

Among the many achievements of Zebra and Reflexis in the LeaderBoard is the fact that both companies appear in the decisive top-20 "master list." This list, which is officially called the "2021 RIS Software LeaderBoard Top 20," is the only chart in the report that runs 20 vendors deep and also uses the comprehensive set of research data in the analysis.

Overall, the report includes 51 important lists. However, aside from the master list, the others delve into granular views of the report's exclusive datapoints through the use of cross-tab analysis.

2021 Broad Suite Vendor Leaders (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
6	Zebra	38.5	38	5	81.5

2021 Customer Satisfaction for Large Vendors

RANK	VENDOR	CUSTOMER SATISFACTION
6	Zebra	38.5

2021 Top Vendors for Mid-Size Retailers (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
7	Zebra	34.7	38	5	77.7

2021 Customer Satisfaction for Apparel Vendors

RANK	VENDOR	CUSTOMER SATISFACTION
8	Zebra	39.8

2021 Customer Satisfaction for Broad Suite Vendors

RANK	VENDOR	CUSTOMER SATISFACTION
9	Zebra	38.5

2021 Specialty Vendor Leaders in Customer Satisfaction

RANK	VENDOR	CUSTOMER SATISFACTION
5	Reflexis	43.3
9	Zebra	40.0

2021 Leaders in Total Cost of Operations by Tier One Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
2	Reflexis	4.5
7	Zebra	3.9

2021 Leaders in Technology Innovation by Tier One Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
3T	Reflexis	4.4
5T	Zebra	4.2

2021 Leaders in Quality of Support by Tier One Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
3T	Reflexis	4.7
6T	Zebra	4.3

2021 Leaders in Quality of Service by Tier One Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
3T	Reflexis	4.6
6T	Zebra	4.3

2021 Leaders in Recommendation by Tier One Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
5	Reflexis	4.4
6T	Zebra	4.3

2021 Leaders in Ease of Installation & Integration by Tier One Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
1	Reflexis	4.7

2021 Leaders in Ease of Administration & Maintenance by Tier One Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
1T	Reflexis	4.6

The top-20 master list is also unique because it is both deep and broad. It is the one chart that validates whether or not a tech vendor is a leading player in the retail industry.

As a result, every solution provider vying for attention in the retail marketplace seeks to be represented on the master list because it is a powerful measure of a vendor's standing among retailers and the scope of its technology footprint.

So, for both Zebra and Reflexis to achieve high scores on the master list is an impressive accomplishment. On the 2021 master list, Zebra appears in the number six position and Reflexis number 20.

Zebra's high ranking is derived from overall strength in the three categories that produce a combined score in the master list – Customer Satisfaction, Retail Concentration and Revenue Factor. These three categories are referred to as the Full Data Set in the report.

The high ranking for Reflexis is due to its stellar Customer Satisfaction score, which is the signature element in the LeaderBoard. Reflexis' score for Customer Satisfaction in 2021 is the third highest score among the 50 software vendors researched to produce this year's report.

ZEBRA'S TOP RANKINGS

"Customer satisfaction is a top priority for retailers, and as such, it is a top priority for Zebra and Reflexis," says Guy Yehiav, general manager, Zebra Analytics. "Our solutions empower front-line workers to focus on the right tasks, at the right time, with the greatest impact on the

2021 Customer Satisfaction for Grocery Vendors

RANK	VENDOR	CUSTOMER SATISFACTION
2	Reflexis	45.2

2021 Leaders in Technology Innovation

RANK	VENDOR	CUSTOMER SATISFACTION
2	Reflexis	4.6

2021 Leaders in Ease of Installation & Integration

RANK	VENDOR	CUSTOMER SATISFACTION
2	Reflexis	4.7

2021 Leaders in Ease of Administration

RANK	VENDOR	CUSTOMER SATISFACTION
2	Reflexis	4.6

2021 Leaders in Overall Performance by Tier One Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
2T	Reflexis	4.8

2021 Leaders in Overall Performance by Tier One Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
2T	Reflexis	4.5

2021 Customer Satisfaction by Mid-Size Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
2	Reflexis	47.6

2021 Customer Satisfaction for Targeted Solution Vendors

RANK	VENDOR	CUSTOMER SATISFACTION
3	Reflexis	46.2

2021 Customer Satisfaction for Mid-Size Vendors

RANK	VENDOR	CUSTOMER SATISFACTION
3	Reflexis	46.2

2021 Top Vendors in Customer Satisfaction

RANK	VENDOR	CUSTOMER SATISFACTION
3	Reflexis	46.2

2021 Leaders in Total Cost of Operation

RANK	VENDOR	CUSTOMER SATISFACTION
3	Reflexis	4.6

2021 Leaders in Quality of Support

RANK	VENDOR	CUSTOMER SATISFACTION
3T	Reflexis	4.7

customer experience."

A review of the LeaderBoard's 51 charts reveals Zebra appears on 17, including many of the most prestigious top-10 lists. Beyond the already noted sixth place on the top-20 master list are a pair of top-three rankings: third place in Large Vendors (Full Data Set) and third place in Grocery Vendor Leaders (Full Data Set).

Other top placements include: fourth place in Specialty

Vendor Leaders (Full Data Set), Leaders in Technology Innovation by Tier One Retailers, and Top Vendors in Retail Concentration; fifth place in Apparel Vendor Leaders (Full Data Set); and sixth place in Broad Suite Vendor Leaders (Full Data Set), Customer Satisfaction for Large Vendors, Leaders in Quality of Support by Tier One Retailers, Leaders in Quality of Service by Tier One Retailers, and Leaders in Recommendation by Tier One Retailers.

**TOP RANKINGS
BY REFLEXIS**

One way to grasp the full scope of Reflexis' outstanding performance in the 2021 LeaderBoard is to note it appears in 38 of the report's 51 charts. This high number demonstrates across-the-board strength in areas that retailers care most about when selecting software and using it on a daily basis.

Heading the list of outstanding placements in this year's report are first-place rankings on the following lists: Leaders in Ease of Installation & Integration by Tier One Retailers and Ease of Administration & Maintenance for both Tier One and Mid-Size Retailers, and Leaders in Recommendation by Mid-Size Retailers.

A list of the many second-place rankings include: Customer Satisfaction for Grocery Vendors, Customer Satisfaction by Mid-Size Retailers, Leaders in Technology Innovation, Leaders in Ease of Installation & Integration, Leaders in Ease of Administration, Leaders in Overall Performance by Tier One Retailers, Leaders in Return on Investment by Tier One Retailers, Leaders in Total Cost of Operations by Tier One Retailers, Leaders in Technology Innovation and Leaders in Ease of Installation & Integration.

"Zebra's and Reflexis' rankings in the 2021 LeaderBoard are a testament

2021 Leaders in Quality of Service

RANK	VENDOR	CUSTOMER SATISFACTION
3T	Reflexis	4.7

2021 Leaders in Recommendation

RANK	VENDOR	CUSTOMER SATISFACTION
4T	Reflexis	4.6

2021 Leaders in Software Reliability by Tier One Retailers

RANK	VENDOR	CUSTOMER SATISFACTION
4	Reflexis	4.6

2021 Leaders in Overall Performance

RANK	VENDOR	CUSTOMER SATISFACTION
4	Reflexis	4.6

2021 Leaders in Return on Investment

RANK	VENDOR	CUSTOMER SATISFACTION
4	Reflexis	4.6

2021 Leaders in Software Reliability

RANK	VENDOR	CUSTOMER SATISFACTION
4T	Reflexis	4.6

2021 Targeted Solution Vendor Leaders (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
4	Reflexis	46.2	10	3	59.2

2021 Mid-Size Vendors (Full Data Set)

RANK	VENDOR	CUSTOMER SATISFACTION	RETAIL CONCENTRATION	REVENUE FACTOR	TOTAL
9	Reflexis	46.2	10	3	59.2

to our firm's commitment to providing retailers globally with efficient and effective solutions to their toughest challenges," says Yehiav. "Notably, our ranking in the Top 10 across multiple categories is a direct link to this commitment, including technology innovation, total cost of operation, return on investment, leaders in recommendation and customer satisfaction."

The acquisition of Reflexis by Zebra has not only created an alliance of powerhouse

performers in the RIS Software LeaderBoard, but it has also created a company that offers retailers a solution suite to optimize store operations, inventory and supply chain management.

And importantly, as demonstrated in 2021 LeaderBoard rankings, the success of both Zebra and Reflexis are based on qualities that are worth more than the sum of their parts. They are based on customer satisfaction – retailer satisfaction. **RIS**



Zebra (NASDAQ: ZBRA) empowers the front line in retail/ecommerce, manufacturing, transportation and logistics, healthcare, public sector and other industries to achieve a performance edge. With more than 10,000 partners across 100 countries, Zebra delivers industry-tailored, end-to-end solutions to enable every asset and worker to be visible, connected, and fully optimized. The company's market-leading solutions elevate the shopping experience, track and manage inventory as well as improve supply chain efficiency and patient care. For more information, visit www.zebra.com.