

# Retail Supply Chain Planning Buyers Guide

Software Provider and Product Assessment

**EXECUTIVE  
SUMMARY**

**\*ISG** Research



## Key Takeaways

Retail supply chain planning has evolved into a continuous, data-driven discipline that helps retailers balance product availability, inventory investment and profitability across increasingly complex channels and fulfillment models. Organizations rely on SCP platforms to improve forecasting, optimize replenishment and respond more effectively to shifting consumer demand and supply conditions. AI, demand sensing and scenario analysis capabilities are accelerating the transition toward more agile and responsive retail planning operations.

### Software Provider Summary

The ISG Buyers Guide™ for Retail Supply Chain Planning evaluates 20 software providers offering products that support demand forecasting, replenishment planning and retail-focused supply chain optimization. The research ranked the top three overall leaders as Anaplan, SAP and Oracle. Providers were classified using weighted performance in Product Experience and Customer Experience for ISG quadrant placement. Anaplan, Board, Coupa, Infor, Manhattan Associates, o9 Solutions, Oracle, SAP and WiseTech were rated Exemplary, with Blue Yonder and John Galt Solutions rated Innovative. Netstock was rated Assurance, and Blue Ridge, GAINS, ICRON, Logility, RELEX, Slimstock, Sunstice and ToolsGroup were rated Merit.

### Product Experience Insights

Product Experience, representing 80% of the evaluation, focuses on Capability (40%) and Platform (40%), including adaptability, manageability, reliability and usability. Anaplan, SAP and o9 Solutions achieved the highest performance as Leaders in this category, highlighted by demand planning and replenishment planning capabilities and scenario analysis that supports retail-focused planning decisions. Leaders demonstrated enterprise-grade platform capabilities across varied merchandising, inventory and supply chain planning contexts.

### Customer Experience Value

Customer Experience, representing 20% of the evaluation, focuses on validation and TCO/ROI. Anaplan, Oracle and Board were the Leaders in this category, demonstrating strong customer commitment and clear dedication to customer needs. Providers with lower performance often lacked sufficient information to demonstrate customer success, articulate commitment to customer experience or communicate measurable value through TCO/ROI.

### Strategic Recommendations

Retailers should evaluate supply chain planning platforms based on the ability to support demand forecasting, replenishment optimization and cross-functional coordination across channels and fulfillment models. Assessment should prioritize demand sensing, inventory visibility, scenario modeling, analytics capabilities and support for continuous planning processes. Organizations should also evaluate AI-enabled forecasting, recommendation and decision-support capabilities that improve responsiveness while maintaining operational control and profitability objectives.



# The Findings

The software providers and products evaluated in this research offer product and customer experiences, but not every feature is equally valuable to every enterprise or is needed to support the relevant business processes and use cases. Moreover, having too many product capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a more comprehensive set of capabilities is important and meets your enterprise’s requirements.

An effective customer relationship with a software provider is vital to the success of any investment. The overall customer experience and the full lifecycle of engagement play a key role in ensuring satisfaction and long-term success. Providers with dedicated customer leadership, such as chief customer officers, tend to invest more deeply in these relationships and prioritize customer outcomes in line with TCO and ROI expectations. It is equally important that this commitment to customer success is evident throughout the provider’s website, the buying process and the customer journey.

## Overall Scoring of Software Providers Across Categories

The research finds Anaplan atop the list, followed by SAP and Oracle. Providers that place in the top three of a category earn the designation of Leader. Anaplan has done so in four categories, SAP and Oracle in three, Board and o9 Solutions in two and Coupa in one category.

### Retail Supply Chain Planning Overall

Providers	Grade	Performance
Anaplan	B++	<b>Leader</b> 80.4%
SAP	B++	<b>Leader</b> 78.2%
Oracle	B++	<b>Leader</b> 77.7%
Board	B++	75.2%
o9 Solutions	B+	73.7%
Infor	B+	70.5%
WiseTech	B	66.5%
Manhattan Associates	B	66.4%
Blue Yonder	B	64.1%
John Galt Solutions	B	63.3%
Coupa	B	62.9%
ICRON	B-	58.8%
RELEX	B-	57.9%
ToolsGroup	C++	55.0%
Logility	C++	54.7%
GAINS	C++	53.6%
Netstock	C++	52.7%
Sunstice	C++	52.1%
Blue Ridge	C++	52.0%
Slimstock	C+	48.6%

Source: ISG Research  
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## Buyers Guide Overview

ISG Research has conducted market research for over two decades across vertical industries, business applications, AI and IT. We have designed the ISG Buyers Guide™ to provide a balanced perspective on software providers and products, rooted in an understanding of business and IT requirements. Utilizing our research methodology and decades of experience, our Buyers Guide is an effective tool for assessing and selecting software providers and



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products. The findings of this research provide a comprehensive approach to rating software providers and rank their ability to meet specific product and customer experience requirements.

This ISG Buyers Guide™ is the distillation of continuous market and product research. It is an assessment of how well software providers' offerings address enterprises' requirements. The Value Index methodology is structured to support a request for information (RFI) for a request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. The ISG Buyers Guide™ evaluates customer experience and the product experience across capability and platform.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. It can ensure the best long-term relationship and value achieved from a resource and financial investment. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of software can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its potential. In addition, this approach can reduce the project's development and deployment time and eliminate the risk of relying on opinions or historical biases.

ISG Research believes that an objective review of existing and potential new software providers and products is a critical strategy for the adoption and implementation of enterprise software. An enterprise's review should include an analysis of both what is possible and what is relevant. We urge enterprises to conduct a thorough evaluation, and we offer this ISG Buyers Guide™ as both the results of our in-depth analysis of these providers and as an evaluation methodology.



## About ISG Research

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## About ISG

[ISG](#) (Nasdaq: [III](#)) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data and research, in-depth knowledge and governance of provider ecosystems, and the expertise of its 1,500 professionals worldwide working together to help clients maximize the value of their technology investments.

## About the Authors



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David Menninger leads the overall team for software research and advisory, supporting IT and expertise in AI software at ISG. With over three decades of experience in enterprise software, Dave's leadership has advanced digital transformation with information and insights for enterprises around the world.