Supply Chain Logistics & Management

QKS Group

SPARK Matrix™: Omnichannel Order Management System, Q1, 2025

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Key Findings

Increasing consumer demands are pushing OMS platforms to deliver hyper-personalized and smooth shopping experiences by integrating unified commerce, real-time inventory visibility, and efficient returns management. This approach ensures consistent brand interactions across channels, ultimately driving higher customer satisfaction and loyalty.

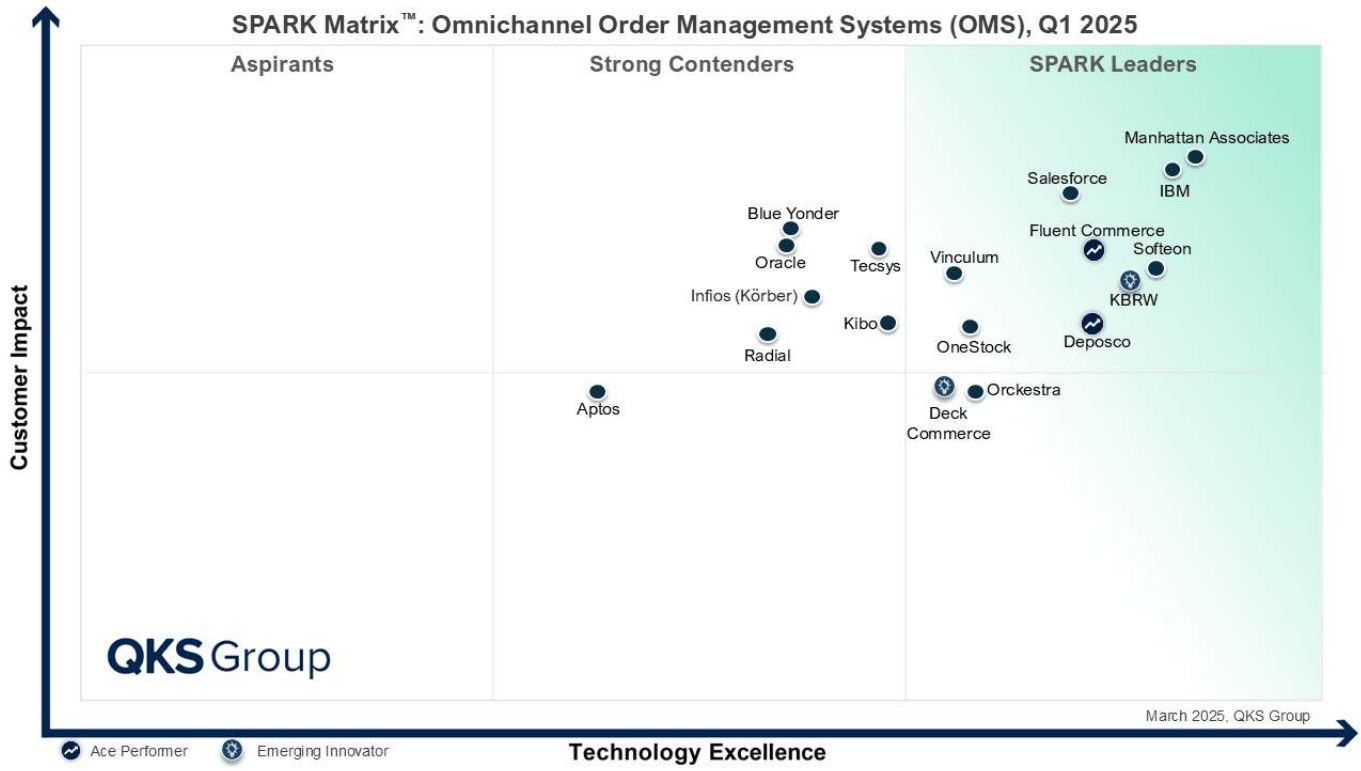
A strong focus on cost optimization is leading to the incorporation of AI-driven demand forecasting, dynamic order routing, and intelligent inventory allocation. These features work together to lower shipping expenses, shorten delivery times, and enhance warehouse operations, resulting in leaner and more responsive supply chains.

The OMS market presents a diverse range of solutions from comprehensive end-to-end platforms to specialized modules focusing on inventory and returns management. This variety provides flexibility but also necessitates careful vendor selection to ensure seamless integration and alignment with specific operational requirements.

Modern OMS solutions are increasingly built on microservices-based architectures that offer superior scalability, flexibility, and rapid deployment. Such architectures enable real-time data processing and smooth integration with existing systems, which is essential for adapting to ever-changing market conditions.

SPARK Matrix™: Omnichannel Order Management System, Q1, 2025

Figure: 2025 SPARK Matrix™:(Strategic Performance Assessment and Ranking) Omnichannel Order Management System



Vendor Profile

The following vendor profiles are written based on the information provided by the vendor's executives as part of the research process. The QKS's research team has also referred to the company's website, whitepapers, blogs, and other sources for writing the profile. A detailed vendor profile and analysis of all the vendors, along with various competitive scenarios, are available as a custom research deliverable to our clients. Users are advised to directly speak to respective vendors for a more comprehensive understanding of their technology capabilities. Users are advised to consult QKS Group before making any purchase decisions, regarding Omnichannel Order Management (OMS) Solutions and vendor selection based on research findings included in this research service

Aptos

Founded in 1972 and headquartered in Atlanta, GA, USA, Aptos provides omnichannel commerce and merchandise lifecycle management solutions that help retailers create responsive assortments, streamline operations, and deliver seamless experiences across channels. Its unified commerce suite includes order management, store fulfillment, analytics, POS, CRM, sales audit, allocation, replenishment, forecasting, and merchandising. Its cloud-based order management solution covers the entire order lifecycle with key capabilities such as Order Capture, Order Broker, and Order Hub.

Strengths

- Aptos' Order Hub capability allows retailers to view and manage orders, payments, returns, and subscriptions while providing real-time order status insights. Its platform offers a comprehensive view of customer, inventory, and order data, enabling seamless order management and enhancing customer experiences with personalized service throughout the purchasing process.
- Aptos’ platform integrates front-end order management with real-time inventory visibility, allowing retailers to fulfill out-of-stock items from any location or channel. It enables direct delivery or pickup options, and associates can review and modify orders as needed. With order brokering and sourcing logic, the platform ensures efficient order fulfillment based on real-time inventory data.
- Aptos uses intelligent order routing to automatically direct orders to the most efficient fulfillment location, optimizing the use of inventory across multiple channels. Its fulfillment optimization ensures that orders are processed in the most cost-effective way, while back-order management helps retailers manage out-of-stock items by automatically re-routing or delaying orders as needed.
- Aptos’ OMS is designed to scale with businesses of all sizes, it adapts to growing order volumes and expanding sales channels, ensuring consistent performance and flexibility as retailers evolve.

Challenges

- Aptos Order Management lacks dynamic resource allocation capabilities, which limits users' ability to efficiently manage high order volumes during peak periods. Unlike competitor which leverage AI-driven load balancing and real-time capacity

adjustments, Aptos relies on static allocation methods that struggle to adapt to fluctuating demand. As a result, retailers experience processing delays, stock discrepancies, and potential revenue loss due to inefficient order prioritization and fulfillment

- Aptos Order Management requires extensive customization to align with specific business needs, leading to higher implementation costs and increased resource investment. For retailers, this translates into longer deployment timelines, higher total cost of ownership, and potential disruptions in operations. Unlike competitors, which offer configurable, low-code/no-code environments, Aptos lacks flexible modular architecture and pre-built automation frameworks.

Blue Yonder

Founded in 1985 and headquartered in Scottsdale, Arizona, USA, Blue Yonder provides end-to-end supply chain management and omnichannel commerce solutions, including supply chain planning, execution, and omnichannel capabilities. Its Order Management System (OMS) functionalities include real-time inventory visibility, order orchestration, fulfillment, store fulfillment, and returns management.

Strengths

- Blue Yonder is differentiated by its OMS features including dynamic safety stock, stockout prediction, mark out prediction, anomaly tracking, and predictive capacity. The platform’s improved inventory placement feature leverages past customer data to predict the future demand of items and determines the replenishment of items in different inventory locations based on the predicted customer demand in the geographical area.
- Blue Yonder offers reservations feature that allows customers to hold inventory based on shopping stage, location, and customer value. It helps retailers determine fulfillment capacity by considering factors like fulfillment type, selling channel, and product hierarchy.
- Blue Yonder's OMS offers configurable workflows and orchestration capabilities, enabling businesses to tailor the system to their specific needs and ensure order processing across diverse environments.
- Its OMS leverages advanced optimization algorithms to ensure efficient order routing, inventory allocation, and fulfillment processes, resulting in improved customer satisfaction.

  Challenges
- Blue Yonder’s real-time inventory updates have been reported by some users to experienceoccasional latency, particularly during peak sales periods. For retailers, this may impact order accuracy and fulfillment speed, potentially leading to stock discrepancies and delayed deliveries, which could affect customer satisfaction and operational efficiency.
- Blue Yonder experienced a significant ransomware attack in late 2024 by a group called "Termite," which encrypted files and disrupted operations. The

attack may have compromised sensitive supply chain data and customer information, raising concerns about data security and privacy.

Deck Commerce

Founded in 2015 and headquartered in St. Louis, Missouri, USA, Deck Commerce provides SaaS, direct-to-consumer order management system (OMS) that helps organizations simplify their complex inventory, Order processing, and fulfillment operations. The company's OMS manages a large volume of order data to optimize the entire order lifecycle from storefront to front door. Deck Commerce provides native OMS capabilities, including inventory visibility, order orchestration, returns management, transaction processing, and omnichannel retail.

Strengths

- Deck Commerce's Order Management System (OMS) automates critical processes such as order routing, allocation, and fulfillment. By intelligently directing orders to the most suitable fulfillment location—based on factors like inventory availability, proximity, and delivery speed—it helps businesses minimize shipping costs, reduce delivery times, and maintain accurate stock levels.
- Deck Commerce's pre-built, industry-optimized workflows and integrations deliver a ready-to-use order management solution that minimizes implementation risks and accelerates time-to-value. It is designed for scalability and efficiency, adapts to complex, high-volume operations while continuously evolving through customer feedback to lower Total Cost of Ownership (TCO).
- Deck Commerce's order management system (OMS) supports a unified inventory view across multiple channels, potentiallyincreasing revenue and conversion rates while reducing excess inventory and price reductions. Its workflows, tailored for order processing and returns, aim to improve operational efficiency and customer satisfaction. The system leverages an API-first, cloud-based platform with smart routing logic, real-time inventory tracking, and numerous prebuilt integrations to facilitate these outcomes
- Deck Commerce offers advanced returns management capabilities through its Order Management System (OMS), enabling retailers to automate returns, manage refunds, and facilitate omnichannel returns such as buy-online-return-in-store (BORIS). It allows customers to self-initiate returns, generate authorization forms and shipping labels, and track return reasons. These technologies optimize reverse logistics, reduce manual efforts, and enhance customer satisfaction.

Challenges

- Deck Commerce might face a constrained growth environment due to mixed global economic conditions and a slowdown in eCommerce growth. This translates to tighter technology budgets and reduced investments in innovative solutions for users, limiting its ability to enhance customer experiences.
- One key challenge for Deck Commerce is its absence from the MACH Alliance, signalling a limited alignment with fully composable commerce principles. For brands prioritizing modular, API-first, cloud-native, and headless architectures, this raises concerns about long-term flexibility and interoperability. As a result, businesses may face integration hurdles and reduced agility when scaling or evolving their tech stack.
- Deck Commerce's standard implementation timeline of 10-12 weeks may not align with the needs of retailers requiring faster deployments, particularly during peak seasons or time-sensitive rollouts. For end users, this could delay go-to-market strategies and impact responsiveness to seasonal demand, potentially affecting revenue opportunities and competitive positioning.

Deposco

Founded in 2011 and headquartered in Alpharetta, Georgia, USA, Deposco delivers a unified suite of supply chain planning and execution solutions under its "Bright" Suite. This suite encompasses supply chain execution applications such as warehouse management, an order management system (OMS), and fulfillment orchestration, in addition to planning functionalities like demand forecasting and inventory optimization. The following profile provides an insights-driven and analysis-driven technical evaluation of Deposco's system capabilities and challenges.

Strengths

- Deposco has been recognized as an top performer in SPARK Matrix, demonstrating high revenue growth over the past three years. Its OMS solution has driven adoption among major retailers, 3PL providers, and mid-market eCommerce brands, supported by strategic integration partnerships with platforms like Shopify, BigCommerce and Magento to enhance fulfillment capabilities.
- Deposco's OMS delivers automatic order routing, exception management, and order consolidation, enabling business to optimize fulfillment across multiple locations. These capabilities allow for faster issue resolution, cost-effective shipping and enhanced operational efficiency.
- Deposco supports pre-ordering and pre-selling features that let businesses configure availability for out-of-stock items. This approach ensures pre-orders are prioritized and fulfilled efficiently when inventory arrives, reducing stockouts and improving customer satisfaction.
- Recent additions to Deposco's OMS include Store Cycle Counting for accurate inventory visibility, a Sales Channel Available to Promise (ATP) function with a visual calculation tool for real-time ATP insights and safety buffers, and Order Consolidation to merge similar customer orders for reduced shipment costs. These functions aim to streamline operations and reduce logistical complexity.
- Deposco's supply chain planning, execution and intelligence solutions operate on a single, unified platform, eliminating integration hurdles and maintaining real-time data flow. In contrast, some providers rely on fragmented, standalone or acquired systems, creating challenges in synchronization.

Challenges

- Deposco competes in a highly competitive OMS market alongside larger, established vendors. While its growing presence in the mid-market segment is strong, increasing brand awareness among enterprise buyers remains an area of opportunity. As Deposco continues to expand, enhancing visibility and credibility among enterprise players will be key to long-term growth.
- Deposco prioritizes pre-defined integrations with existing order capture and payment processing solutions, allowing businesses to leverage their preferred systems for capturing and refunding payments. While this approach ensures flexibility and interoperability, some enterprise customers may prefer an OMS that embeds these functions directly. As Deposco continues expanding its enterprise capabilities, this area presents an opportunity for future enhancement.

Fluent Commerce

Founded in 2013 and headquartered in The Rocks, New South Wales, Australia, Fluent Commerce provides a cloud-native, distributed Order Management System (OMS) designed to streamline order orchestration, inventory management, and fulfillment across multiple channels. The platform delivers real-time inventory visibility, flexible fulfillment options, and robust integrations with eCommerce platforms and third-party logistics providers, offering a technically advanced solution for modern retail operations.

Strengths

- The Enterprise Inventory Hub consolidates inventory data from multiple sources into a single, real-time view. Coupled with a Virtual Segmentation capability, the system categorizes inventory into logical segments, thereby improving visibility and optimizing fulfillment processes. This dynamic allocation of inventory supports precise order management aligned with demand and supply.
- The Intelligent Promising feature provides reliable delivery and pickup options by making real-time sourcing decisions before purchase completion. This capability enhances transparency and builds trust, ultimately contributing to an improved customer experience and potentially higher conversion rates.
- Fluent Commerce has achieved significant global expansion across North America, Europe, and APAC by leveraging a modular, headless OMS architecture. Its seamless integration with ERP, WMS, and POS systems—facilitated by multiple integrators—supports complex enterprise deployments, ensuring real-time inventory monitoring and efficient order management.
- The platform manages the entire order lifecycle with sourcing logic that contributes to reduced delivery costs. It also supports multi-brand management from a single system, enabling data sharing across brands while allowing each to maintain its unique fulfillment rules.
- A dedicated Rules Software Development Kit (SDK) allows developers to implement custom logic into the OMS workflows. By compiling these custom rules into plugins, businesses can tailor the system to their specific processes without impacting other functionalities.

Challenges

- Fluent Commerce's current OMS is primarily optimized for B2C scenarios and lacks dedicated B2B functionalities. It lacks support workflows tailored for bulk orders, invoice-based payment processing, or multi-level approval processes. Consequently, organizations with significant B2B operations may need to implement additional modules or perform substantial system modifications to meet their specific operational requirements.
- Fluent Commerce's pricing model is structured around order volume and inventory position changes. This approach can result in cost fluctuations that are difficult to predict for high-volume retailers. As order volumes increase or inventory dynamics shift, expenses may escalate unexpectedly. This variability can render the model less competitive, especially when compared to tiered or more flexible pricing structures that allow for more predictable budgeting and scalability.
- The system demands significant upfront configuration to meet specific business requirements, which can delay deployment for organizations requiring immediate operational capabilities. The configuration process involves customizing workflows,integrating with existing systems, and setting up tailored inventory rules—all of which necessitate extensive testing and validation to ensure optimal system performance. Additionally, coordinating these technical adjustments typically requires collaboration across multiple teams, such as IT, logistics, and operations, thereby extending the implementation timeline. This requirement for a thorough pre-deployment phase may hinder organizations that need to achieve rapid operational readiness.

IBM

Founded in 1911, and headquartered in Armonk, New York, USA, IBM provides suites of enterprise solutions spanning cloud computing, AI, cybersecurity, and automation. It offers businesses access to industry software, hardware, consulting, and managed services, enabling digital transformation, including the IBM Sterling Order Management System (OMS). IBM OMS helps users manage order processing, inventory visibility, and fulfillment across multiple channels. IBM recently acquired HashiCorp to strengthen its hybrid cloud automation capabilities and Prescinto to enhance AI-driven renewable energy asset management.

Strengths

- IBM Sterling Order Management's Rules-Based Sourcing Engine helps businesses optimize order fulfillment by defining specific criteria for sourcing decisions. It considers factors like cost to serve, capacity, and inventory thresholds to determine the most efficient fulfillment options. The system can split orders or consolidate shipments based on business rules, improving delivery efficiency and reducing costs.
- IBM's Sterling Order Management System leverages Gradient Boosted Tree models to enhance inventory management and sales forecasting. These models analyze historical data on inventory levels, sales trends, promotions, and other relevant factors to predict metrics such as sales velocity, markdown sales, and stockout risks. As new data becomes available, the system automatically retrains these predictive models, ensuring they remain accurate and reflective of current market conditions.
- IBM has integrated generative AI capabilities into its Sterling Next Gen Call Center, aiming to enhance customer service operations. This integration leverages IBM's watsonx.ai platform, providing pre-built AI use cases that utilize enterprise data to improve agent efficiency and reduce the time required to address order inquiries. The AI assistant can handle repetitive tasks, such as accessing policy guidelines or summarizing customer interaction histories, thereby enhancing agent productivity. These advancements are part of IBM's broader strategy to infuse AI across its software portfolio, aiming to streamline customer support and improve order fulfillment processes.

- IBM Sterling Order Management provides reverse logistics capabilities to streamline returns and exchanges across multiple sales channels. It enables real-time returns tracking, automateddispositioning, and linking returns to original sales orders for accuracy. The system also automates refund and credit processing, reducing manual effort and improving efficiency. These features help businesses manage returns more efficiently, lower costs, and enhance customer satisfaction.

Challenges

- While some users have noted that the UI could be more intuitive, IBM Sterling Order Management incorporates the IBM Carbon Design System, which offers consistency and flexibility. The interface can be customized to align with specific workflows and user roles, supporting effective operations across various business functions. Additionally, the native analytics capabilities may necessitate integration with complementary BI tools or additional modules for deeper insights, which could increase the total cost of ownership. For end users, this may lead to slower adoption, reduced efficiency, and higher operational complexity, particularly for organizations seeking immediate, out-of-the-box omnichannel analytics.
- IBM's Sterling OMS lacks built-in gamification features as compared to some of its competitors, which can support employee engagement and productivity in order fulfillment and warehouseoperations. The absence of these features may result in fewer real-time incentives for store teams and warehouse staff, potentiallyinfluencingfulfillment speed and efficiency.
- Integrating IBM Sterling OMS with legacy systems or third-party applications may require substantial technical expertise, which can extend deployment timelines. For businesses, this may lead to increased implementation complexity and resource allocation, potentially delaying full system adoption and operational efficiency.

Infios (Formerly Körber Supply Chain)

Headquartered in Hamburg, Germany, Infios (formerly enVista and later operating under Körber Supply Chain Software), Körber's Order Management System (OMS) was established through the acquisition of enVista's omnichannel commerce platform in 2022. Infios offers a suite that integrates order management, warehousing and fulfillment, and transportation management. The platform leverages advanced technologies such as AI and predictive analytics to optimize supply chain operations. Its Order Management System (OMS) is designed to streamline order processing, inventory management, and fulfillment across multiple channels, enabling businesses to enhance efficiency and customer satisfaction.

The transition from Körber to Infios represents a strategic consolidation of supply chain expertise and omnichannel technology, enabling a unified product roadmap and accelerated R&D. While some near-term misalignments may occur particularly in harmonizing legacy architectures ,the rebrand positions Infios to more effectively address global deployment needs and enhance feature rollouts. In the long run, this synergy is poised to deliver improved customer experiences by offering a single source of truth for end-to-end supply chain and commerce solutions.

Strengths

- Infios's Order Management System (OMS) leverages a versionless architecture, meaning businesses automatically receive continuous updates without the hassle of traditional software upgrades. This eliminates the risks and costs associated with system downtime, ensuring seamless operations. By maintaining an always-current software environment, organizations can quickly adapt to evolving market demands and regulatory changes.
- Infios has developed an integration layer that connects diverse data sources—ranging from e-commerce platforms and ERPs to transportation management systems. This architecture processes high-volume data streams and provides near real-time visibility into inventory status across channels. By leveraging proven data orchestration tools, Infios’s OMS minimizes stock inaccuracies and keeps sales and fulfillment channels aligned elevating customer satisfaction.
- Infios’s OMS includes built-in support for multi-currency, multi-language, and region-specific tax capabilities. Additionally, Infios’s professional services team

offers localized expertise to help businesses navigate complex international regulations, including VAT/GST compliance and regional data privacy laws. This foundation expedites global rollouts and reduces reliance on third-party solutions or lengthy customization cycles.

- Infios's focus on client enablement ensures teams can manage and optimize the OMS in-house. Through training programs, comprehensive documentation, and ongoing workshops, both technical teams and end-users gain the skills to run the solution effectively. Where deeper expertise is needed, Infios maintains a robust network of certified partners and managed service offerings, helping companies scale without being limited by specialized resource constraints.

Challenges

- Infios's OMS integrates inventory data from numerous sources—stores, warehouses, drop-shippers, and e-commerce channels. Maintaining real-time accuracy can be difficult for large or decentralized fulfillment networks. Differences in data update frequencies or connectivity gaps can lead to inaccurate inventory visibility, risking both over-promised availability and potential stockouts. These discrepancies undermine customer experience and operational efficiency.
- Infios's OMS has a flexible rules engine, yet this flexibility can be challenging for users. Companies sometimes create highly customized workflows instead of following best-practice configurations, which complicates future upgrades and patches. When Infios releases updates, these unique environments require extensive regression testing and rework, prolonging the time-to-value cycle.
- Following Infios's acquisition of enVista and the rebranding from Körber, customers may experiencetransitional challenges. Although the move combines supply chain expertise under one roof, misalignments can occur between Infios's broader product lineup and the inherited Enspire Commerce™ solutions. As the company finalizes product roadmaps, some customers might face shifting priorities, integration difficulties, or a delay in new feature rollouts.

KBRW

Founded in 2009 and headquartered in Paris, France, KBRW's solution suite encompasses a platform-enabled offering with key capabilities across digital experience, order management system (OMS), and warehouse/store inventory management system (WMS). It includes customer-facing portals, global planning and execution for OMS, and local planning and execution for WMS. Additionally, it integrates a robust technology stack with a BPM suite, event hub, data platform, and hosting capabilities to support bespoke configurations and scalability.

Strengths

- KBRW is recognized as an emerging innovator in the SPARK Matrix for its cloud-native distributed order management system, tailored for large-scale enterprises with multi-faceted supply chains. Its scalable, modular, and configurable OMS allows retailers to manage high transaction volumes, customize workflows, and optimize fulfillment processes.
- KBRW's Global Capacity & Inventory Management module provides inventory and capacity management across omnichannel commerce and logistics centers. It supports inventory unification, audits, and fulfillment capacity planning while enabling businesses to configure product and inventory location data for improved visibility. The OMS facilitates real-time inventory synchronization, a no-code configuration engine for adaptability, and inventory allocation and fencing capabilities. These features help businesses manage stock distribution and order fulfillment across multiple brands and locations in both B2B and B2C scenarios, ensuring accuracy and operational consistency.
- Kbrw's Global Execution capability streamlines and optimizes distributed order workflows across multiple systems, enabling automation of order execution processes. It features configurable order workflows, enhanced order queue management to address inventory shortages, and adaptable workflows for replenishment through purchase orders, ensuring efficient and flexible order handling.
- Kbrw's Global Return capability facilitates omnichannel return processes, ensuring efficient handling of returns across various customer touchpoints and

inventory locations. It streamlines the entire return execution, enhancing customer satisfaction and optimizing inventory management for businesses.

- KBRW’s OMS platform is designed to support large-scale operations with high order volumes and complex requirements. It provides a configurable approach using standardized business process modeling, simplifyingimplementation while ensuring integration with digital commerce ecosystems. The platform offers extensibility through a dedicated integration framework and supports ERP consolidation and IT modernization. With an average deployment timeline of 3-4 months, it enables businesses to enhance supply chain visibility, streamline operations, and adapt to evolving industry needs.

Challenges

- KBRW primarily operates within Western Europe, which restricts its global expansion. This limited geographic footprint may hamper KBRW's ability to diversify its client base and secure growth opportunities in emerging markets, especially when competing with global OMS leaders.

Kibo Commerce

Founded in 2015 and headquartered in Dallas, Texas, USA, Kibo Commerce offers a ‘unified commerce platform’ that integrates solutions for eCommerce (B2B and B2C), order management, personalization, and mobile point of sale. Kibo offers a microservice-based order management system (OMS) that enables retailers to optimize inventory and order fulfillment across fulfillment network to meet evolving customer demands. Kibo order management offers native OMS capabilities including global inventory visibility, distributed order routing, omnichannel fulfillment, and customer & order servicing.

Strengths

- Kibo’s order management platform has configurable Available- To-Promise (ATP) features, which allows retailers to provide a single source of real- time inventory data for all omnichannel sales touchpoints, including eCommerce, retail stores, and call centers.
- Kibo features an Intelligent Order Routing engine that sources inventory from the most optimal location based on business-defined rules, ensuring efficient fulfillment and cost control.
- Kibo provides a unified view of inventory across all locations in real-time, enabling businesses to eliminate data silos, optimize stock levels, and respond swiftly to demand fluctuations.
- Kibo OMS offers flexible fulfillment options, including out-of-the-box workflows and the ability to create custom processes, supporting various fulfillment models such as drop shipping, cross-dock replenishment, and in-store pickup.

Challenges

- Kibo's OMS is built to manage high transaction volumes, but some users have noted limitations in scaling to support rapid business growth or unexpected demand surges. For retailers, this may impact order processing efficiency and system responsiveness, potentially leading to delays in fulfillment and challenges in meeting customer expectations during peak periods.

Manhattan Associates

Founded in 1990, headquartered at Atlanta, Georgia, USA, Manhattan Associates provides SaaS-based, mobile-native solutions for omnichannel commerce and digital supply chain management. It offers an Omnichannel Order Management System (OMS) through its platform, Manhattan Active, which delivers robust OMS capabilities such as enterprise inventory, adaptive fulfillment, and enterprise promotions. It also supports interactive inventory, digital self-service, and conversational commerce.

Strengths

- Manhattan OMS employs AI based algorithms for dynamic order routing and fulfillment. It supports features such as automated order splitting, carrier selection, and routing optimization, ensuring cost-effective and timely delivery.
- Manhattan's OMS includes digital self-service and conversational commerce solutions, enabling customers to track orders, manage returns, and interact with businesses through chatbots and virtual assistants.
- The Active platform offers stock visibility across all locations, including in-transit, on-order, and third-party fulfilled inventory, ensuring accurate order fulfillment promises. Its interactive inventory capability optimizes stock levels, reducing overstock and out-of-stock situations.
- Its OMS integrates with all sales channels, providing a unified commerce experience. It supports advanced omnichannel features like buy online, pick up in-store (BOPIS), ship-from-store, and same-day delivery, meeting modern customer expectations.
- It utilizes in-memory caching technology to provide rapid and precise order promises, enhancing the speed and reliability of omnichannel fulfillment.

Challenges

- Manhattan Associates' real-time inventory updates and order status synchronization face inconsistencies, which can disrupt order processing. Accurate inventory visibility is critical for end users to ensure efficient order fulfillment and prevent operational bottlenecks. Inaccurate data can result in split shipments, backorders, and incorrect deliveries, ultimately leading to increased

operational costs and a diminished customer experience, impacting brand loyalty and satisfaction.

- Manhattan Associates' value proposition does not exhibit distinct differentiation in critical areas such as cost-effectiveness and scalability when compared to some of the competitors. This may create challenges for end users seeking optimized operational costs and flexible, future-proof solutions, potentially impacting Manhattan’s ability to attract and retain customers in an increasingly competitive OMS market.

Onestock-Retail

Founded in 2015 and headquartered in Toulouse, France, OneStock is a provider of a cloud-native Distributed Order Management (DOM) platform with a composable architecture for B2B and B2C connected commerce. OneStock platform offers key OMS functionalities, including stock unification, delivery promise (ATP), order orchestration, ship from store, unified click and collect, order in store, and returns orchestration.

Strengths

- OneStock's order orchestration capability provides self-learning algorithms and customizable industry rules to manage real-time order processing. Users can define and modify rules using a comprehensive list of factors automatically evaluated by OneStock, including geographic proximity, stock coverage, store capacity, preparation speed, and transport costs.
- OneStock offers self-service configurability, allowing users to modify options on the go without needing specific developments or IT support. This empowers users to adapt the system to their evolving needs quickly.
- OneStock Retail has introduced generative AI-driven features, including actionable explanations for carrier error messages, an internal chatbot for quick responses to configuration and implementation queries, and a conversational interface to simplify the configuration of allocation rules.
- The OneStock platform is differentiated by its unique OMS features, such as competitive allocation, where the same order is presented simultaneously to multiple stores or drop shippers. The store or drop shipper that claims the order first is responsible for its preparation. This approach fosters competition among stores, encouraging quick responses and creating a gamified atmosphere.
- OneStock demonstrates capabilities in managing complex delivery options, including same-day delivery, Click & Collect, and order orchestration across multiple warehouses and carriers. Its advanced carrier management system, real-time promise calculations, and integrations with leading delivery providers enhance fulfillment efficiency. While its cross-border fulfillment capabilities are at a moderate level, the platform's ability to configure routes and integrate with global solutions strengthens its offering.

Challenges

- OneStock's returns management system currently addresses basic operational needs but lacks sophisticated capabilities such as predictive fraud detection and intelligent restocking recommendations. This shortfall necessitates greater manual intervention and creates inefficiencies in the reverse logistics process, which can delay returns and weaken the overall user experience. From a cost perspective, increased labor and slower turnaround times inflate operational expenses.
- While OneStock has historically been concentrated in Western Europe, the company has expanded its presence beyond this region. As of 2025, OneStock has established a team in North America and partnered with system integrators. This expansion enhances its ability to provide localized support and improve response times for international clients. However, the effectiveness of this expanded presence in addressing global coverage concerns will be observed as it matures.

Oracle

Founded in 1977 and headquartered in Redwood City, California, USA, Oracle is a provider of cloud applications and enterprise software, offering a comprehensive suite of solutions for various business needs, including the Oracle Fusion Cloud Order Management system. The Platform comprises OMS capabilities such as order orchestration, store fulfillment, and end to end inventory visibility.

Strengths

- Oracle OMS automates the entire order process, from order capture to fulfillment, and provides real-time visibility into inventory and order status, ensuring seamless customer experiences.
- Oracle's OMS includes advanced pricing strategies that allow businesses to model complex pricing scenarios and ensure consistency across sales channels. Additionally, the intuitive configuration capabilities simplify the setup of customizable products and services.
- Oracle's OMS supports intelligent order sourcing and routing, ensuring efficient order fulfilment and delivery.
- Oracle’s OMS manages backorders, captures complex orders, fulfill with flexibility, and manages exceptions. Oracle offers a compelling portfolio of AI products to automate and optimize operations across the supply chain network and make informed decisions based on comprehensive insights to maximize profitability.

Challenges

- Oracle’s OMS may face scalability limitations during peak demand periods, potentially affecting system performance and responsiveness. For businesses, this could lead to slower order processing and fulfillment delays, impacting customer satisfaction and the ability to meet high-volume sales efficiently.
- Maximizing the full potential of Oracle’s OMS platform requires adequate training, which may demand dedicated time and resources for seamless adoption. For end users, this can extend the learning curve and initial implementation efforts, potentially delaying operational efficiency and system utilization.

Orckestra

Founded in 1996 and headquartered in Longueuil, Quebec, Canada. Orckestra, a subsidiary of MDF commerce, delivers omnichannel commerce solutions centered around its SaaS-based Order Management System (OMS) platform. Orckestra's OMS provides unified inventory visibility, flexible order routing, and last-mile fulfillment. It integrates eCommerce, in-store, and supply chain operations to enhance the consumer shopping experience.

Strengths

- Orckestra's systems support individual pricing and time-specific options for fulfillment slots. The ability to configure date-specific exceptions based on quota and type enables precise control over scheduling, ensuring that fulfillment operations can be aligned with resource availability and anticipated demand. This level of detail in scheduling can help manage peak periods and prevent over-allocation of limited resources.
- The platform aggregates timeslot options from multiple stores and fulfillment providers into a single, unified view. This consolidation reduces data fragmentation and potential scheduling conflicts by offering a centralized source for managing fulfillment slots. It simplifies cross-location coordination and ensures that scheduling policies are applied uniformly across different points of fulfillment.
- Orckestra provides a dedicated testing interface that allows users to run queries independently from the live storefront environment. By incorporating search relevance scoring, the interface offers quantitative feedback on the performance of search queries, enabling technical teams to assess and fine-tune the indexing and retrieval processes. This analytical tool supports continuous improvement of search accuracy and content positioning.
- The system includes a configuration interface that allows users to adjust the weight assigned to various searchable properties. Using boost and bury functions, technical teams can fine-tune the search ranking algorithm to prioritize certain attributes over others. This configurability ensures that the search results are better aligned with specific operational priorities and criteria, leading to more accurate and contextually relevant outcomes.

- Orckestra OMS supports diverse order routing strategies, including order splitting and prioritization. By analyzing factors such as geographic location, stock levels, and delivery requirements, the system can determine the optimal routing paths for orders. This technical flexibility not only optimizes the distribution process but also enables the system to adapt dynamically to changes in supply chain conditions, improving overall fulfillment efficiency.

Challenges

- Orckestra's AI-driven fulfillment process might face challenges in rapidly recalibrating order routing across multiple fulfillment locations. The system may struggle to adjust in real time to fluctuations in demand, warehouse capacity, and last-mile logistics, which can lead to operational inefficiencies that require complex trade-off analysis.
- Due to its relatively smaller scale, Orckestra may experiencelimitations in rapidly scaling operations and accurately predicting market trends. This can create uncertainty in resource allocation and feature prioritization, potentially slowing innovation compared to larger competitors with more robust market insights.
- While Orckestra has a strong presence in established verticals like retail and logistics, its visibility in emerging markets such as healthcare and manufacturing are limited. This constraint may restrict the diversification of its client base and impede growth opportunities in sectors that are rapidly expanding.
- The platform's reliance on direct collaboration for system modifications, rather than offering low-code or no-code customization options, increases the complexity of tailoring workflows. This dependency can extend implementation timelines, particularly for businesses with specific needs regarding integrations or feature enhancements.

Radial

Founded in 2016 and headquartered in Prussia, Pennsylvania**.** Radial offers an Order Management suite with a set of solutions including Radial Order Management, Inventory Visibility, Store Fulfilment, Drop shipment management, customer care, and reporting and analytics. Radial Order Management, a modular, SaaS-based, multi-tenant platform which offers capabilities like enterprise inventory, order orchestration, and reporting and analytics.

Strengths

- Radial provides a single, real-time view of inventory across all channels, warehouses, stores, and distribution centers ensuring accurate available-to-promise (ATP) calculations.
- Radial streamlines the returns process with features like return merchandise authorization (RMA) generation and real-time tracking, improving customer satisfaction.
- Radial utilizes real-time data analytics to dynamically route orders to the most efficient fulfillment locations, reducing shipping times and costs.
- The Company equips customer service representatives with a unified view of orders and customer interactions, enabling personalized support and efficient issue resolution.
- Radial provides actionable insights through comprehensive reporting and analytics, facilitating informed decision-making and operational optimization.

Challenges

- Radial OMS leverages AI-driven decision-making for optimized order routing, but managing factors like cost, speed, fulfillment location, and carrier availability in real time adds complexity. For businesses, this requires ongoing fine-tuning to maintain efficiency, and without proper optimization, it may lead to processing delays and higher operational costs.
- Integrating Radial's OMS with existing systems can be complex, sometimes resulting in compatibility issues that extend implementation timelines. For businesses, this may require additional technical resources and careful planning,

potentially delaying system deployment and the seamless synchronization of order management processes.

Salesforce

Founded in 1996 and headquartered in San Francisco, California, USA, Salesforce is a provider of enterprise cloud computing and customer relationship management solutions. Salesforce Commerce Cloud offers various products, including B2C commerce, B2B commerce, Order Management System (OMS), and payment solutions. Salesforce's OMS offers multiple capabilities, including omnichannel inventory visibility, order routing, omnichannel fulfillment, and distributed order management.

Strengths

- Salesforce OMS is part of the Salesforce Commerce Cloud, providing a unified platform that integrates with Sales and Service Clouds. This integration connects the entire customer experience, from order placement to fulfillment
- Salesforce's Agentforce platform enables self-service for customers to place, track, or cancel orders easily. This empowers retailers to reduce the workload on customer service teams.
- Salesforce OMS supports automatedworkflows for order processing, routing, and fulfillment. This reduces manual labor, minimizes errors, and streamlines operations.
- Salesforce offers a complete order management solution catering to B2B and B2C customers.Salesforce Order Management provides various products, including Order Visibility, Starter, and Growth. Salesforce bundles Data Cloud and Agentic Actions for Order Support within these SKUs, along with out-of-the-box integration to Commerce and native connectivity to Service. This helps organizations by providing visibility into orders, flexible order management, and order orchestration across complex distribution networks and B2B orders.

Challenges

- Ensuring consistent and accurate data synchronization between Salesforce OMS and external systems can be complex due to variations in data structures and real-time processingcapabilities. These mismatches may lead to errors in order processing or inventory updates, causing fulfillment delays, inaccurate stock levels, and increased operational overhead.

Softeon

Founded in 1999, headquartered at Reston, VA, US, Softeon provides diverse supply chain solutions, including warehouse management, warehouse execution, warehouse automation, and distributed order management. Softeon’s Distributed Order Management System (DOM) offers capabilities including real-time inventory & order visibility, multi-channel sales management, cross-channel order management, and inventory optimization.

Strengths

- Softeon’s DOM provides flexible order orchestration, enabling businesses to route orders intelligently based on customer preferences, inventory levels, and fulfillment strategies, ensuring optimal fulfillment speed and cost efficiency.
- Softeon’s DOM integrates with its broader supply chain solutions, including Warehouse Management System (WMS) and Transportation Management System (TMS), providing a unified platform for managing orders, inventory, and fulfillment across multiple channels.
- Softeon’s DOM system's real-time inventory capability offers enterprise-wide visibility, which includes in-transit inventory to help retailers leverage the chance of gaining customer orders in a complex network.
- Built on a flexible architecture, Softeon’s DOM is scalable, enabling businesses to adapt to changing customer demands, seasonal fluctuations, and growth without major disruptions to their operations.
- Softeon's platform features a rules-based order pool management system to support various business models. It facilitates cross-channel order management, even for individual orders, to enhance customer satisfaction. The platform's rules-based engine provides comprehensive control over the entire order lifecycle, including segmentation, prioritization, holding, releasing, sourcing, and optimizing order-related constraints.

Challenges

- Softeon's reverse logistics management, encompassing restocking, refunds, and fraud detection, currently provides foundational capabilities compared to competitors' solutions, this may lead to operational inefficiencies and a slower

returns process, potentially impacting customer satisfaction, increasing operational costs, and posing challenges to customer retention.

- Softeon's OMS, while offering extensive capabilities, presents a navigation system with multiple pathways to similar functions, which can hinder operational efficiency. For end users, this may lead to slower processes and increased time spent on routine tasks, ultimately impacting overall productivity and system adoption.

Tecsys

Founded in 1983 and headquartered in Montreal, Canada, Tecsys provides cloud-native, supply chain solutions which includes warehouse management, transportation management, delivery management, order management etc. The company offers a SaaS-based retail distributed order management platform under the Omni™ Retail solutions which offers comprehensive OMS capabilities, including order orchestration, inventory visibility, store fulfillment, reporting, and returns management.

Strengths

- Tecsys' cloud-native OrderDynamics® features a robust Distributed Order Management (DOM) engine that allows configuration, management, and execution of complex order routing processes through advanced order orchestration functionality.
- Tecsys offers Advanced "store-as-warehouse" functionality that provides in-store pick and pack workflows that streamline the fulfillment process, delivering speed, efficiency, and cost savings.
- Tecsys offers a highly configurable workflow engine that automates order processing, returns, and replenishments. This flexibility allows businesses to tailor order management processes to their unique operational needs. This includes supporting an open API ecosystem, expanding omnichannel partner ecosystem, and building additional pre-integration.
- Tecsys allows for maximum flexibility in creating, canceling, or editing orders, offering appeasement options like price matching, credits, and adjustments to exceed customer expectations.

Challenges

- Tecsys’ OMS is well-suited for B2C, healthcare, and 3PL environments but may require additional customization to fully support specialized B2B functionalities like advanced bulk order processing and complex approval workflows. For businesses with significant B2B operations, this could lead to extended implementation timelines and additional resource investments to tailor the system to their specific needs.

- Tecsys’ advanced features and customization options offer flexibility but may come with a steep learning curve for users, especially those unfamiliar with complex supply chain systems. For businesses, this could extend training and onboarding efforts, requiring additional time and resources to ensure teams can fully leverage the platform’s capabilities, potentially delaying operational efficiency.

Vinculum Group

Founded in 2007, headquartered in Noida, Uttar Pradesh, India. Vinculum Group offers a comprehensive suite of SaaS solutions for omnichannel retailing, including Order Management System (OMS), warehouse management, and product information management. Vinculum provides Vin OMS, designed for order orchestration, fulfillment, and returns across B2B and B2C channels. It supports real-time inventory visibility, enabling efficient order fulfillment from stores and enhancing customer satisfaction.

Strengths

- Vinculum OMS offers integration with a wide range of eCommerce platforms, online marketplaces, and third-party logistics (3PL) providers such as DHL and Blue Dart. This compatibility enables retailers to efficiently manage orders, inventory, and fulfillment across multiple sales channels and partners.
- Vinculum provides order orchestration with dynamic routing, automated order splitting, and order hopping features. These features enable flexible shipping options through customized carrier selection and shipping algorithms, optimizing cost and delivery speed. With support for complex scenarios such as same-city delivery, cross-border shipping, and real-time carrier tracking, businesses can ensure efficient, cost-effective fulfillment across multiple locations.
- Vinculum OMS centralizes inventory management across physical stores, warehouses, and online platforms, providing inventory visibility and reducing stock discrepancies. This unified inventory pool enhances order fulfillment efficiency by dynamically allocating stock based on demand and predefined business rules, supporting seamless omnichannel operations.
- Vin eRetail OMS offers an Endless Aisle solution that enables customers to access a retailer's full catalog, including out-of-stock or non-store items. By displaying real-time availability from other stores, warehouses, or suppliers, it ensures seamless order fulfillment,enhancing customer satisfaction through immediate or timely delivery options.

Challenges

- Vinculum's platform may struggle to efficiently scale with rising transaction volumes and broader global expansion, particularly if performance optimization

is not addressed. This constraint can lead to slower order processing and operational bottlenecks, ultimately affecting fulfillment speed and the quality of the customer experience. As business demands grow, such limitations could significantly hinder Vinculum's ability to compete with larger, more agile solutions.

- While Vinculum has a solid foothold in the APAC region, its comparatively lower visibility in markets such as North America and Europe may deter businesses that prioritize geographically distributed partners. This limited reach can reduce international appeal and diminish trust among global clients, leading to missed opportunities for broader adoption, strategic partnerships, and sustained growth in key regions.
- Vinculum may face challenges in delivering accurate, real-time data on orders and inventory across multiple channels. The system could encounter delays or inconsistencies that disrupt fulfillment workflows and affect customer trust. Inaccurate inventory levels or delayed shipments can lead to lost sales and inefficiencies, emphasizing the importance of immediate visibility for maintaining smooth operations and ensuring customer satisfaction.

Appendix

Market Definition & Capabilities

QKS Group defines an Order Management System (OMS) as a "centralized platform that optimizes and orchestrates order fulfilment by leveraging real-time inventory across the entire supply chain network. It enables businesses to aggregate, allocate, and synchronize inventory across multiple sales and fulfilment channels including eCommerce, brick-and-mortar stores, third-party marketplaces, and distribution centers. The system dynamically routes orders based on configurable business rules, balancing cost-effectiveness, service levels, and delivery speed, while offering end-to-end visibility and control over the order lifecycle."

The Omnichannel Order Management System (OMS) market is experiencing rapid expansion, driven by the increasing complexity of modern commerce, rising consumer expectations, and the push towards unified commerce ecosystems. Businesses are investing in OMS solutions to deliver a seamless, channel-agnostic shopping experience, ensuring customers can browse, purchase, receive, or return products across any channel without friction. The evolution of eCommerce, direct-to-consumer (DTC) models, and hybrid retail strategies has made real-time inventory visibility, intelligent order routing, and distributed order management (DOM) essential for meeting growing consumer demand for faster and more flexible fulfilment options.

Following are the key functionalities of Omnichannel Order Management (OMS):

- **Enterprise-Wide Inventory Visibility:** Enterprise-Wide Inventory Visibility in OMS provides businesses with enterprise-wide inventory visibility by centrally tracking and managing inventory across all sales channels including product availability in-store, online, and through third-party marketplaces. The OMS determines the optimal fulfilment source for efficiency and cost-effectiveness, integrating seamlessly with systems like Warehouse Management Systems (WMS), Enterprise Resource Planning (ERP), and Point of Sale (POS) for a consolidated view of inventory levels across diverse locations. The system can enhance the omnichannel experience by determining the optimal fulfilment choice through dynamic stock availability and intelligent order routing.

- **Order Management Experience:** Order management experience in OMS focuses on delivering a seamless and unified order management experience for customers across all sales channels offering a real-time, intuitive interface for fulfillment associates to access unified inventory information, order workflows, and customer data from diverse touchpoints. The process includes identifying the various channels, setting up a tracking platform, creating an inventory system to monitor orders and inventory levels, and implementing a Customer Relationship Management (CRM) platform to track customer information. This capability assists retailers in enhancing customer satisfaction by monitoring orders, managing shipments and payments, and addressing order-related issues.
- **Store Fulfilment:** Store fulfilment in OMS allows businesses to fulfil orders directly from their physical stores as part of a broader omnichannel fulfilment strategy. The process involves receiving order details, checking inventory levels across all locations, fulfilling orders from nearby stores when items are available, and updating order status and inventory levels in real-time. Integration of order management, inventory tracking, and fulfilment processes through modern OMS automates workflows and provides customers with enhanced convenience, speed, flexibility, and personalized fulfilment experiences.
- **Order Orchestration and Order Routing:** Order Orchestration and Order Routing in OMS provide essential processes within an Omnichannel Order Management System (OMS) for efficiently managing and fulfilling customer orders across various channels including stores, distribution centres, suppliers, 3PLs, and drop shippers. Order Orchestration involves selecting the optimal stock location, be it internal or from a supplier, to oversee each order until delivery while meeting business requirements and exceeding customer expectations. This includes routing capabilities to manage inventory across stores, warehouses, suppliers, resellers, and third-party logistics providers, and reducing delays for customers. Order routing involves routing the order to a specific warehouse or directly to a retail store if the item is in stock and near the customer's location.
- **Delivery model:** The delivery models within an Order Management System (OMS) provide a variety of fulfilment options designed to efficiently handle and deliver customer orders across multiple channels. The platform can offer various fulfilment options included in OMS delivery models such as ship-from-store, ship-to-store, ship from DC, Buy Online Pick Up in Store (BOPIS), Buy Online Return In-Store (BORIS), Reserve Online Pickup In-Store (ROPIS), vendor dropship, and curbside pickups.
- **Returns Management:** Returns management in OMS provides businesses with an efficient and effective process for handling product returns. It initiates

customer-requested returns through various channels like online portals, customer service, or in-store The OMS streamlines returns authorization through automated processes based on predefined rules and policies, ensuring consistent and accurate approvals. Subsequent steps include generating a return confirmation, processing the refund, and updating and replenishing the inventory. The platform facilitates the returns and exchange process by offering various features like automated returns, customer-initiated returns, omnichannel returns, returns management authorization, refund & credit management, and shipping label creation.

Research Methodologies

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Evaluation Criteria

QKS Group’ SPARK Matrix provides a snapshot of the market positioning of the key market participants. SPARK Matrix provides a visual representation of market participants and provides strategic insights on how each supplier ranks related to their competitors, concerning various performance parameters based on the category of technology excellence and customer impact. QKS's Competitive Landscape Analysis is a useful planning guide for strategic decision-making, such as finding M&A prospects, partnerships, geographical expansion, portfolio expansion, and similar others.

Technology Excellence	Weightage
Enterprise-Wide Inventory Visibility	15%
Order Orchestration	20%
Dynamic Store Fulfilment	15%
Returns Management	10%
Vision & Roadmap	10%
AI, Analytics, & Reporting	10%
Competitive Differentiation Strategy	10%
Integration & Interoperability	10%

Customer Impact	Weightage
Product Strategy & Performance	20%
Market Presence	20%
Customer Service Excellence	15%
Unique Value Proposition	15%
Ease of deployment	15%
Proven Record	15%

Technology Excellence

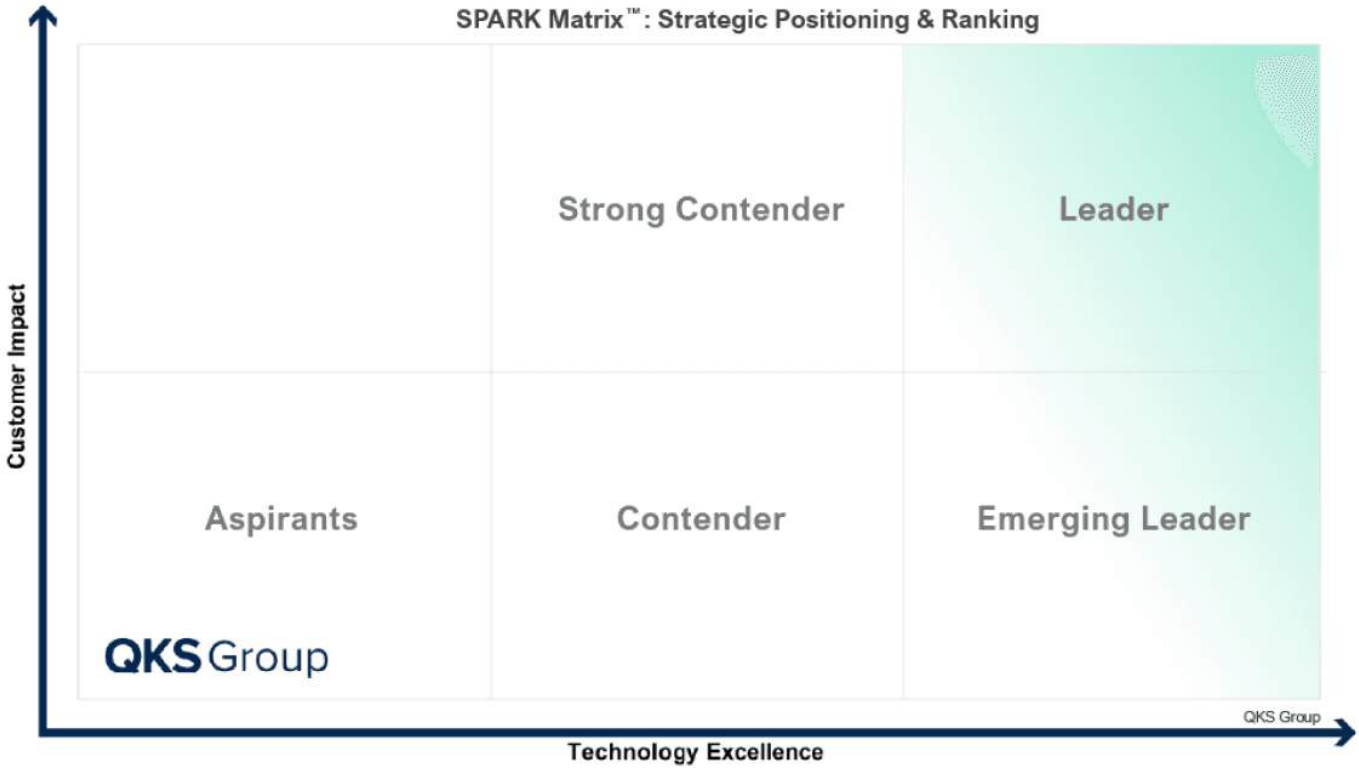
- **Enterprise-Wide Inventory Visibility** : Evaluate platform's ability to offer real- time unified visibility into the availability of inventory across various fulfillment channels, including DC, in-store, in-transit, and manufacturing centers.
- **Order Orchestration:** Evaluate platform's ability to provide real-time order orchestration and routing capabilities that help retailers streamline orders and manage inventory across various fulfilment channels. Additionally, will evaluate vendor's ability to offer various features like Order Simulation, Order Consolidation, Order Splitting, Order Routing, Order Hopping, and others.
- **Dynamic Store Fulfilment :**Evaluate platform's ability to provide various fulfilment options such as Ship-from-store, Ship-to-store, Ship from DC, Buy Online Pick Up in Store (BOPIS), Buy Online Return In-Store (BORIS), Reserve Online Pickup In-Store (ROPIS), Vendor Dropship, and Curb side Pickups, Endless Aisle, Multi-channel Order Fulfilment.
- **Returns Management:** Evaluates platform's ability to facilitate the returns and exchange process by offering various features like automated returns, customer-initiated returns, omnichannel returns, returns management authorization, refund & credit management, and shipping label creation.
- **Vision & Roadmap**: Evaluates product development strategies and new technological enhancements
- **AI, Analytics, & Reporting:** Prescriptive/Predictive Analytics, Machine Learning (ML), Dashboard, Business Intelligence (BI)
- **Competitive Differentiation Strategy:** Evaluates strategic alignment for the OMS technological trends.
- **Integration & Interoperability:** Evaluates the ability to exchange data with multiple platforms and partner ecosystems.

Customer Impact

- **Product Strategy & Performance :** Evaluation of multiple aspects of product strategy and performance in terms of product availability, price to performance ratio, excellence in GTM strategy, and other product- specific parameters.
- **Market Presence:** The ability to demonstrate revenue, client base, and market growth along with a presence in various geographical regions and industry verticals.
- **Proven Record** : Evaluation of the existing client base from SMB, mid- market and large enterprise segment, growth rate, and analysis of the customer case studies.
- **Customer Service Excellence :** The ability to demonstrate vendors' capability to provide a range of professional services from consulting, training, to support. Additionally, the company's service partner strategy or system integration capability across geographical regions is also considered.
- **Unique Value Proposition:** The ability to demonstrate unique differentiators driven by ongoing industry trends, industry convergence, technology innovation, and such other.
- **Ease of deployment:** The ability to provide superior deployment experience to clients supporting flexible deployment or demonstrate superior purchase, implementation, and usage experience. Additionally, vendors' products are analysed to offer user-friendly UI and ownership experience

How to read SPARK Matrix™

The **SPARK Matrix**™ by QKS Group is a comprehensive evaluation framework that benchmarks vendors across key industries based on their **Technology Excellence** and **Customer Impact**. This proprietary analysis tool provides a detailed, comparative assessment of market players, enabling businesses to make informed decisions when selecting technology partners. The matrix highlights vendor strengths, growth trajectories, and market strategies, offering a dynamic visualization of their competitive positioning. Designed to cater to the needs of decision-makers, the SPARK Matrix serves as a trusted guide for navigating complex markets and identifying the vendors best suited to drive organizational success and innovation.



- **Leader:** The Leader section of the SPARK Matrix represents organizations that set the gold standard in their respective industries. These vendors excel across both Technology Excellence and Customer Impact parameters, delivering best-of-breed solutions that are innovative, scalable, and future-ready. Leaders are recognized for their ability to anticipate market trends, address critical customer pain points, and deliver transformative outcomes. Their robust technological capabilities, combined with a deep customer-centric approach, position them as trusted partners for organizations seeking strategic growth and sustainable competitive advantages.

- **Emerging Leader:** The Emerging Leader section highlights organizations that are rapidly closing the gap with established leaders. These vendors exhibit a strong potential for future dominance, driven by significant advancements in Technology Excellence and increasing Customer Impact. Emerging Leaders often focus on niche markets or disruptive innovations, demonstrating a clear vision and execution capability. Their upward trajectory is marked by consistent enhancements to their offerings, growing market share, and an ability to deliver targeted solutions that cater to specific customer needs.
- **Strong Contender:** The Contenders section includes vendors that are establishing their footing in the market. These companies exhibit potential but may face limitations in terms of Technology Excellence or Customer Impact. Contenders often focus on addressing fundamental market needs and are actively investing in R&D and customer engagement strategies to strengthen their position. While they may not yet have the maturity or comprehensive offerings of higher-ranked categories, Contenders are key players to watch as they evolve and refine their strategies.
- **Contender:** The Aspirant section represents vendors that are in the early stages of development or are relatively new to the competitive landscape. These vendors have foundational offerings but lack the technological sophistication or customer-centric impact to compete at higher levels. Aspirants often serve niche markets or focus on incremental improvements, positioning themselves as future competitors in the space. Their journey involves building credibility, enhancing solution capabilities, and developing customer relationships to rise through the SPARK Matrix rankings.

About the Authors

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Avinash Singh is an Analyst at QKS Group, specializing in the domains of supply chain, procurement, and retail. He is responsible for SPARK Matrix Analysis, Product Strategy & Consulting Projects, Market Insights Reports, vendor competitive analysis and conducting market research including notable studies on Retail Execution Platform, Forecasting & Replenishment Solutions, and Retail Pricing and Promotions Optimization. He also works on revenue modelling assignments based on market intelligence and forecasting for numerous companies within the supply chain space. Additionally, Avinash is an active participant in industry webinars and conferences, where he engages with peers and thought leaders to discuss emerging trends and challenges in the supply chain and retail technology sector. He frequently contributes his insights on market dynamics and technological advancements through blogs and strategic social media posts.

Kumar Anand

Kumar Anand is a Principal Industry Analyst and Supply Chain Innovation Expert, recognized for his contributions to advancing supply chain strategies. With extensive experience in logistics, procurement, inventory management, sustainability, and digital transformation, Kumar collaborates with leading organizations to enhance operational efficiency and resilience across their supply chains. As Principal Industry Analyst, Kumar leads research projects focused on supply chain management, specializing in the integration of emerging technologies such as autonomous mobile robots (AMRs), navigating technologies, and multi-enterprise supply chain business networks. His work empowers companies to navigate industry disruptions and turn challenges into opportunities using data-driven insights and proven frameworks. Kumar holds an MBA in Operations and Supply Chain, with a career that spans impactful roles in supply chain consulting and market research. He has a strong focus on evaluating and optimizing supply chain processes for global corporations. Kumar's career also includes significant contributions to market research and strategic consulting, where he has played a critical role in assessing technology trends across domains like supply chain management, AI, and digital transformation. His work has been integral to the development of forward-looking strategies that address the evolving needs of modern supply chains. With publications in supply chain planning, supply chain execution, and supply chain robotics (AMR), Kumar’s expertise is widely recognized. He continues to predict and navigate technological disruptions, crafting strategies that transform potential risks into sustainable business opportunities.

Nithin Bhaskaran

Nithin Bhaskaran is a Senior Analyst at QKS Group, bringing extensive expertise in Customer Experience (CX) and Supply Chain domains. In his current role, Nithin focuses exclusively on the Supply Chain Management domain, with a particular emphasis on the Supply Execution market. His work involves providing strategic research and market intelligence, helping clients navigate complex market dynamics. His expertise is reflected in his extensive research portfolio, which includes in-depth studies on Omnichannel Order Management Systems, Global Trade Management, and Global Service Parts Planning Applications. In addition to his research contributions, Nithin is actively involved in industry engagement. He conducts webinars with vendors and authors numerous blogs and market insights, shedding light on emerging trends and advancements within the supply chain sector. His expertise and thought leadership are instrumental in guiding clients toward successful outcomes and strategic growth in the ever-evolving supply chain landscape.