

The Forrester Wave™: Order Management Systems, Q2 2021

The Seven Providers That Matter Most And How They Stack Up

by Emily Pfeiffer

April 29, 2021

Why Read This Report

In our 38-criterion evaluation of order management system (OMS) providers, we identified the seven most significant ones — Aptos, enVista, IBM, Kibo Commerce, Manhattan Associates, Oracle, and Radial — and researched, analyzed, and scored them. This report shows how each provider measures up and helps digital business professionals select the right one for their needs.

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The OMS Is The Lauded Hero Of Digital Business In 2021

At least one-quarter of all reference customers in this Forrester Wave™ evaluation credit their OMS as their business savior in 2020. “Only digital and omnichannel use cases kept us alive,” said one company. Overnight, fulfillment options (like ship-from-store and curbside pickup) became the difference between survival and collapse in the face of sudden shifts in consumer needs and mandated limitations. In 2020, 35% of US online consumers told us that they chose to use “buy online, pick up in-store” service to avoid delivery costs (up from 20% in 2019), and 31% said they did so because they felt “it is safer than going to a store” (not even a consideration factor in 2019).

The demands of the time have forced retailers — and their OMS vendors — to innovate at an unprecedented pace: Think adding drop-shipped items to websites to quickly beef up sales, launching quick “on ramp” digital solutions, and streamlining operations to maximize strained employee bandwidth. In fact, 39% of retailers and wholesalers increased their tech spend immediately due to the pandemic.

As a result of these trends, OMS customers should look for providers that:

- **Offer flexible fulfillment support.** Consumers want options for delivery — and many of them, depending on their moment of need. Scheduled timeslots are the top preferred online shopping fulfillment option among shoppers in [the UK](#) (38%) and [Canada](#) (32%). Curbside pickup is the top choice in the US (28%) and number two in Canada (27%). Free next-day delivery and various other pickup options come in close behind. In short, there is no silver bullet fulfillment option; rather, variety is the new expectation.
- **Provide balanced support for Forrester’s pillars of omnichannel OMS — as needed.** This evaluation assessed each vendor’s capabilities across the four pillars: enterprise-level inventory visibility; distributed order management (DOM); customer service; and store fulfillment. However, not every digital business needs all four (e.g., companies without physical stores won’t require in-store associate tools). Some vendors segment functionality into various solutions within their portfolios; others provide shared services across multiple solutions. Now, most OMS vendors offer

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point-of-service (POS) solutions as a separate product — some with shared services, some with included store associate functionality within the OMS, and some as a fully featured, stand-alone product. The scale explanations of scores clarify whether it is necessary to purchase an additional product to achieve the evaluated functionality.

- **Provide omnichannel promotions.** The availability of a unified promotions engine is a strong litmus test for how successfully a vendor supports true omnichannel operations for its customers. Omnichannel promotions benefit businesses that serve customers via multiple channels such as store, website, social, and call center. To qualify as truly omnichannel promotions, vendors must provide a single promotions management tool that natively syndicates those offers to all digital and face-to-face channels. By contrast, some vendors support multichannel promotions management, which requires that businesses recreate promotions in each solution within their portfolio. Additionally, some of the solutions we evaluated that offer a truly omnichannel promotions management solution only do so at additional cost. Vendors earned the highest scores for this criterion with a robust, omnichannel promotions engine, included within their order management solution for no additional cost.
- **Have solutions that are intuitively operable for the average business user.** “Evaluating enterprise-level OMS vendors now comes down to the demo, because being able to perform a given function isn’t enough,” explained Sophelle CEO Doug Weich. “What matters more is how it’s done, what it takes, how many steps or clicks it requires, and whether it can all be done easily by a business user in the interface.” As business leaders increasingly pull their users into [the vendor selection process](#), they assess a deeper value to the user interface as an efficiency tool for their employees. New technology systems should not require extensive training, tutorials, or help files to solve unintuitive user experiences. Solutions that streamline the day-to-day work of running digital business will win over busy teams.

Evaluation Summary

The Forrester Wave evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It’s an assessment of the top vendors in the market and does not represent the entire vendor landscape. You’ll find more information about this market in our report [Now Tech: Omnichannel Order Management Systems, Q1 2021](#).

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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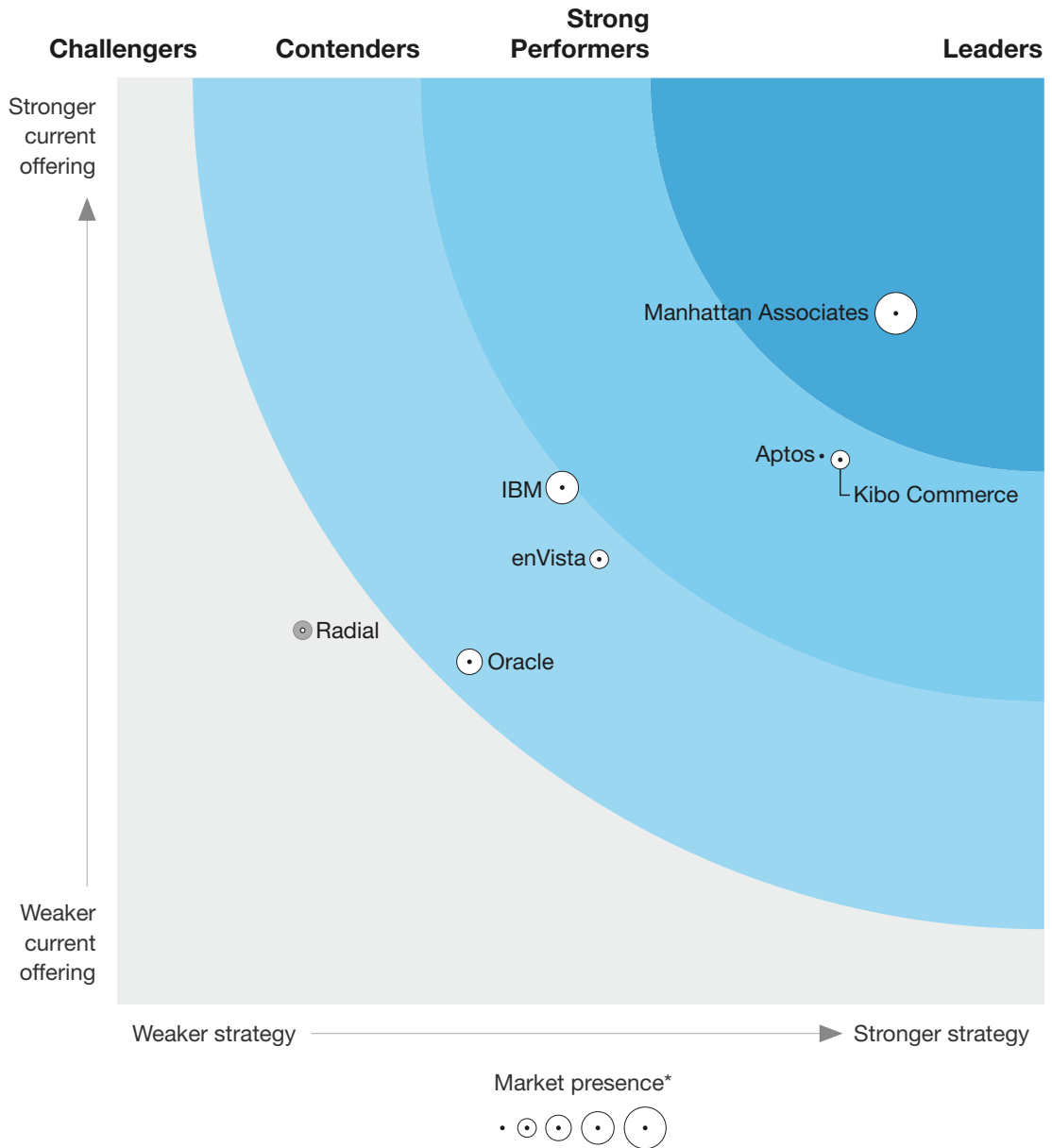
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FIGURE 1 Forrester Wave™: Order Management Systems, Q2 2021

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Order Management Systems

Q2 2021



*A gray bubble indicates a nonparticipating vendor.

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FIGURE 2 Forrester Wave™: Order Management Systems Scorecard, Q2 2021

	Forrester's weighting	Aptos	enVista	IBM	Kibo Commerce	Manhattan Associates	Oracle	Radial*
Current offering	50%	2.96	2.40	2.79	2.94	3.73	1.85	2.02
Solution architecture	15%	2.90	1.30	2.00	4.30	3.70	1.90	1.00
Enterprise inventory management	15%	2.50	2.00	4.00	2.50	4.00	1.00	2.00
Contact center capabilities	10%	3.00	2.00	2.00	3.00	4.00	3.00	5.00
Distributed order management	15%	4.50	2.30	2.80	2.10	2.20	2.30	1.50
Order orchestration	15%	2.20	4.00	2.20	1.60	3.20	2.20	1.60
Fulfillment	20%	3.20	1.80	3.20	3.80	4.80	1.20	2.00
Reporting and analytics	5%	3.00	5.00	1.00	3.00	3.00	1.00	3.00
Prepurchase customer experience	5%	1.00	3.00	5.00	3.00	5.00	3.00	1.00
Strategy	50%	3.80	2.60	2.40	3.90	4.20	1.90	1.00
Product vision and innovation roadmap	25%	5.00	3.00	3.00	5.00	3.00	1.00	1.00
Partner ecosystem	10%	1.00	1.00	5.00	3.00	5.00	3.00	1.00
Supporting products	25%	5.00	1.00	3.00	3.00	5.00	3.00	1.00
Delivery model	15%	3.00	5.00	1.00	5.00	3.00	1.00	1.00
Commercial model	15%	3.00	3.00	1.00	5.00	5.00	1.00	1.00
Customer service	10%	3.00	3.00	1.00	1.00	5.00	3.00	1.00
Market presence	0%	1.00	2.00	4.00	2.00	4.50	2.50	1.50
Number of live installations	25%	1.00	1.00	5.00	5.00	3.00	3.00	1.00
Revenue	25%	1.00	1.00	5.00	1.00	5.00	1.00	3.00
New customers and retention	50%	1.00	3.00	3.00	1.00	5.00	3.00	1.00

All scores are based on a scale of 0 (weak) to 5 (strong).

*Indicates a nonparticipating vendor

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Vendor Offerings

Forrester included seven vendors in this assessment: Aptos, enVista, IBM, Kibo Commerce, Manhattan Associates, Oracle, and Radial. We did not include three vendors in this evaluation whose OMS solutions were available only within a greater suite of solutions rather than as a packaged, stand-alone OMS product: Digital River, Microsoft, and Oracle Netsuite. These latter three solutions best serve businesses that already use the vendor's greater portfolio.

Commerce technology continues to evolve, and solutions are quickly becoming more modular. As such, customers must sometimes purchase multiple products from their vendor to cover all basics of OMS functionality (as described in the first inclusion criterion below) — and can avoid purchasing functionality they don't need. We evaluated the appropriate collection of products from each vendor to achieve this coverage. Many scales for specific criteria reflect functionality that vendors offer within other solutions in their greater portfolio that are not included within the evaluated solutions or that are available for additional charges. This evaluation considers functionality as “included” when vendors provide it within the specific products or modules listed (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Aptos	Aptos Enterprise Order Management	2020.3
enVista	enVista Enspire Commerce Order Management System (OMS)	N/A
IBM	IBM Sterling Order Management, IBM Sterling Inventory Visibility	20.3
Kibo Commerce	Kibo Order Management	N/A
Manhattan Associates	Manhattan Active™ Omni components: enterprise order management, distributed order management, store inventory management, store order fulfillment	N/A
Oracle	Oracle Retail Order Management System Cloud Service (OROMS), Oracle Retail Order Broker Cloud Service (OROB)	19.4
Radial	Radial DOM, Enterprise Inventory, Store Fulfillment, Customer Care	20.4

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Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- **Manhattan leads with a robust, well-connected solution that is more than some need.**

Manhattan is a power player in the OMS category, with a proven history of delivering comprehensive solutions. It is strong in its greater partner ecosystem and in its own modular architecture. Although businesses can choose only the modules they require, they will need to purchase multiple modules and additional potential add-ons to achieve full OMS functionality.

The solution is very strong in scalability and inventory management and segmentation. Some areas of functionality, such as orchestration rules, are robust and flexible, if complex to manage. Certain functions, such as subscriptions management, are not as strong as those from other vendors. Reference customers feel well supported and find the solution “expensive, but worth it.” Manhattan is a best fit for well-resourced enterprises with complex needs that require a mature solution.

Strong Performers

- **Kibo’s user experience shines, though some operational functions are underdeveloped.** Kibo is the combination and modernization of a number of acquired solutions. The organization shows promising vision, coupled with cutting-edge delivery and commercial models. It does have some challenges around customer service and is still growing its partner ecosystem.

Users administer Kibo’s powerful omnichannel pricing and promotions engine and its comprehensive “buy online, pick up ...” tools within a user interface that excelled above all others in this evaluation. It should build on some operational areas like returns and exchanges, cost-based rules, and drop shipping. Reference customers appreciate the strong tooling that supports business growth but would like to see more proactive recommendations from the vendor. Kibo is a best fit for growing digital companies that want the usability of a well-integrated portfolio of solutions.

- **Aptos’ modernized solution simplifies workflows but struggles with external integrations.** Aptos has invigorated its solution with updates that enable its customers to successfully support retail and digital combined operations. It leads with product vision and by offering a solid portfolio of solutions. Although its solutions work well together, it provides somewhat limited partnerships with providers outside the Aptos portfolio.

It offers strong distributed order management (DOM) capabilities and some retail-specific features like endless aisle and promotions. The solution is behind in several specific areas of enterprise inventory management, including in-store inventory management and B2B use cases. Reference customers credit new Aptos leadership with positive experiences but would value the addition of predictive analytics and stronger reporting tools. Aptos is a best fit for businesses with tens or hundreds of stores, in addition to websites, that prefer to buy into the larger Aptos portfolio of solutions.

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Contenders

- **IBM offers a powerful solution that requires more developer resources to fully exploit.** IBM provides a well-established partner ecosystem with a broad portfolio of solutions. Some customers combine on-premises and cloud models to get the features they need.

It is robust in the fundamentals around inventory management and is the only vendor in this evaluation to excel at B2B-specific OMS support. User controls are complex and, in some areas, require coding — like customer-based rules. Reference customers touted the power of the system but lamented the lack of stronger AI and proactive alerting within the solution. IBM is a best fit for enterprise-class businesses with the capacity to handle complexity and the resources to leverage the functionality via development resources.

- **enVista has broken into the enterprise space with great momentum but is still maturing.** The enVista solution is a stand-alone OMS for retailers and consumer packaged goods (CPG) companies. Its cloud-native solution streamlines updates to keep all customers on the most current version, though there is room to grow its partner ecosystem.

It differentiates by offering included functionality like native support for drop shipping and the ability to customize reports in the UI. However, it is still limited in some areas such as globalization and retail-centric functionalities, including endless aisle and ship-to-store. Reference customers appreciate the vendor's speed and responsiveness but hope for expanded built-in reporting tools and stronger partnerships with other providers. enVista is a best fit for businesses seeking a specialty OMS vendor with versionless cloud infrastructure.

- **Oracle provides a time-tested solution but struggles to differentiate.** Oracle's OMS offers a balanced approach to the needs of the market. It has a solid partner ecosystem and a broad portfolio of supporting products under its banner. Its delivery and commercial models are falling behind some of the more disruptive vendors in this space.

Oracle is a strong partner to its customers, especially around use cases for fraud prevention and globalization. Yet the solution has opportunities to strengthen fulfillment and inventory management capabilities. Reference customers feel well supported but hope for more data accessibility and predictive analytics. Oracle is a best fit for companies that need a good all-around solution, particularly if they are combining it with other products from the Oracle portfolio.

Challengers

- **Radial is a full-service provider but faces challenges around OMS strategy.** Radial is a strategic partner to customers by offering value-added services in a few key areas, such as customer service operations. The organization has gone through some recent changes, and its progress in the market has slowed.

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The solution is very strong in customer service and fraud prevention and offers services to support its solution (call center for customer service, full responsibility for fraud, and fulfillment). It could improve in areas relating to solution architecture, including usability and customization. Reference customers appreciate the partnership during implementation but would welcome more innovation and proactive technical support. Radial is a best fit for midmarket companies looking for value-added services. Radial declined to participate in the full Forrester Wave evaluation process.

Evaluation Overview

We evaluated vendors against 38 criteria, which we grouped into three high-level categories:

- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include pricing and promotions; inventory management; inventory segmentation; and buy online, pick up.
- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision and innovation roadmap; partner ecosystem; supporting products; delivery model; commercial model; and customer service.
- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number of live installations; revenue; and number of new customers and retention.

Vendor Inclusion Criteria

Forrester included seven vendors in the assessment: Aptos, enVista, IBM, Kibo Commerce, Manhattan Associates, Oracle, and Radial. Each of these vendors has:

- **Strong support for complex omnichannel order orchestration and routing.** These vendors have a time-tested, mature, and packaged OMS product that supports complex and configurable end-to-end order lifecycle management across channels and between fulfillment hubs. Capabilities include but are not limited to enterprise-class inventory visibility and management, order capture and modification, and order orchestration workflow.
- **A broad customer base with mindshare among Forrester clients.** The vendors have an existing customer base of enterprise global customers, with current evidence of mindshare and adoption among Forrester clients.
- **A minimum of \$15 million in annual revenue from its OMS product.** Vendors included in this evaluation offer a proven product and stated that they generate \$15 million or more in annual revenue attributable to their OMS offering specifically.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

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In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by January 2021 and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ and New Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

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