

Retailers Target POS Mobility for Engagement, Interactivity, and Revenue

December 2010 Greg Belkin, Sahir Anand



Analyst Insight



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Between October and December 2010, Aberdeen surveyed over 100 retailers regarding their use of in-store Point of Service (POS) devices to interact with customers (see definition in sidebar). Results indicate that 42% of these organizations are moving beyond simple transaction processing and are integrating POS systems with marketing, merchandising, inventory, and Customer Relationship Management (CRM) data to offer a personalized, unique, and interactive experience for consumers. At the same time, nearly two-thirds (65%) of retailers have identified the mobile POS device as central to this initiative, extending this integrated experience outside of the traditional shopping lane, and onto the selling floor, decreasing wait time, and increasing employee/consumer interactivity. The purpose of this Analyst Insight is to examine how top retailers are improving their POS and mobile POS functionality to not only process payments faster, but also to strengthen their overall long-term revenue-generating customer relationships.

Retailers Struggle to Provide an Optimal POS Experience

In a highly competitive retail market, organizations know that consumers have high expectations when it comes to the limited time duration for shopping in the physical retail store. The experience consumers have at the POS is a major part of the shopping experience, but has in fact been a particular challenge for retailers. For example, 60% of these organizations rate themselves below, or at best, sub-par on their current POS capabilities. Given this reality, it is no wonder that keeping up to date with a rapid evolution in consumer shopping preferences is a top pressure driving retailers to address their in-store POS tools (43%), as shown in Figure 1.

Rapid evolution in 43% consumer preferences Growing consumer dependence 40% on mobile device Increased competitive 27% promotional outreach High market cost of POS system 20% maintenance and training 0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% Source: Aberdeen Group, December 2010

Figure 1: Top Extended POS Pressures for Retailers

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Analyst Insight

Aberdeen's Insights provide the analyst perspective of the research as drawn from an aggregated view of the research surveys, interviews, and data analysis.

Mobile Retail points of Service Defined

Aberdeen defines mobile POS solutions as either:

- Retailer-owned associateoperated rugged or commercial-grade handheld devices capable of processing payments or other retail functions
- Consumer owned-operated commercial-grade handheld devices such as smart phones used for product browsing, payment processing, coupons, and loyalty messaging devices

This finding is consistent with Aberdeen's March, 2010 <u>The New Customer</u> <u>Service Strategies in Retail: The Reign of Kiosks and Self-Service?</u> report, in which 40% of retailers identified rapidly changing customer preferences as a top pressure driving increased adoption of self-self -service functionality instore.

One of the most fundamental challenges for a retailer is to keep track of evolving consumer preferences for modes of service, and provide the right service and sales strategy that matches these requirements in stores. Indeed, these organizations must take into consideration a multitude of different variables, such as how a consumer prefers to receive marketing and promotional information, which specific products a consumer is likely to gravitate toward, and general demographic information that provides important clues as to future buying patterns.

The deeper the POS experience is taken within the four walls, including the use of the mobile device, the more it serves as a strategic way for retailers to address the changing customer needs for more product information, cross-channel shopping, and faster transactions. Indeed, according to the November, 2010 <u>Multi-Channel to Cross-Channel</u> benchmark report, 34% of retailers are pressured by customer expectations of relevant promotional offers and other business and personal information, regardless of channel.

Increased Consumer Mobility

Interestingly enough, the second highest POS-related pressure was growing consumer dependence on the mobile device as a primary consumer shopping vehicle (40%). Mobility, in general, is gaining attention and momentum among retailers from both an employee-facing or consumer-facing perspective. For example, according to the September, 2010 <u>Mobile Retail as a Reality</u> report, 38% of retailers are currently at some stage of mobile retail technology or mobile channel adoption, compared to 18% at the end of 2008. At the same time, the consumer's mobile phone has emerged as a POS and channel growth opportunity that presents both increased customer transaction processing speed potential and incremental revenue options for retailers within stores:

- Increased consumer transaction processing potential. By providing applications to consumers that allow for in-store- or prepayment, consumers can further accelerate the POS experience by themselves. This is particularly helpful during high volume business periods, such as the winter holiday season, when retailers are challenged to process customers with speed and efficiency. By using mobile devices to accelerate this process, queues can be decreased while still offering the same level of customer service.
- Increased incremental revenue. Retailers can use consumeroriented mobile POS devices as an additional opportunity to touch consumers with marketing and merchandising campaigns, which lead to increased incremental revenue potential. Already, more than two-thirds of retailers are utilizing POS pin pads to streamline

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Demographics

$\sqrt{106}$ Retail Organizations

- Industry: Specialty (3%);
 Apparel and Luxury (8%);
 Telecom (8%); Retail Bank (8%); Consumer Products (5%); Financial (4%); General merchandise (3%);
 Manufacturing (6%);
 Entertainment (3%); Food Retail (Grocery, Convenience, Supermarket) 3%; Other (49%)
- Department / function: IT (25%); Marketing (20%); Business Development (15%); and Corporate Management (14%); Other (26%)
- √ Geography: North America (54%). Asia-Pacific (15%);
 Europe (23%); Middle East / Africa (4%); Other (4%)
- √ Revenue Size: Large enterprises (annual revenues above US \$1 billion) 23%; Midsize enterprises (annual revenues between \$50 million and \$1 billion) 22%; Small businesses (annual revenues of \$50 million or less) 55%

"We are not yet at the point where we are taking advantage of consumer smart phones. However, it is a part of the future, and we are starting to prepare for it. We assume that consumer smart phones will not be limited to transactions, but serve as a back and forth between ourselves and our customers."

~ Senior Director of IT Large US-based Electronics company



promotional content and digital images for consumers to review pre-purchase (67%). Moving this visual content to a consumerowned device through an application or web interface is a natural next step as consumers increasingly depend on these devices for increased retail activity.

Multi-System Integration Tops Retail Mobile POS Priority List

Integration of extended point of service systems (both mobile and traditional) with other business and consumer data sources has become a top priority for retailers. According to Aberdeen data, 42% of these organizations have prioritized POS integration initiatives for traditional POS systems, and an additional 29% of retailers are focused on bringing this integration specifically to the mobile POS device (Figure 2). Given that a primary pressure for retailers is to manage rapid changes in consumer shopping preferences, it is no wonder that retailers are looking to connect relevant systems that enable customer engagement to the final major point of the in-store retailer/consumer interaction: the POS.

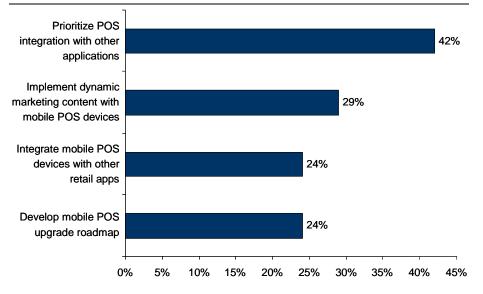


Figure 2: Top Extended POS Actions for Retailers

Source: Aberdeen Group, December 2010

Linking relevant consumer-focused applications with POS systems has the potential to yield two major benefits: short-term customer satisfaction leading to revenue enhancement and long-term customer-specific data accuracy:

• Short-term revenue enhancement. According to findings in the March, 2010 <u>Cross-Channel Customer Loyalty</u> report, 36% of Best-in-Class retailers are focused on utilizing historical purchase preference data such as frequency rates to successfully retain



customers in-store (compared to 30% of all others). Indeed, if a store associate has increased access to this specific consumer information (including outreach preferences and product affinities), there is an increased likelihood that they will be able to offer relevant short-term cross-sells and up-sells on an immediate basis in a way that is ultimately pleasing to the consumer. Additionally, a retailer can access specific cross-channel orders that may (or may not) have been successful, and suggest either alternative products or cross-sells that may be immediately available in-store. Finally, access to business-specific information such as inventory availability, crosschannel product availability or product pricing data allows store associates to provide a value-added experience to consumers, who may participate further participate in immediate cross-sells or upsells (or reserve yet-to-be-available products) based on this information.

• Long-term customer-specific data accuracy. According to Aberdeen data, 43% of Best-in-Class retailers are deploying CRM data to their entire enterprise (compared to 16% of Industry Average, and 11% for Laggard). By providing this data to store they can take the initiative to update consumer demographic information, such as email addresses, physical addresses, and stated outreach preferences. Additionally, product affinity-based data can supplement this information automatically, once a transaction has been completed. Accurate CRM data, in addition to product affinity data, increases the likelihood of providing highly accurate and effective cross-selling and up-selling opportunities on a long-term basis.

Retailers Target Customer-Specific and Business-Specific Integration Priorities

Retailers have many options when it comes to which systems and processes they will target as key integration points for their POS systems and for extended points of service, such as mobility. According to Aberdeen data, however, two main strategies have emerged: customer-specific data collection systems (such as CRM and loyalty data), and business-specific data sources (such as product and pricing lookup across channels):

- Customer-specific data collection. According to Aberdeen data, 64% of retail respondents prioritize CRM data as the top integration point for mobile POS systems (Figure 3). Additionally, 58% these same respondents are also looking to increase access to loyalty data. This customer-specific data leads to increased selling accuracy, both in specific products offered, and in selling strategy.
- **Business-specific data collection.** According to Aberdeen data, 59% of retail respondents are planning to provide product lookup capabilities to the store-level employee or to consumers directly. This can be achieved through a dedicated web browser, or

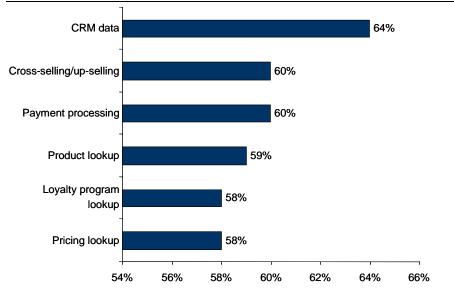
"We see the POS as the final moment where we can really impress our customers. Obviously, the more crosssystem data integration we can take advantage of, the better. It's good for us, and it's good for the customer as it makes the process more personal and palatable."

~ Senior Director of Marketing US-based online floral retailer



application. Additionally, 58% of respondents are planning to provide product pricing information to the POS experience, and 51% are targeting inventory availability data. None of these data sources focus on consumer-specific information, but provide an important window into product availability and related details which is likely to increase future cross-sell/up-sell opportunities as well. This is especially relevant at the POS, where employees have a unique selling opportunity based on not only consumer specific data, but on internal product information, and channel availability as well.





Source: Aberdeen Group, December 2010

Aberdeen Insights — Customer Efficiency Dominates Retail POS Improvement Priority List

According to Aberdeen data, a common theme of customer efficiency has emerged for retailers as they consider future POS improvement strategies. Sixty five percent (65%) of retailers have identified mobility as a key POS focal point. This list also includes loyalty (44%), and self-service kiosks (29%). Each of these areas present a unique consumer benefit, for example:

• The Mobile POS device allows employees to increase the speed of the consumer interaction, as well as create a sense of one-on-one intimacy which can lead to increased cross-sells and up-sells.

continued



Aberdeen Insights — Customer Efficiency Dominates Retail POS Improvement Priority List

- Loyalty tools at the POS and mobile POS allow retailers to understand a consumer's previous buying patterns, as well as outreach preferences, more closely personalizing the shopping experience for the consumer.
- Self-service kiosks not only provide the consumer with business-specific information such as product or pricing lookups, but also with personal information such as multi-channel order history, consumer-specific marketing opportunities, and product-specific guidance based on previous behavior.

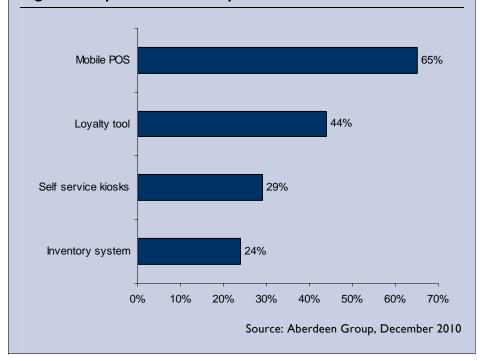


Figure 4: Top Point of Sale Improvement Areas for Retailers

The Current Capabilities of Choice to Expand Retail POS Mobility

According to Aberdeen data, mobile POS is a growing focus for retailers, both in terms of perceived pressures (40% of retailers identify increased consumer use of mobile devices as a primary shopping tool as a POS upgrade pressure), and top improvement initiatives (see Aberdeen Insights on preceding page). In order to properly take advantage of POS mobility, however, retailers must ensure that the appropriate internal capabilities are in place to support this initiative. To that end, four key capabilities have emerged as top strategies retailers are embracing to address this challenge:



- Ability to capture, use, and turn mobile POS data into business intelligence (63%), as shown in Figure 5
- Establish infrastructure to support mobile POS device uptime (63%)
- Near real time execution of mobile POS promotion changes (62%)
- Establish traditional and mobile POS transaction data collection and storage processes (61%)

Ability to Capture, Use, and Turn Traditional and Mobile POS Data into Business Intelligence

According to Aberdeen's April 2010 <u>Pervasive Retail Business Intelligence</u> report, nearly two thirds of Best-in-Class retailers (63%) are turning to pervasive BI (see definition in sidebar) to increase overall consumer insight. The POS experience, and the mobile devices that support this experience, are a key part of a retailer's overall customer interaction strategy. This touch point allows retailers to collect and/or update existing information to help them market and sell their product more effectively. To that end, data collected using POS devices must be a part of collected business intelligence.

Take, for example, Potbelly Sandwich Works, an Illinois-based retail restaurant chain with over 200 stores in 11 states. The retailer once struggled with keeping tabs on the changing needs of its customers because customer-facing executives at the POS were unable to share relevant customer data and effectively communicate with top levels of its organization. After a pervasive BI implementation, information regarding changing customer needs (including large amounts of data collected at the POS) was made available not only to top business executives, but to purchasing, forecasting, and customer-facing executives and managers as well.

Establish Infrastructure to Support Mobile POS Device Uptime

Establishing a mobile POS infrastructure that encourages uptime requires a blend of two key ingredients: physical device maintenance and a robust network supported by an optimized data flow.

- **Physical device maintenance.** Mobile POS devices must be constantly maintained. To this end, 56% of retailers have active plans to establish a dedicated helpdesk and depot repair team to support mobile POS functionality. Requirements include regular charging, support for hot swapping, and consistent internal system upgrading.
- **Robust network management.** In-store network efficiency plays a crucial role in how well the mobile POS device will function at the store-level. However, based on the amount of integration points with other sources of data that retailers are bringing to the mobile

Pervasive BI Definition and Scope

Aberdeen defines "pervasive BI" as the existence of an information environment where access to and usage of business intelligence capabilities is available to all stakeholders in an organization when, how, and where they work. BI systems may include but are not limited to:

- $\sqrt{}$ Enterprise data warehouse
- $\sqrt{}$ Operational dashboards
- $\sqrt{}$ Scorecards
- $\sqrt{}$ Executive dashboards
- $\sqrt{}$ Analytical applications

"Ever since we have adopted POS mobility, we have been able to increase transaction speed times. This is especially helpful during the holiday season, when we need to move customers in and out of the store in a hurry. We haven't been able to achieve the high levels of system integration, but it is a top priority. Given the relative infancy of mobile POS, we still feel like we have a competitive advantage."

> ~ IT Systems Director UK-based Apparel retailer



device, this is no easy task. To counter this challenge, retailers would be wise to ensure their networks support the 802.11n data standard which is designed to support video, audio and other dataintensive mediums (as opposed to 802.11g, which is designed primarily for low-intensity American Standard Code for Information Interchange (ASCII) data). 802.11n has the advantage of providing the performance and security of a wireline network at a lower cost of acquisition, installation, and maintenance. It also enables institutions to upgrade their network infrastructure in older campus buildings where laying in new cable for wireline infrastructure would be cost-prohibitive. In fact, the May 2009 report Wireless LAN 2009: From Network of Convenience to Business-Critical Infrastructure findings indicate that 79% of Best-in-Class and 75% of Industry Average respondents either have current or planned 802. I In implementations, whereas the Laggards trail the Industry Average by 27%.

Near Real-time Execution of Mobile POS Promotion Changes

According to Aberdeen data, 62% of retailers are focusing on updating mobile POS promotional changes in real-time. Given that more than twothirds (67%) of retailers are already utilizing traditional POS pin pads to streamline promotional content and digital images for consumers to review pre-purchase, it makes sense that retailers would not only want to extend this capability to mobile devices, but to do so as expediently as possible. Indeed, many retailers are making near instantaneous promotional changes based on same-day market trends. Larger retailers such as Wal-Mart, for example, have been known to make same-day promotional adjustments based on consumer reaction. If retailers make rapid adjustments to promotions in this manner, adjustments need to be reflected in the mobile devices that employees use to interact with customers, ensuring that they are offering the most up-to-date and relevant opportunities to prospects.

Establish Mobile POS Transaction Data Collection and Storage Processes

Sixty one percent (61%) of retailers have prioritized the establishment of a data collection and storage process for mobile POS transactional data. This process, however, can vary widely on a per-retailer basis. For example, some retailers may have a separate Order Management System (OMS) that will process a cross-channel order, and then, once complete, move it to a transaction system. On the other hand, some retailers might choose to move mobile POS activity directly to transaction processing within the four walls. Whatever the strategy, retailers must ensure that this process is not only defined and consistent, but that it also highly secure. In fact, 48% of retailers are focused on ensuring their entire POS platform is PCI compliant (see sidebar definition) at all points, a necessity if customer-specific data such as credit card information is a part of this experience.

PCI/DSS Security Standards Definition

PCI/DSS stands for the Payment Card Industry Data Security Standard. It is a standard established to ensure that transactional data is transmitted from one part of the payment process to another without being compromised by inadequate security.



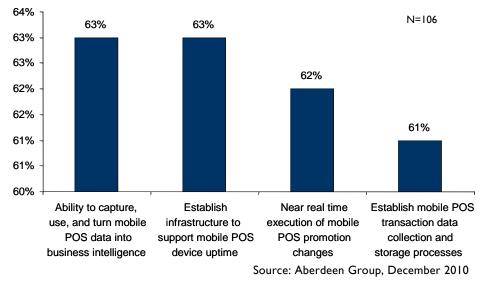


Figure 5: Top Extended POS Capabilities for Retailers

Retailers View POS Mobility Enablers from their Own Perspective - and from That of the Consumer

According to Aberdeen data, retailers have planned for the development of three different yet equally relevant methods of delivering enhanced mobile POS functionality to their consumers:

- The employee-owned handheld device (76% of retailers), as shown in Figure 6
- 2. An "app" on a consumer-owned smart phone device (74% of retailers)
- 3. A consumer-operated (employee owned) handheld device (63% of retailers)

A mere 2% delta between the two most popular enablers, and an 11% delta between the second and third, speaks to the fact that retailers are embracing all three mediums together as they build out their mobile POS infrastructure. Although consumer adoption of smart phones still has different issues to work out (such as lack of industry-accepted or applied standards, or pricing) before it becomes pervasive, retailers know that growing interest in the iPhone, Android OS, Windows, BlackBerry, and other smart phone platforms is likely to accelerate adoption in short order. In fact, 'growing consumer dependence on a mobile device' was the second highest POS pressure point among retailers. Each of the mobile device platforms listed above offer distinct benefits and drawbacks for consumers. For example:

• The consumer-oriented handheld shopping device is used by retailers such as Stop & Shop to facilitate shopping (and a sense of customer empowerment) in their brick-and-mortar stores. Consumers scan product UPC symbols as they go, allowing for fast pass-through of check-out lines at the end of their shopping experience. By supplementing these devices with credit card readers or abilities to access pre-paid accounts, customer



transaction processing can be executed even faster, with additional opportunities for personalized marketing and merchandising.

- The consumer's mobile phone has emerged as a channel growth opportunity that presents both customer engagement potential and incremental revenue options for retailers. According to the September, 2010 <u>Mobile Retail as a Reality</u> report, 38% of retailers are currently at some stage of mobile retail technology or mobile channel adoption, compared to 18% at the end of 2008 (see the <u>New-Age Multi-channel Retail</u> report). By providing applications to consumers that allow for in-store- or pre-payment options using these devices (through, for example, a PayPal account), consumers can further accelerate the POS experience.
- The employee-operated handheld device allows retail associates to speed up transaction processing and marketingoriented functions in times of high volume sales. Additionally, the employee-operated handheld device also allows retailers to address day-to-day information and productivity gaps in the field, such as managing workforce management-related issues, or increasing inventory visibility. In fact, according to the August 2009 <u>Mobile Field</u> <u>Workforce in Retail</u> benchmark report, 43% of Best-in-Class retailers are utilizing mobile devices to address inadequate access to sales, service, and operations information (compared to 36% of all others). Additionally, according to the same report, 52% of Best-in-Class retailers are using mobile devices for real-time data capture and data storage for daily inventory (tracking, floor set-up and control) processes in the field (compared to 34% of Industry Average, and 16% of Laggard retailers).

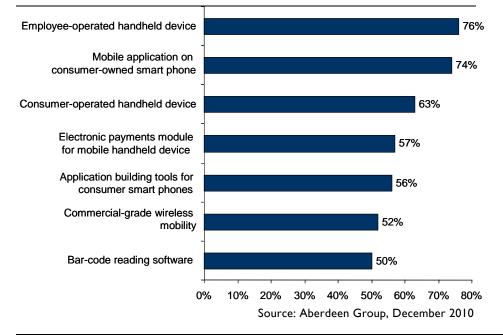


Figure 6: Top Extended POS Capabilities for Retailers



Conclusion: Consumer Mobility Growth Serves as Prime Motivator for Increased Efficiency and Interactivity at the POS

In the last few years, the retail point of service industry has been in a state of constant flux. In the early 2000's, for example, investment in these systems was growing, based on the need to cover the basics such as core transaction processing and limited value-added customer interactivity. Several years later, as the global economy sputtered and the realities of dealing with POS expenses as a Capital Expenditure (CapeX) set in, investment decreased. Now, however, POS investment has once again become a priority based on several factors, such as a generally dismal review of existing systems (64% of retailers rate their POS systems sub par at best), the need to make the POS experience interactive and customercentric (42% of retailers are focusing on integrating other data sets into the POS), and the general fact that economic activity in retail has slowly but surely increased.

What makes this upswing different than any others is the simultaneous growth of mobility as a primary means of interaction between a consumer and a retailer. While hardly pervasive, mobility has caught the attention of retailers that are anticipating its growth in the near future (40% of retailers identified growing consumer dependence on the mobile phone as a key POS upgrade pressure). Additionally, retailers have also demonstrated that when these devices do become pervasive, consumers are likely to expect them to be data-rich devices, incorporating both consumer-specific and business-specific selling information.

Few retailers would argue that the POS is currently a major point of interaction for consumers. As consumer mobility grows, however, retailers have identified this trend as a prime motivational factor to make the POS experience increasingly dynamic, personal, and efficient if they are to remain relevant in the eyes of consumers.

Recommendations for Action

Aberdeen data suggests retailers take the following steps toward achieving optimal traditional and mobile POS strategies:

 Continually track POS wait times to ensure customer satisfaction with the in-store experience. Fifty nine percent (59%) of retailers have indicated that they have no immediate plans to monitor POS wait times on a weekly basis. This is surprising, considering that one of the central goals of the POS experience for a retailer is to process customer orders with speed and efficiency. POS wait times also tend to be a top metric used for justification of not only mobile POS equipment and related infrastructure purchases, but for core applications such as transaction processing equipment and data integration services as well. To counter this challenge, retailers would be wise to install automatic wait-time



recording devices, and integrate this data into a business intelligence system so as to get a true picture of how it affects other parts of the business.

- Invest in mobile handheld peripherals to help ensure guaranteed system uptime. Sixty three percent (63%) of retailers have no immediate plans to invest in mobile handheld peripherals such as battery chargers, locators, holsters etc. This is surprising, considering that, at the same time, the same amount of retailers are focused on establishing infrastructure to support mobile POS device uptime. If retailers are focusing on device uptime, they must also remember that hardware such as battery packs, locators, and holsters are crucial ingredients to ensure consistency in front of the consumer. Just as with any other place in a retailer's organization, items can be lost, stolen, or otherwise mistreated, and retailers must expect this reality as they roll out their mobile strategy.
- Invest in a wireless intrusion protection system to ensure mobile POS network security. Just 44% of retailers have immediate plans to invest in a wireless intrusion protection system. Indeed, wireless POS devices and the corresponding network which they function on are highly susceptible to hackers and other mischievous and unwanted guests. This is of especially higher concern for a wireless POS network, where payment details and personalized data are being exchanged in rapid quantities. Retailers would be wise to invest in high levels of data protection and ensure security to avoid a breech (and the negative publicity that usually goes along with it).
- Link mobile POS functionality with web channel data to ensure cross-channel order consistency. According to Aberdeen data, less than half of retailers (48%) have established Web channel access on their mobile POS devices. This is surprising, based on the increased pervasiveness of online commerce among consumers. By bringing this experience to the mobile POS device, in-store employees can help consumers facilitate online ordering, especially when a product is not available and alternative purchasing efforts must be arranged. Retailers would be wise to not only link these two selling channels together, but to also teach employees how to navigate this medium with ease.
- Ensure best-practice POS mobility tool utilization by training employees. According to Aberdeen data, slightly more than half (54%) of retailers have active plans to educate, inform, and train managers and associates on new mobile POS payment technologies. On first glance, POS mobility might be viewed as similar to traditional smart phones. However, retailers should ensure that their employees are trained to manage these devices to not only ensure a safe and secure transaction, but to also identify potential cross-sell and up-sell opportunities. Associates should be



skilled to the point where they can use these devices to answer non-standard questions, such as product-specific or availability information. This can be achieved by offering ongoing training classes at different levels, and provide interactive working demo models for employees to familiarize themselves with.

• Monitor customer satisfaction rates to ensure an appropriate blend of technology and human interaction. According to Aberdeen data, 55% of retailers are planning for regular monitoring of customer satisfaction rates related to mobile POS utilization. Regular monitoring of customer acceptance of technologies such as a mobile POS device is important because some consumers value human interaction over technology. It is incumbent on a retailer to make sure an appropriate blend is in place to service all perspective customers.

For more information on this or other research topics, please visit <u>www.aberdeen.com</u>.

Related Research	
<u>Mobile Retail is a Reality: The Increasing</u> <u>Mobility of Consumers Has Retailers</u> <u>Engaged;</u> September 2010	POS to Profits: Reviving Best-in-Class Sales & Service in Retail Store; June 2009
<u>Re-Stocking The Marketer's Digital</u> <u>Toolbox,</u> June 2010	<u>Mobile Payments in Retail: Next Wave in</u> <u>Customer-Centricity</u> ; October 2008
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