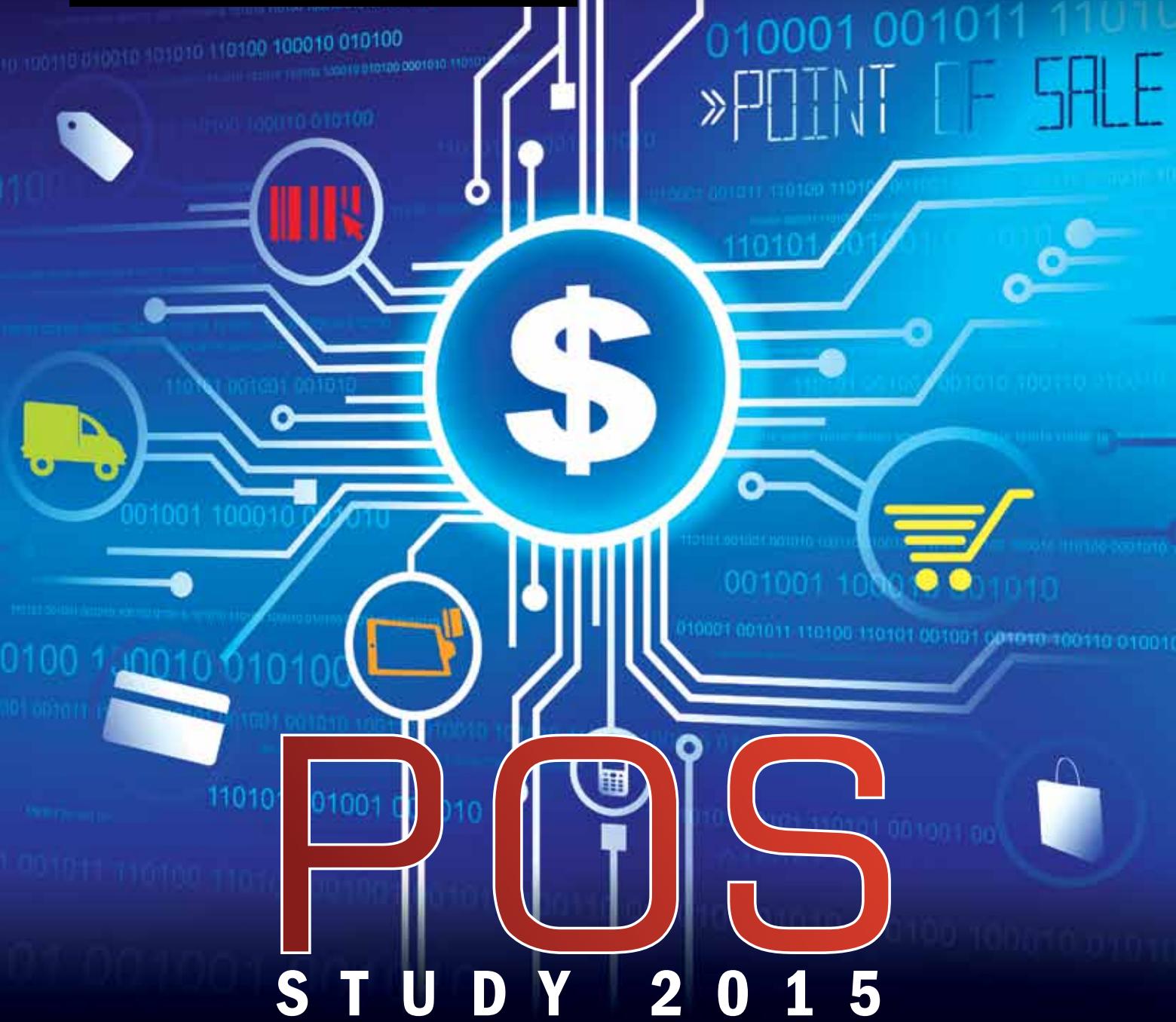


VSR

RESEARCH

POINT OF SALE STUDY

- Top pain points of existing POS systems (pg. 8)
- Why SMBs are upgrading, and what do new POS systems look like? (pg. 10)
- What are the most sought after complementary POS technologies right now? (pg. 18)
- Plus, hear from VARs about competitive forces, and biggest hurdles to success (pg. 22)



TRANSFORMATIVE TIMES PRODUCE UNPRECEDENTED
TRIALS FOR SOLUTION PROVIDERS

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NO PAIN, NO GAIN

Based on this “state of the POS union” report, two things soared up above all the rest. First, that it’s a pivotal time for those selling point-of-sale, and second, it’s also rather painful. Respondents to this year’s POS survey were not shy about sharing what seem to be escalating concerns about disruption in the market. New players, new technologies, and new ways of selling (translation: free POS) stack up like bricks, forming a formidable wall of frustration —and those trying to sell and support point-of-sale solutions must scale it, or retreat.

But the climb may be worth it in the end. Whether it’s outdated POS, security concerns, EMV, PCI or mobile, SMB retailers are looking for new and add-on solutions. Consider these key findings:

- The most common form of replacement includes rip and replace (60%), while another third are looking to create hybrid systems combining the old with the new.
- Pain points of current systems include outdated POS, difficulty adding functionality and e-commerce being divorced from the store.
- Topping the list of reasons to upgrade include PCI compliance, mobile POS, enhancements to customer service and faster checkout.
- The POS is transforming to more hybrid, e-commerce, SaaS/cloud, and mobile.
- Mobile reigns supreme in every vertical market, with nearly all solution providers selling or planning to sell it within the next year.
- Payment security, touchscreen monitors, payment processing, mobile POS and tablets are most sought after by SMB end users today.

Based on this year’s findings, despite competitive forces, the time is now to sell point-of-sale solutions, services and add-on technologies. The brick wall may be intimidating, but the reward far outweighs any risk. Grab your climbing gear, take a leap, and hoist yourself over.

ANGELA DIFFLY
EDITOR, VSR MAGAZINE

POS

STUDY 2015

TRANSFORMATIVE TIMES PRODUCE UNPRECEDENTED
TRIALS FOR SOLUTION PROVIDERS

There is very little that is not changing about POS: Form factor, platform, its role in the store, and perhaps most important, how it is sold and supported. Solution providers making a living selling and supporting POS must be nimble and forward-looking to continually adapt their businesses as the ground keeps shifting beneath them.

That can be tricky, because the pace of change is far from even. One geographic region may tend to hum along contentedly with traditional terminals, while others

rush headlong into mobile and SaaS. Vertical market needs, say pay at the pump, may prevent some from embracing a trend such as associate-facing mobile that others widely adopt. Generational differences have some leaning to what's proven and reliable while others dismiss that as outdated and limiting.

The collective wisdom of the crowd, however, reveals some distinct trends that are likely to hit every POS buyer when the time is right. In this, VSR's annual survey of readers on important trends in point-of-sale, we found:

- Mobile, payment and to a lesser degree, loyalty, are unstoppable and interdependent forces shaping the way business is conducted.
- Buyers are highly concerned with the security of payment and other sensitive data.
- "Free" POS from payment companies and low-cost SaaS-based POS are changing the competitive landscape.

If you're the type that thrives on chaos, you're in the right business.

Business is Good

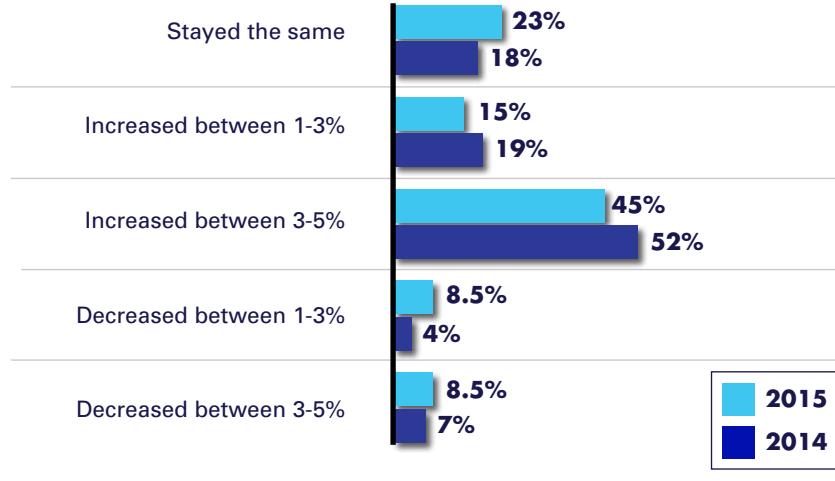
Buyers' spotlight on POS is a good thing for POS revenues. Almost half (45%) of solution providers surveyed saw POS sales increase between 3% and 5% in the past year, and another 15% saw a 1% to 3% rise — meaning three of every five POS solution providers are seeing an increase (Figure 1). But that's down a bit from the 71% reporting a POS revenue increase last year.

One reason for the positive numbers is that budgets are up a bit from last year. The sweet spot for solution providers is in clients with POS budgets of \$2500 to \$5,000 and \$5,000 to \$10,000, a sum that covers installation, support, service, repair, replacement and maintenance.

VSR readers tend to sell to smaller businesses — in fact, the majority (71%) sell POS into retail SMB. Other

FIGURE 1

HOW HAVE POS SALES CHANGED IN THE PAST YEAR?



big markets are quick service (49%) and full service (47%) restaurants (Figure 2). The number selling into grocery dropped from 55% last year to just 20% in 2015, although it's unclear if this reflects a change in the group answering the survey or a distinct downturn in grocery POS purchasing. Gas/convenience and healthcare continue to represent small but consistent opportunity.

The vast majority of POS installations are small — 61% are 1 to 5 terminals and 25% are 5 to 10. This reflects the SMB status of the average solution provider customer. But retailers are trending toward smaller store formats, so this is likely to become the sweet spot across all customers of all sizes in this vertical.

POS sales trends have always ebbed and flowed, but it's worth considering whether POS has reached its peak in the current era, at least for fixed POS. As a point of comparison, VSR sister publication *RIS News*, which tends to skew toward larger retailers, conducts an annual survey of retailers and their technology plans. It found that 38% of respondents have up-to-date POS now. Another 34% are either in the midst of a POS hardware upgrade or have an upgrade in the works.

Kevin Kogler, president of MicroBiz (www.microbiz.com), says his company's POS business is up, but the overall drop across solution providers could be attributed to increased competition from tablet and cloud POS systems, as well as

THE TOP PAIN POINTS TEND TO BE THE SAME, ALTHOUGH THE ORDER SHIFTS A BIT FROM YEAR TO YEAR:

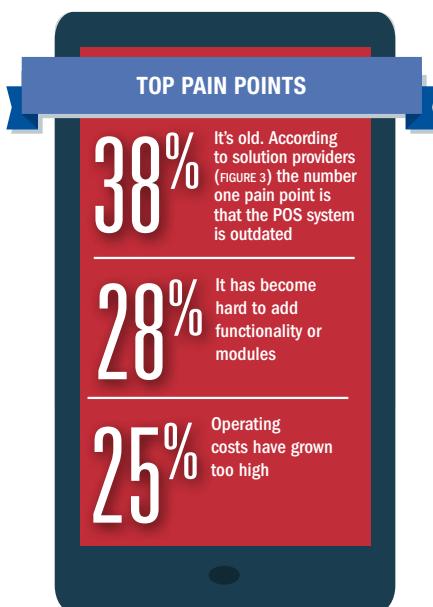
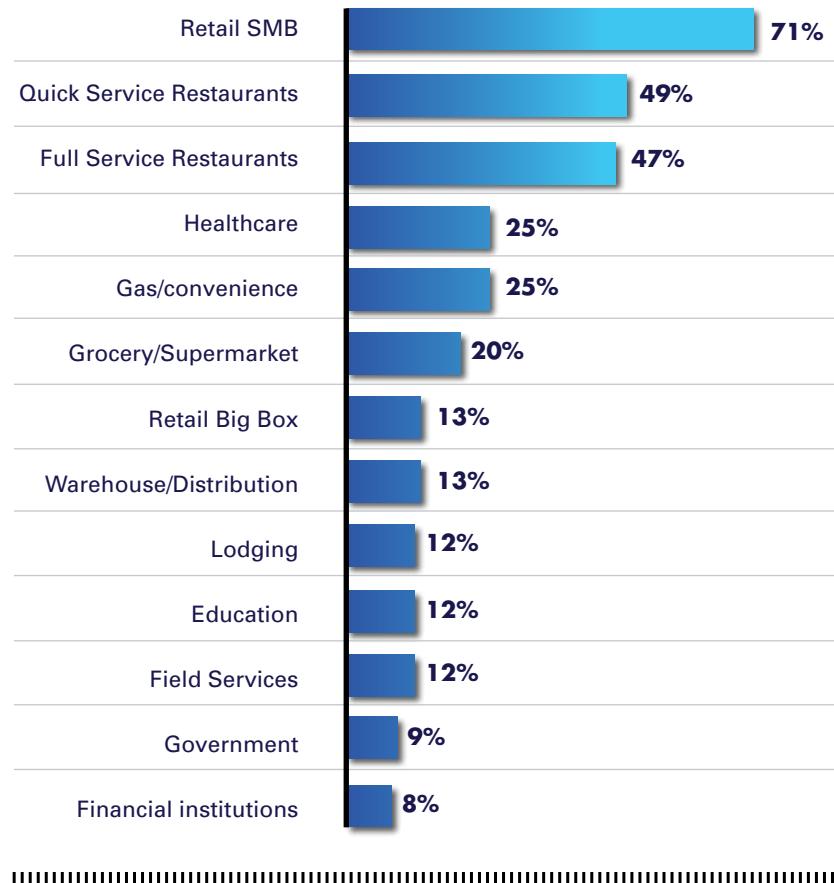


FIGURE 2

LEADING POS MARKETS: RETAIL & RESTAURANTS



processor-owned POS systems and ISVs that are not channel-friendly. "There are dozens of niche POS software vendors that are developing their POS system for a specific vertical," he says. "These ISVs tend to use online marketing to directly reach their target market, and do not have the resources or appetite to pay a VAR a commission for their services."

Why Upgrade?

Most POS buyers love to hold onto their equipment as long as possible to reap the most value from their investment. But inevitably the pain at some point outweighs the hesitation and they seek out a replacement. Knowing what problems are top of mind helps in crafting marketing messages that resonate with potential customers.

"Merchants are requiring more than the old POS systems," says one respondent. "They want all of the bells and whistles: document management, scheduling systems, advanced inventory functions, etc."

A significant problem — and one many Tier one operators devoted considerable

resources to address over the past few years — is the single-channel architecture underlying a lot of older POS systems as customer expectations have moved firmly to omnichannel operations: 27% of respondents cite the fact that e-commerce is divorced from the store as a top pain point.

A closely related issue, cited by 18%, is that POS is a silo that is not well integrated with the rest of the customer's business systems.

In a live survey at VSR sister publication's Hospitality Technology's Multi-Unit Restaurant Technology Conference (MURTEC) this past March, a member of the magazine's advisory board put it this way: "Integrations and data standards still

seem to be lacking in our industry," notes Steve Barrow, VP of IT for Luby's Fuddruckers Restaurants (www.lubysinc.com). "Independent systems remain difficult to integrate and many solution providers are selling systems that are not integrated as tightly as they should be."

Scott Curry, VP of IT for Craftworks Restaurant & Breweries (www.craftworksrestaurants.com), was even more blunt: "Open APIs? I think it's huge. I am just astonished at how closed most of the vendors are. The government is ahead of this

industry in terms of openness. That should make us feel a little strange."

It's worth noting that while these complaints lead the list, others are not far behind: issues with customer satisfaction, solutions that are not aligned with future needs and vendors that are slow to market with changes all garner nearly as many mentions.

Payment and Mobile Drive Purchases

Those pain points are pushing POS replacement projects, but there are a lot of factors pulling those purchases as well.

Payment has dominated attention over the past few years due to major payment data security breaches and the rapid rise of mobile payment and new payment technologies and regulations.

So it's no surprise that solution providers call PCI compliance the number one factor driving customers to upgrade POS (46%) (Figure 4). It's a big concern for solution providers too.

"The industry is in a frenzy about PCI as it's constantly changing the software manufacturers can barely keep up," says one solution provider.

Interestingly, the second-most cited driver is increasing the speed of checkout, (45%) up from number four last year. This is one of the longest-running drivers for new POS systems, going back decades. As processor strength rose and credit approval and receipt printing speeds decreased to mere seconds, some believed this problem would go away.

"The desire for expedient checkout has little, if anything, to do with the rate items are scanned or how fast receipts are printed — but rather because, in today's modern retail environment, the layers to the transaction have changed," says George Muchae, director of business development at New West Technologies (www.newwest.com). Instead, it's authenticating

FIGURE 3

TOP PAIN POINTS OF EXISTING POS SYSTEMS

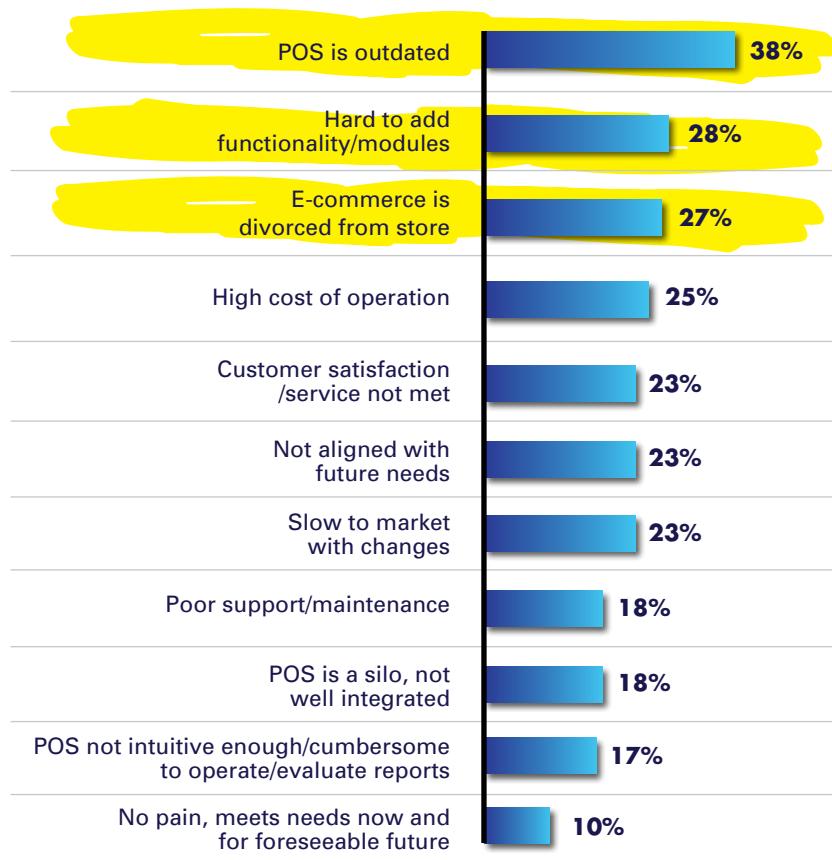


FIGURE 4

TOP REASONS FOR UPGRADING POS



IDs for loyalty programs, redeeming coupons and rewards or using ecommerce QR codes that have changed the scan and pay paradigm. "Merchants are compelled to have a speedy checkout at the risk of losing customers due to long lines; especially when they're selling merchandise that is readily available elsewhere," including ecommerce sites, he says.

Adding mobile POS is the third-most-cited driver (43%). Mobile is not only extending POS into places that were difficult to reach before, but also replacing or supplementing fixed position POS in retail, hospitality, healthcare and other settings of all sizes and settings.

"Everyone wants an iPad solution regardless of how it will work within their business/infrastructure."



The EMV liability shift coming in October, 2015 is also on POS buyers' radar — 32% of solution providers cite it as a driver. That indicates that efforts to spread awareness have paid off.

Interestingly, two modern retail themes have dropped off a bit as POS drivers. This year we asked about mobile wallet specifically, whereas last year we asked about enabling new payment options, including wallet. But interest dropped from (23% to 13%). Similarly, omnichannel fell from 21% to 13%.

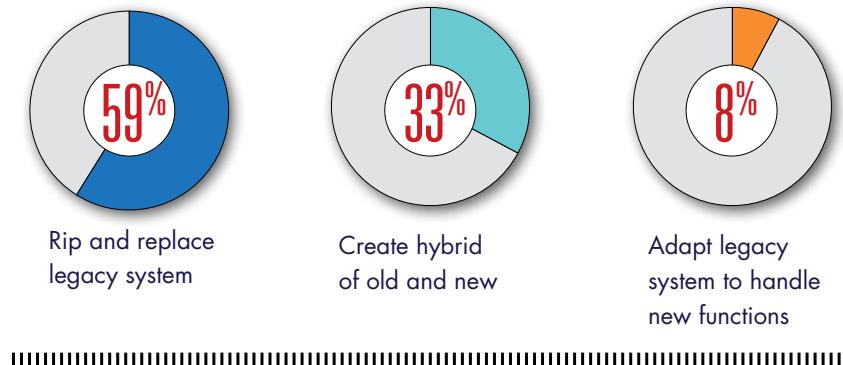
Those are still important concerns, but payment security and mobile (and speed!) still dominate POS buyers' concerns, an important thing to remember when marketing and quoting solutions.

Options Confound POS Decisions

But making the decision to replace POS is just the start. Gone are the days when the next decision point became which fixed

FIGURE 5

MOST COMMON FORM OF POS REPLACEMENT



POS platform to replace it with. Today's POS buyers face a dizzying array of choices:

- **Reusing some components of their current systems or undertaking a wholesale replacement**
- **Buying part or all of the solution as a service**
- **Licensing it up front, paying monthly, leasing, etc.**
- **Choosing thin client, mobile/tablet or PC-based POS, or a combination**

The choices solution providers see their clients making give some clues as to the general direction of POS evolution. They know POS buyers as a group have traditionally tried to hang onto hardware as long as possible. **But in the face of all the new POS options, just 8% of their customers are hoping to adapt their legacy systems to handle new functions. (Figure 5) A third are looking to create a hybrid of old and new systems.**

One solution provider says, "Integration to a client's existing system is more in demand than the need to install a completely NEW POS system." But that's not the majority: **The largest group, nearly three in five (59%), want to rip and replace their legacy systems.**

That's potentially good news for solution providers, because it means bigger projects. However, the popularity of consumer grade devices such as iPads together with diminishing hardware mar-

gins have reduced some of the upside. Completely new systems do mean new software and services at a time when more POS solution providers are migrating to SaaS reselling and a services-based business model.

But when it comes to how to pay for POS hardware, software and support, the largest group of POS buyers are decidedly traditional. The most-preferred model is hardware up front, a software license fee up front and a monthly support fee (42%).

However, as-a-service is gaining ground (Figure 6): The second-most popular pay-

ment model is hardware up front and software and support as a service (23%), followed by solution-as-a-service: One monthly charge for hardware, software and support (19%). The oldest model is the least-requested, but only by a small margin: Hardware and software up front and per-incident support (16%).

Where is POS Headed?

The mixed messages around buying decisions reflect the rapidly shifting nature of POS. "There is a lot of noise and confusion about today's POS technology," says one respondent.

We asked solution providers about how they see the physical format of the POS changing over the next few years (Figure 7). Several newer trends led the way:

- **Hybrid POS platform and e-commerce platform (49%)**
- **SaaS/Cloud/On-demand delivery with in-store server back-up (41%)**
- **Mobile POS takes the leading role over fixed POS (40%)**

"There will be a growing demand for the mobile iPad/tablet with a need for the anchored base terminal to round out the fast-paced needs," one respon-

FIGURE 6

HOW DO CUSTOMERS PREFER TO PAY FOR POS?

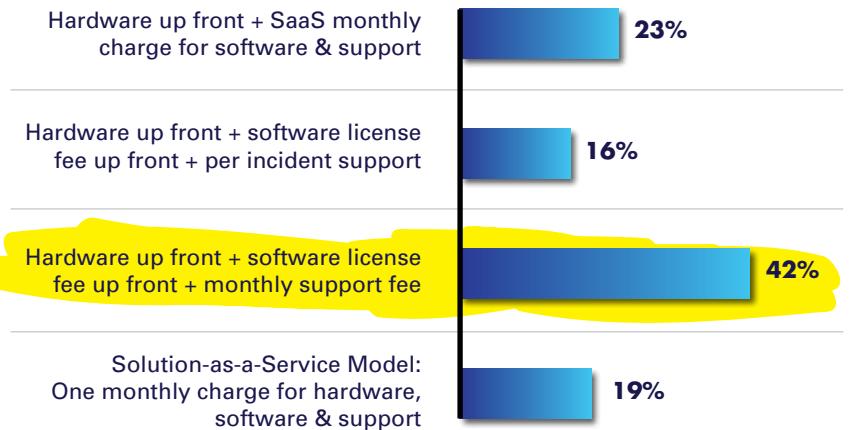
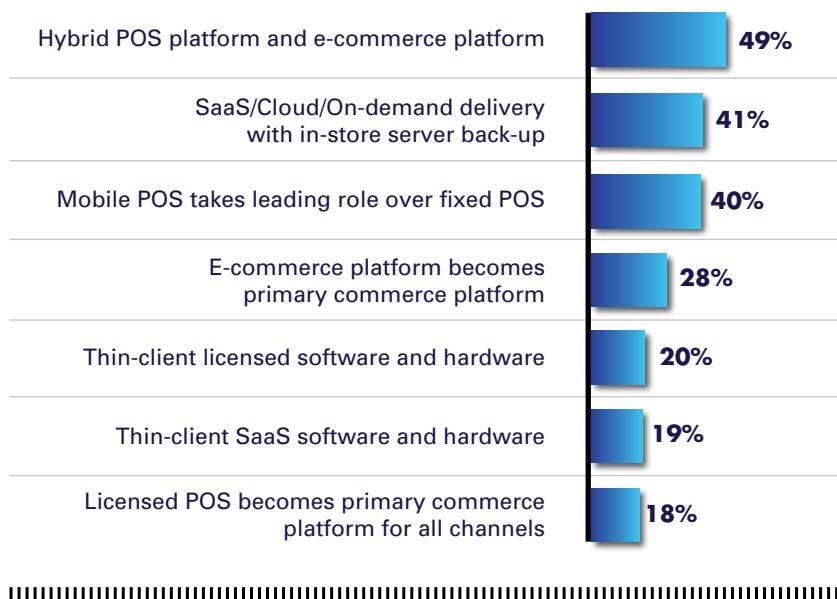


FIGURE 7

HOW DO YOU SEE THE PHYSICAL POS FORMAT CHANGING



dent predicts, while another notes, "The low end is being taken over by cloud-based services."

A somewhat smaller percentage (28%) of solution providers envision e-commerce platforms becoming the primary commerce platform, as omnichannel becomes the dominant model of retailing, dwarfing the 18% who see the licensed POS device as the primary platform for all channels.

Thin POS models continue to have their proponents, with 20% seeing thin-client licensed software and hardware predominating and 19% favoring thin client SaaS software and hardware. "Retailers are looking to cut hardware costs by deploying thin client hardware and more hosted solutions," one respondent notes.

Mobile Becomes Mainstream

Mobile devices have moved into POS in a big way, particularly in tablet-based solutions for both countertop and on-the-

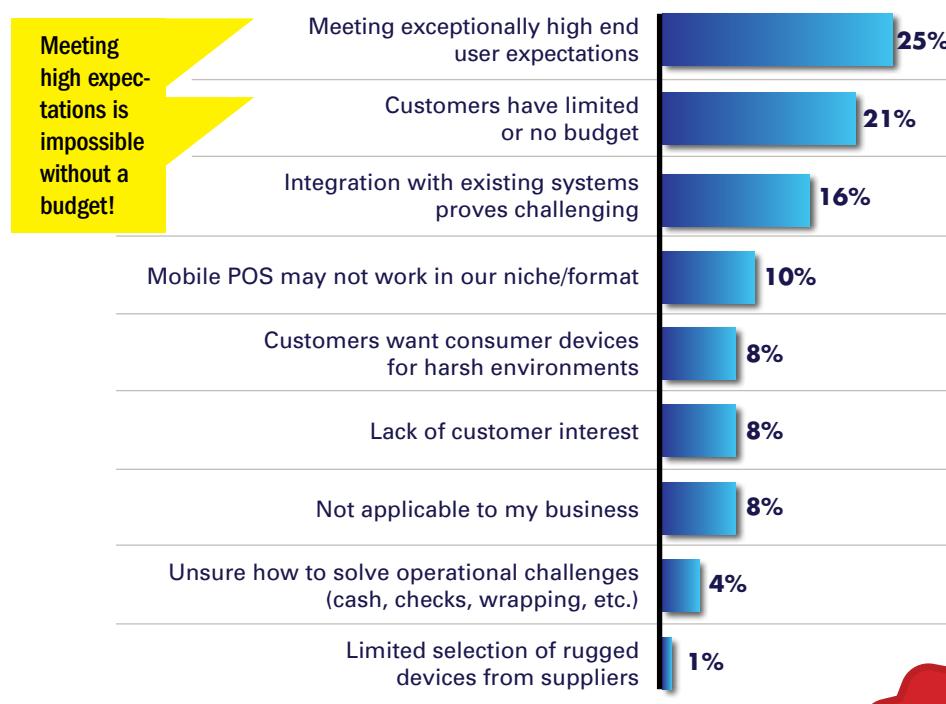
FIGURE 8

MOBILE SALES BY VERTICAL MARKET

Vertical Market	Yes, currently sell a mobile POS solution	Plan to in the next 12 months	Plan to in the next 2 to 3 years	Have no plans to sell a mobile POS solution
Retail Big Box	67%	11%	22%	0%
Grocery/Supermarket	57%	36%	7%	0%
Retail SMB	53%	33%	6%	8%
Quick Service Restaurants	66%	26%	6%	3%
Full Service Restaurants	71%	26%	3%	0%
Lodging	67%	33%	0%	0%
Healthcare	42%	26%	16%	16%
Government	57%	29%	14%	0%
Education	67%	22%	11%	0%
Warehouse/Distribution	60%	30%	10%	0%
Field Services	78%	22%	0%	0%
Financial institutions	60%	20%	20%	0%
Gas/convenience	56%	33%	11%	0%

FIGURE 9

HYPE MAKES SELLING MOBILE POS A CHALLENGE



move POS. As we saw in earlier results, mobile POS is the number three driver of new POS investments, and 40% of solution providers see mobile POS taking a leading role over fixed POS. In IHL Research's report, *Mobile POS: Hype to Reality*, researchers project a 380% increase in shipments of mobile devices from 2013 through 2017.

Because of this, just over half of respondents sell a mobile POS solution (56%). That's down a bit from the 69% reported last year, but not for long. In only three verticals is there any measurable number of solution providers NOT planning to sell mobile POS. Solution providers selling into field service (78%) and full service restaurants (71%) lead the way in featuring mobile on their line cards, followed closely by those selling into retail big box, lodging and education (67% each).

In RIS' audience, just 9% currently have

up-to-date mobile POS. More than one in four (26%) are deploying mobile POS right now and another 28% have plans — making more than half investing in mobile POS.

Despite the enthusiasm, simply offering a highly hyped product category isn't enough. In fact, that hype is the biggest challenge. Consumers have developed sky high expectations about the mobile experience that they bring to commercial settings, both as customers of businesses and as buyers of POS solutions for their own operations. **As seen in Figure 9, meeting exceptionally high end-user expectations is the top-rated challenge to selling mobile POS (25%).** The experience of selling mobile "keeps on evolving as mobile IT users' expectations increase," notes one respondent.

Budgets are also an obstacle, with

21% of solution providers saying customers have limited or no budgets with which to realize their mobile POS dreams. One respondent commented, "Mobility is not free and I have to explain that to my customers who want it for free. 'Why do I need to buy the iPad?' Because Apple does not wholesale it."

And then there is the challenge of integration, cited by 16%.

Despite the hype around mobile, few see fixed POS going away anytime soon. The RIS survey also found the vast majority (80%) of retailers reporting no plans to decrease the number of fixed POS terminals they use. Mobile becomes an add-on, not a replacement, for these larger operators.

Those aren't the only mobile POS sales concerns. One respondent notes, "Mobile is king and security is a constant challenge where the make or break of a business is dependent on ease of use and secure data collection and transmission."

What Buyers Want

POS is far from the only item on buyers' shopping lists. The hottest five technologies buyers are interested in, according to solution providers, are (Figure 10):

● **Payment security.**

One respondent notes a focus on "payment security concerns and cost associated" among buyers.

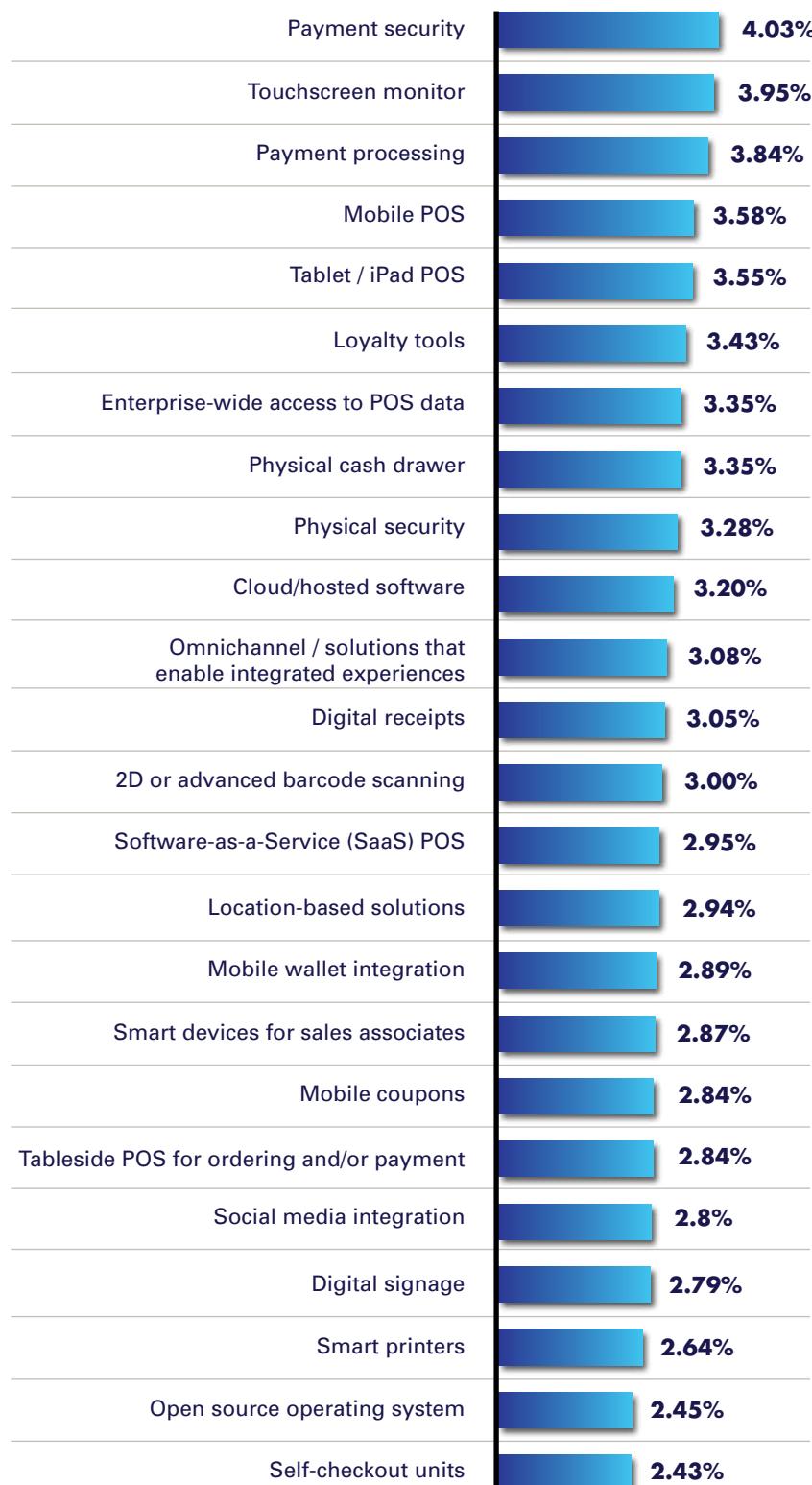
● **Touchscreen monitors.** This category indexes high across all verticals, led by financial institutions.● **Payment processing.** Merchant services providers are capitalizing on this demand to offer POS solutions bundled with payment, a topic we explore in depth later in this report.● **Mobile POS.** "Some early adopters are open to and excited about iPads or POS devices that the employee can bring to you," says one respondent.

Customers are demanding more personalized options.



FIGURE 10

TECHNOLOGIES RATED BY LEVEL OF INTEREST AMONG END USERS



- **Tablet-iPad POS.** "These new breed of POS software applications designed specificity for tablets and mobile devices are very appealing to retailers opening new stores," says MicroBiz' Kogler. "They also generally have more modern interfaces, are easier to use, sleek look and feel and have more features suited for today's 'connected customer' such as emailed receipts, mobility and loyalty programs."

ONE SOLUTION PROVIDER PUT IT BEST

"The merchants are more savvy, very selective, very precise on where technology needs to fit into their retail strategy, and their willingness to adapt to change. This has driven a paradigm shift, compelling todays VARs to be more educated, current on tech trends and ready to bring smart technology tools to serve the omni-channel retail market."

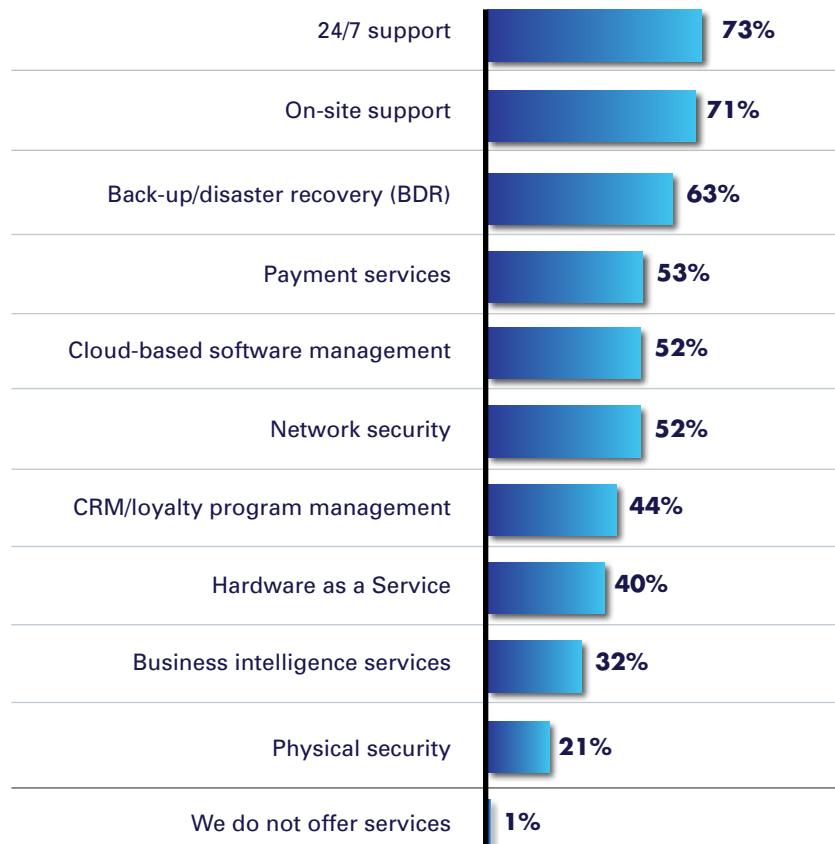
Note that two of the top five technologies relate to payment and three to tablets and the touch interface they employ, reinforcing the top-of-mind status of these trends among buyers.

But the good news is, they don't lead by much. Many other technologies garner nearly as much interest and therefore broad opportunity for solution providers to craft complete solutions and sell add-ons to customers whose POS is up to date. These additional technologies hit a weighted average importance score 3.0 or higher. We cross referenced solution providers' ratings with the verticals they sell into to get an idea where these technologies are resonating best. Financial institutions appear to be in buying mode:

- **Loyalty tools:** Led by financial institutions, field services, gas and convenience

FIGURE 11

SERVICES OFFERED WITH POS SOLUTION



- **Physical cash drawers:** Led by financial institutions, government, education, lodging and gas/convenience
- **Physical security:** Led by financial institutions, government and lodging
- **Cloud/hosted software:** Led by government, lodging and retail big box
- **Digital receipts:** Led by financial institutions, government and field service
- **2D or advanced bar code scanning:** Led by financial institutions, retail big box, gas/convenience

The Role of Support

Buyers turn to solution providers for the personal attention, customized expertise and support they offer. So it's no surprise that 24/7 (73%) and on-site support (71%) are offered by the largest percentage of respondents (Figure 11). One respondent notes "a desire for responsive and immediate technical support."

BDR (back-up/disaster recovery) is also widespread, offered by 63%, followed by payment services (53%): Both have been standard parts of most POS solution providers' line cards for years.

But two POS companion services are on the rise: network security climbed from 39% last year to 52% this year, reflecting the heightened security awareness evident in POS buyers' purchase priorities. Cloud-based software management is also offered by 52% of solution providers.

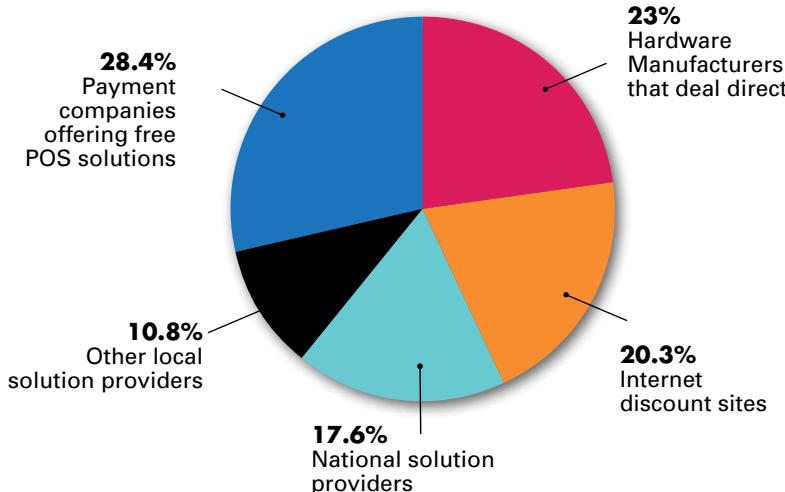
The percentage of solution providers offering business intelligence services fell from 42% to 32%. CRM/loyalty program management also dropped from 56% to 44% of providers.

Opening the Powder Keg: Payment Companies in POS

No topic invites more collective passion from solution providers than the changing competitive landscape. Merchant services companies have moved into the

FIGURE 12

COMPETITIVE LANDSCAPE



Point of Sale Buyers View 2014

Software Advice (<http://www.softwareadvice.com/retail/>) is a web-based company that connects POS systems vendors with retail software buyers. Recently, it analyzed a random selection of interactions with retailers to uncover common pain points and reasons for purchasing new software. The sample consisted of mostly single-store specialty retailers (77%), and those who manage two-five stores (18%). Here are key findings:

Most of the buyers

(42%)

wanted to replace existing POS or other retail software

20%

are still using cash registers

21%

are currently using manual methods (spreadsheets, paper ledgers, hand written receipts)

15%

want POS software that's compatible with iPads

14%

are looking to upgrade to a more user-friendly interface

Of those replacing current POS systems, **37%** need advanced functionality in the form of:

- Inventory management (76%)
- Reporting & analytics (60%)
- CRM (39%)

POS space in a big way with bundled solutions that include payment and “free” or low-cost POS, often on tablets. They have quickly become solution providers’ biggest competition (Figure 12).

“As banks and processors move into POS, they are stealing market share from established software vendors and VARs that have historically been viewed as partners,” says Microbiz’ Kogler. “These larger entities can treat POS as a ‘loss leader’ to capture the higher margin processing business.”

This not only threatens initial sales, but long-term relationships as well. Consider this respondent’s assessment: “Processors [are] offering POS software to ‘lock in’ payment processing business. As switching costs of POS are much higher than the cost to switch processors, this will lower churn for processors. The question will be whether retailers will feel comfortable being locked into one processor/POS provider, as the integrated processor/POS vendor will have little incentive to offer competitive rates knowing that the retailer will be reluctant to incur the costs to switch POS systems.”

But not everyone sees this entirely as us versus them. **This viewpoint comes from another respondent:**

“The biggest change is the exponential increase in the co-dependency of the payment processing industry and point of sale industry. Long gone are the days when point of sale providers operated independently from the payment processing providers. The point of sale providers that still remain profitable are the providers that have been able to create strategic partnerships with payment processors.

It wasn’t long ago that there was an us (POS Providers) versus them (Credit Card Sales People). In these days there wasn’t a huge demand to be integrated with all the major processors because you could steer a customer in the direction of a single processor and there wasn’t a demand for other processors from the customer.

Now payment processing companies provide many more business services to point of sale customers than ever before including financing, payroll, SMB services, HR, etc. POS vendors can now leverage these programs and create very profitable relationships with payment processors.”

Hardware companies are also feeling the heat from POS offered on consumer grade devices, and results suggest they may be switching strategies as a result. **Last year 8% of solution providers said “hardware providers that deal direct” were big competition. This year 23% make that assessment, displacing long-time competitor Internet discount sites as the second biggest competition (21%).**

“Big hardware suppliers have pricing going in wrong direction (up) and layering newer technology on top of older technology (poorly),” one respondent says.

Bombarded with Change

The type of players in the competitive arena isn’t the only way the business of selling POS has changed. In addition to the merchant services POS play, “there are a lot of ways that the POS market has changed over the past few years including mobile POS, SaaS offering, migration to MSP, etc.,” one solution provider says, a sentiment echoed by a number of respondents. “In fact, the POS environment looks entirely different.”

Another notes, “new technologies [come] at a super fast pace.”

The availability of low/no cost POS is not only winning business, but impacting buyer expectations. Buyers have “High expectations for large-chain features at mom and pop prices,” says one respondent.

But not everyone is at the cutting edge. The changes are at last dragging some holdouts out of the pre-computer stage, according to this solution provider. “More merchants adopting POS vs. multiple solutions that are not integrated. The days of the stand-alone cc machine, Big Chief Tablets (those are paper tablets for those who have never seen one), un-programmed cash register and pocket calculator are not far from over, but it’s surprising how many people still try to run their business that way! Owners are realizing that it’s more difficult for employees to steal when there’s a POS solution in place.”

But complaining about change has never worked: Nimble shifting strategies to meet the customer where they are is the recipe solution providers have employed for decades to meet each channel-threatening change. **VSR**



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