
2009 Escalate Retail Summit ~ Ecometry General Session

This year was the first year that the conference was held on the west coast. The conference featured support from Escalate corporate and a review of the Escalate business as a whole was given by Stu Bloom CEO of the Escalate group. This conference was focused on the Ecometry division, especially with messages around PCI compliance, and migrations.

Summit Sessions



Theme

Brian Johnson is your Sherpa! Brian's job is to help you and your company make the trek to the summit... just like a Sherpa on a climb of Mt. Everest.

[Read more...](#)



The Ecometry Road Map

Brian and his team laid out the Ecometry Road Map to help their customers understand the company's future plans when rolling in and out versions of the software... [Read more...](#)



Some Interesting Statistics

Ecometry spent \$15 Million on R& D
48 Escalate Customers were represented at the Summit
25 Sites Migrated during 2008 [Read more...](#)



PCI

Ecometry is taking security very seriously. They have Tom Mulder leading their Industry Compliance team in the effort to stay on top of the security practices. [Read more...](#)



Migration Process

Todd Misemer (Escalate Retail) and Birket Foster (MB Foster) headed up the round table for the migration track. Todd commented that migrating to Open Systems is like a new install. [Read more...](#)



MB Foster

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The information provided, are my opinions and not the opinions of all those that attended. Some of the information, may not be 100% accurate, however, I've done my level best to provide an overview of topics that may fit your upcoming goals and objectives.

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1) Theme

Summit - Brian Johnson is your Sherpa! Brian's job is to help you and your company make the trek to the summit ... just like a Sherpa on a climb of Mt. Everest, you can get the guidance, coaching, and assistance you require to help your organization get the best out of the journey that you are on...whatever your skill level, Brian will make sure the Ecometry team resources will be there to support your quest. Each company has its own resources and skills and will require different assistance to get to the peak ... Brian is carrying the load with his team to make the journey easier. So while you were at work, the Ecometry team spent 13,000 hours enhancing the Ecometry software to address 924 enhancements in the last year including ...

- * Auto update to Fraud DB, Customization filter
- * Refund Management, Charge back management
- * Multi Co/Division support, PIP management
- * New ESM Help (Visual Link is being sunset)

Ecometry is releasing a .NET commerce engine, currently being installed at Gump's and other sites. An enhancement document has been released which details this information.



2) More Enhancements

More enhancements are coming related to conversion to COBOL.NET

- * Proof of Concept has been completed
- * Confirmed that COBOL.NET will be a 64bit solution
- * Can be easily integrated with other .net products because of the way the .NET technology works the COBOL.NET will interoperate with programs in VB.NET, C#, etc within the .NET frameworks
- * The solution scales easily
- * Timeframe for this release is unknown but progress is being made

What else is coming?

- * Cross Channel Commerce
- * Order on-line, pick up at store
- * Mobile Commerce – order from social networks, using Microsoft's SNAP TAG
- * SNAP TAG is currently available and easily enabled in Ecometry

3) Roadmap

Brian and his team addressed the version road map to help customers understand the plans for evolving the versions of Ecometry so they can fit the changes into the customer's schedule.

- * Q1-09 v8.1 Open Sys – end of life
- * Q2-09 v10.04 Open Sys
- * Q4-09 v 11.01 Open Sys and support for SQL Server 2008

Last year Brian shared with attendees that Escalate was moving forward with a Shipping Gateway. This would allow you to reach out to other agents beyond FedEx and UPS. Brian stated this year that this project has been postponed due to the economic climate. Escalate is considering development of an automated upgrade utility, allowing clients the ability to move easily from current to new versions.

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4) Some Statistics

- ◇ The Escalate Group has 3 divisions
- ◇ Current installed base includes:
 - * 44% are direct commerce (Ecometry)
 - * 19% are general retail (combination of Blue Martini / Ecometry + brick & mortar)
 - * 37% are big ticket (GERS/POS)
 - * 31% of the revenue for Escalate comes from Ecometry
 - * 37% of the people are in the Ecometry division
- ◇ 33% of the R&D is being spent on the Ecometry division

Stu felt that Escalate was well positioned due to the trends on flexibility, service & choice across the channels, This should mean 40% of all sales will be cross-channel by 2012 (Source Forrester – The Web’s impact on Retail Sales). Escalate is driving a ‘buy anywhere, fulfill anywhere’ commerce focus.

- ◇ 25 sites migrated during 2008
- ◇ Backlog of >25 sites pending ‘go-live’
- ◇ 75 MPE sites have yet to plan or engage with Escalate
- ◇ New International Sales
- ◇ Predictable sales in Escalate group with ~420 Escalate multi-channel customers (upgrades, support, services)



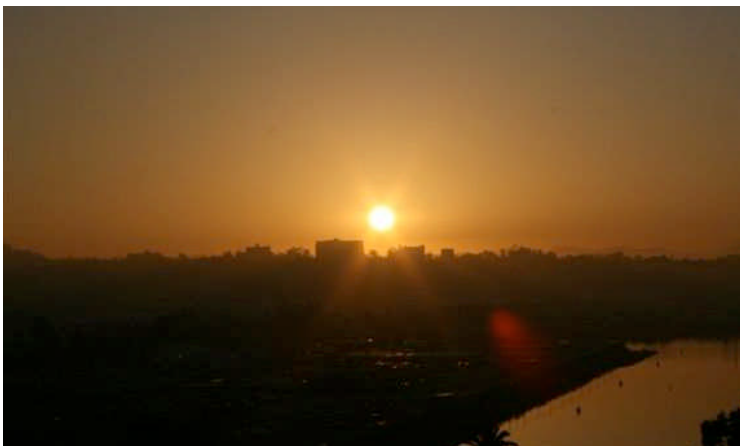
- ◇ Strong balance sheet and enterprise value
- ◇ Spent \$15 million on R&D
- ◇ 48 Escalate companies represented at the Summit
- ◇ Total client/customers in attendance was 81
- ◇ 24 Escalate Alliance Partners were represented (MB Foster was a SILVER sponsor of the conference)
- ◇ Escalate staff in attendance was 30 - 40
- ◇ Customer Satisfaction Surveys
 - * 15% very positive
 - * 59% positive
 - * 17% no response

5) PCI

Within Escalate Retail there is a dedicated Security Team. Tom Mulder is the director of Industry Compliance – he has 13 years of retail electronic payment processing experience. His team will be responsible for quarterly security meetings, monitoring PCI changing requirements, Annual PCI-DSS/PA-DSS assessments, company security education, and reviews of electronic payment application designs for compliance. Escalate has passed PCI compliance and obtained certification for version 10.02 of Ecometry Open Systems.

MASTERCARD – PCI DSS Presentation

A Mike Green from MasterCard gave a very detailed presentation on PCI-DSS (Data Security Standard) and PABP (Payment Best Practices). He provided a URL to the PCI Security Council www.pcisecuritystandards.org as the place to go to learn more about PCI compliance. At this site you can find the “self assessment questionnaire (SAQ)” to determine your readiness for the July 2010 deadline.



At this website you will also find a Prioritized Approach for DSS – It provides guidance that will help merchants identify how to reduce risk to card holder data as early on as possible.

The motto throughout his presentation was if you don’t need customer credit card information, “don’t store it”. Additionally, clients need to validate if they are PCI compliant every year.

One final note, if you using some other credit card processor (Paymentech etc.), you still need to be PCI compliant as you are storing credit card information.

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6) Migration Process (Understanding the Process)

Todd Misemer (Escalate Retail) and Birket Foster (MB Foster) headed up the round table for the migration track. Todd commented that migrating to Open Systems is like a new install. For Ecometry, the migration focus is on the back office (IT). He and Birket mentioned the following is needed:

This migration process is well defined by now – you need an executive sponsor in your organization, you will need to plan the timelines so 'go-live' is at a good time, the testing needs to be planned (Birket pointed out it usually take 3 times as long as you thought), Ecometry will help with the environment (SW/HW/Back office), EMMA will move Ecometry data – MB Foster can help with non-Ecometry data. MB Foster will also help with surround code planning, and execution – surround code is everything that interfaces to Ecometry like data extracts and reporting (Got Suprtool?).

- * Training i.e. Database Course (available directly from Escalate can take over the web)
- * EMMA and or Bridgewater is required to move Ecometry data: 120 day license is available. The recommendation was to split the time i.e. 90 days (for test migrations) and 30 days (for go live).
- * If you have 70 GB of data it will take 24 hours. It will take an additional 12 hours to do a full re-index.
- * Test data migrations can be done during daily processes
- * EMMA has error and reject log files
- * EMMA does not move GTS data
- * It was highly recommended that you clean your data before moving forward with test data migration. ‘
- * It was recommended that you have 20-25 users per application server if using Visual Link.
- * On average you will perform anywhere from 3-5 test data migrations before going live.
- * Surround Code inventory should be completed with the objective of trying to determine what surround code is obsolete in your organization.

Standard Escalate Migration Service is 480 hours @ \$200.00 USD per hour. A complex migration service pack might go as high as 2057 hours. The surround code is over and above that. Surround code includes reports, extracts, interfaces to other systems, and any customizations or applications written to interface with the Ecometry system.

Those who have migrated confirmed that the effort and cost to convert GTS to a Windows environment was minimal and easily accomplished and could be done in advance of a migration to Ecometry Open Systems.

MB Foster detailed their Operational Data Store (ODS) and Datamart solutions which are available for both classic Ecometry on the HP 3000 and integrated to work with the Ecometry Open product, see: http://www.mbfoster.com/datamart/datamarts_escalate.cfm

Fun at the conference – There was an outing to the Shout House and also a poker night – what happens at Ecometry stays at Ecometry ;-)



If there are questions or comments, please get hold of Lynn Hall at 1-800-ANSWERS (that's 800-267-9377) extension 225 and we will help you out.



On behalf of the team, thanks for all your business,

Birket Foster, Chris Whitehead & Kamin McKay

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