

WAVE REPORT

The Forrester Wave™: Order Management Systems, Q1 2025

The Eight Providers That Matter Most And How They Stack Up

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Summary

In our evaluation of order management system (OMS) providers, we identified the most significant ones and researched, analyzed, and scored them. This report shows how each provider measures up and helps you select the right one for your needs.

Additional resources are available in the [online version](#) of this report.

Evolution And Improvement Drive Order Management Adoption

The current order management system (OMS) market tells a story of evolution — on the part of the vendors themselves and the businesses that use them. The vendors are in various states of improvement. The long-standing ones are modernizing by moving solutions to the cloud or unifying them on a single platform. Newer solutions are expanding [functionality](#) and partnerships. They're all thinking about how data gets in and out of these mission-critical systems, evolving from integrations through API calls and now to [event-driven architecture](#). Many digital businesses currently demonstrate their evolution not by major replatforming projects but by augmenting their deeply ingrained systems with modules of modern solutions. Maybe those changes will result in a slow replacement, but they may also represent a new version of modernization that maintains legacy “nucleus” systems at the core of the ecosystem while keeping the “electrons” of modular systems in orbit longer term.

OMS customers using this evaluation to inform a purchase decision should consider:

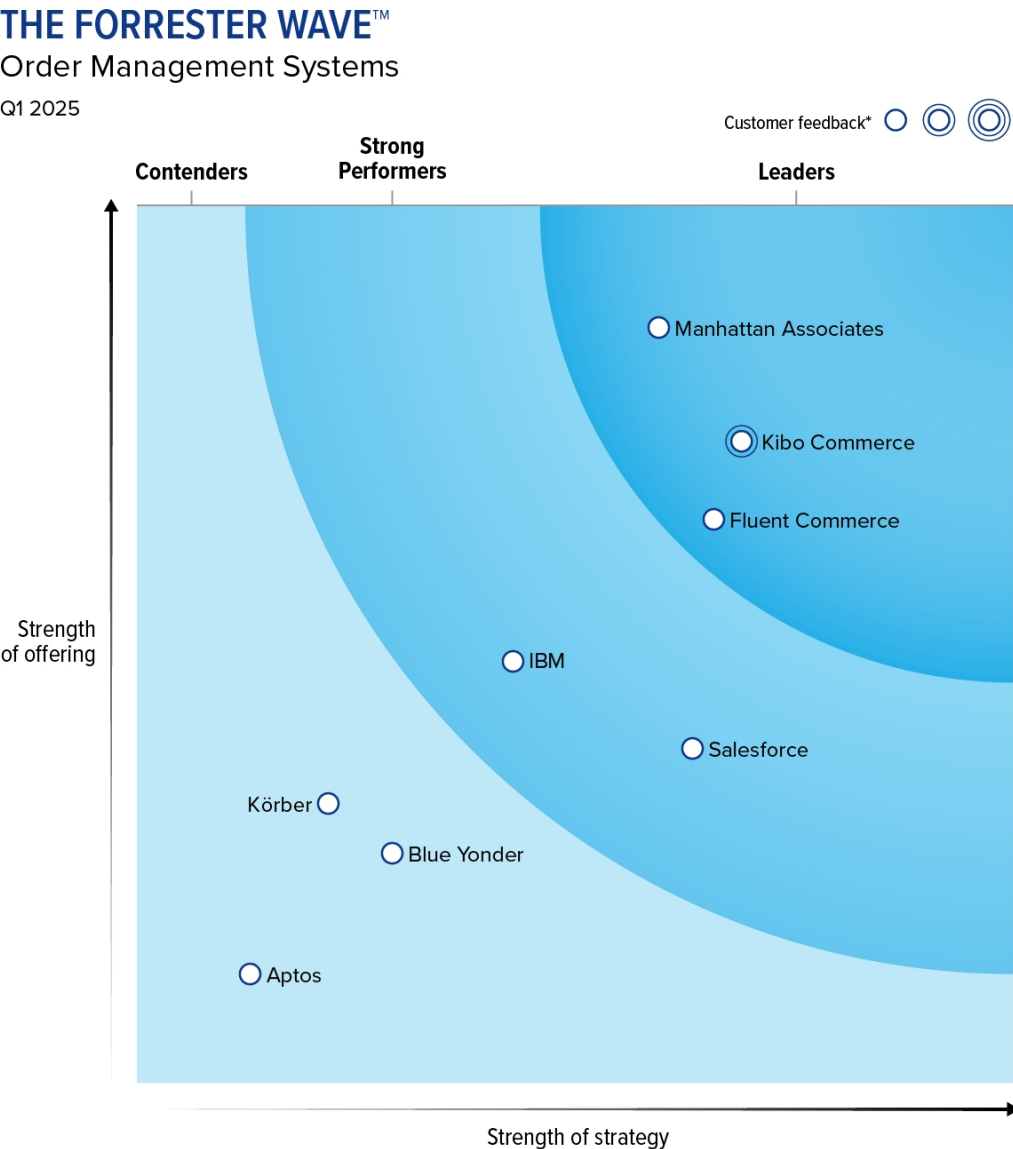
- **Whether an augmentative approach is best for their current state of OMS evolution.** OMS selection processes are now a matter of whole or part. Incremental adoption isn't new, but historically, it was about a “strangler pattern” to replace a legacy OMS (if slowly). Now, many digital and technical leaders [have a long-standing OMS](#) that they can't simply replace, even slowly. They should seek individually deployable modules from newer solutions that they can run alongside their preexisting OMS. This augmentative approach is a powerful option for businesses that previously were stuck with the limitations of existing solutions.
- **Whether a complete replacement or new adoption will bring the most value.** A “whole” approach to OMS adoption is best for businesses that don't yet have a packaged OMS or for those that can execute a replacement of a preexisting system. Although the costs of a replatforming are significant, they may not outweigh [the costs of remaining](#) with a solution that no longer is adequate. Examine the significant potential benefits from a modern, packaged OMS to direct costs, efficiency, and savings in the long term.
- **The experiences of all users.** Even reference customers that highly rated the usability of their vendors' solutions noted that they might have different answers for some specific OMS UIs. Many of these systems have multiple experiences, such as a mobile interface for store associates, an application for shipping, a technical UI to manage workflows, and the primary admin interface. Despite claims that each UI serves a different role, when vendors provide multiple experiences,

leaders must understand how and where users will work and evaluate the quality of the experiences for all users in order to head off frustrations for some teams.

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, and Contenders (see Figures 1 and 2). We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt the findings based on their priorities using Forrester's interactive provider comparison experience.

Figure 1
Forrester Wave™: Order Management Systems, Q1 2025



*A halo indicates above-average customer feedback. A double halo indicates that the vendor is a Customer Favorite.

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Figure 2

Forrester Wave™: Order Management Systems Scorecard, Q1 2025

		Forrester's weighting	Aptos	Blue Yonder	Fluent Commerce	IBM	Kibo Commerce	Körber	Manhattan Associates	Salesforce
Current offering			1.42	2.00	3.60	2.92	3.98	2.24	4.52	2.50
Usability and configuration	4%	1.00	1.00	5.00	1.00	5.00	1.00	3.00	5.00	
Reporting and analytics	5%	3.00	1.00	5.00	1.00	5.00	3.00	5.00	3.00	
Actionable alerts	5%	1.00	1.00	3.00	3.00	3.00	1.00	5.00	5.00	
Workflows	4%	1.00	1.00	5.00	3.00	3.00	1.00	5.00	3.00	
Enterprise inventory management	5%	1.00	5.00	5.00	5.00	5.00	1.00	3.00	3.00	
Inventory segmentation and allocation	5%	1.00	1.00	5.00	1.00	3.00	5.00	5.00	1.00	
Store inventory management	1%	1.00	3.00	1.00	3.00	3.00	1.00	5.00	3.00	
Order orchestration rules	4%	1.00	3.00	5.00	3.00	3.00	3.00	5.00	1.00	
Omnichannel order management	4%	3.00	1.00	3.00	3.00	5.00	3.00	5.00	1.00	
Fulfillment automation	4%	3.00	5.00	1.00	3.00	5.00	3.00	3.00	1.00	
Pre-purchase customer experience	4%	1.00	3.00	5.00	3.00	3.00	3.00	5.00	3.00	
Post-purchase customer experience	2%	1.00	5.00	5.00	3.00	5.00	1.00	5.00	3.00	
Pricing and promotions	3%	3.00	1.00	1.00	5.00	5.00	1.00	3.00	1.00	
Digital products and services	3%	1.00	1.00	1.00	3.00	5.00	3.00	5.00	1.00	
Customer service	5%	1.00	1.00	3.00	3.00	5.00	3.00	5.00	5.00	
Store fulfillment: pick, pack, and ship or stage	5%	1.00	3.00	5.00	3.00	3.00	3.00	5.00	3.00	
Store fulfillment: pickup orders	5%	1.00	1.00	3.00	3.00	3.00	1.00	5.00	1.00	
Store fulfillment: administration	3%	1.00	3.00	3.00	3.00	5.00	1.00	5.00	1.00	
Endless aisle	3%	1.00	1.00	3.00	3.00	5.00	1.00	5.00	1.00	
Returns and exchanges	5%	3.00	1.00	3.00	5.00	3.00	1.00	5.00	3.00	
Customer self-service	3%	1.00	1.00	1.00	1.00	3.00	1.00	5.00	3.00	
Subscriptions management	1%	1.00	1.00	1.00	3.00	5.00	5.00	1.00	1.00	

Scores are on a scale of 1 (below par relative to others evaluated) to 5 (superior relative to others evaluated).

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	Forrester's weighting	Aptos	Blue Yonder	Fluent Commerce	IBM	Kibo Commerce	Körber	Manhattan Associates	Salesforce
Current offering		1.42	2.00	3.60	2.92	3.98	2.24	4.52	2.50
Drop shipping	3%	1.00	1.00	1.00	3.00	3.00	5.00	3.00	1.00
International orders and globalization	3%	1.00	3.00	5.00	3.00	5.00	3.00	5.00	3.00
B2B order management	3%	1.00	1.00	5.00	3.00	3.00	3.00	3.00	5.00
Scalability	4%	1.00	3.00	3.00	5.00	3.00	3.00	5.00	1.00
Architecture	4%	1.00	3.00	5.00	1.00	5.00	1.00	5.00	3.00
Strategy		1.44	2.12	3.66	2.70	3.80	1.82	3.40	3.56
Vision	15%	1.00	1.00	3.00	3.00	3.00	3.00	3.00	5.00
Innovation	15%	1.00	1.00	5.00	1.00	3.00	1.00	3.00	3.00
Roadmap	15%	3.00	1.00	5.00	3.00	3.00	1.00	3.00	3.00
Partner ecosystem	15%	1.00	3.00	3.00	5.00	3.00	1.00	3.00	5.00
Adoption	15%	1.00	3.00	3.00	3.00	5.00	1.00	5.00	3.00
Pricing flexibility and transparency	10%	1.00	3.00	5.00	3.00	5.00	3.00	1.00	1.00
Community	8%	1.00	5.00	3.00	1.00	5.00	5.00	5.00	5.00
Supporting services and offerings	7%	3.00	1.00	1.00	1.00	5.00	1.00	5.00	3.00

Scores are on a scale of 1 (below par relative to others evaluated) to 5 (superior relative to others evaluated).

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Leaders

Manhattan Associates

Manhattan's market-leading OMS is part of the Manhattan Active Omni platform. The product has broad features that appeal to a variety of customer profiles.

- **Strategy.** Manhattan both attracts and successfully retains customers in its target markets. Its customer base welcomes the opportunities it provides to interact at its annual user conference. Customers often adopt additional products from the vendor, such as the warehouse management system (WMS) and its newer point-of-service (POS) solution. It has an opportunity to improve its pricing flexibility and transparency so that customers better understand the costs of all of the functionality they will need.
- **Capabilities.** Manhattan's OMS has strong functionality across the platform. It has some strengths in several areas that other vendors don't have. For example, the

store fulfillment functionality included with the OMS provides strong support for pickup orders (e.g., click and collect, “buy online, pick up in-store” [BOPIS]). It also provides features for store inventory management, such as cycle counting, which are rare among its OMS peers. Its self-service portal for end customers to track orders, initiate returns, and get other support from merchants is a differentiator in the market. It is not strong in subscriptions management.

- **Customer feedback.** Customers appreciate that they have access to leadership within Manhattan and feel they have a strong partnership. They sometimes feel that new features bring additional costs, which add up quickly.
- **Forrester’s take.** Manhattan is a best fit for well-resourced organizations that require robust functionality, especially if they’re pairing it with Manhattan’s WMS.

View [Manhattan Associates’ detailed scorecard](#).

Kibo Commerce

Kibo’s refocus on its unified platform for commerce and OMS solutions paid off. Some thoughtful new features in order management and some strategic adjustments make it a compelling choice.

- **Strategy.** Kibo boasts recent adoption among net-new enterprise clients while successfully retaining its existing customer base. Customers have the opportunity to network at the vendor’s annual summit. The commerce and OMS solutions on a single platform bring benefits to customers via shared functionality, even when customers only buy into one or the other solution, earning it strength in supporting services and offerings. Kibo is on par in its vision and innovation, as it keeps pace with the changing market.
- **Capabilities.** Kibo’s recent additions include an SLA management interface that empowers nontechnical users to set parameters with impacts across the platform. Its unrivaled endless-aisle functionality enables store associates to serve customers when desired items are out of stock. Its market-leading subscription management functionality, available via an optional add-on within the platform, enables site admins, customer service reps, and the customers they serve to control subscription orders. The UI is more consistent and usable than most others.
- **Customer feedback.** Customers we spoke to expressed more satisfaction for Kibo than any other vendor we evaluated. They feel heard and express the sense that all customers enjoy that treatment.

- **Forrester's take.** Kibo is a best fit for organizations seeking a commerce-first approach to order management, with strong tools for nontechnical users.

View [Kibo Commerce's detailed scorecard](#).

Fluent Commerce

Fluent Commerce has set a bar for low-code/no-code tooling for technical users to manage workflows within the UI. It is gaining recognition in the North American market as it stretches beyond the APAC and EMEA regions.

- **Strategy.** Fluent is very strong in innovation, and customers feel the vendor proactively brings innovative functionality to them. Its roadmap manages customer expectations for delivery of new features. Fluent's pricing is straightforward, without unpleasant surprises. As a single-product company, it is weaker in supporting products and services.
- **Capabilities.** Fluent's UI remains one of the easiest to use in this market. It particularly shines compared to most other vendors in this evaluation in areas such as workflows, order orchestration rules, store fulfillment (pick, pack, and ship or stage), and B2B order management. Its experience in APAC and EMEA markets is evident in its capabilities around international orders and globalization. Over the past two years, Fluent has actively worked to gain ground on the functionality of more established competitors. It is weaker in some of the more niche criteria, such as pricing and promotions, subscriptions management, and customer self-service.
- **Customer feedback.** Customers feel very positive about their relationship overall with Fluent. Although they appreciate the ongoing support included after implementation, they would prefer an option that didn't require an outsourced first line of support.
- **Forrester's take.** Fluent Commerce is a best fit for businesses with more unique use cases that require more flexibility in an open platform, particularly if they'd like to add specific modules to their ecosystem rather than execute a full OMS implementation.

View [Fluent Commerce's detailed scorecard](#).

Strong Performers

Salesforce

The familiarity of Salesforce's tooling and availability of OMS functionality in other products on its core platform ("on core") within the Salesforce ecosystem are benefits to users of the broader portfolio.

- **Strategy.** The vendor clearly articulates its vision for this product and describes a clear path forward for its future. The partner ecosystem around Salesforce bolsters adoption and helped vault this product to prominence in just four years. Salesforce annual conferences support its community. Pricing and flexibility have an opportunity for improvement, as customers are not always clear on what it will cost and don't feel they can pay less if they need less than the full functionality available within the platform.
- **Capabilities.** The solution enjoys the standard Salesforce user tooling, which enables users to customize their own experiences. Salesforce is stronger than most in its support for B2B order management, including enabling parent and child accounts with different buying rules. Customers who purchase additional products from the vendor will find more complete support for some functionality, such as reporting and analytics, and pricing and promotions.
- **Customer feedback.** All reference customers we spoke with use additional products in the Salesforce portfolio and chose this as their first packaged OMS (not a replacement for another). Customers feel good about the relationship but note that their internal teams may have required quite a bit of training to successfully adopt this solution.
- **Forrester's take.** Salesforce's OMS is a best fit for companies that have already bought into the Salesforce ecosystem and will benefit from its interoperability with adjacent solutions on core.

View [Salesforce's detailed scorecard](#).

IBM

IBM's order management system has been a powerhouse in this market for years. It remains in use by a large portion of the market. Even as more businesses add modular functionality from newer vendors, the IBM OMS often remains in the ecosystem, if with reduced functionality.

- **Strategy.** IBM's partner ecosystem is foundational to the OMS product's success. Although some major systems integrators (SIs) have sunsetted their practices around other "legacy" OMS solutions, they describe thriving IBM practices. The product is isolated in the vendor's portfolio, without the benefit of shared platforms with adjacent solutions like some other vendors have. It continues to bring new features to market but does not innovate at the pace of its competitors.
- **Capabilities.** At its core, IBM is strong in enterprise inventory management, which enables it to serve as the foundation for the fulfillment operations for many businesses. It has proven scale, supporting some of the largest enterprises. However, customers increasingly add modules from competing vendors to enhance features like near-real-time inventory availability for digital channels.
- **Customer feedback.** Customers appreciate that this solution is a workhorse for their business. They find it impossible to remove, as the business is fundamentally reliant on it operationally. However, many are working to reduce that reliance — and the associated costs — as they carve out functionality to supplement it with more modern solutions.
- **Forrester's take.** IBM is a best fit for organizations with high-volume, global businesses and complex use cases that prefer to work with agencies or SIs to customize a solution to their unique needs.

View [IBM's detailed scorecard](#).

Contenders

Blue Yonder

Blue Yonder's combination of modules enables businesses to augment its ecosystem with targeted benefits. Its inventory planning background supports strength in inventory optimization.

- **Strategy.** Blue Yonder's biggest strategic strength is the community that it fosters, including its yearly ICON event. It is on par in adoption, pricing flexibility and transparency, and partner ecosystem. Its vision and innovation have faltered as it has worked to unify its modules at the underlying data model level in the past few years. It states that this work is mainly finished, so customers may be able to look forward to a more complete, unified solution from Blue Yonder in the near future.
- **Capabilities.** Blue Yonder has strengths in enterprise inventory management and fulfillment automation. Customers use the latter to augment other solutions. It is

also strong in post-purchase customer experience, enabling simplified messaging to end customers. It is weaker in some criteria that surround the user experience, including usability and configuration, reporting and analytics, and workflows.

- **Customer feedback.** Customers look to Blue Yonder to augment and supplement other order management systems. They add modules from the Blue Yonder portfolio to assist with inventory planning or delivery promising in the pre-purchase experience. Some don't see a path yet to purchasing a more complete solution from the vendor, likely because the various acquired elements are not yet unified as a single solution.
- **Forrester's take.** Blue Yonder is a best fit for organizations that want "strike mission" solutions to solve business problems without ripping and replacing their current solution.

View [Blue Yonder's detailed scorecard](#).

Körber

Körber's focus on supply chain provides benefits in specialty use cases. The vendor is just a few years into its acquisition of the enVista OMS and is still finding its footing.

- **Strategy.** Körber has strength in community, as it provides opportunities for customers to connect through advisory boards and its annual event, Elevate. It is on par in pricing flexibility and transparency. Körber is weaker in strategic areas such as innovation and adoption as it works to stabilize the acquisition and cement its position in the market.
- **Capabilities.** Körber remains unrivaled in its support for drop shipping. Customers use it as a connection broker, with the functionality included in the OMS. Körber is also strong in inventory segmentation and allocation, providing features backed by the expertise of this supply-chain-focused vendor. It is weaker in areas such as returns and exchanges, as well as enterprise inventory management.
- **Customer feedback.** Customers describe the relationship — particularly in reference to their points of contact — as open and positive. They look forward to the acquisition reaching stability within the new organization. They would appreciate more configuration controls to avoid paying for customizations, as well as a clearer roadmap with timelines for delivery.
- **Forrester's take.** Körber is a best fit for organizations that prioritize inventory management both for supporting drop-shipping suppliers and for their own drop shipping and marketplace selling.

View [Körber's detailed scorecard](#).

Aptos

Aptos is in the process of moving its existing OMS into its Aptos ONE platform. This evaluation includes the current version of its OMS, as this evolution is incomplete.

- **Strategy.** Aptos has had a consistent vision for its Aptos ONE evolution, which hasn't changed meaningfully in the past few years, although it has adapted (such as shifting focus away from API calls and toward event-driven architecture). However, the OMS is not yet on the Aptos ONE platform. Subsequently, Aptos is on par for roadmap, as it promises these changes are nearing reality, and for supporting services and offerings, as its POS already is on the new platform.
- **Capabilities.** Because it has focused on the architectural evolution of the OMS product onto the new platform in recent years, its capabilities have been somewhat stagnant. Aptos is on par in areas such as omnichannel order management, returns and exchanges, and fulfillment automation. Some functionality, such as store associate tools, are in Aptos ONE and will pair with the OMS when it moves onto the platform.
- **Customer feedback.** Customers are not leaving the platform, necessarily, but they are augmenting it with modules from other solutions. They find the isolated nature of the current version of the solution challenging to integrate.
- **Forrester's take.** Aptos has been on the cusp of a potential comeback with its OMS for several years. Now that the hard work of updating the underlying architecture is complete, 2025 may be the year it reintroduces OMS as a modern solution to the market and can restart its feature enhancement cycles for this product.

View [Aptos' detailed scorecard](#).

Vendor Offerings

Forrester evaluated the offerings listed below (see Figure 3).

Figure 3
Evaluated Vendors And Product Information

Vendor	Product evaluated
Aptos	Aptos Enterprise Order Management
Blue Yonder	Blue Yonder Inventory, Blue Yonder Commits, Blue Yonder Order Services, Blue Yonder Adaptive Fulfillment & Warehousing, Blue Yonder Commerce Insights and Actions
Fluent Commerce	Fluent Order Management
IBM	IBM Sterling Order Management Platform, IBM Sterling Inventory Visibility
Kibo Commerce	Kibo Order Management, Kibo Subscriptions
Körber	Körber Order Management System
Manhattan Associates	Manhattan Active Omni: Enterprise Order Management, Store Order Fulfillment, Inventory Management, Customer Engagement, Enterprise Promotion
Salesforce	Salesforce Order Visibility, Order Servicing, Order Management Growth

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Evaluation Overview

We evaluated vendors against three categories:

- **Current offering.** Each vendor’s position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering.
- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors’ strategies, including elements such as vision and innovation.
- **Customer feedback.** A halo on a vendor’s marker indicates above-average customer feedback relative to the other evaluated vendors. A double halo indicates outstanding customer feedback: We consider the vendor to be a Customer Favorite. As part of this evaluation, we speak with up to three customers of each vendor. We also consider customer input from our previous research.

Vendor Inclusion Criteria

Each of the vendors we included in this assessment has:

- **Support for inventory- and order-related functions.** This includes, but is not limited to, inventory visibility and allocation; order capture, modification, and orchestration; support for representatives and/or associates to serve customers during the order lifecycle; and store associate tools for store fulfillment. 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.
- **A broad customer base with mindshare among Forrester clients.** The vendors have an existing customer base of enterprise global customers, with traction in more than one global region, and 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 have stated that they generate \$15 million or more in annual revenue attributable to their OMS offering specifically.

Other Notable Vendors

The Forrester Wave evaluation is an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market and additional vendors that Forrester considers to be notable for enterprise clients in our corresponding report: [The Order Management Systems Landscape, Q3 2024](#).

OMS customers may be familiar with or considering the following vendor, which we did not evaluate in this report:

- **Oracle.** The OMS from Oracle is part of the vendor's Retail product portfolio. It remains in use by businesses dedicated to the Oracle ecosystem but is no longer a principal option across the enterprise market.

Supplemental Material

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](#) to evaluate participating vendors.

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 and briefings, and reference customer 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 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 October 22, 2024, 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 [our vendor review policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. We score vendors that met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation in accordance with [our vendor participation policy](#) and publish their positioning along with those of the participating vendors.

Aptos, Blue Yonder, and IBM declined to participate in the full Forrester Wave evaluation process. For vendors that are not full participants, Forrester uses primary and secondary research in its analysis. For example, we might use public information, data gathered via briefings, and independently sourced customer interviews to score the vendor. We may ask the vendor for an abbreviated briefing and/or to provide reference customers. We may also rely on estimates to score vendors.

Integrity Policy

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