Disclaimer

This report should be used for informational purposes only. Vendor and product selections should be made based on multiple information sources, face-to-face meetings, customer reference checking, product demonstrations, and proof-of-concept applications.

The information contained in all Wisdom of Crowds® Market Study Reports reflects the opinions expressed in the online responses of individuals who chose to respond to our online questionnaire and does not represent a scientific sampling of any kind. Dresner Advisory Services, LLC shall not be liable for the content of reports, study results, or for any damages incurred or alleged to be incurred by any of the companies included in the reports as a result of the content.

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Enterprise Planning: A Definition
An enterprise planning system covers the methods of planning for the internal and external factors that affect an enterprise. This includes strategic, operational, and financial planning.
Introduction
This year we celebrate the ninth anniversary of Dresner Advisory Services! Our thanks to all of you for your continued support and ongoing encouragement!

Since our founding in 2007, we have worked hard to set the “bar” high—challenging ourselves to innovate and lead the market—offering ever greater value with each successive year.

Our first market report in 2010 set the stage for where we are today. Since that time we have expanded our agenda and have added new research topics every year since. For 2016 we’re on track to release 15 major reports, including, this, our BI flagship report—in its seventh year of publication!

In addition to our ongoing coverage of key topics such as embedded BI, big data analytics and advanced and predictive analytics, we have added new topics including Collective Insights™ (blending collaboration and governance) and systems integrators.

This publication marks our second annual “Flagship” Wisdom of Crowds Enterprise Planning Market Study. In this report we examine user perceptions, intentions and realities associated with enterprise planning. For our second year of coverage we have included a number of year-over-year comparisons to indicate market shifts versus 2015.

We hope you enjoy this report!

Best,

Howard Dresner
Chief Research Officer
Dresner Advisory Services
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Benefits of the Study
The Wisdom of Crowds® Enterprise Planning Market Study provides a wealth of information and analysis—offering value to both consumers and producers of enterprise planning technology and services.

Consumer Guide
As an objective source of industry research, consumers use the Wisdom of Crowds® Enterprise Planning Market Study to understand how their peers leverage and invest in planning and related technologies.

Using our trademark 33-criteria vendor performance measurement system, users glean key insights into planning software supplier performance, enabling:

- Comparisons of current vendor performance to industry norms
- Identification and selection of new vendors

Supplier Tool
Vendor Licensees use the Wisdom of Crowds® Enterprise Planning Market Study in several important ways such as:

External Awareness
- Build awareness for the planning market and supplier brand, citing Wisdom of Crowds® Enterprise Planning Market Study trends and vendor performance
- Create lead and demand-generation for supplier offerings through association with Wisdom of Crowds® Enterprise Planning Market Study brand, findings, webinars, etc.

Internal Planning
- Refine internal product plans and align with market priorities and realities as identified in Wisdom of Crowds® Enterprise Planning Market Study
- Better understand customer priorities, concerns, and issues
- Identify competitive pressures and opportunities
About Howard Dresner and Dresner Advisory Services
The Wisdom of Crowds® Enterprise Planning Market Study was conceived, designed and executed by Dresner Advisory Services, LLC—an independent advisory firm—and Howard Dresner, its President, Founder and Chief Research Officer.

Howard Dresner is one of the foremost thought leaders in business intelligence and performance management, having coined the term “Business Intelligence” in 1989. He has published two books on the subject, The Performance Management Revolution – Business Results through Insight and Action (John Wiley & Sons, Nov. 2007) and Profiles in Performance – Business Intelligence Journeys and the Roadmap for Change (John Wiley & Sons, Nov. 2009). He lectures at forums around the world and is often cited by the business and trade press.

Prior to Dresner Advisory Services, Howard served as chief strategy officer at Hyperion Solutions and was a research fellow at Gartner, where he led its business intelligence research practice for 13 years.

Howard has conducted and directed numerous in-depth primary research studies over the past two decades and is an expert in analyzing these markets.

Through the Wisdom of Crowds® Business Intelligence market research reports, we engage with a global community to redefine how research is created and shared. Other research reports include:

- Advanced and Predictive Analytics
- Big Data Analytics
- Business Intelligence Competency Center
- Cloud Computing and Business Intelligence
- Collective Insights™
- Embedded Business Intelligence
- End User Data Preparation
- Internet of Things and Business Intelligence
- Location Intelligence

Howard (www.twitter.com/howarddresner) conducts a weekly Twitter “tweetchat” on Fridays at 1:00 p.m. ET. The hashtag is #BIWisdom. During these live events the #BIWisdom community discusses a wide range of business intelligence topics.

You can find more information about Dresner Advisory Services at www.dresneradvisory.com.
About Jim Ericson
Jim Ericson is Vice President and Research Director with Dresner Advisory Services.

Jim has served as a consultant and journalist who studies end-user management practices and industry trending in the data and information management fields.

From 2004 to 2013 he was the editorial director at Information Management magazine (formerly DM Review), where he created architectures for user and industry coverage for hundreds of contributors across the breadth of the data and information management industry.

As lead writer he interviewed and profiled more than 100 CIOs, CTOs, and program directors in a 2010-2012 program called “25 Top Information Managers.” His related feature articles earned ASBPE national bronze and multiple Mid-Atlantic region gold and silver awards for Technical Article and for Case History feature writing.

A panelist, interviewer, blogger, community liaison, conference co-chair, and speaker in the data-management community, he also sponsored and co-hosted a weekly podcast in continuous production for more than five years.

Jim’s earlier background as senior morning news producer at NBC/Mutual Radio Networks and as managing editor of MSNBC’s first Washington, D.C. online news bureau cemented his understanding of fact-finding, topical reporting, and serving broad audiences.
Survey Method and Data Collection
As with all of our Wisdom of Crowds® market studies, we constructed a survey instrument to collect data and used social media and crowd-sourcing techniques to recruit participants.

We also include our own research community of over 3,500 organizations (versus 3,000 in 2015) as well as vendors’ customer communities.

Data Quality
We carefully scrutinized and verified all respondent entries to ensure that the study includes only qualified participants.
Executive Summary

User Analysis:

- Twenty-nine percent of respondents use enterprise planning software today, down from 31 percent in 2015 poll, indicating ongoing soft demand for adoption (p. 18).
- Among organizations that have not adopted enterprise planning software but do have plans, respondents indicate they are pushing out adoption into future time frames (p. 19-22).
- Perceived criticality of enterprise planning declined 5 percent in 2016 while measures of "very important" and "important" improved slightly, indicating lower urgency that may relate to economic cycles. Finance is easily the leading advocate of enterprise planning (p. 23-27).
- Enterprise planning adoption is mostly unchanged year over year. Outside finance, operations, strategic planning, and sales are the most likely future users. Small organizations will adopt more than larger peers in near-term time frames (p. 28-38).
- Annual financial budgets, by several measures, are solidly at the top of the list of enterprise planning initiatives in 2016, followed by rolling forecasts, bottom-up budgeting, and balance sheet planning (p. 39-45).
- In terms of frequency, forecasting is most likely to be a monthly or quarterly exercise among organizations of different sizes across geographies. Planning and budgeting remains mostly an annual exercise, especially for finance, IT, and executive management (p. 46-55).
- Organizations do not express especially strong preference toward any specific deployment option for enterprise planning. While it remains the most popular option, sentiment has turned somewhat against on-premises deployment. Led by favorability in small organizations, hosted solutions, mobile data entry, mobile data entry and SaaS/cloud are all forecasted for above-average deployment in 2017 (p. 56-62).

Industry Analysis:

- Industry support for strategic planning, financial planning, operational planning, and architectural features is generally well served and will be almost fully mature in the next 12 months (p. 63-68).
Study Demographics
Our 2016 survey base provides a cross-section of data across geographies, functions, organization size, and vertical industries. We believe that, unlike other industry research, this supports a more representative sample and better indicator of true market dynamics. We have constructed cross-tab analyses using these demographics to identify and illustrate important industry trends.

Geography
Survey respondents represent the span of geographies. North America (including the United States, Canada, and Puerto Rico) accounts for the largest group with 60 percent of all respondents. EMEA accounts for 27 percent; Asia Pacific and Latin America make up the remainder of the sample (fig. 1).

![Geographies Represented](image)

Figure 1 – Geographies represented
Functions

Information technology represents the largest single group by function, with about 30 percent of the sample (fig. 2). Executive management follows closely with 26 percent; finance, the BICC and marketing/sales are the next most represented. Eight percent of respondents do not fall into our functional breakout.

Tabulating results across functions helps us develop analyses that reflect the differences and influence of different departments within organizations.

Figure 2 - Functions represented
**Vertical Industries**

Consulting, healthcare, and technology are the most represented industries in our 2016 study and collectively make up 30 percent of the sample (fig. 3). Education, financial services, business services, manufacturing, and insurance are the next most represented.

Tabulating results across industries helps us develop analyses that reflect the maturity and direction of different business sectors.

![Vertical Industries Represented](image-url)

**Figure 3 - Vertical industries represented**
Organization Size
Participation is balanced across organizations of different sizes (global employee head count). Small organizations (1-100 employees) represent 30 percent of respondents, midsize organizations (101-1,000 employees) also 30 percent, and large organizations (>1,000 employees) account for the remaining 40 percent (fig. 4).

Tabulating results by organization size reveals important differences in practices, planning, and maturity.

Figure 4 - Organization sizes represented
Analysis and Trends
Analysis and Trends

Plans to Use Enterprise Planning Software
Across all functions, geographies, industries, and organizations sizes, 29 percent of respondents are using planning and budgeting software today (fig. 5). This figure declined from 31 percent in our 2015 poll. A second group with no plans grew in size slightly and correspondingly, accounting for slightly more than half of the sample. This indicates no radical change but, rather, somewhat softer demand for adoption. We acknowledge that these results reflect individual usage or awareness to planning software and do not necessarily reflect overall organization adoption rates.

*Figure 5 - Plans to use enterprise planning software 2015 to 2016*
Adoption of Enterprise Planning Software
Among organizations that have not adopted enterprise planning software but do have plans, respondents indicate they are pushing out adoption into future time frames (fig. 6). Eleven percent will adopt in the current calendar year (compared to 15 percent in our 2015 study). A growing percentage (30 percent) plan adoption in the next calendar year (compared to 23 percent in our 2015 study). We consider enterprise planning a significant strategic undertaking for organizations that goes well beyond budgeting, and might be tied more to economic cycles of opportunity than conventional ongoing upgrades.

Figure 6 – Adoption of enterprise planning software 2015 to 2016
Among organizations that have adopted or plan to adopt, uptake of enterprise planning software is greatest in North America, followed by Asia Pacific, EMEA and Latin America (fig. 7). Of this subset, more than 70 percent of respondents in Latin America, North America, and Asia Pacific have already adopted enterprise planning software. EMEA predicts the most 12-month adoption (9 percent) followed by Latin America (5 percent) and Asia Pacific (3 percent). Latin America predicts the greatest 2017 adoption (26 percent).

![Adoption of Enterprise Planning Software by Geography](image-url)

*Figure 7 – Adoption of enterprise planning software by geography*
Among organizations that have adopted or plan to adopt, current use of enterprise planning software is highest among large organizations of 1,000 or more employees (fig. 8). Twelve-month adoption will be greatest in organizations of 101 to 1,000 employees (6 percent) and small organizations of 100 or less employees (5 percent). 2017 adoption will also be higher in small and midsized organizations.

Figure 8 – Adoption of enterprise planning software by organization size
Current adoption and plans to adopt enterprise planning software varies by industry (fig. 9). In our 2016 sample, current adoption is greatest in higher education, followed by healthcare, manufacturing, and business services. Among those that will adopt, 12-month adoption rates will be highest in insurance, financial services, and healthcare. Business services predicts the greatest long-term adoption.

Figure 9 - Adoption of enterprise planning software by selected vertical industry
Importance of Enterprise Planning Software
Perceived criticality of enterprise planning declined 5 percent in 2016 while measures of "very important" (+3 percent) and "important" (+1 percent) improved slightly (fig. 10). This mild cooling of sentiment may indicate that enterprise planning is moving to the "back burner" compared to other initiatives related to analysis and core business processes. As already noted, enterprise planning is a significant strategic undertaking and implementation is likely to relate positively to strong economic cycles.

Figure 10 – Importance of enterprise planning 2015 to 2016
Not surprisingly, finance, with its history and obligatory deliverables, assigns the highest ("critical") mean level importance to planning and budgeting (fig. 11). Executive management and IT follow closely with weighted mean importance between "very important" and "critical." Marketing and sales operations perceives the least criticality and has the most diverse and somewhat polarized levels of interest between “critical” and “not important.” Diversities of sentiment toward enterprise planning somewhat predictably speak to the tension between short-term and long-term goals based on function.

![Importance of Enterprise Planning/Budgeting by Function](image)

Figure 11 - Importance of enterprise planning/budgeting by function
Across geographic regions, attitudes toward enterprise planning (among adopters) are largely consistent with weighted mean values near "critical" (fig. 12). Asia Pacific and North America have slightly more "critical" importance than respondents in EMEA and Latin America. It is somewhat surprising to see EMEA, traditionally characterized by long-term relationships and more conservative practices, trailing this metric, albeit by only a very small margin.

Figure 12 - Importance of enterprise planning/budgeting by geography
Large organizations (>1,000 employees) place greater emphasis on enterprise planning and budgeting than smaller peers (fig. 13). Generally, we would expect size and complexity to call for greater planning and budgeting oversight as borne out in this view. That said, all organizations using or planning for enterprise planning and budgeting consider it “very important” to critically important. Weighted mean importance ranges between 3.7 at organizations of 100 or fewer employees to 4.1 at organizations with 1,001 to 10,000 employees.

Figure 13 - Importance of enterprise planning/budgeting by organization size
The perceived importance of enterprise planning/budgeting varies by industry; furthermore, industry rankings by importance vary somewhat from industry adoption rates. For example, healthcare ranks highest in current adoption (fig. 9, p. 22) but lower in perceived importance (fig. 14 below). Likewise, the same charts show insurance ranks enterprise planning and budgeting importance more highly than current adoption reflects.

![Importance of Enterprise Planning/Budgeting by Selected Vertical Industry](image-url)

**Figure 14 - Importance of enterprise planning/budgeting by selected vertical industry**
Functions Using Enterprise Planning
Over time, the functional use of enterprise planning is in a fairly stable state. Not surprisingly, finance, with its many cyclical reporting obligations, is the leading functional use of enterprise planning in organizations today; close to 70 percent of 2016 finance respondents claim current use, slightly up from our 2015 study (fig. 15). Operations, sensitive to continuity and business dynamics, is the second most frequent user at 42 percent, closely followed by strategic planning (42 percent), sales (41 percent), IT (41 percent), and human resources (38 percent).

Figure 15 – Functions that use enterprise planning 2015 to 2016
Figure 16 also measures the use of enterprise planning but by future plans only, with current users excluded. (Thus, finance, with the greatest current deployment, has fewer future deployment plans.) In this view, operations, strategic planning, sales, HR, and finance have the highest 12-month adoption plans in descending order. Outside these functional planners, more than 30 percent of respondents at all other functions have “no plans” for sales or operations enterprise planning adoption. Manufacturing, R&D, and supply chain have comparatively lower future plans for new adoption and the highest levels of “no plans.”
Across all geographic regions, finance is consistently the most likely user of enterprise planning, though, surprisingly, it is least of all in EMEA (fig. 17). Among current users, Latin American respondents report the greatest finance, sales, HR, and marketing uptake of enterprise planning. Asia Pacific reports slightly higher strategic planning use.

Figure 17 - Functions that use enterprise planning by geography - today
Figure 18 measures future functional use of enterprise planning across five roles (of 10 total, continued on page 32) with the current user base excluded. In this view, soft ongoing demand for enterprise planning is plainly reflected in the numbers of functions with "no plans" for future use. Sales and IT uptake appear especially weak in terms of future plans.

![Functions that Use Enterprise Planning by Geography - Future Plans - Part One](image)

Figure 18 - Functions that use enterprise planning by geography – future plans – part one
Figure 19 displays future plans for the five trailing areas of enterprise planning adoption excluding current users. Across geographies, there are no specific areas of near-term strength. Manufacturing, R&D, and supply chain are especially unlikely future users.

<table>
<thead>
<tr>
<th>Functions that Use Enterprise Planning</th>
<th>by Geography - Future Plans - Part Two</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Resources</td>
<td>Will use in 12 months, Will use in 24 months, No plans</td>
</tr>
<tr>
<td>Marketing</td>
<td>Will use in 12 months, Will use in 24 months, No plans</td>
</tr>
<tr>
<td>Supply Chain</td>
<td>Will use in 12 months, Will use in 24 months, No plans</td>
</tr>
<tr>
<td>Research and Development (R&amp;D)</td>
<td>Will use in 12 months, No plans</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Will use in 12 months, Will use in 24 months, No plans</td>
</tr>
</tbody>
</table>

Legend:
- North America
- Asia Pacific
- Latin America
- Europe, Middle East and Africa

**Figure 19 - Functions that use enterprise planning by geography – future plans – part two**
Across organizations of different sizes, finance is consistently the most likely current user of enterprise planning (fig. 20). And again, larger organizations are generally more likely to use enterprise planning today. An exception is sales, where (often externally focused) small organizations lead use by function. To a lesser degree, marketing uptake is stronger at small organizations. Elsewhere, uptake of enterprise planning generally increases with organization size.

**Figure 20 - Functions that use enterprise planning by organization size - today**
Figure 21 displays future plans for the five leading functional users of enterprise planning adoption by size of organization (excluding current users). In small organizations of one to 100 employees, operations, sales, and IT have the greatest overall 12-month plans (near 20 percent) for investment. Twelve-month plans at larger organizations are more modest and again outstripped by organizations with no current plans to invest in enterprise planning.
Figure 22 displays future plans for the five trailing functional users of enterprise planning adoption excluding current users. In this view, small enterprise marketing, IT and human resources respondents show the most, if minimal, interest in 12-month investment in enterprise planning. Again, the more obvious observation is market softness as demonstrated by the number of organizations of any size with no plans to invest.

<table>
<thead>
<tr>
<th>Functions that Use Enterprise Planning by Organization Size - Future Plans - Part Two</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will use in 12 months</td>
</tr>
<tr>
<td>Human Resources</td>
</tr>
<tr>
<td>1 - 100</td>
</tr>
</tbody>
</table>

Figure 22 - Functions that use enterprise planning by organization size – future plans – part two
Across industries, the greatest number of existing enterprise planning users is again found in finance (fig. 23). Healthcare usage is highest in finance and operations. Higher education users are most often found in IT and human resources. Manufacturing use of enterprise planning is highest in strategic planning, operations, sales and, expectedly, manufacturing. Business services and financial services are the least likely among industries to use enterprise planning outside of finance.

![Functions that Use Enterprise Planning by Industry - Today](image-url)

**Figure 23** - Functions that use enterprise planning by industry – today
Figure 24 describes future plans for five functional uses (of 10, continued on page 38) of enterprise planning across industries (excluding current users). The most near-term plans, particularly for strategic planning and operations, are found in business services. Outside of finance, all industries appear to be holding back on any substantial future investment, particularly in higher education, financial services, and healthcare.

![Functions that Use Enterprise Planning by Industry - Future Plans - Part One](image-url)

**Figure 24** - Functions that use enterprise planning by industry – future plans – part one
Figure 25 describes future plans for the trailing five functional uses of enterprise planning across industries (excluding current usage). Business services show near-term interest in enterprise planning in marketing, supply chain, and R&D. Business services and healthcare have minimal enterprise planning objectives in human resources. Most industries report large percentages or majorities with no plans for enterprise planning investment in these trailing functional categories.

**Figure 25 - Functions that Use enterprise planning by industry – future plans – part two**

- Business services
- Manufacturing
- Healthcare
- Financial services
- Education (Higher Ed)
Enterprise Planning Initiatives
As we found in our 2015 study, despite many calls for more flexible and responsive budgeting models, annual financial budgets are solidly at the top of the list of enterprise planning initiatives in 2016 (fig. 26). Compared to this status quo reality, rolling forecasts, widely espoused by industry experts as a better method of planning, are in second place, followed by bottom-up budgeting and balance sheet planning. Cash flow forecasting, especially important to executive management, ranks fifth. All these categories, plus headcount, salary, and compensation planning are, at minimum, "very important" to at least 60 percent of respondents.

Figure 26 – Enterprise planning Initiatives
Year over year, enterprise planning initiative priorities have mostly held rank with a few exceptions (fig. 27). While annual budgets have grown in importance as the only initiative viewed as "critical," there have also been upticks in other areas. Bottom-up budgeting and headcount, salary and compensation, and balance sheet planning might all be connected to workforce evolution and, indirectly, the Affordable Care Act. Some comparatively aspirational categories, including revenue/demand planning, strategic planning, and linking strategy to budget, declined slightly.

**Figure 27 - Enterprise planning initiatives 2015 to 2016**
By geography, all regions except Asia Pacific have similar leading interest in annual budgets (fig. 28). Latin America again places well above-average importance in several planning initiatives where other regions are often more aligned. Excluding Latin America, EMEA leads interest in rolling forecasts, bottom-up budgeting, revenue/demand planning, sales and operations, and several lesser categories. North America (excluding Latin America) leads interest in annual financial budgets, headcount and salary and compensation planning. Asia Pacific interest is below weighted mean for most measures.

Figure 28 - Enterprise planning Initiatives by geography
Interest in enterprise planning initiatives varies somewhat predictably by function (fig. 29). Finance has especially high interest in annual financial budgets, headcount/salary, linking strategic plans to annual budget, revenue/demand planning, and several other areas. Executive management has the second-highest interest in several of the same categories and shares marketing and sales’ acute interest in cash flow forecasting and sales/operations planning. IT trails interest in most enterprise planning initiatives.

Figure 29 – Enterprise planning Initiatives by function
Small, midsized, and large organizations all indicate uniformly “critical” interest in annual financial budgets (fig. 30). Interest in rolling forecasts and bottom-up budgeting is also tightly clustered, the latter led by midsized (101-1,000 employees) organizations. Very large (>10,000 employees) organizations lead interest in all other enterprise planning initiatives with the exception of product or customer profitability analysis, where small (1-100 employees) organizations are most engaged.

Figure 30 – Enterprise planning Initiatives by organization size
Vertical industries in our 2016 sample all share critical interest in enterprise planning for annual financial budgets (fig. 31). After this leading preference, industry sentiment varies. Business services, attuned to contracts and projects, reports the highest interest in rolling forecasts but also bottom-up budgeting, cash flow, headcount, and many lesser categories. Healthcare, with above-average interest generally, also has the highest interest in linking strategic plans to annual budget along with high interest in head count and cash flow. Manufacturing leads interest in revenue/demand planning and sales and operations planning while education leads interest in balance sheet planning.

**Figure 31 - Enterprise planning Initiatives by vertical industry**
Figure 32 depicts prioritized enterprise planning initiatives and the degree they are currently deployed or planned for the future. (In this view, dots that are not red represent future plans, indicating urgency and hot spots in new/planned use of enterprise planning. For example, about as many organizations place a similar priority upon rolling forecasts as have already adopted. 2016 plans, most likely to be budgeted and therefore most dependable, place a higher priority upon increased cash flow forecasting, and bottom-up budgeting.) Most other initiatives not already adopted are deferred to 2017 or beyond.

![Enterprise Planning Initiatives by Adoption Plans](image_url)

**Figure 32 - Enterprise planning Initiatives by adoption plans**
Frequency of Enterprise Planning and Forecasting

Figure 33 depicts the preferred organizational frequency of enterprise forecasting and planning/budgeting in a side-by-side comparative view. In this view, we see that forecasting is most likely a monthly exercise, followed by quarterly. Planning and budgeting frequency is predominately annual, though almost 20 percent create monthly budgets, and another 20 percent revise quarterly. Despite the campaigning for rolling forecasts noted earlier, just 10 percent of respondents create them. Weekly forecasts are in the 10 percent range while weekly budgets are only used by just 5 percent of respondents. Fewer than 5 percent forecast or budget on a daily basis.

![Frequency of Enterprise Planning/Budgeting and Forecasting](image)

Figure 33 – Frequency of enterprise planning/budgeting and forecasting
Year over year, annual planning/budgeting has only increased in favor at the expense of monthly plans/budgets. Meanwhile, forecasting time frames are almost entirely unchanged (fig. 34). There is little to add to this view except to note that rolling (as well as daily and weekly) plans and forecasts have only barely gained momentum in enterprises.

Figure 34 – Frequency of enterprise planning/budgeting and forecasting 2015 to 2016
By geographic region, all organizations remain mostly dependent on monthly forecasts (fig. 35). EMEA leads use of daily and weekly forecasts, with the next lowest latency reported in Latin America, North America, and finally, Asia Pacific. Asia Pacific is, however, the greatest user of rolling forecasts. North America and EMEA report lesser use of rolling forecasts and are more dependent on quarterly forecasting.

![Frequency of Forecasting by Geography](image)

**Figure 35 – Frequency of forecasting by geography**
Again by region, North America, followed by EMEA, are the most prominent users of annual planning and budgets (fig. 36). Asia Pacific and Latin America are somewhat greater users of monthly budgets. Rolling planning and budgeting is used by fewer than 5 percent of respondents in any region.

![Figure 36 - Frequency of enterprise planning/budgeting by geography](image-url)
Forecasting frequency varies by function in organizations (fig. 37). Executive management, finance, and R&D prefer monthly forecasts; marketing and sales is most driven by weekly forecasts. Notably, marketing/sales and R&D are also category leaders in adoption of rolling forecasts. Quarterly forecasts also play strongly across all functions excluding marketing and sales.

Figure 37 – Frequency of forecasting by function
Planning and budgeting time frames also vary by function (fig. 38). Finance, IT, and executive management most notably adhere to annual plans/budgets. Marketing and sales is most likely to report rolling plans and budgets. Research and development has the strongest monthly planning/budgeting focus.

![Figure 38 - Frequency of enterprise planning/budgeting by function](http://www.dresneradvisory.com)
All organization sizes rely mostly on a mix of monthly and quarterly forecasts (fig. 39). Very large organizations (>10,000 employees) are the most diversified group, the greatest users of monthly forecasts (30 percent), and also the most likely users of rolling forecasts (15 percent). Rolling forecast use is under 10 percent at all other organizations.

Figure 39 – Frequency of forecasting by organization size
Small, midsized, and large organizations rely most on annual planning and budgeting, though small (1-100 employees) enterprises are about equally reliant on monthly forecasts (fig. 40). Midsized (101-1,000 employees) and larger organizations with 1,001 to 10,000 employees are especially dependent on annual plans/budgets. Twenty-six percent of very large (>10,000 employees) rely upon quarterly plans/budgets with 10 percent employing rolling plans and budgets.

Figure 40 - Frequency of enterprise planning/budgeting by organization size
Frequency of forecasting varies by industry (fig. 41). Business services is the greatest user of monthly forecasts; financial services leads use of quarterly forecasts and higher education is most likely to depend on annual forecasts. Rolling forecasts are used most in manufacturing (20 percent), followed by higher education (11 percent), food, beverage and tobacco (10 percent), and healthcare (8 percent).
The frequency of planning and budgeting activity also varies by industry (fig. 42). Quarterly plans/budgets are most prominent in financial services, higher education, and business services. Manufacturing, healthcare, and food, beverage and tobacco are more likely to depend on annual plans and budgets. Fifteen to 20 percent of business service and food/beverage respondents use daily or weekly forecasts; 10 percent or fewer respondents in any industry report use of rolling plans or budgets.

**Figure 42 - Frequency of enterprise planning/budgeting by industry**
Deployment Options for Enterprise Planning
Organizations do not express a strong preference toward any specific deployment option for enterprise planning (fig. 43). The most popular model, on-premises deployment, is viewed as "critical" to 16 percent of respondents and "very important" to 23 percent. Hosted solutions follow closely with more than 60 percent of respondents affirming, at minimum, "important." SaaS/cloud service options for enterprise planning currently have only average acceptance among respondents.

![Deployment Options for Enterprise Planning](image)

**Figure 43 – Deployment options for enterprise planning**
Year over year, sentiments toward deployment options for enterprise planning are somewhat shuffled with a notable shift away from on-premises systems in favor of hosted and SaaS/cloud-based options (fig. 44). However, this change is slight and suggests a general ambivalence toward deployment options at this time.

Figure 44 - Deployment options for enterprise planning 2015 to 2016
By geography, Asia Pacific is most enthusiastic toward all options except hosted solutions, where Latin America reports an outstanding preference. North America reports below-average enthusiasm for all but on-premises deployment options for enterprise planning (fig. 45). EMEA is also most interested in on-premises deployment and reports above-average interest in hosted solutions. SaaS/cloud service options hold only average interest as deployment options across geographies.

Figure 45 - Deployment options for enterprise planning by geography
Deployment preferences for enterprise planning vary somewhat by function, though all maintain a preference for on-premises (fig. 46). Where marketing and sales especially prefer on-premises systems, executive management is simultaneously most interested in both hosted solutions and SaaS/cloud deployment, perhaps in reflection of cost and time to market considerations. In the same vein, IT does not appear opposed to any option but prefers on-premises deployment of enterprise planning.

![Deployment Options for Enterprise Planning by Function](image)

*Figure 46 - Deployment options for enterprise planning by function*
Small, midsized, and large organizations report somewhat different preferences for enterprise planning deployment options (fig. 47). Large organizations (>1,000 employees) prefer on-premises systems. Small organizations, predictably driven by cost and scale, mostly prefer hosted solutions and SaaS/cloud but also lead interest in all off-premises options.

![Deployment Options for Enterprise Planning by Organization Size](image)

**Figure 47 - Deployment options for enterprise planning by organization size**
Deployment options for enterprise planning vary by vertical industry (fig. 48). Business services leads interest in most deployment options, especially SaaS/cloud services. Manufacturing and healthcare are the industries most likely to employ on-premises systems. Excluding business services, financial services has the strongest interest in SaaS/cloud, mobile, and modular CPM solutions.

Figure 48 - Deployment options for enterprise planning by vertical industry
Figure 49 compares adoption plans to the enterprise planning deployment options available. Where on-premises systems have high rankings for both current and planned adoption, other options have lesser but significant deployment prospects going forward, at least in the longer term. While current-year adoption will be weak, hosted solutions, mobile data entry, mobile data entry, and SaaS/cloud are all forecasted for above-average deployment in 2017.

Figure 49 – Deployment options for enterprise planning by adoption plans
Industry and Vendor Analysis
Industry Capabilities

Industry – Strategic Planning Features
For our 2016 study, we broke industry coverage into strategic planning, financial planning, operational planning, and architectural features from enterprise planning vendors (figs. 50-53). Figure 50 depicts strategic planning features currently available and planned for release through the vendor communities studied. Current industry products fully address most common feature requirements. All are covered by at least 80 percent of vendors until we reach mergers and acquisition analysis and Monte Carlo statistical simulations common to market-sensitive industries (i.e., energy, finance, and commodities trading).

![Industry - Strategic Planning Features](image-url)

*Figure 50 – Industry – strategic planning features*
Industry – Financial Planning Features
Figure 51 depicts financial planning features currently available and planned for release through the vendor community studied. Here we see that feature offerings listed are currently available from 85 to 100 percent of vendors in all cases. All financial planning features with the exception of automatic variance and exception reporting will have 90 percent plus support within 12 months. As with the previous chart, the graphic can serve as a feature key and checklist in the (mostly unlikely) event that a specific requirement (i.e., multi-language support) is lacking.
### Industry - Financial Planning Features

<table>
<thead>
<tr>
<th>Feature</th>
<th>Today</th>
<th>12 months</th>
<th>18 months</th>
<th>24 months</th>
<th>No plans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support for financial eliminations and consolidations to meet GAAP and...</td>
<td></td>
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<tr>
<td>User-defined budgeting periodicity (e.g. daily, weekly, monthly,...</td>
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<tr>
<td>Pre-built asset and depreciation calculations</td>
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<tr>
<td>Breakback allocations across dimensions</td>
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<tr>
<td>Allocations of revenue and costs based on fixed or dynamic variables</td>
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<tr>
<td>Driver-based planning</td>
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<tr>
<td>Bottom-up budgeting</td>
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<td>Top-down planning</td>
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<tr>
<td>Automatic variance and exception reporting</td>
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<td>Data validation at point of entry</td>
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<tr>
<td>Balance sheet planning and budgeting</td>
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<tr>
<td>Financial budgeting for revenues and expenses</td>
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<tr>
<td>Support entry of unlimited levels of line-item detail</td>
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<tr>
<td>Multi-language support</td>
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<td>Automated forecasting based on historical data trends and patterns</td>
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<td>Integration of historic data from GL and other source systems</td>
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<td>Web data entry forms</td>
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<tr>
<td>Locking of submitted data and prevention of revisions unless authorized</td>
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<tr>
<td>Textual annotations of input assumptions</td>
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<tr>
<td>Maintain an audit trail/log of all associated activity and changes</td>
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<tr>
<td>Export of budgets and plans to other systems and tools</td>
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<tr>
<td>Task lists to guide casual users</td>
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<tr>
<td>Built-in financial intelligence (e.g. revenues, expenses, assets,...</td>
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<td>Users can enter financial and nonfinancial data in real time at summary...</td>
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<td>Excel-based data entry</td>
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<td>Multi-currency support</td>
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<tr>
<td>Enable changes/revisions/modifications/approvals at various stages of...</td>
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<tr>
<td>Workflow for reviews and approvals, process status</td>
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<tr>
<td>Year-end projections and forecasting</td>
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<tr>
<td>Rolling forecasts (e.g. weekly, monthly, quarterly, annual)</td>
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</tbody>
</table>

**Figure 51 - Industry – financial planning features**
Industry – Operational Planning Features

Figure 52 depicts operational planning features currently available and planned for release through the vendor community studied. All but two of the operational features in our key are currently supported by about 85 percent or more of the vendor community. Plans for new vendor support is expected to be almost completely fulfilled in the coming 12 months. Only transfer pricing and modeling for sales quotas and territories is expected to have less than 80 percent support 12 months from now.

Figure 52 - Industry – operational planning features
Industry – Architectural Features

Figure 53 depicts architectural features currently available and planned for release through the vendor communities studied. Architectural feature sets are somewhat less fully penetrated across the vendor communities but nonetheless represent considerable maturity. Future industry support will likely be nearly complete within 12 months and, among categories not fully supported already, is expected to result in complete support for automated alerts, cloud, mobile, and integrated collaboration. While some vendors are cloud only or hosted only, all are expected to have cloud options in 12 months. The same is not true for on-premises systems, with 20% indicating no plans.
Vendor Rankings
Vendor Rankings

In this section we offer rankings of enterprise planning software vendors. We rated vendors using 33 different criteria, on a five-point scale for each. Criteria covered sales/acquisition experience (8 criteria), value for price paid (1), quality and usefulness of product (12), quality of technical support (5), quality and value of consulting services (5), whether the vendor is recommended (1), and integrity (1).

As we explore vendor performance in more detail, it is important to understand the scale we used in scoring the industry and vendors:

- 5.0 = Excellent
- 4.0 = Very good
- 3.0 = Adequate
- 2.0 = Poor
- 1.0 = Very poor

For 2016 we dispensed with market segmentation and now rely upon our Customer Experience and Vendor Credibility models, introduced last year, as a means of presenting relative vendor ratings. As a result, we no longer include a peer average for individual vendor rating charts. Instead, this has been replaced (where possible) with a year-over-year comparison for each vendor.

Based on our scoring methodology, all vendors performed at a level that is considered more than “adequate” for all criteria categories.

Please note that “average score” is the mathematical mean of all items included in vendor ratings. Each column in the chart represents a scale consisting of varying numbers of items (for example, "sales" is a scale consisting of eight items, while "value for price paid" is one item). As such, each column is weighted differently (based upon the number of items represented and the number of respondents rating those items) in calculating the overall average rating. The average score cannot be calculated by simply averaging across the subscale scores.
Enterprise Planning Market Models

Starting in 2015, we developed two new models for examining and understanding the business intelligence market. Using quadrants, we plotted aggregated user sentiment into x and y axes.

Customer Experience Model

The customer experience model considers the real-world experience of customers working with BI products on a daily basis (fig. 54). For the x axis, we combined all vendor touch points— including the sales and acquisition process (8 measures), technical support (5 measures), and consulting services (5 measures) — into a single “sales and service” dimension. On the y axis, we plotted customer sentiment surrounding product, derived from the 12 product and technology measures used to rank vendors. On the resulting four quadrants, we plotted vendors based on these measures.

The upper-right quadrant contains the highest-scoring vendors and is named “overall experience leaders.” Technology leaders (upper-left quadrant) identifies vendors with strong product offerings but relatively lower services scores. Contenders (lower-left quadrant) would benefit from varying degrees of improvement to product, services, or both.

User sentiment surrounding outliers (outside of the four quadrants) suggests that significant improvements are required to product and services.
Figure 54 - Customer experience model
Vendor Credibility Model
The vendor credibility model considers how customers “feel” about their vendor (fig. 55). The x axis plots perceived value for the price paid. The y axis combines the integrity and recommend measures, creating a “confidence” dimension. The resulting four quadrants position vendors based on these dimensions.

The upper-right quadrant contains the highest-scoring vendors and is named “credibility leaders.” Trust leaders (upper-left quadrant) identifies vendors with solid perceived confidence but relatively lower value scores. Contenders (lower-left quadrant) would benefit by working to improve customer value, confidence, or both.

User sentiment surrounding outliers (outside of the four quadrants) suggests that significant improvements are required to improve perceived value and confidence.
Figure 55 - Vendor credibility model
Detailed Vendor Ratings
In this section, we offer detailed vendor scores. Using our 33-criteria evaluation model (table 1), we compare each vendor’s performance to its previous year’s performance and to the average for all vendors (all records in the study population).

The detailed criteria are below. We added “clock” position information to assist in locating specific scores.

Table 1 - Detailed vendor rating criteria

<table>
<thead>
<tr>
<th>- Sales/acquisition experience (12 - 2 o’clock)</th>
</tr>
</thead>
<tbody>
<tr>
<td>o  Professionalism</td>
</tr>
<tr>
<td>o  Product knowledge</td>
</tr>
<tr>
<td>o  Understanding our business/needs</td>
</tr>
<tr>
<td>o  Responsiveness</td>
</tr>
<tr>
<td>o  Flexibility/accommodation</td>
</tr>
<tr>
<td>o  Business practices</td>
</tr>
<tr>
<td>o  Contractual terms and conditions</td>
</tr>
<tr>
<td>o  Follow-up after the sale</td>
</tr>
</tbody>
</table>

| - Value for price (3 o’clock) |

<table>
<thead>
<tr>
<th>- Quality and usefulness of product (continued)</th>
</tr>
</thead>
<tbody>
<tr>
<td>o  Customization and extensibility</td>
</tr>
<tr>
<td>o  Ease of upgrade/migration to new versions</td>
</tr>
<tr>
<td>o  Online forums and documentation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>- Quality of technical support (8 - 9 o’clock)</th>
</tr>
</thead>
<tbody>
<tr>
<td>o  Professionalism</td>
</tr>
<tr>
<td>o  Product knowledge</td>
</tr>
<tr>
<td>o  Responsiveness</td>
</tr>
<tr>
<td>o  Continuity of personnel</td>
</tr>
<tr>
<td>o  Time to resolve problems</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>- Quality and value of consulting services (9 - 10 o’clock)</th>
</tr>
</thead>
<tbody>
<tr>
<td>o  Professionalism</td>
</tr>
<tr>
<td>o  Product knowledge</td>
</tr>
<tr>
<td>o  Experience</td>
</tr>
<tr>
<td>o  Continuity</td>
</tr>
<tr>
<td>o  Value</td>
</tr>
</tbody>
</table>

| - Integrity (11 o’clock) |

| - Whether vendor is recommended (12 o’clock) |
Adaptive Insights Detailed Score

With scores generally above the overall sample, Adaptive Insights is an overall leader in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model. For 2016, it saw improvements across virtually all sales measures, a majority of product measures, all technical support measures, and most consulting measures. It is best in class for contractual terms and conditions, reliability of technology, scalability, customization and extensibility, ease of upgrade/migration to new versions, online training, forums and documentation. It is best in class across all technical support measures as well as consulting professionalism and product knowledge.
Anaplan Detailed Score

**Anaplan**

Anaplan is an overall leader in both the Customer Experience and Vendor Credibility models. For 2016, it saw key improvements across most sales measures, value, product robustness/ sophistication of technology, completeness of functionality, integration with third-party technologies, ease of installation, ease of administration, ease of upgrade/migration to new versions, technical support responsiveness, and continuity of personnel. It also saw improvements across all consulting measures. It is best in class for ease of installation and consulting experience, continuity, and value. It has a perfect recommend score.

**Figure 57 - Anaplan detailed score**

Anaplan is an overall leader in both the Customer Experience and Vendor Credibility models. For 2016, it saw key improvements across most sales measures, value, product robustness/ sophistication of technology, completeness of functionality, integration with third-party technologies, ease of installation, ease of administration, ease of upgrade/migration to new versions, technical support responsiveness, and continuity of personnel. It also saw improvements across all consulting measures. It is best in class for ease of installation and consulting experience, continuity, and value. It has a perfect recommend score.
Budget Maestro (Centage) Detailed Score

![Budget Maestro Diagram]

**Figure 58 – Budget Maestro (Centage) detailed score**

Although its scores declined over 2015, Budget Maestro (Centage) saw improvements in sales professionalism, integration of components within product, ease of upgrade/migration to new versions, online training, forums and documentation, technical support responsiveness, and continuity of personnel, consulting professionalism, product knowledge, and value.
Host Analytics Detailed Score

Figure 59 – Host Analytics detailed score

A leader in both the Customer Experience and Vendor Credibility models, Host Analytics saw key improvements across every category of measurement including sales, value, product, technical support, consulting, integrity, and recommend. It is best in class for sales responsiveness and follow-up after the sale. It has a perfect recommend score.
IBM saw a substantial decline versus 2015 and has fallen below the overall sample for most measures. However, it saw improvements in reliability of technology.
Infor is a Trust Leader in the Vendor Credibility Model. Although generally aligned with the overall sample, it saw a decline across most measures for 2016. It did, however, see an improvement in sales business practices, contractual terms and conditions and consulting professionalism, product knowledge, and value.
Jedox Detailed Score

A new entry for 2016, Jedox is a leader in both the Customer Experience and Vendor Credibility models. It is best in class for sales understanding business/needs, flexibility/accommodation, overall value, product completeness of functionality, overall usability, and ease of administration. It has a perfect recommend score.
Microsoft Detailed Score

Figure 63 - Microsoft detailed score

A new entry for 2016, Microsoft is generally below the overall sample for all measures.
Oracle’s scores declined over 2015 and are consistently below the overall sample. It did, however, see improvements in product robustness/ sophistication of technology, completeness of functionality, reliability of technology, scalability, ease of installation, and online training, forums and documentation.

Figure 64 - Oracle detailed score
Prophix Detailed Score

A leader in both Customer Experience and Vendor Credibility models, Prophix saw key improvements over 2015 and is best in class for sales professionalism, product knowledge, business practices, product robustness/sophistication of technology, integration of components within product, integration with third-party technologies, online training, forums and documentation. It was also best in class for integrity and has a perfect recommend score.
Figure 66 - SAP detailed score

Although generally below the overall sample, SAP saw substantial improvements across all categories of measurement including sales, product, overall value, technical support, consulting services, integrity, and recommend.
Other Dresner Advisory Services Research Reports

- “Flagship” Wisdom of Crowds Business Intelligence Market Study
- Advanced and Predictive Analytics
- Big Data Analytics
- Business Intelligence Competency Center
- Cloud Computing and Business Intelligence
- Collective Insights™
- Embedded Business Intelligence
- End User Data Preparation
- Internet of Things and Business Intelligence
- Location Intelligence
- Mobile Computing and Business Intelligence
- Small and Mid-sized Enterprise Business Intelligence
Appendix - The 2016 Wisdom of Crowds® Enterprise Planning Market Survey Instrument

Please enter your contact information below

First Name*: _________________________________________________
Last Name*: _________________________________________________
Title: _________________________________________________
Company Name*: _________________________________________________
Street Address: _________________________________________________
City: _________________________________________________
State: _________________________________________________
Zip: _________________________________________________
Country: _________________________________________________
Email Address*: _________________________________________________
Phone Number: _________________________________________________
URL: _________________________________________________

May we contact you to discuss your responses and for additional information?
( ) Yes  ( ) No

What major geography do you reside in?*
( ) North America
( ) Europe, Middle East and Africa
( ) Latin America
( ) Asia Pacific
Please identify your primary industry*

( ) Advertising
( ) Aerospace
( ) Agriculture
( ) Apparel & accessories
( ) Automotive
( ) Aviation
( ) Biotechnology
( ) Broadcasting
( ) Business services
( ) Chemical
( ) Construction
( ) Consulting
( ) Consumer products
( ) Defense
( ) Distribution & logistics
( ) Education (Higher Ed)
( ) Education (K-12)
( ) Energy
( ) Entertainment and leisure
( ) Executive search
( ) Federal government
( ) Financial services
( ) Food, beverage and tobacco
( ) Healthcare
( ) Hospitality
( ) Insurance
( ) Legal
( ) Manufacturing
( ) Mining
( ) Motion picture and video
( ) Not for profit
( ) Pharmaceuticals
( ) Publishing
( ) Real estate
( ) Retail & wholesale
( ) Sports
( ) State and local government
( ) Technology
( ) Telecommunications
( ) Transportation
( ) Utilities
( ) Other - Write In: _________________________________________________

How many employees does your company employ worldwide?

( ) 1 - 100
( ) 101 - 1,000
( ) 1,001 - 2,000
2,001 - 5,000
5,001 - 10,000
More than 10,000

What function do you report into?*

Business Intelligence Competency Center
Executive management
Faculty (Education)
Finance
Human resources
Information Technology (IT)
Manufacturing
Marketing
Medical staff (Healthcare)
Operations
Research and development (R&D)
Sales
Strategic planning function
Supply chain
Other - Write In: ____________________________________________

Do you use or intend to use Enterprise Planning and Budgeting software within your organization?

Yes. We use Planning and Budgeting software today
No. We have no plans to use Planning and Budgeting software at all.
We are currently evaluating Planning and Budgeting software.

We may use Planning and Budgeting software in the future.

What are your plans for Enterprise Planning software in the Future?

- Will adopt in 2016
- Will adopt in 2017
- Will adopt beyond 2017

How important is Enterprise Planning/Budgeting to your organization?

- Critical
- Very important
- Important
- Somewhat important
- Not important

Which functions use (or will use) Enterprise Planning software/solutions in your organization?

<table>
<thead>
<tr>
<th></th>
<th>Use today</th>
<th>Will use in 12 months</th>
<th>Will use in 24 months</th>
<th>No plans</th>
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</thead>
<tbody>
<tr>
<td>Finance</td>
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<tr>
<td>Human Resources</td>
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<tr>
<td>Information Technology</td>
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</table>

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Please prioritize the following planning items

<table>
<thead>
<tr>
<th></th>
<th>Critical</th>
<th>Very important</th>
<th>Important</th>
<th>Somewhat important</th>
<th>Not important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual financial budgets</td>
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<td>Balance sheet planning - financial instruments</td>
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<td>Bottom-up budgeting</td>
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<td>Capital asset planning &amp; budgeting</td>
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<td>Cash-flow</td>
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<td>forecasting/planning</td>
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<td>Headcount, salary and compensation planning</td>
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<td>Linking strategic plans to annual budget</td>
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<td>Model and plan optimal sales territories &amp; quotas</td>
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<td>Monte Carlo and other scenario analyses</td>
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<td>Optimize workforce plans and staffing to meet demand</td>
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<td>Product or customer profitability analysis</td>
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<td>Project-based financial planning &amp; budgeting</td>
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<td>Revenue/demand planning</td>
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<td>Rolling forecasts (monthly, quarterly etc.)</td>
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<tr>
<td>Sales and operations planning</td>
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<td>Strategic planning (3 - 5 years)</td>
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<td>Top-down planning</td>
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<td>Transfer pricing analysis</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
</tbody>
</table>

With what frequency are plans/ budgets and forecasts created/updated in your organization?

<table>
<thead>
<tr>
<th></th>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
<th>Quarterly</th>
<th>Bi-annually</th>
<th>Annually</th>
<th>Rolling basis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning/budgeting</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
<tr>
<td>Forecasting</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
</tbody>
</table>

How important are each of the following deployment options?

<table>
<thead>
<tr>
<th></th>
<th>Critical</th>
<th>Very important</th>
<th>Important</th>
<th>Somewhat important</th>
<th>Not important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hosted solution</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
<tr>
<td>Mobile data entry</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
<tr>
<td>Mobile reporting</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
<tr>
<td>Modular CPM solution</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
<tr>
<td>On-premise system</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
</tbody>
</table>
Please specify your current Enterprise Planning/Budgeting software vendor.

( ) Adaptive Insights
( ) Anaplan
( ) Bitam
( ) Board International
( ) Budget Maestro
( ) Microsoft
( ) Host Analytics
( ) IBM
( ) Infor
( ) Jedox
( ) KCI Computing
( ) LongView Solutions
( ) Oracle/Hyperion
( ) Planview
( ) Prophix
( ) SAP
( ) SAS Institute
( ) Solver
( ) Tagetik

( ) Tidemark

( ) Xlerant

( ) Other - Write In: _________________________________________________

Please specify the product name and version for the selected vendor

_________________________________________________

How long has this product been in use?

( ) Less than 1 year

( ) 1 - 2 years

( ) 3 - 5 years

( ) 6 - 10 years

( ) More than 10 years

How many users currently use this product?

( ) 1-5

( ) 6-10

( ) 11-20

( ) 21-50

( ) 51-100

( ) 101-200

( ) 201-500

( ) 501 - 1,000
How would you characterize the sales/acquisition experience with this vendor?

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Very good</th>
<th>Adequate</th>
<th>Poor</th>
<th>Very poor</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professionalism</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
</tr>
<tr>
<td>Product knowledge</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
</tr>
<tr>
<td>Understanding our business/needs</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
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</tr>
<tr>
<td>Responsiveness</td>
<td>()</td>
<td>()</td>
<td>()</td>
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<td>()</td>
<td>()</td>
</tr>
<tr>
<td>Flexibility/accommodation</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
</tr>
<tr>
<td>Business practices</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
</tr>
<tr>
<td>Contractual terms and conditions</td>
<td>()</td>
<td>()</td>
<td>()</td>
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</tr>
<tr>
<td>Follow up after the sale</td>
<td>()</td>
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</tr>
</tbody>
</table>

How would you characterize the value for the price paid?

( ) Great value (Well exceeded expectations)
( ) Good value (Somewhat exceeded expectations)
( ) Average value (Met expectations)
( ) Poor value (Fell short of expectations)
( ) Very poor value (Fell far short of expectations)

How would you characterize the quality and usefulness of the product?
<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Very good</th>
<th>Adequate</th>
<th>Poor</th>
<th>Very poor</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robustness/sophistication of technology</td>
<td>()</td>
<td>()</td>
<td>()</td>
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<td>()</td>
<td>()</td>
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<tr>
<td>Completeness of functionality</td>
<td>()</td>
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<td>()</td>
<td>()</td>
<td>()</td>
</tr>
<tr>
<td>Reliability of technology</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
</tr>
<tr>
<td>Scalability</td>
<td>()</td>
<td>()</td>
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</tr>
<tr>
<td>Integration of components within product</td>
<td>()</td>
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</tr>
<tr>
<td>Integration with 3rd party technologies</td>
<td>()</td>
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</tr>
<tr>
<td>Overall Usability</td>
<td>()</td>
<td>()</td>
<td>()</td>
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</tr>
<tr>
<td>Ease of installation</td>
<td>()</td>
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<tr>
<td>Ease of administration</td>
<td>()</td>
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</tr>
<tr>
<td>Customization and Extensibility</td>
<td>()</td>
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</tr>
<tr>
<td>Ease of upgrade/migration to new versions</td>
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<td>()</td>
</tr>
<tr>
<td>Online training, forums and documentation</td>
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</tr>
</tbody>
</table>

How would you characterize the vendor's technical support?

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Very</th>
<th>Adequate</th>
<th>Poor</th>
<th>Very</th>
<th>Don't</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>good</td>
<td></td>
<td>poor</td>
<td></td>
<td>know</td>
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<tr>
<td>Product knowledge</td>
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<tr>
<td>Responsiveness</td>
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<tr>
<td>Continuity of personnel</td>
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<tr>
<td>Time to resolve problems</td>
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<td></td>
</tr>
</tbody>
</table>

How would you characterize the vendor's consulting services?

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Very good</th>
<th>Adequate</th>
<th>Poor</th>
<th>Very poor</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professionalism</td>
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<tr>
<td>Product knowledge</td>
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</tr>
<tr>
<td>Continuity of personnel</td>
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</tr>
<tr>
<td>Time to resolve problems</td>
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</tr>
</tbody>
</table>

How would you rate the "integrity" (i.e., truthfulness, honesty) of this vendor?

( ) Excellent

( ) Very good
( ) Adequate
( ) Poor
( ) Very poor
( ) Don’t know

Did this vendor’s overall performance improve, remains the same or decline from last year?
( ) Improved
( ) Stayed the same
( ) Declined

Would you recommend this vendor/product?
( ) I would recommend this vendor/product
( ) I would not recommend this vendor/product

Please enter any additional comments regarding this vendor and/or its products
____________________________________________
____________________________________________
____________________________________________
____________________________________________