Wisdom of Crowds®
Enterprise Planning Market Study

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Definitions

**Enterprise Planning** covers the methods and processes used by an organization to plan for the impact of various internal and external factors on its future performance and business outcomes. This includes strategic, operational, and financial planning and forecasting. Enterprise planning can include the creation and management of periodic budgets that are used to manage income and expenditures against a plan.

**Enterprise Planning Software** covers the systems that automate enterprise planning processes. These systems can vary significantly in complexity and automation capabilities, from relatively straightforward spreadsheet replacements to sophisticated multi-user systems that support collaborative planning and use advanced technologies such as in-memory computing.
Introduction

In 2018, we celebrate the 11th 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.

We are also excited that our second annual conference, Real Business Intelligence, was held June 27 and 28, 2018 on the MIT campus in Cambridge, Massachusetts. Unlike other events, we designed Real Business Intelligence as an immersive thought leadership event focused on strategies for success with information management, business intelligence, analytics, and performance management.

Our first market report in 2010 set the stage for where we are today. Since that time, we expanded our agenda and added new research topics every year. For 2018, we plan to release 16 major reports, including this one, our fourth annual enterprise planning report.

In this “Wisdom of Crowds® Enterprise Planning Market Study report, we examine user perceptions, intentions, and realities associated with enterprise planning. For this fourth year of coverage we include a number of year-over-year comparisons to indicate market shifts.

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

- Wisdom of Crowds® Flagship BI Market Study
- Advanced and Predictive Analytics
- Analytical Data Infrastructure
- Business Intelligence Competency Center
- Cloud Computing and Business Intelligence
- Collective Insights®
- Embedded Business Intelligence
- End User Data Preparation
- IoT 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.
Executive Summary
Executive Summary

- There is a significant increase in the adoption of enterprise planning software, up to 58% in 2018 from 30% in 2017.
- There is growing evidence of market maturity, with emphasis shifting from evaluation and selection to implementation and deployment.
- The perceived overall importance of enterprise planning increases significantly in 2018, with 37 percent of organizations rating it of "critical" importance, up from 28% in 2017. The Finance function and Executive Management rate enterprise planning of higher importance than other functions.
- Despite the increase in market maturity and overall adoption, customer-facing functions (Sales/Marketing and Customer Service) represent the largest potential adopters of enterprise planning in the next 12 to 24 months.
- Annual financial budgets remain by far the most important enterprise planning initiative. However, headcount, salary, and compensation planning steadily grew in importance and in 2018 are the second most important enterprise planning initiative, overtaking rolling forecasts.
- Annual budgets and quarterly forecasts remain the most common periodic analyses used across all types of organizations.
- SaaS is the most important deployment model in 2018, representing a significant shift in the market. On-premises deployment declines to third (after SaaS and hosted solutions). The preference for SaaS is highest among small organizations (1-100 employees), but there is interest in SaaS from organizations of all sizes.
- Service industries and technology are the verticals that show the strongest preference for SaaS deployment. Healthcare and Manufacturing are the least enthused with SaaS, with 53% and 39% respectively, rating it as “not important.”
- Vendor rankings are displayed on pages 45-63.
Study Demographics
Our 2018 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 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 75 percent of all respondents. EMEA accounts for 18 percent; Asia Pacific and Latin America make up the remainder of the sample (fig. 1). North America represents a higher percentage of survey respondents in 2018 (up from 58%), while EMEA is down from 31%.

Due to the heavily skewed nature of the dataset towards North America, the Trend Analysis section in this study does not include breakdown by geography, as the sample sizes for EMEA, Asia Pacific, and Latin America are too small for drawing meaningful conclusions.

Figure 1 – Geographies represented
Respondent Functions

Finance is the function most represented among respondents, with 36% of the sample (fig. 2). Executive Management follows with 23%, while IT drops to 19% percent (down from 29% in the 2017 study). The BICC, R&D, Operations (which includes manufacturing, supply chain and services), Sales & Marketing and Strategic Planning are the next most represented. Four percent of respondents do not fall into our functional breakout.

Tabulating results by respondent function helps us create analyses that represent different perspectives by function.

Figure 2 – Respondent Functions represented
Vertical Industries
Technology, Manufacturing, Financial Services, Healthcare, and Higher Education are the most represented industries in our 2018 study and collectively make up 52% of the sample (fig. 3). Fourteen vertical industries had 1% or fewer respondents, making up 11% of the total. Examples of these vertical industries include Chemical, Automotive, Federal Government, State & Local Government, Biotechnology, and others. Although these are not represented in Figure 3, we used these industries to support some analyses in this study.

Tabulating results across industries helps us develop analyses that reflect the maturity and direction of different business sectors. The 2018 study provides greater insight by industry, as the “Other” category (respondent industry not covered by one of the questionnaire options) only represents 3% of the total (down from 35% in 2017).

Figure 3 – Vertical industries represented
Organization Size
Participation is balanced across organizations of different sizes (measured by global employee head count). Small organizations (1-100 employees) represent 23% of respondents, mid-size organizations (101-1,000 employees) account for 34%, and large organizations (>1,000 employees) account for the remaining 43% (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

Current Adoption and Plans to Use Enterprise Planning Software
Compared to previous years, the 2018 study shows a significant increase in organizations that currently use enterprise planning software (fig. 5). Use jumps to 58% in 2018, whereas it was around 30% for the previous three years. There is also a marked decline in organizations with no plans to use enterprise planning software, down to 24% in 2018 from around 50% in the three previous years. The percentage of respondents currently evaluating enterprise planning software continues to increase steadily.

This data shows that the market is shifting away from the potential adoption of enterprise planning software to focus on how it should be implemented and used to deliver business value. End-user organizations need to focus on implementing enterprise planning best practices and expanding user adoption. Vendors should focus on support and implementation services and partnerships.

Figure 5 – Plans to use enterprise planning software 2015-2018
The current level of adoption is fairly evenly spread over organizations of all sizes (fig. 6), although adoption is lowest among the smallest organizations (1–100 employees), at 45%. However, organizations of this size have the highest percentage of responses for either currently evaluating (10%) or may use in the future (13%). Current adoption is highest among organizations with 101-1,000 employees, at 68%.

This data is further confirmation of the increasing maturity of the market across organizations of all sizes, although the greatest future adoption opportunity is in the smallest organizations.

Figure 6 – Plans to use enterprise planning software by organization size
Adoption of Enterprise Planning Software by Respondent Function

There is a significant increase in respondents that report into the Finance function in the 2018 study. This may account for some of the overall increase in current adoption of enterprise planning software. Over 77% of Finance respondents say their organizations currently use enterprise planning software, while only 39% of respondents that report into IT currently use enterprise planning software (fig. 7).

This finding highlights the importance of the Finance function in the adoption of enterprise planning software. Respondents that report into the Finance function clearly have greater involvement in an organization’s use of enterprise planning compared to IT.

Also of interest is the level of adoption (over 55%) in organizations whose respondents report into Executive Management; together with Finance respondents, they account for 59% of the study sample.

Organizational Plans to Use Enterprise Planning Software by Respondent Function

![Organizational Plans to Use Enterprise Planning Software by Respondent Function](image_url)

- **Yes, we use planning and budgeting software today**
- **We are currently evaluating planning and budgeting software**
- **We may use planning and budgeting software in the future**
- **No, we have no plans to use planning and budgeting software at all**

*Figure 7 – Organizational plans to use enterprise planning software by respondent function*
Importance of Enterprise Planning

We asked respondents how important enterprise planning is to their organization (fig. 8). The perceived "critical" value of enterprise planning increases by 9% in 2018 and reverses the declining trend of the previous three years. Measures of "very important" (+1%) and "important" (+7%) also improve (fig. 7).

This data shows a marked increase in the overall importance of enterprise planning in 2018. This is most likely due to the increased maturity of the market, reflected in the higher current adoption rates for enterprise planning software in 2018, and also the makeup of the study sample with its increased share of respondents that report into the Finance function.

Figure 8 – Importance of enterprise planning 2015-2018
Our analysis of this data by respondent function shows that respondents from the Finance function rate enterprise planning as more important to their organization compared to most other functions. Figure 9 shows importance by respondent function ranked in order of sample size (from left to right). Finance and Executive Management respondents together account for 59% of all responses. We also include the relative share of “no response” answers, as “no response” indicates that the respondent is not closely involved with enterprise planning and likely does not know how important it is to their organization (or has no opinion on its importance).

This data confirms that the Finance function is the key driver of enterprise planning initiatives. However, it also shows that enterprise planning is very much on the radar screen of Executive Management and Operations (which includes manufacturing, supply chain and services). Consequently, there is a risk that IT staff may underestimate the importance of enterprise planning in their organization based on their own perceptions rather than those of Finance, Executive Management, and other business leaders.

**Figure 9 – Importance of enterprise planning by respondent function**

![Importance of Enterprise Planning by Respondent Function](image-url)
The 2018 study shows no significant differences in the perceived importance of enterprise planning across organizations of different sizes (fig. 10). The mean of responses is very consistent across all organization sizes, although enterprise planning has the greatest level of critical importance to organizations with 1,001 - 10,000 employees. This is likely because these organizations have a span of control that can be managed by a common approach to enterprise planning, whereas larger organizations may devolve more responsibility to business units or geographic regions.

This means that small and mid-sized organizations should not assume that enterprise planning is only of importance to larger organizations. They should ensure they include enterprise planning in their overall IT strategy. Also, vendors of enterprise planning software have market opportunities in organizations of all sizes but will need to ensure they have solutions focused on the differing needs of small, mid-sized, and large organizations.

Figure 10 – Importance of enterprise planning by organization size
There is greater variation in the perceived importance of enterprise planning by industry (fig. 11), with the mean response ranging from 4.3 (Healthcare) to 3.4 (Education). Perceived "critical" value scores are highest in Healthcare and Manufacturing and lowest in Education.

There is a significant jump in the perceived “critical” value scores in Healthcare in the 2018 study (up 20% from 2017) which is likely fueled by the uncertainty around healthcare legislation in the United States, as the majority of 2018 study respondents are U.S. based. This shows that the importance of enterprise planning is impacted by issues affecting specific industries and is likely to vary year on year.

![Importance of Enterprise Planning by Vertical Industry](image)

*Figure 11 – Importance of enterprise planning by vertical industry*
Enterprise Planning Software Usage by Function

We asked respondents to identify the current usage of, and future adoption plans for, enterprise planning software across the various functions in their organizations (fig. 12). This analysis shows that Finance continues to lead the way in current usage of enterprise planning software, with a significant 10% increase over 2017. However, many other functions also increased their usage compared to 2017, indicating a greater overall level of market maturity. This supports the conclusions from the earlier analysis of enterprise planning software usage by respondent function.

Organizations deploying enterprise planning software should therefore ensure that the Finance function plays a key role in any such initiative but should be encouraged to work with line-of-business leaders from other functions that also use these solutions. This will help prevent a siloed and fragmented approach to enterprise planning.

Figure 12 – Functions using enterprise planning software 2015-2018
Analysis of future adoption plans by function further indicate increased market maturity, as there are no significant plans for increased adoption by any function within the next 24 months (fig. 13). However, if we consider Sales, Marketing, and Customer Service together, they represent 30% of the total sample size planning to adopt enterprise planning software within 12-24 months. This shows there are opportunities for organizations to extend enterprise planning initiatives into customer-facing functions.

The Manufacturing function remains the least likely to adopt enterprise planning software, with 64% of respondents stating they have no plans to adopt, which is very similar to our 2017 findings. Manufacturing organizations, therefore, have a greater risk of implementing siloed planning systems and processes, which could compromise their ability to respond to changing market conditions. However, Manufacturing organizations that implement enterprise planning software have an opportunity to create competitive advantage over their peers if they can effectively link planning processes across functions.

**Enterprise Planning Software Planned Adoption by Function**

![Enterprise Planning Software Planned Adoption by Function](image)

*Figure 13 – Enterprise planning software planned adoption by function*
Across organizations of different size, Finance is consistently the most frequent current user of enterprise planning (fig. 14), although the usage is lower among small organizations, most likely due to the relative simplicity of their finance needs. There are some functional distinctions between small and large organizations. Large organizations (> 1,000 employees) are more likely to use enterprise planning in their IT functions, while the largest organizations (> 10,000 employees) show greater adoption in HR and Supply Chain. This is due to the relative complexity of the planning needs of these functions compared to those in small and mid-sized organizations.

Figure 14 – Functions using enterprise planning software by organization size
Importance of Enterprise Planning Initiatives

Annual financial budgets remain at the top of the list of enterprise planning initiatives in 2018 (fig. 15), with 65 percent of respondents stating it is critically important. This is unsurprising, as annual financial budgeting is the traditional approach used to manage performance against financial targets, and this is unlikely to change any time soon.

However, respondents also view rolling forecasts as important. Rolling forecasts are an alternative to fixed, annual financial budgets, and many practitioners recommend replacing annual budgets with rolling forecasts. The study data indicates that many organizations currently use rolling forecasts to augment rather than replace annual financial budgets.

Respondents rank many enterprise initiatives at similar levels of importance. This may create the temptation to build “all encompassing” projects when implementing enterprise planning software. This can be risky, and for most organizations it would be better to focus on no more than two to three initiatives in a single project phase.

Figure 15 – Importance of enterprise planning initiatives
We note limited change in the relative importance of enterprise planning initiatives over the last four years based on respondent mean scores (fig. 16). However, the importance of head count, salary, and compensation planning steadily grew and, in the 2018 study, slightly overtakes rolling forecasts to become the second most important initiative.

We added two new initiatives to the study in 2018: driver-based budgeting/planning and zero-based budgeting. Respondents ranked driver-based budgeting and planning overall at similar levels to other initiatives but ranked zero-based budgeting much lower. Some industry commentators note the increasing popularity of zero-based budgeting in recent years (which had fallen somewhat out of favor), but our study does not appear to support this.

Monte Carlo analysis and other scenario techniques have a low and declining relative importance. This likely indicates that users are wary of sophisticated forecasting capabilities. This may represent an opportunity for vendors to deliver these in ways that require less user intervention (for example, using AI and machine learning).

Figure 16 – Mean importance of enterprise planning initiatives 2015-2018

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The relative importance of enterprise planning initiatives is broadly similar across all organization sizes when ranked by the one to five mean scores (fig. 17). The smallest organizations rate head count, salary, and compensation planning of notably lower importance, while they also rate revenue/demand planning and sales and operations planning lower than other organizations. This is understandable as the smallest organizations have less need of these capabilities.

Perhaps more surprising is the lack of any significant differences between the largest, most complex organizations and other organizations. Therefore, small and mid-sized organizations evaluating enterprise planning software should not assume they will need simpler functional capabilities compared to larger organizations. Vendors of enterprise planning software should focus offerings for small and mid-sized organizations on ease of deployment and implementation rather than restricting functional capabilities.

Figure 17 – Mean importance of enterprise planning initiatives by organization size
All industries rate annual financial budgets and head count planning, salary, and compensation planning at similar levels of importance (fig. 18). Respondents rate some initiatives lower because they are less applicable to some industries (for example, revenue/demand planning and sales and operations planning in Education). Manufacturing respondents rate sales and operations planning higher because they are most applicable in that industry.

However, there are some notable variations by vertical in cross-industry initiatives. Education respondents rate zero-based budgeting of higher importance than top-down or bottom-up budgeting, indicating that zero-based budgeting may be of most relevance in this industry, despite the overall low ranking across industries. Publicly available information reveals examples of U.S. public education organizations that used zero-based budgeting in recent years to improve budgeting outcomes.

Also of note is the relatively higher rating of Monte Carlo and scenario analysis given by Financial Services and Insurance respondents.

**Enterprise Planning Initiatives by Industry**

![Diagram showing importance of enterprise planning initiatives by industry](image)

**Figure 18 – Mean importance of enterprise planning initiatives by industry**
Frequency of Enterprise Planning and Forecasting
In 2018, annual budgeting is the most prevalent frequency, increased steadily to 44% in 2018 from 31% in 2015 (fig. 19). It is clear that annual budgets will remain the foundation for enterprise planning in the future, especially given the overriding importance of annual financial budgets in the analysis of enterprise planning initiatives.

From a forecasting perspective, the use of rolling forecasts remains steady at 9-10%, while quarterly forecasting gains ground mainly at the expense of monthly, weekly, and daily forecasting.

Figure 19 – Frequency of planning/budgeting and forecasting 2015-2018
Regardless of organization size, annual budgeting and quarterly forecasting are most widely used in 2018 (fig. 20). The smallest organizations do not use daily budgeting or forecasting; these are most prevalent among the largest organizations (> 10,000 employees). This is understandable due to the complexity of collecting forecast data on a daily basis and the sophistication of software required to support daily budgeting. However, somewhat surprisingly, 6% of the smallest organizations use weekly budgeting, while 12% use weekly forecasting. This shows that even some of the smallest organizations budget and forecast at less than monthly frequencies.

The use of rolling forecasts is consistent (although limited) across organizations of all sizes, again showing that more advanced enterprise planning techniques are not restricted only to larger, more complex organizations.

Figure 20 – Frequency of planning/budgeting and forecasting by organization size
Deployment Options for Enterprise Planning

A major shift occurred in the 2018 study with SaaS becoming the most important deployment option overall for enterprise planning software, albeit narrowly (fig. 21). Sixty-two percent of respondents rank SaaS/cloud service as either “critical,” “very important,” or “important,” while the equivalent total for hosted solutions is 61%. However, hosted solutions have a slightly higher “critical” importance ranking (14% versus 12%).

This is a significant shift in the market, as SaaS/cloud services and hosted solutions are both ahead of on-premises systems in terms of importance. Overall, these three deployment options are the most important considerations for organizations deploying enterprise planning software.

For other deployment options, respondents rank mobile reporting as more important than mobile data entry; respondents have a small preference for deploying a unified CPM solution over a modular CPM approach, although this is not significant.

![Importance of Deployment Options for Enterprise Planning](image-url)

*Figure 21 – Importance of deployment options for enterprise planning*
The increasing importance of SaaS as a deployment option shows in the analysis of the mean one to five scores from 2015-2018 (fig. 22). In 2015, respondents rank on-premises and mobile reporting the most important deployment options overall. Hosted solutions became more important in 2016 but levelled off, while SaaS/cloud service continues to rise in importance steadily since 2015. 2018 marks the first year in the study when SaaS/cloud service overall scores the highest in relative importance.

This potentially represents a pivot point in the market. Although hosted and on-premises solutions are still important to many organizations, SaaS is now the most important deployment option, and this trend is likely to continue.

**Deployment Options for Enterprise Planning, Relative Importance Mean Score 2015-2018**

![Deployment Options for Enterprise Planning, Relative Importance Mean Score 2015-2018](image_url)

*Figure 22 – Deployment options for enterprise planning, relative mean score 2015-2018*
The importance of SaaS as a deployment option varies by organization size (fig. 23). Significantly more small organizations (1-100 employees) view SaaS/cloud service of “critical” importance (25%) compared to larger organizations. However, larger organizations have a similar level of “very important” ratings, ranging from 28% to 32%. This shows that SaaS is a potentially important deployment option for organizations of all sizes. However, the largest organizations (> 10,000 employees) are fairly evenly split between ranking SaaS/cloud service as “important” or higher (51%) compared to “somewhat important or “not important” (49%). These organizations also have the highest share of “not important” ratings (32%). Thus, while smaller organizations adopt SaaS solutions, it appears that the largest organizations still hedge their bets.

Therefore, small organizations should focus their evaluations of enterprise planning software on SaaS as the preferred deployment option, while the largest organizations need to consider SaaS deployment for enterprise planning in line with other organization-wide initiatives for deploying cloud solutions. Vendors of enterprise planning software need to ensure they have the appropriate deployment options for their target markets.

**Importance of SaaS/Cloud Service Deployment by Organization Size**

![Figure 23 – Importance of SaaS/cloud service deployment by organization size](image)
The 2018 study also reveals significant variances in the perceived importance of SaaS by industry (fig. 24). Service industries (which includes advertising, business services, consulting, real estate, hospitality, and similar industries), and technology are the industry verticals with the largest share of “critical” (55%) and “very important” (47%) rankings. These industries clearly perceive SaaS their preferred deployment option, with only 10% and 11% rating it as “not important.”

Organizations in the Healthcare and Manufacturing verticals take a different view, with 53% and 39% respectively, rating SaaS as “not important.” No respondents in the Retail/Wholesale industry rate SaaS as “critically important,” and no respondents in Healthcare rate SaaS as either “critical” or “very important,” indicating these industries lag others in their strategic focus on SaaS deployment of enterprise planning.
Industry and Vendor Analysis
Industry Capabilities
For our 2018 study, we analyzed vendor responses about the functional and architectural capabilities of their products the following categories:

**Strategic Planning** – features and functions that support planning activities of a strategic nature. These typically help the management team set high-level and long-term plans and also model the impact of complex strategic decisions (such as acquiring a company). They also help senior management connect strategic objectives to financial and operational activities.

**Financial Planning** – capabilities that help the CFO and finance team create and manage financial plans and budgets. These are built using financial logic and frequently use coding structures found in the general ledger (GL). They need to manage the accounting conventions of debits and credits and typically follow the format of the primary financial reports (balance sheet, income statement, and cash-flow statement). They use these reports to predict likely financial performance and compare it against actuals.

**Operational Planning** – features and functions that line-of-business managers use to help plan their activities using measures and drivers that are relevant to their function. Examples include workforce planning tools that would be used by the human resources team, or territory and quota planning tools that would be used by the sales function. There are many specialist domain planning solutions, but vendors that offer operational planning capabilities in addition to strategic and financial planning may be attractive to organizations wanting to adopt a holistic approach to enterprise planning.

**Planning & Budgeting Process Support** – capabilities that support the entry, amendment, review, and approval of plans and budgets.

**Planning & Modeling Capabilities** – how the solution supports the modeling aspect of planning and budgeting. This includes forecasting, simulation, and “what-if” capabilities, along with the flexibility and sophistication of the underlying model or models. These capabilities are relevant to all types of planning (strategic, financial, and operational).

**Technical Architecture** – features of the underlying technical and application architecture, including delivery models supported and data architecture.
Industry – Strategic Planning Capabilities

Strategic planning is the only category where none of the capabilities are supported by all the vendors in the study (fig. 25). Support for debt vs. equity financing (choosing how to finance strategic activities) and long-range financial planning is the highest (both 92%), but these overlap with financial planning and are likely to prove popular with CFOs. Support for the most important aspect of strategic planning, linking strategic goals with annual budgets, is the lowest at 85%.

Overall, there is broad support for strategic planning. Interestingly, vendors that do not support these capabilities today have no plans to fill the gaps. This indicates that strategic planning is a lower priority for vendors in their future product road maps. Organizations that want to implement strategic planning as part of their deployment of enterprise planning software should ensure they evaluate vendors on the basis of their current delivered capabilities in these areas.

Figure 25 – Industry – strategic planning capabilities
Industry – Financial Planning Capabilities

Financial planning capabilities are the most widely supported capabilities in the study (fig. 26). This is unsurprising as annual financial budgets remain the most important enterprise planning initiative in 2018, and most enterprise planning evaluations are heavily influenced by the CFO and the needs of the Finance function.

However, there are some notable areas where some vendor solutions lack support for key financial planning activities. For example, cash-flow forecasting is the fourth most important enterprise planning initiative, yet only 87% of vendors support this today and 7% have no plans to support it. Organizations evaluating enterprise planning software must ensure they clearly define and rank their financial planning requirements, as this will help differentiate between vendors.

Industry-specific planning modules have the most focus for the 12-24 month road map.

![Industry - Financial Planning Capabilities](image)
Industry – Operational Planning Capabilities
Support for operational planning capabilities varies considerably across vendors in the study (fig. 27). This is understandable as few enterprise planning vendors have the research & development bandwidth to cover all aspects of operational planning along with strategic and financial planning. Also, there are many specialist vendors that deliver planning capabilities for a single (or limited number) of operational domains, and it can be challenging for broad enterprise planning vendors to compete effectively with the specialists.

Organizations looking to source planning capabilities outside strategic and financial planning from an enterprise planning vendor therefore need to evaluate domain capabilities closely and consider augmenting an enterprise planning solution with a domain specialist solution if these do not go deep enough.

Figure 27 – Industry – operational planning capabilities
Industry – Budgeting & Planning Process Support

Most vendors provide comprehensive support for the processes that underpin the entry, amendment, review, and approval of budgets (fig. 28). There are some notable exceptions. For example, some solutions do not provide an audit trail of changes or support uploads from Excel, and the vendors do not plan to fill these gaps. Consequently, organizations evaluating enterprise planning solutions should not assume that all vendors will meet all their required budgeting and planning process needs, despite the overall maturity of the market.

Figure 28 – Industry – planning & budgeting process support
Industry – Planning & Modeling Capabilities

The 2018 study shows a wide degree of support for many sophisticated planning and modeling functions that are fundamental to delivering a flexible and powerful solution to end users (fig. 29). However, some of the more advanced capabilities are not yet widely supported. Predictive and prescriptive analytics (which are more usually associated with advanced BI solutions) are only supported today by 57% and 36% of vendors, respectively. However, these technologies are on the 12-24 month road map for most vendors that do not yet support them.

Vendors are split with regards to Monte Carlo analysis. Fifty-four percent support this capability today while 39% do not plan to support it in the future. The lack of planned support by many vendors appears to be in line with end-user priorities, as respondents rank Monte Carlo and other scenario analysis the least important enterprise planning initiative.

Mobile support for modeling has the least support from vendors, with 42% not planning to provide this capability. This is understandable, as the prevalence of SaaS reduces the need for mobile capabilities, especially in core functionality like modeling.

Figure 29 – Industry – planning & modeling capabilities
Industry – Technical Architecture Features

The 2018 study shows that all vendors now support Cloud/SaaS technology (fig. 30). In 2017, 90% of vendors support this capability, with the remainder stating it is in their 12-month road map. It appears the remaining vendors delivered on their promise; this is pragmatic, given that the 2018 study identifies SaaS as the preferred deployment model for end users. The vendor focus on SaaS is confirmed by the fact that no vendors plan to add hosted/single-tenant deployment if they do not already offer this.

Vendors clearly made their choices in most other technology areas. For example, 77% percent of vendors support in-memory databases, but the remainder have no plans to support this technology in the future. Mobile support for data entry, workflow, and processing is the one technology that is still on the road map for a significant segment of vendors (28%).

Organizations evaluating enterprise planning software need to involve their IT strategy team in evaluations to identify how well the technology adopted by potential enterprise planning vendors aligns with their enterprise strategic technologies. Although functional needs should be the primary driver of vendor selection, technical architecture differentiates vendors when functional fit is broadly similar.

![Industry - Technical Architecture Features](http://www.dresneradvisory.com)

**Figure 30 – Industry – technical architecture features**
Vendor Rankings

In this section, we offer rankings of enterprise planning software vendors. We rate vendors using 33 different criteria, on a five-point scale for each. Criteria covers 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 use in scoring the industry and vendors:

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

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

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. 31). For the x axis, we combine 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 plot customer sentiment surrounding product, derived from the 12 product and technology measures used to rank vendors. On the resulting four quadrants, we plot 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 31 – Customer experience model
**Vendor Credibility Model**

The vendor credibility model considers how customers “feel” about their vendor (fig. 32). 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 32 – 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 add “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>

<table>
<thead>
<tr>
<th>Value for price (3 o’clock)</th>
</tr>
</thead>
</table>

<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>

<table>
<thead>
<tr>
<th>Integrity (11 o’clock)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Whether vendor is recommended (12 o’clock)</th>
</tr>
</thead>
</table>
Adaptive Insights Detailed Score

Figure 33 – Adaptive Insights detailed score

With scores generally above the overall sample, Adaptive Insights has improvements across most categories of measurement for 2018. It is a Technology Leader in the Customer Experience Model and an Overall Leader in the Vendor Credibility Model. It is considered best in class for product ease of upgrade/migration to new versions and online training, forums and documentation. It maintains a perfect recommend score.
Anaplan is a Contender in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model. Its scores this year decline compared to 2017, with most scores generally below or in line with the overall sample. It maintains a perfect recommend score.
Figure 35 – Board International detailed score

In its first year of inclusion, Board International’s scores are generally above the overall sample, and it is an Overall Leader in both Customer Experience and Vendor Credibility Models. It has a perfect recommend score.
Budget Maestro (Centage) Detailed Score

Budget Maestro

Figure 36 – Budget Maestro (Centage) detailed score

Budget Maestro (Centage) has significant improvements in all categories of measurement for 2018. It is an Overall Leader in both the Customer Experience and Vendor Credibility models. Its scores are generally above the overall sample, and it is best in class for support product knowledge, consulting professionalism, product knowledge, experience, continuity, value, and overall integrity. It maintains a perfect recommend score.
An Overall Leader in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model, Host Analytics is generally above the overall sample. In 2018, it has key improvements across all sales and consulting measures and maintains a perfect recommend score.

Figure 37 – Host Analytics detailed score
IBM Detailed Score

Figure 38 – IBM detailed score

IBM is a Contender in both Customer Experience and Vendor Credibility models. Although generally below the overall sample, it has key improvements in most sales measures, as well as integrity and recommend scores.
Infor Detailed Score

Figure 39 – Infor detailed score

Infor is a Contender in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model. Although generally aligned with the overall sample, it has improvements across a majority of measures in sales, as well as value, product, and recommend scores.
Jedox Detailed Score

Figure 40 – Jedox detailed score

Generally, above the overall sample, Jedox is an Overall Leader in both the Customer Experience and Vendor Credibility models. It has improvements for nearly every measure across all categories including sales, value, product, technical support, consulting, and integrity. It is best in class for product completeness of functionality and maintains a perfect recommend score.
Microsoft Detailed Score

Figure 41 – Microsoft detailed score

With scores generally below the overall sample, Microsoft shows a decline for most measures in 2018. It is a contender in both Customer Experience and Vendor Credibility models.
Figure 42 – OneStream detailed score

In its first year of inclusion, OneStream is substantially above the overall sample for all measures and is an Overall Leader in the Customer Experience and Vendor Credibility models. It is best in class for a majority of measures across most categories of measurement including sales, value, product, and technical support. It has a perfect recommend score.
Oracle Detailed Score

Figure 43 – Oracle detailed score

With scores well below the overall sample, Oracle’s scores decline in 2018 versus 2017 for most measures. It is an outlier in both Customer Experience and Vendor Credibility models.
With scores consistently above the overall sample, Prophix is an Overall Leader in both Customer Experience and Vendor Credibility models. In 2018, it shows key improvements across most categories of measurement including sales, product, technical support, and consulting. It maintains a perfect recommend score.
SAP Detailed Score

Figure 45 – SAP detailed score

For 2018, SAP is a Trust Leader in the Vendor Credibility model. Its scores are generally below the overall sample.
Other Dresner Advisory Services Research Reports

- Wisdom of Crowds® “Flagship” Business Intelligence Market study
- Analytical Data Infrastructure
- Big Data Analytics
- Business Intelligence Competency Center
- Cloud Computing and Business Intelligence
- Collective Insights®
- Data Catalog
- Embedded Business Intelligence
- End User Data Preparation
- IoT Intelligence®
- Location Intelligence
- Small and Mid-Sized Enterprise Business Intelligence
Appendix - The 2018 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: __________________________________________________________________

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 and Wholesale
( ) Sports
( ) State and Local Government
( ) Technology
( ) Telecommunications
( ) Transportation
( ) Utilities
( ) Other - Please specify below
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
( ) Finance
( ) Human Resources
( ) Information Technology (IT)
( ) Marketing
( ) Operations (e.g., Manufacturing, Supply Chain, Services)
( ) Research and Development (R&D)
( ) Sales
( ) Strategic Planning Function
( ) Other - Write In
Does your organization use or intend to use Enterprise Planning and Budgeting software?

( ) 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 this year

( ) Will adopt next year

( ) Will adopt beyond next year

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>Function</th>
<th>Use today</th>
<th>Will use in 12 months</th>
<th>Will use in 24 months</th>
<th>No plans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance</td>
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<td>()</td>
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<tr>
<td>Human Resources</td>
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<tr>
<td>Information Technology (IT)</td>
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<tr>
<td>Manufacturing</td>
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<tr>
<td>Marketing</td>
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<tr>
<td>Operations</td>
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<tr>
<td>Research and Development (R&amp;D)</td>
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<tr>
<td>Sales</td>
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<tr>
<td>Strategic Planning Function</td>
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<tr>
<td>Supply Chain</td>
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<tr>
<td>Customer Service</td>
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</tbody>
</table>
Please prioritize the following planning and budgeting capabilities for your organization.

<table>
<thead>
<tr>
<th>Capabilities</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>
<td>()</td>
<td>()</td>
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<tr>
<td>Balance sheet planning - financial instruments</td>
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<tr>
<td>Bottom-up budgeting</td>
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<tr>
<td>Capital asset planning and budgeting</td>
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<tr>
<td>Cash-flow forecasting/planning</td>
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<tr>
<td>Driver-based budgeting/planning</td>
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<tr>
<td>Headcount, salary and compensation planning</td>
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<tr>
<td>Linking strategic plans to annual budget</td>
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<tr>
<td>Model and plan optimal sales territories and quotas</td>
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<tr>
<td>Monte Carlo and other scenario analyses</td>
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<tr>
<td>Category</td>
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<tr>
<td>Optimize workforce plans and staffing to meet demand</td>
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<tr>
<td>Product or customer profitability analysis</td>
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<tr>
<td>Project-based financial planning and budgeting</td>
<td>()</td>
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<tr>
<td>Revenue / demand planning</td>
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<tr>
<td>Rolling forecasts (monthly, quarterly, etc.)</td>
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<tr>
<td>Sales and operations planning</td>
<td>()</td>
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<tr>
<td>Strategic planning (3 - 5 years)</td>
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<tr>
<td>Top-down planning</td>
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<tr>
<td>Transfer pricing analysis</td>
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<tr>
<td>Zero-based budgeting</td>
<td>()</td>
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</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>
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<td>( )</td>
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<td>( )</td>
<td>( )</td>
</tr>
</tbody>
</table>

How important are the following deployment options in your organization?

<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-premises system</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
<tr>
<td>SaaS/cloud service</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
<tr>
<td>Unified CPM solution</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
<td>( )</td>
</tr>
</tbody>
</table>
Please specify your organization's current Enterprise Planning and Budgeting software vendor.

( ) Adaptive Insights
( ) Anaplan
( ) Bitam
( ) Board International
( ) Budget Maestro
( ) Microsoft
( ) Host Analytics
( ) IBM
( ) Infor
( ) Jedox
( ) Kaufman Hall (Axiom)
( ) KCI Computing
( ) Longview Solutions
( ) OneStream
( ) Oracle Hyperion
( ) Planview
( ) Prevero (Unit4)
( ) Prophix
( ) SAP
( ) SAS Institute
( ) Solver
( ) Tagetik (Wolters Kluwer)
( ) XLerant
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
( ) More than 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>
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<td>Product knowledge</td>
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<td>Understanding our</td>
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<td>business needs</td>
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<td>Responsiveness</td>
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<td>Flexibility/accommodation</td>
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<td>Business practices</td>
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<td>conditions</td>
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<td>Follow-up after the</td>
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</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>
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</thead>
<tbody>
<tr>
<td>Robustness/sophistication of technology</td>
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<tr>
<td>Completeness of functionality</td>
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<tr>
<td>Reliability of technology</td>
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<td>Scalability</td>
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<td>Integration of components within product</td>
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<td>Integration with third-party technologies</td>
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<td>Overall Usability</td>
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<tr>
<td>Ease of installation</td>
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<tr>
<td>Ease of administration</td>
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<tr>
<td>Customization and extensibility</td>
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<tr>
<td>Ease of upgrade/migration to new versions</td>
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<td>Online training, forums and documentation</td>
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</table>
How would you characterize the vendor's technical support?

<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>
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<tbody>
<tr>
<td>Professionalism</td>
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<td>Product knowledge</td>
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<td>Responsiveness</td>
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<td>Continuity of personnel</td>
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<td>Time to resolve problems</td>
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</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>
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</thead>
<tbody>
<tr>
<td>Professionalism</td>
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<td>Product knowledge</td>
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<td>Experience</td>
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<td>Continuity</td>
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<tr>
<td>Value</td>
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<td>Availability of resources</td>
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</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 your experience with this vendor improve, remain 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

____________________________________________
____________________________________________
____________________________________________
____________________________________________