



June 27, 2019

Dresner Advisory Services, LLC

2019 Edition

Wisdom of Crowds[®] Enterprise Performance Management Market Study

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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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Definitions

Performance management is an approach that fortifies the management cycle with enterprise-class modeling, planning, BI, and analytics in a single, or closely linked, system.

Enterprise Performance Management

An enterprise performance management system is a key element of performance management. It allows 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. EPM systems also include reporting and analytics capabilities that allow organizations to set goals and objectives and monitor performance against those objectives.

EPM systems can vary significantly in complexity and automation capabilities, from relatively straightforward spreadsheet replacements to sophisticated multi-user systems that support collaborative planning, provide a wide range of analytics, and use advanced technologies such as in-memory computing and machine learning.

2019 Wisdom of Crowds® EPM Market Study

Introduction

In 2019, we celebrate the 12th 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 pleased that our third annual conference, Real Business Intelligence, held May 14-15 on the MIT campus in Cambridge, Massachusetts was a huge success. Next year’s event is scheduled for May 5-6, 2020 in Cambridge, MA. Preregistration is available at www.SeeBeyondTheNoise.com.

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. This year, we produced our first Wisdom of Crowds® Enterprise Performance Management Market Study report. This builds on the previous four years of Enterprise Planning Market Studies to shift the focus to enterprise performance management. This reflects what we believe is a shift in the market towards a more holistic approach to performance management.

This report analyzes user perceptions, intentions, and realities associated with enterprise performance management (EPM). Enterprise planning still forms an important aspect of EPM, but this new report includes capabilities such as artificial intelligence, data-driven decision-making, and how EPM impacts other enterprise systems like enterprise resource planning (ERP).

We hope you enjoy this report!

Best



Howard Dresner
Chief Research Officer
Dresner Advisory Services

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2019 Wisdom of Crowds® EPM Market Study

Benefits of the Study

The Wisdom of Crowds® Enterprise Performance Management Market Study provides a wealth of information and analysis—offering value to both consumers and producers of enterprise performance management technology and services.

Consumer Guide

As an objective source of industry research, consumers use the Wisdom of Crowds® Enterprise Performance Management 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 performance management 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 Performance Management Market Study in several important ways such as:

External Awareness

- Build awareness for the enterprise performance management market and supplier brand, citing Wisdom of Crowds® Enterprise Performance Management Market Study trends and vendor performance
- Create lead and demand-generation for supplier offerings through association with Wisdom of Crowds® Enterprise Performance Management 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 Performance Management Market Study
- Better understand customer priorities, concerns, and issues
- Identify competitive pressures and opportunities

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About Howard Dresner and Dresner Advisory Services

The Wisdom of Crowds® Enterprise Performance Management 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](#)
- [Analytical Data Infrastructure](#)
- [Business Intelligence Competency Center](#)
- [Cloud Computing and Business Intelligence](#)
- [Data Preparation](#)
- [Embedded Business Intelligence](#)
- [Location Intelligence](#)
- [Self-Service BI](#)

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

- Current adoption levels indicate the market for enterprise performance management is still maturing and has room for future growth. Sixty-two percent of respondents are potential future users of enterprise performance management software.
- Finance and Operations are the functions with the highest levels of enterprise performance management adoption today, with 64 percent and 50 percent respectively.
- Adoption plans are skewed to 2021 or later. Sixty-nine percent of organizations considering enterprise performance management software plan to do so beyond 2020.
- Most respondents view enterprise performance management as an important technology. Eighty-seven percent rate enterprise performance management as critical, very important, or important.
- Large (1,001-10,000 employees) and very large organizations (greater than 10,000 employees) view enterprise performance management as significantly more important than small (1-100 employees) and mid-sized (101-1,000 employees) organizations.
- Thirty-six percent of enterprise performance management deployments are global in scope. However, 44 percent are departmental in focus, which means they are not used to their full potential as enterprise-level solutions.
- Only 9 percent of respondents prefer to source enterprise performance management from their ERP vendor, whereas 41 percent consider all types of vendors, and 35 percent prefer to source these capabilities from a specialist enterprise performance management vendor.
- Annual financial budgets are the highest priority planning capability in enterprise performance management, although respondents highly rank more advanced capabilities such as rolling forecasts, strategic planning, and linking strategic plans to annual budgets.
- Respondents are split on the impact of machine learning and AI in enterprise performance management. Twenty-nine percent of respondents see significant potential in AI and machine learning, while 21 percent feel that users will resist its adoption and 50 percent are undecided. The Executive Management function sees the greatest beneficial impact from machine learning and AI.
- Respondents have a clear preference for cloud enterprise performance management solutions compared to on-premises deployment.
- Vendor rankings are displayed on pages 53-71.

Study Demographics

Our 2019 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 71 percent of all respondents. EMEA accounts for 22 percent; Asia Pacific for 5 percent and Latin America 2 percent (fig. 1).

Due to the low number of respondents from Latin America, this region was excluded from any analysis by geography in the Trend Analysis section of this Market Study.

Geographies Represented

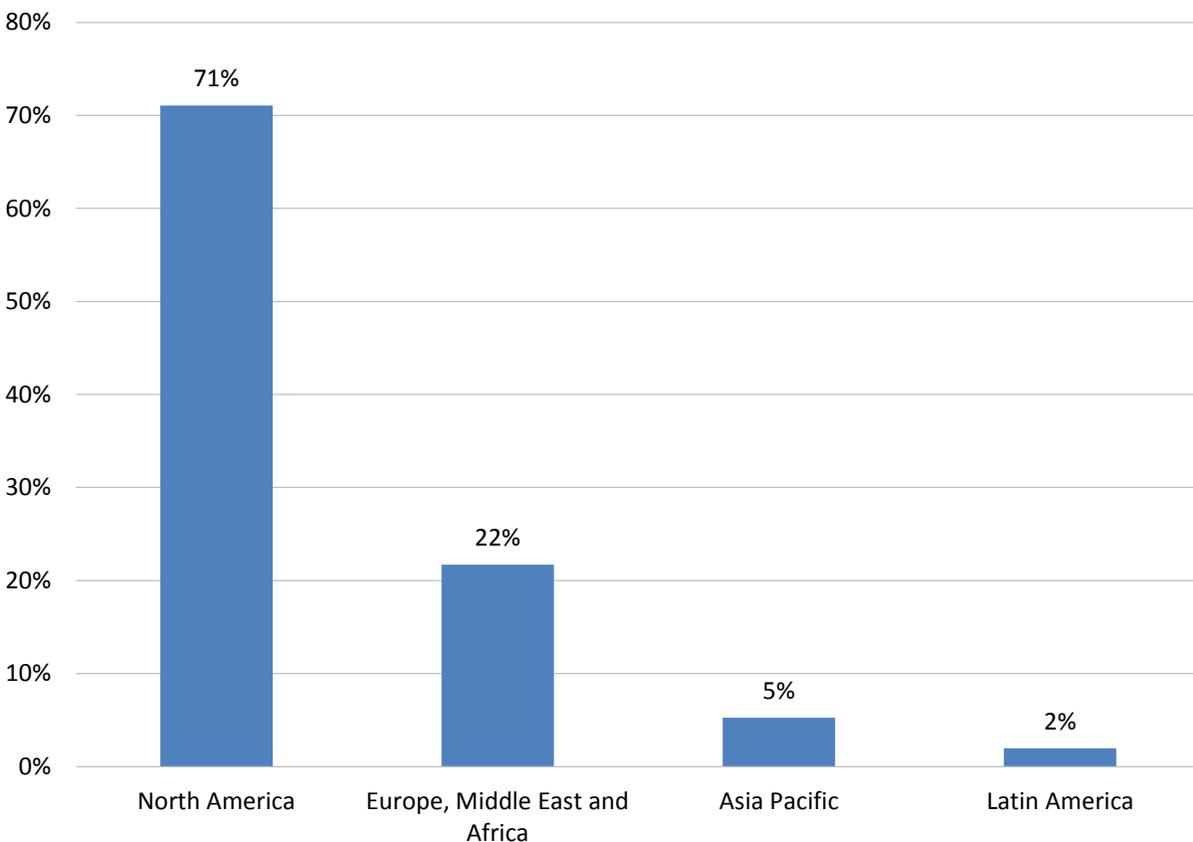


Figure 1 – Geographies represented

Respondent Functions

Finance is the function most represented among respondents, with 34 percent of the sample (fig. 2). Executive Management follows with 24 percent, while IT represents 22 percent. These three functions account for nearly 80 percent of respondents.

The BI Competency Center, Operations (which includes manufacturing, supply chain and services), R&D, Sales & Marketing, Strategic Planning, and Human Resources are the next most represented. Five 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.

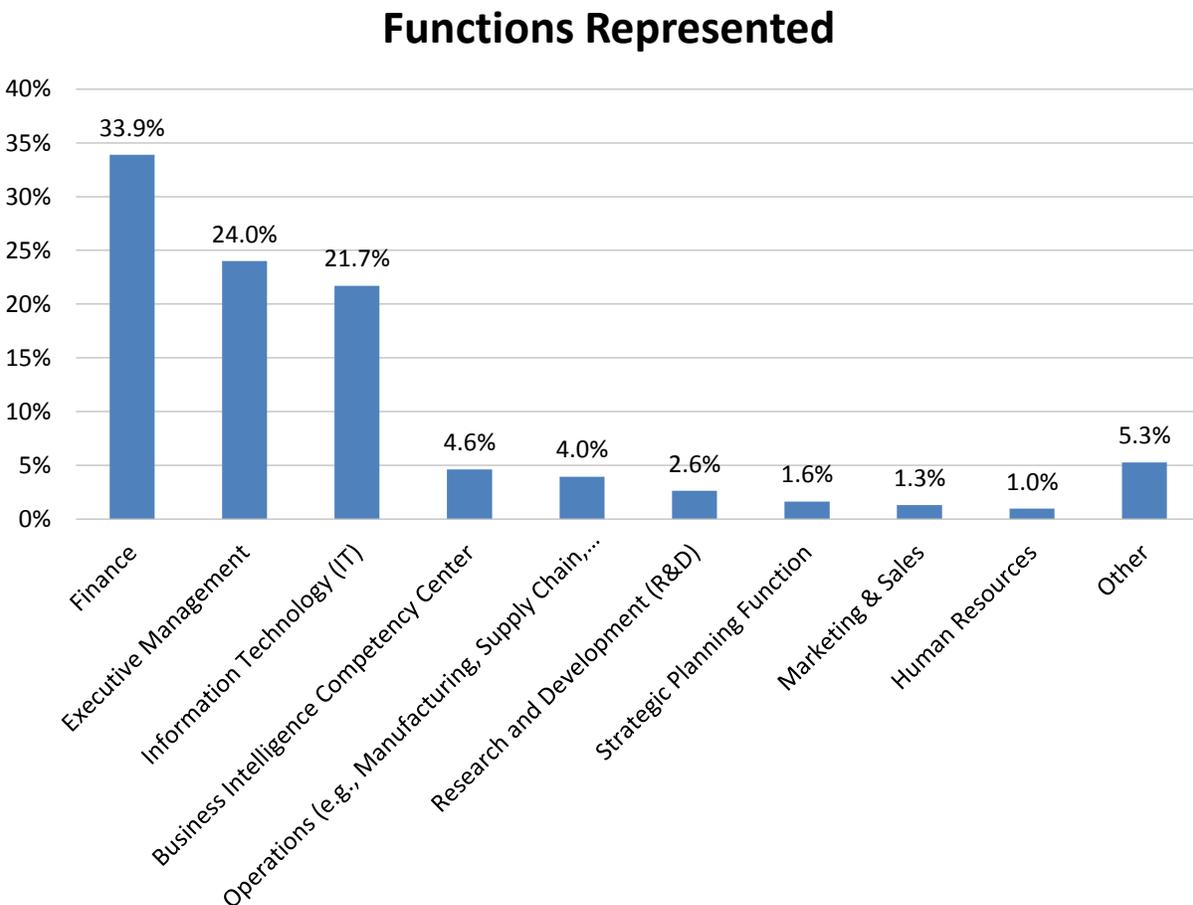


Figure 2 – Functions represented

Vertical Industries

Technology, Manufacturing, and Healthcare are the most represented industries but collectively make up only 28 percent of the sample (fig. 3). The top seven industries make up 51 percent of respondents. This shows that survey respondents are from a broad range of industries and the results are not skewed towards any particular industry.

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

Vertical Industries Represented

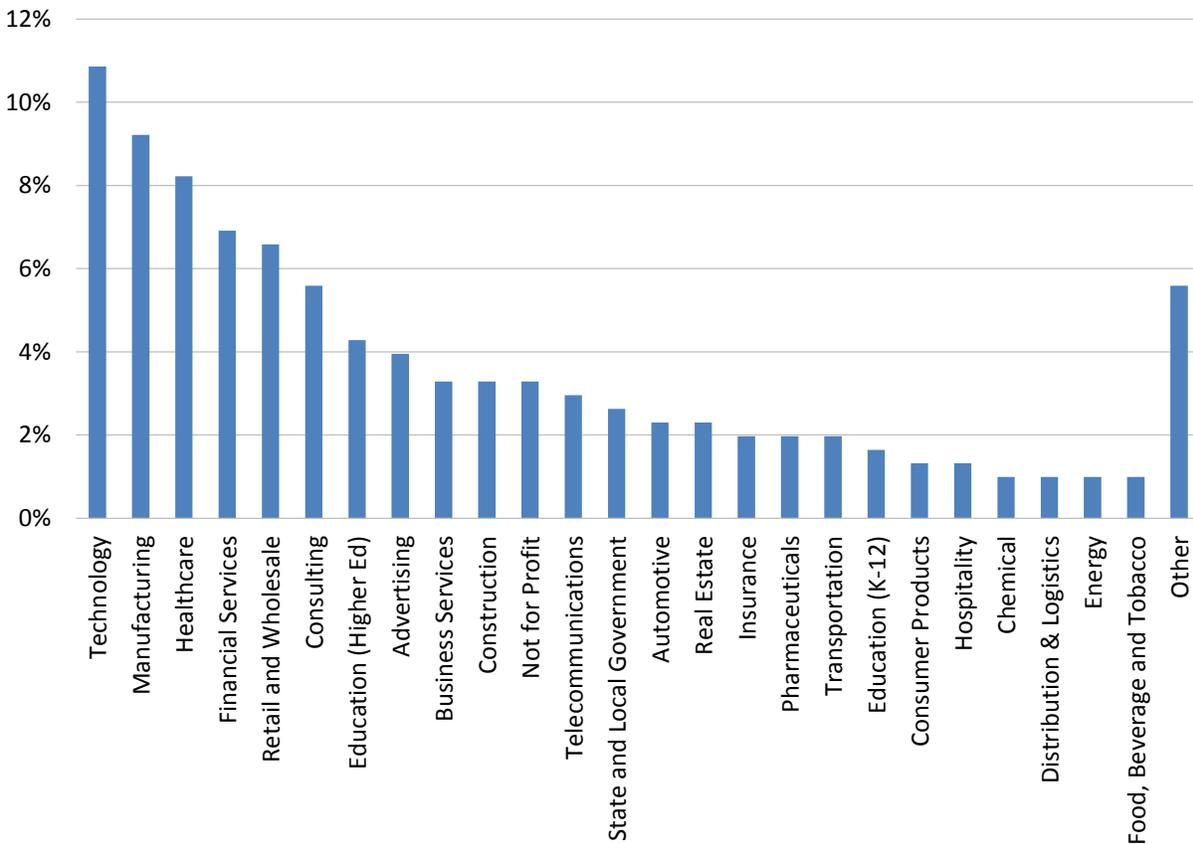


Figure 3 – Vertical industries represented

Organization Size

Participation is balanced across organizations of different sizes (measured by global employee head count). Small organizations (1-100 employees) represent 25 percent of respondents, mid-size organizations (101-1,000 employees) account for 34 percent, and large organizations (>1,000 employees) account for the remaining 41 percent (fig. 4).

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

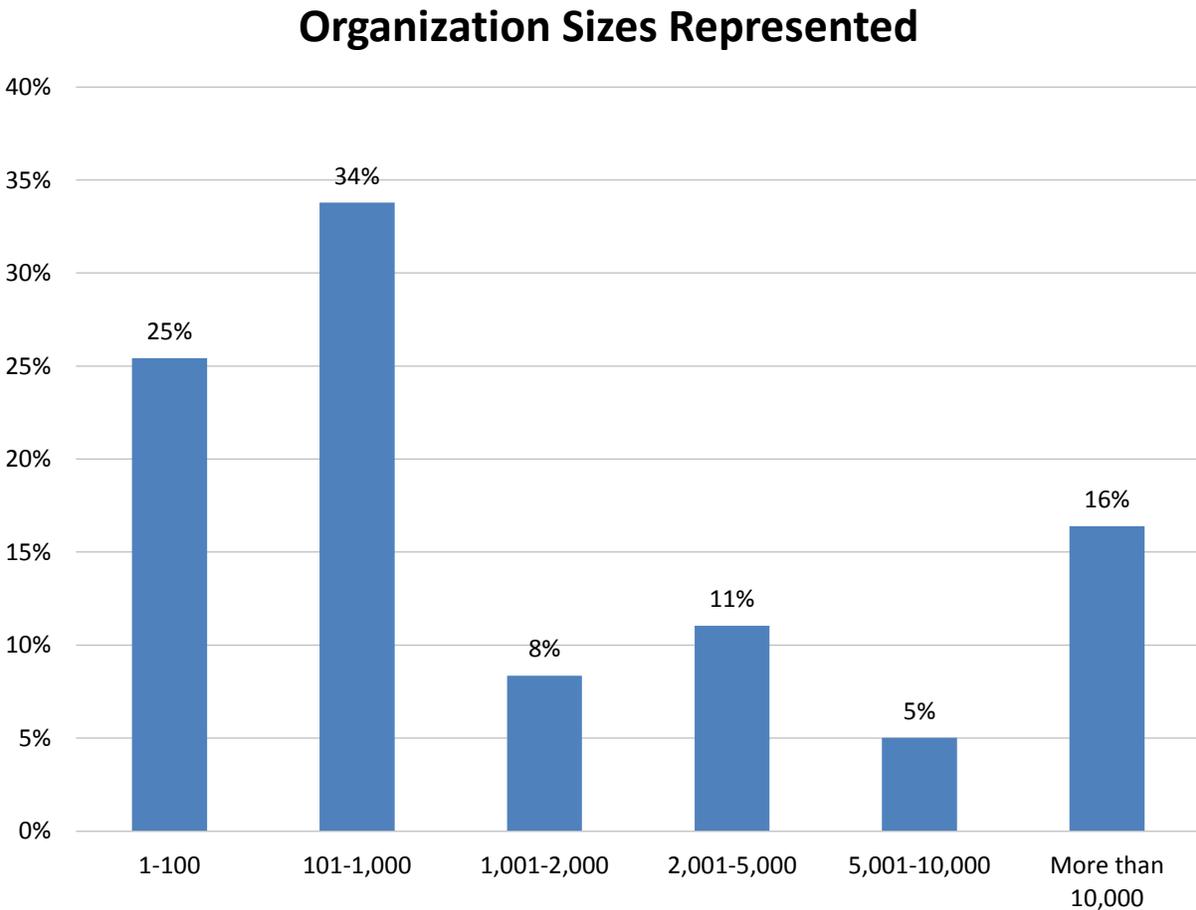


Figure 4 – Organization sizes represented

Analysis and Trends

Analysis and Trends

Current Adoption and Plans to Use Enterprise Performance Management

Current adoption levels indicate the market for enterprise performance management is still maturing and has room for future growth. Thirty-eight percent of organizations already use enterprise performance management software, while a total of 30 percent are either currently evaluating or may use enterprise performance management software in the future (fig. 5). Thirty-two percent of respondents currently have no plans to use enterprise performance management software.

Consequently, the majority of respondents (62 percent) are potential future users of enterprise performance management software. However, over half of these organizations do not yet see value in enterprise performance management software and vendors will need to provide compelling proof points to convince these organizations to consider adopting enterprise performance management.

EPM Software Use

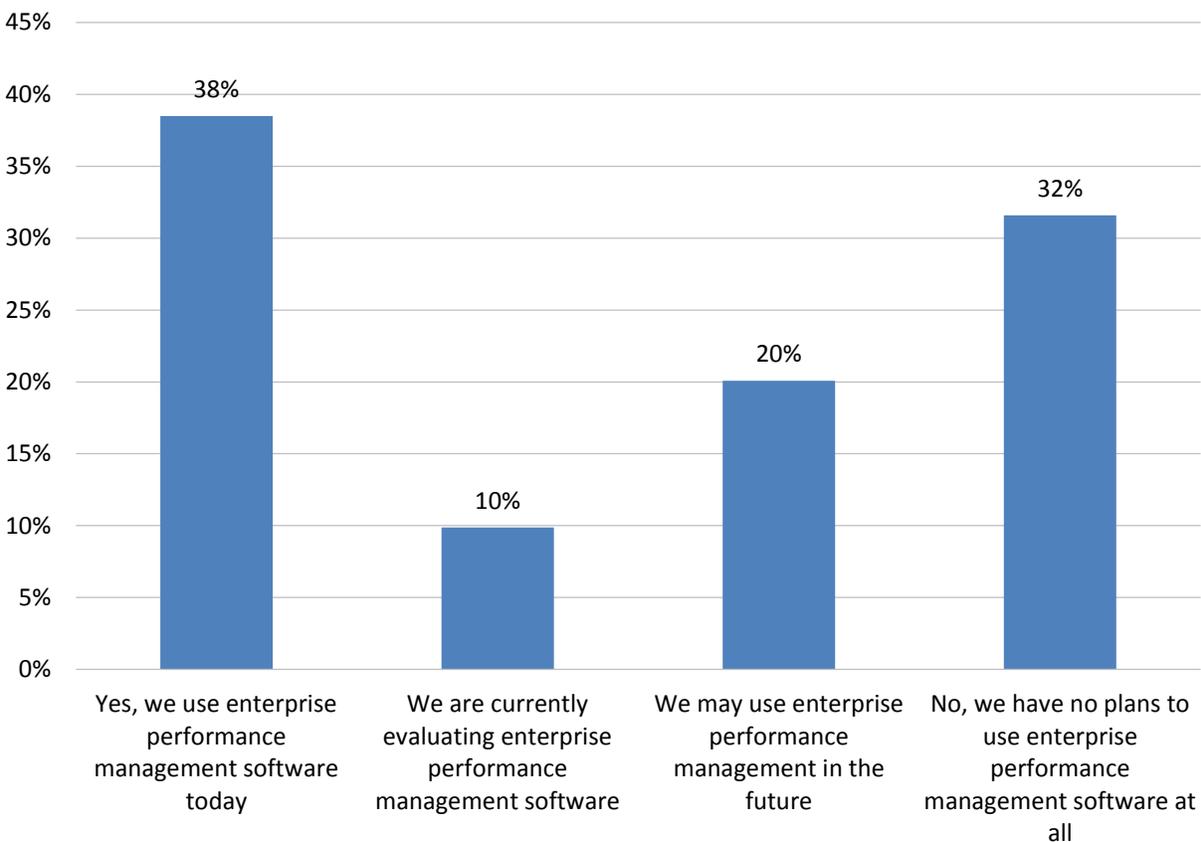


Figure 5 – EPM software use

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There are significant variations in adoption of enterprise performance management by organizations of different size. Current adoption levels are significantly higher in large organizations (those with more than 1,000 employees) compared to small and mid-sized organizations. Fifty-five percent of organizations with 1,001-10,000 employees and 57 percent of organizations with more than 10,000 employees currently use enterprise performance management, compared to 33 percent of mid-sized organizations (101-1,000 employees) and only 18 percent of small organizations (less than 100 employees) (fig. 6).

Small and mid-sized organizations are significantly less likely to adopt enterprise performance management software, with 42 percent and 38 percent respectively stating they have no plans to adopt. Small organizations show the greatest potential for future adoption of enterprise performance management software, with 14 percent currently evaluating and 25 percent open to future adoption.

EPM Software Use by Organization Size

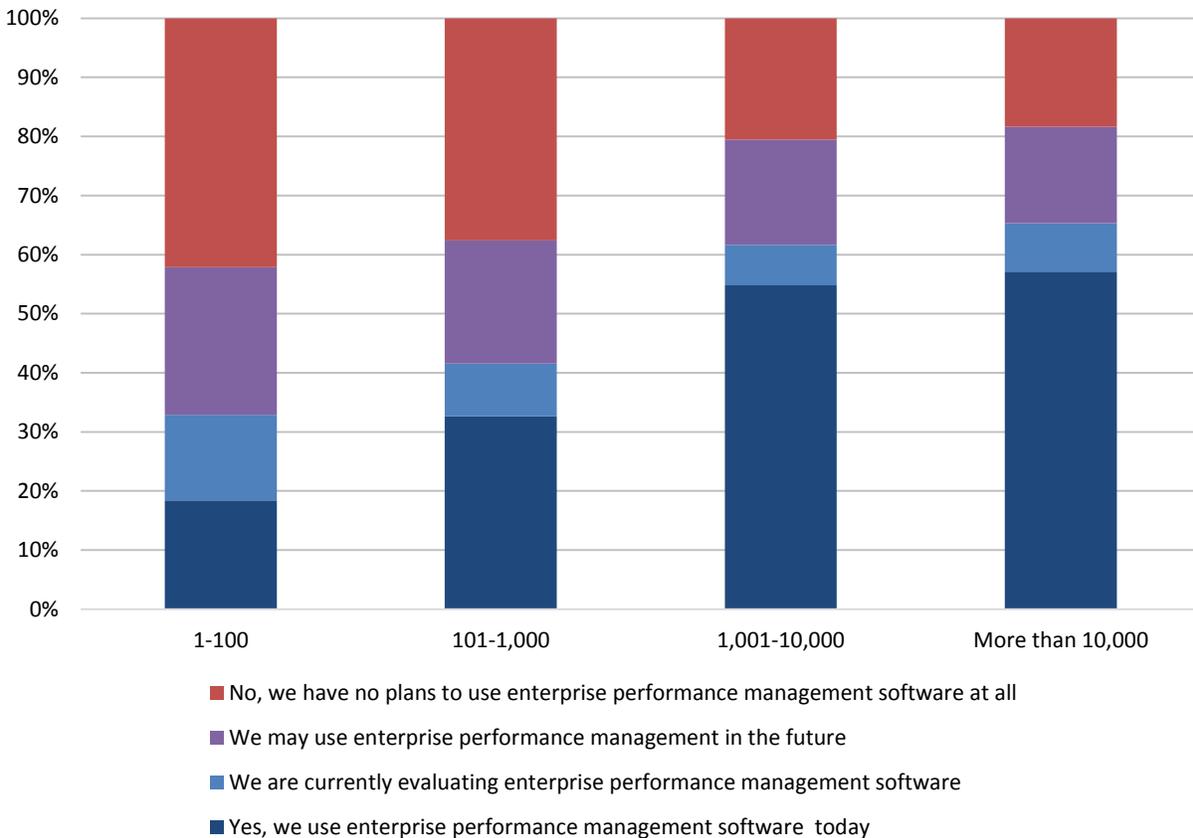


Figure 6 – EPM software use by organization size

2019 Wisdom of Crowds® EPM Market Study

Current adoption levels of enterprise performance management software are highest in North America and EMEA, at 41 percent and 35 percent respectively (fig. 7). Asia Pacific has the lowest level of current adoption (31 percent) but has the highest levels of potential adoption, with 31 percent currently evaluating enterprise performance management software and 19 percent open to adoption in future.

EMEA shows the highest potential resistance to enterprise performance management software, with 36 percent of respondents stating they have no plans to adopt. However, North America is not far behind, with 32 percent stating they have no plans to adopt.

EPM Software Use by Geography

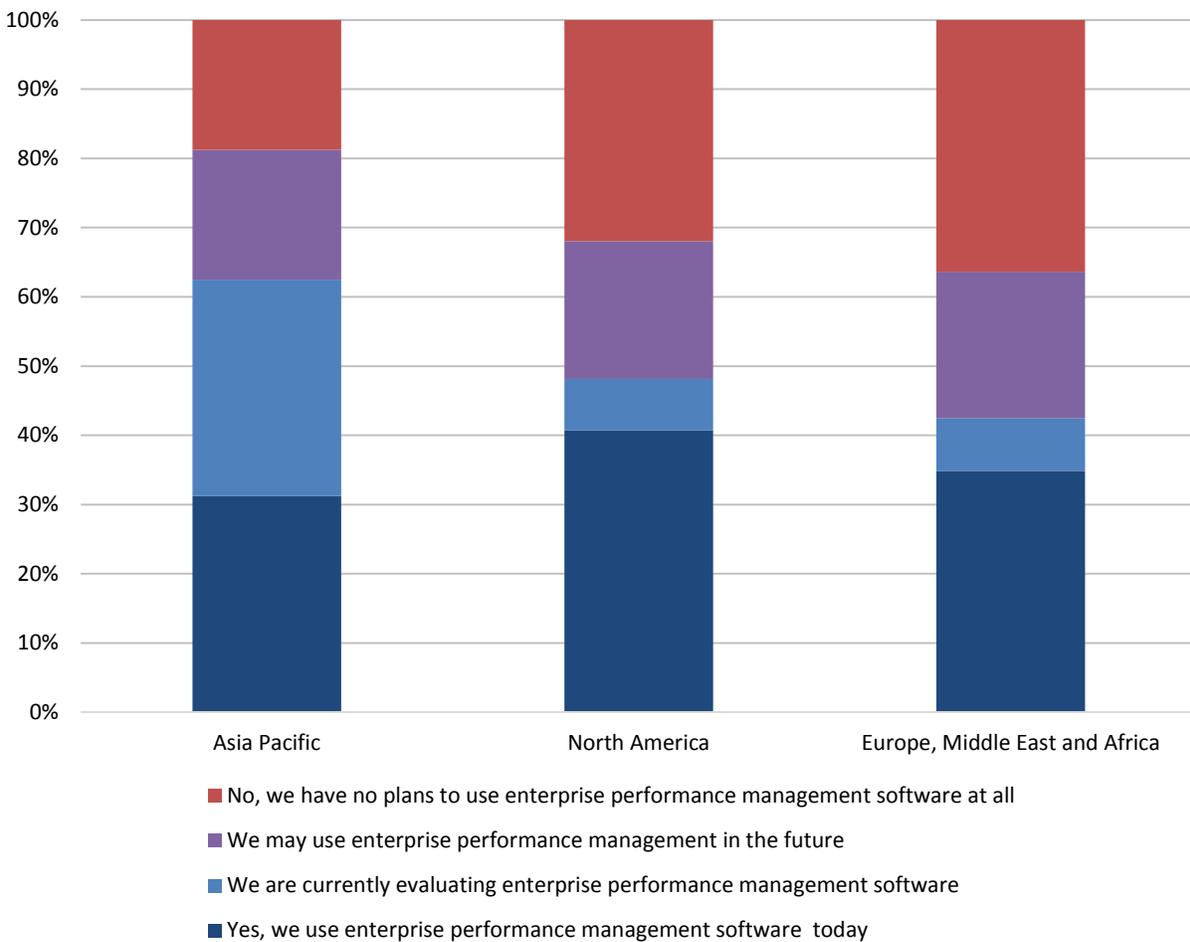


Figure 7 – EPM software use by geography

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Analysis of this data by function shows that Finance and Operations are the functions with the highest levels of EPM adoption, with 64 percent and 50 percent respectively (fig. 8). This is understandable, because finance are the most frequent users of the planning and reporting capabilities that form a key part of any EPM solution. The relatively high levels of adoption by operations is encouraging, because it shows these functions are prepared embrace performance management solutions that reach outside their domain silos.

The low level of current adoption among executive management (25 percent) is concerning, because an effective performance management environment will bring together executive management, finance and operations. The executive management function is clearly open to increased adoption, with a total of 37 percent either currently evaluating or may use enterprise performance management software. However, enterprise performance management vendors and implementation partners need to focus their offerings on executive management to ensure any deployments reflect an enterprise-wide solution.

EPM Software Use by Function

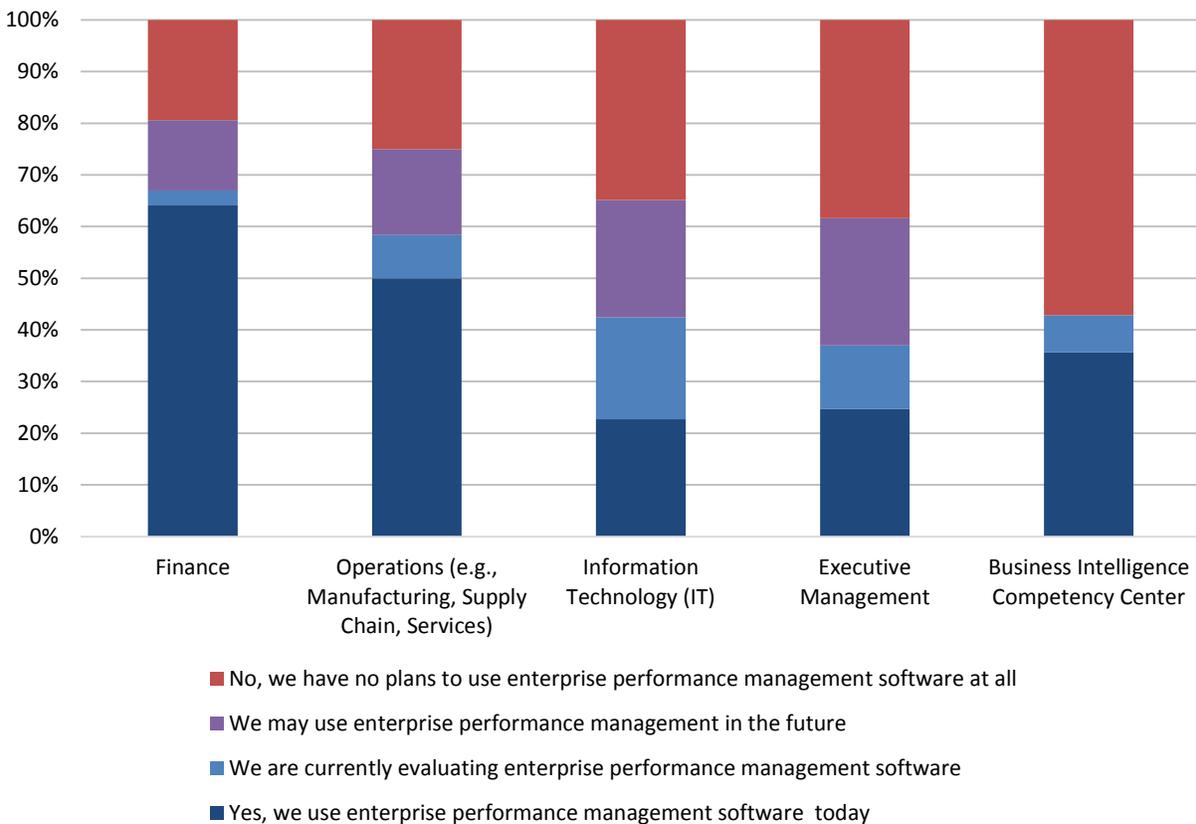


Figure 8 – EPM software use by function

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Manufacturing and Healthcare are the vertical industries with the highest current levels of adoption, with 57 percent and 48 percent respectively (fig. 9). Advertising also has relatively high levels of current adoption (42 percent), with a further 33 percent either currently evaluating enterprise performance management software or considering its use in the future.

The Technology and Financial Services verticals have the lowest adoption of enterprise performance management software, with 52 percent and 41 percent respectively stating they have no plans to adopt. This is understandable in Financial Services, where the specialized performance management needs in banking and insurance (such as asset/liability management and insurance product profitability) mean many enterprise performance management solutions aren't yet a good fit. However, there is clearly an opportunity for vendors and their partners to target the technology vertical as their needs are less specialized than some other verticals.

EPM Software Use by Industry

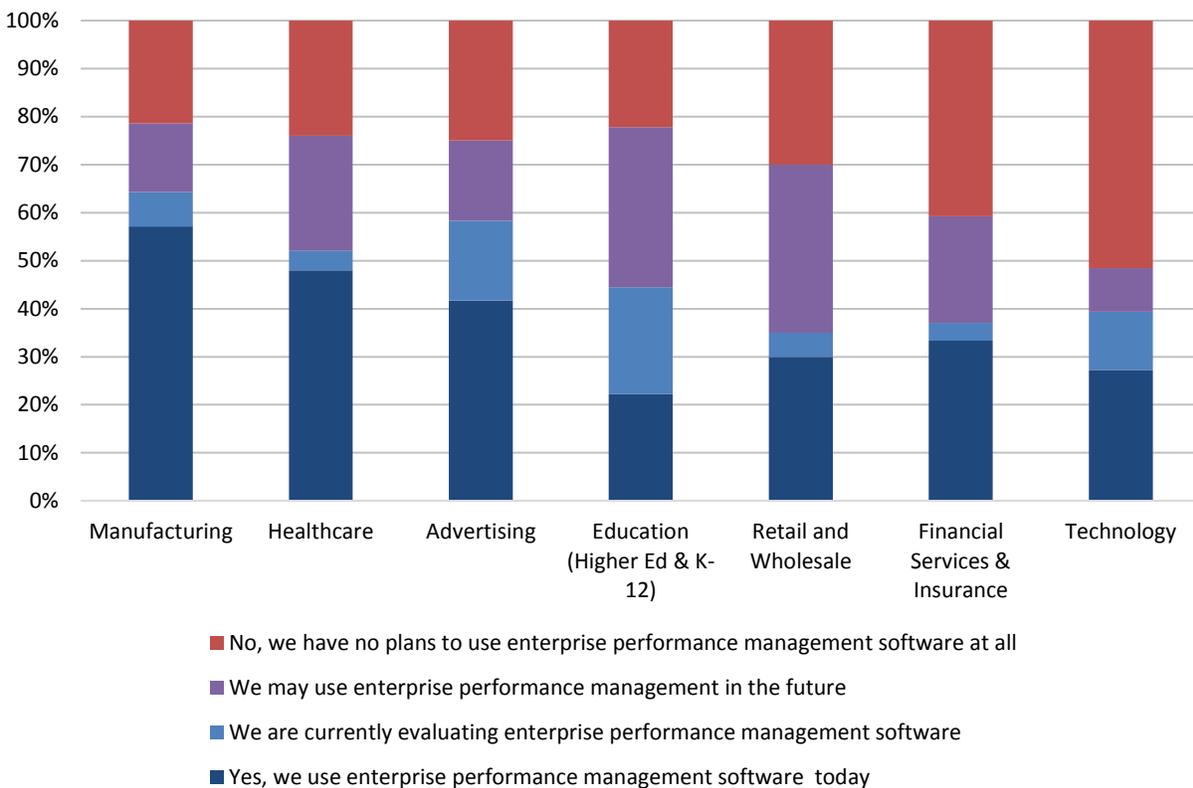


Figure 9 – EPM software use by industry

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Adoption plans are skewed to 2021 or later. Sixty-nine percent of organizations considering enterprise performance management software plan to do so beyond next year (fig. 10). Only 6 percent plan to adopt in 2019, but 25 percent plan to adopt in 2020.

This data indicates there will be a healthy level of growth in enterprise performance management during 2020 and subsequent years.

EPM Software Adoption Plans

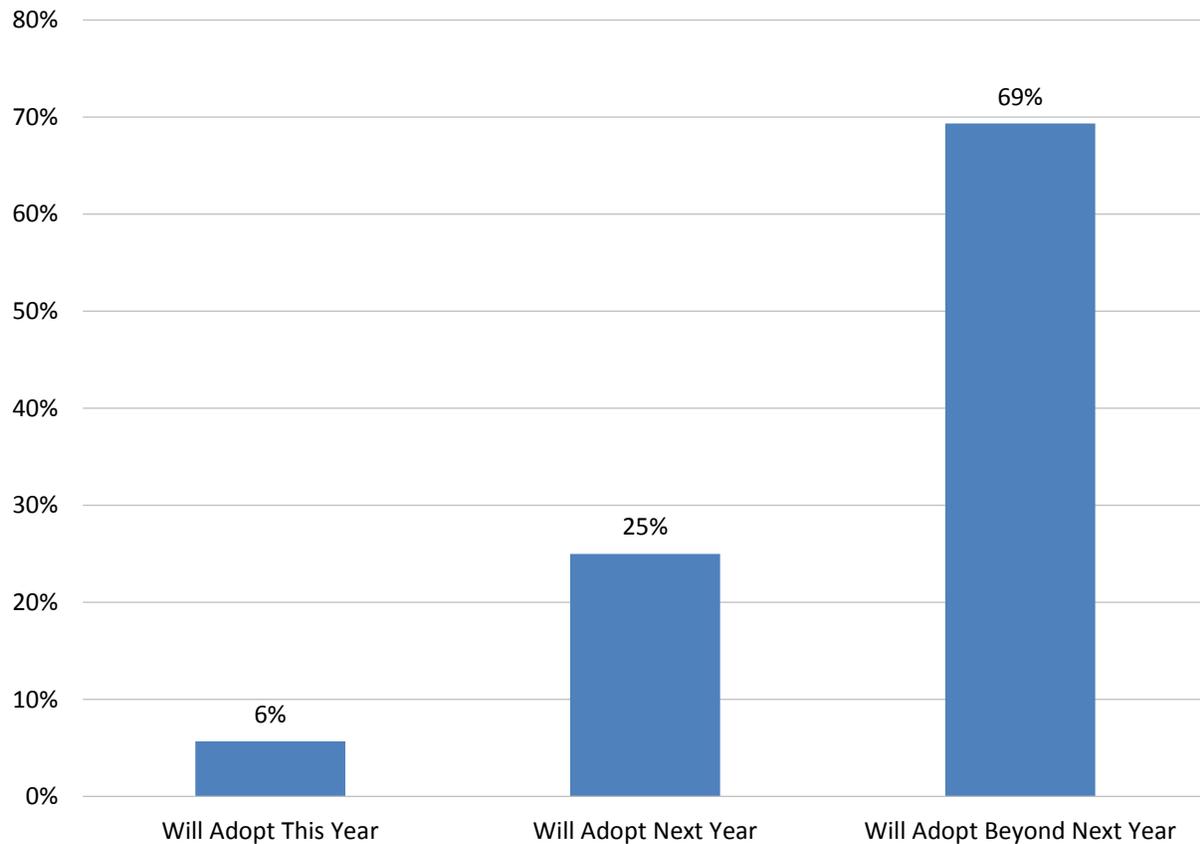


Figure 10 – EPM software adoption plans

Importance of Enterprise Performance Management

We asked respondents how important enterprise performance management is to their organization (fig. 11). Eighty-seven percent of respondents rate enterprise performance management as critical, very important, or important. Twenty-two percent of respondents rate enterprise performance management of critical importance in their organization.

This data shows that enterprise performance management is an important capability to most organizations. Just over 1 percent of respondents rate it not important.

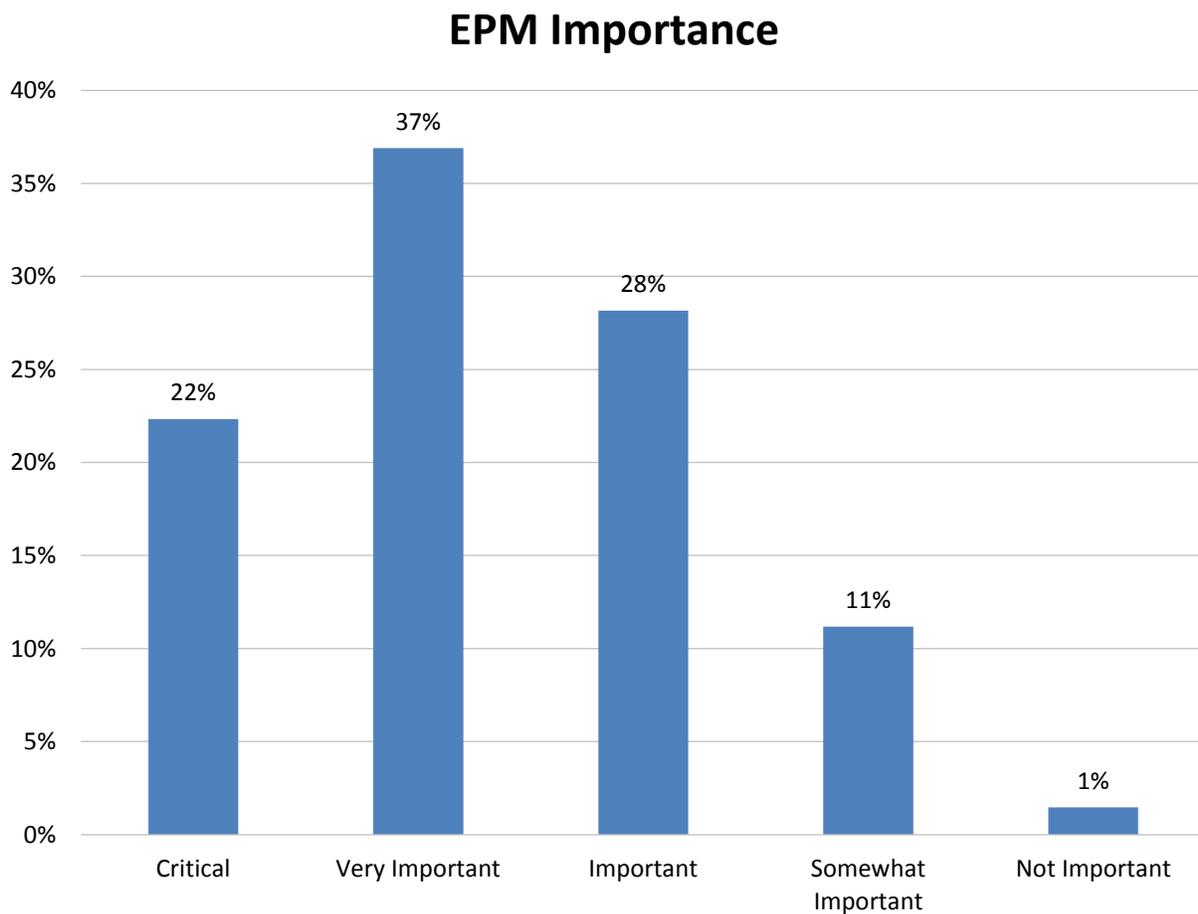


Figure 11 – EPM importance

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The importance of enterprise performance management varies by organization size. Forty-four percent of small organizations (1-employees) and 48 percent of mid-sized organizations (101-employees) rate enterprise performance management either critical or very important (fig. 12). This compares to 74 percent of large organizations (1,001-10,000 employees) and 68 percent of very large organizations that rate enterprise performance management either critical or very important. The small number of respondents that rate enterprise performance management as not important are all from small or mid-sized organizations.

This data shows that enterprise performance management is of significantly greater importance to large and very large organizations. This is because the impact of enterprise performance management is likely to be higher in complex organizations where the span of control extends far beyond the scope of the CEO and senior management team.

EPM Importance by Organization Size

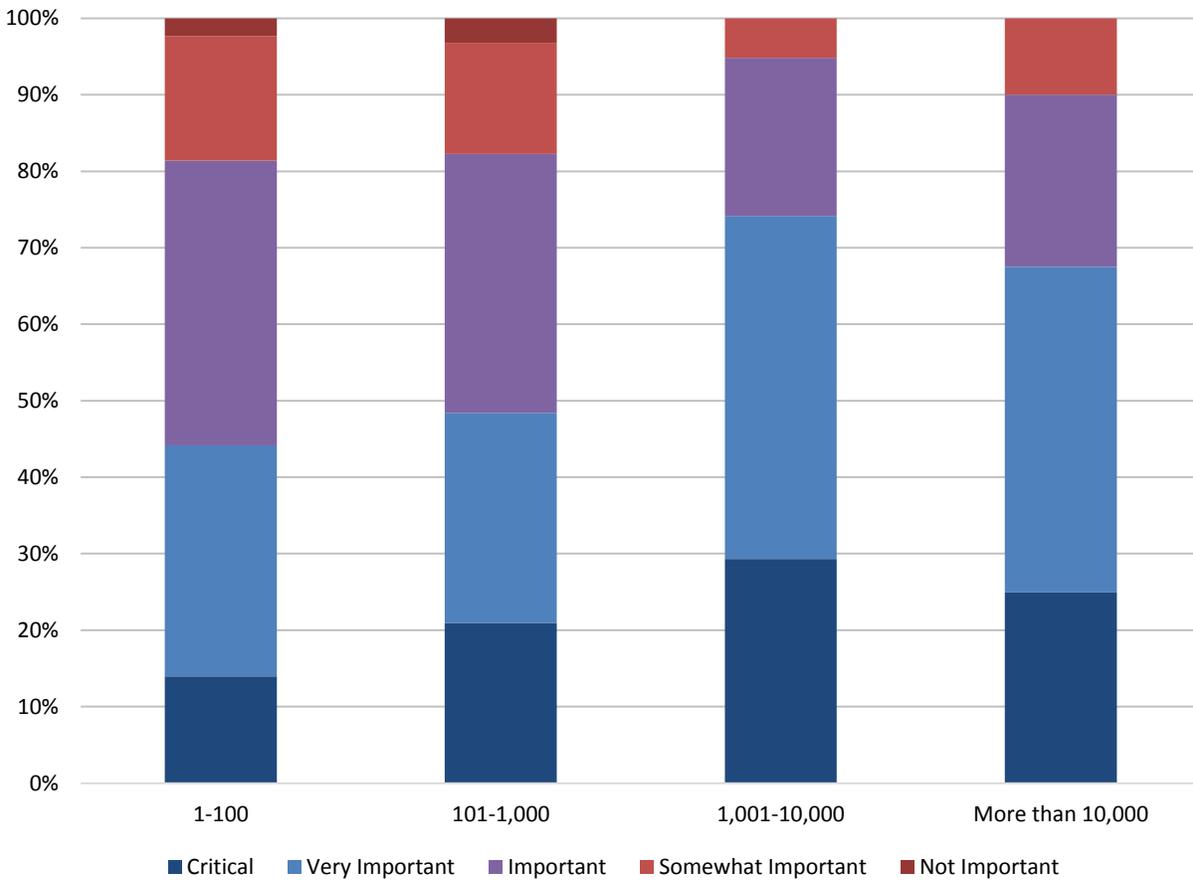


Figure 12 – EPM importance by organization size

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There are significant differences in the perceived importance of enterprise performance management across different industry verticals. Manufacturing and Technology rate enterprise performance value of highest importance, with a mean rating of 4.0 and 3.8 respectively (fig. 13). Although Financial Services, Advertising, Healthcare, and Education have overall mean ratings that are not significantly lower (between 3.7 and 3.5), they have a smaller proportion of respondents rating enterprise performance as “critical” compared to Manufacturing and Technology. Retail/Wholesale rate enterprise performance management overall of lower importance compared to other industries.

The higher importance rating given by respondents in the Technology industry contrasts with the low adoption levels identified in figure 9. This implies that early adopters in the Technology industry achieve success with enterprise performance management, and there is an opportunity for vendors and implementation partners to build on these successes to increase adoption in the Technology vertical.

EPM Importance by Industry

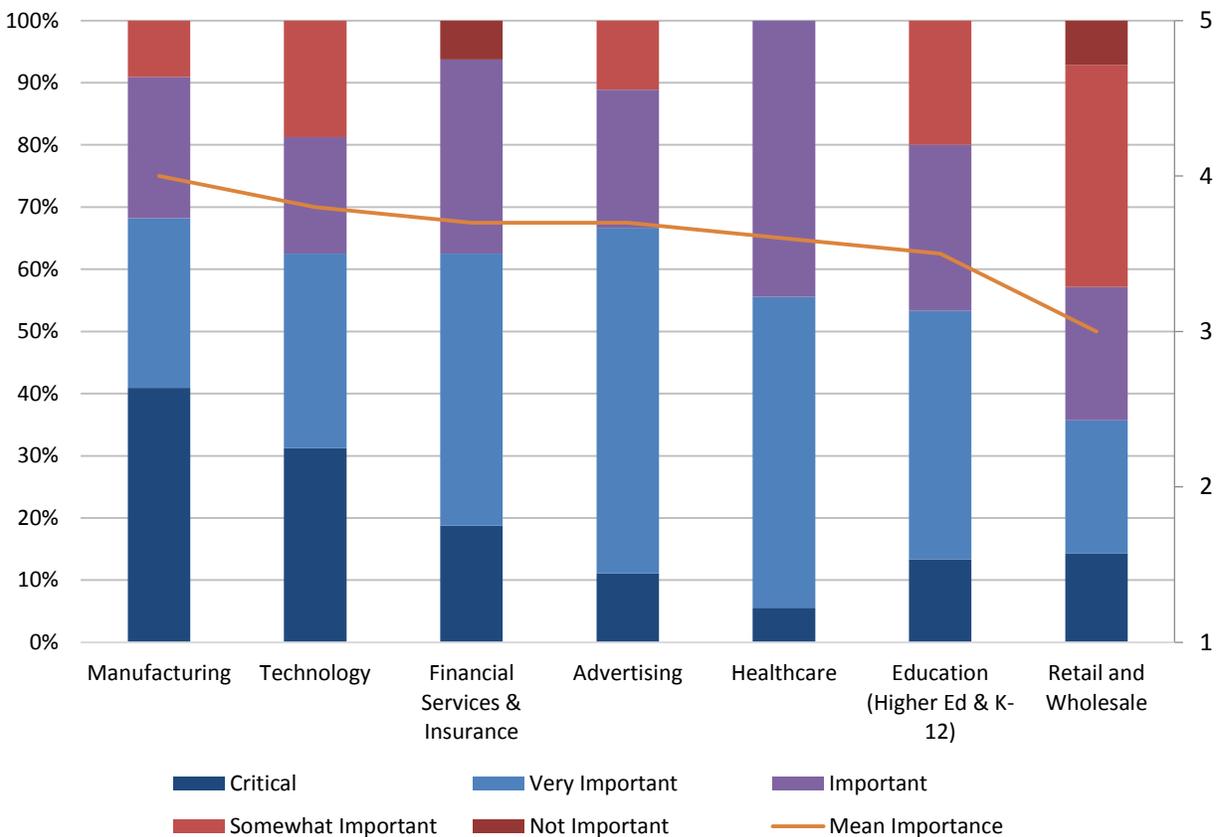


Figure 13 – EPM importance by industry

Enterprise Performance Management Implementation Strategy

We asked respondents to identify how they implemented enterprise performance management (fig. 14). Although the term implies that implementations should always be at an “enterprise” level, the reality is that many organizations deploy these solutions as a performance management system at a departmental, country, or regional level. There’s nothing wrong with this, because enterprise performance management software can deliver a more holistic performance management solution to a business entity such as a large department or country. Often, organizations implement enterprise performance management in part of their organization before rolling it out more widely.

Although the survey shows that 44 percent of organizations use enterprise performance management as a departmental solution, 56 percent use it at a country, regional, or global level, clear evidence that the majority of organizations use enterprise performance management to manage significant business entities. Thirty-six percent implement enterprise performance management software as a global solution, which is a significant proportion given that the EPM market is still maturing.

EPM Implementation Strategy

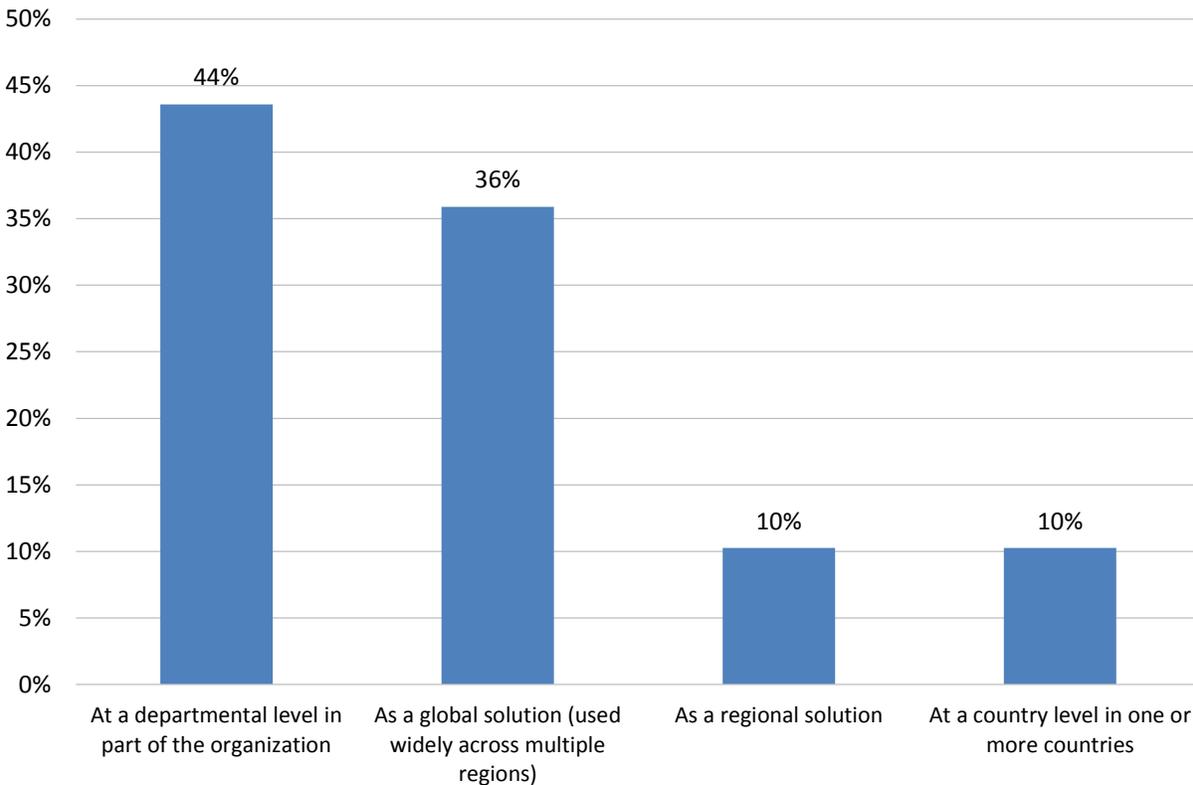


Figure 14 – EPM implementation strategy

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Analysis of implementation strategy geography shows that nearly 40 percent of organizations based in North America use enterprise performance management software as a global system (fig. 15). EMEA has a lower share of global implementations (30 percent) but a much higher percentage of country-level implementations than North America (30 percent compared to 8 percent). Asia Pacific has the highest percentage of country-level and regional implementations (40 percent and 20 percent respectively). This data is evidence that language and cultural differences make global implementation of enterprise performance management challenging for organizations based outside North America.

EPM Implementation Strategy by Geography

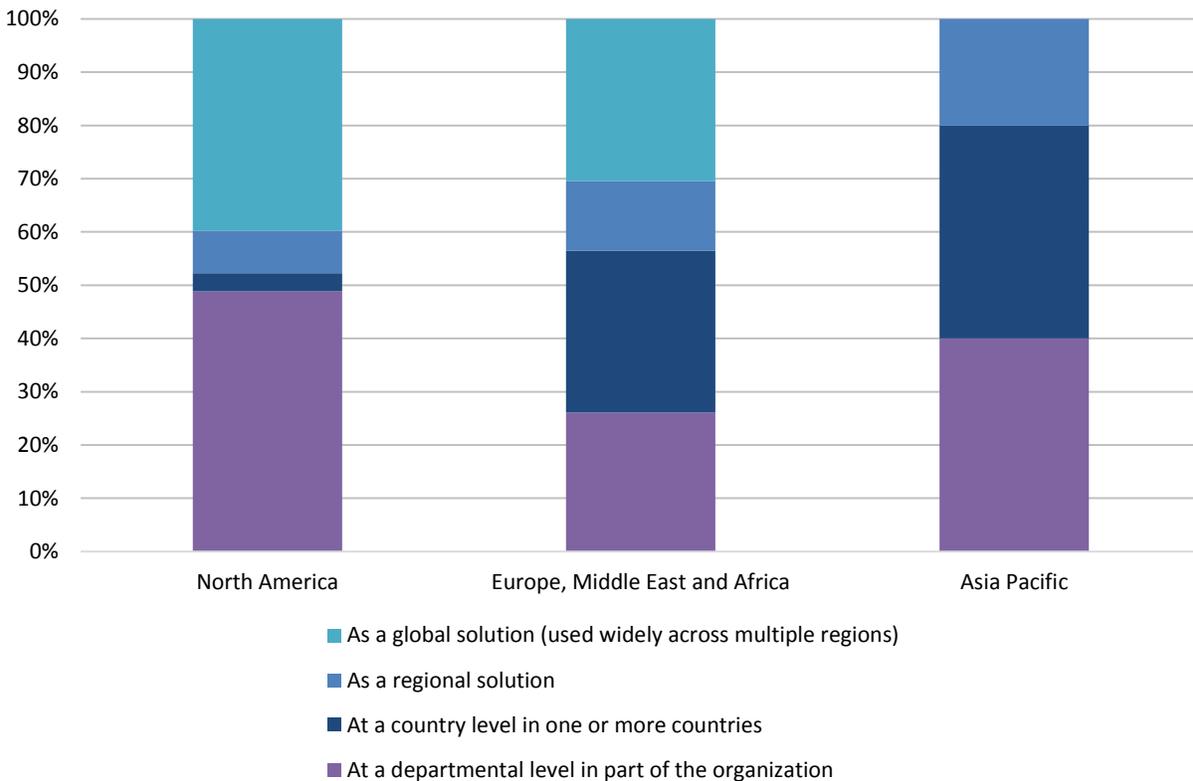


Figure 15 – EPM implementation strategy by geography

Enterprise Performance Management Sourcing Strategy

Sixty-two percent of respondents state their organization deployed an enterprise resource planning (ERP) system. ERP software provides an integrated finance, administrative, and operational transaction processing environment, and most ERP vendors offer their own enterprise performance management solutions that complement and extend the transaction-processing capabilities of ERP software.

ERP vendors can be aggressive in marketing their enterprise performance management solutions, but the survey identifies that most respondents take an objective approach to sourcing these capabilities. Only 9 percent of respondents prefer to source enterprise performance management from their ERP vendor (fig. 16), whereas 41 percent consider all types of vendors, and 35 percent prefer to source these capabilities from a specialist enterprise performance management vendor.

This is good news for vendors that do not offer ERP software and also shows that ERP vendors need to compete effectively with specialist vendors rather than relying on a “pull through” sale.

EPM Sourcing Preferences

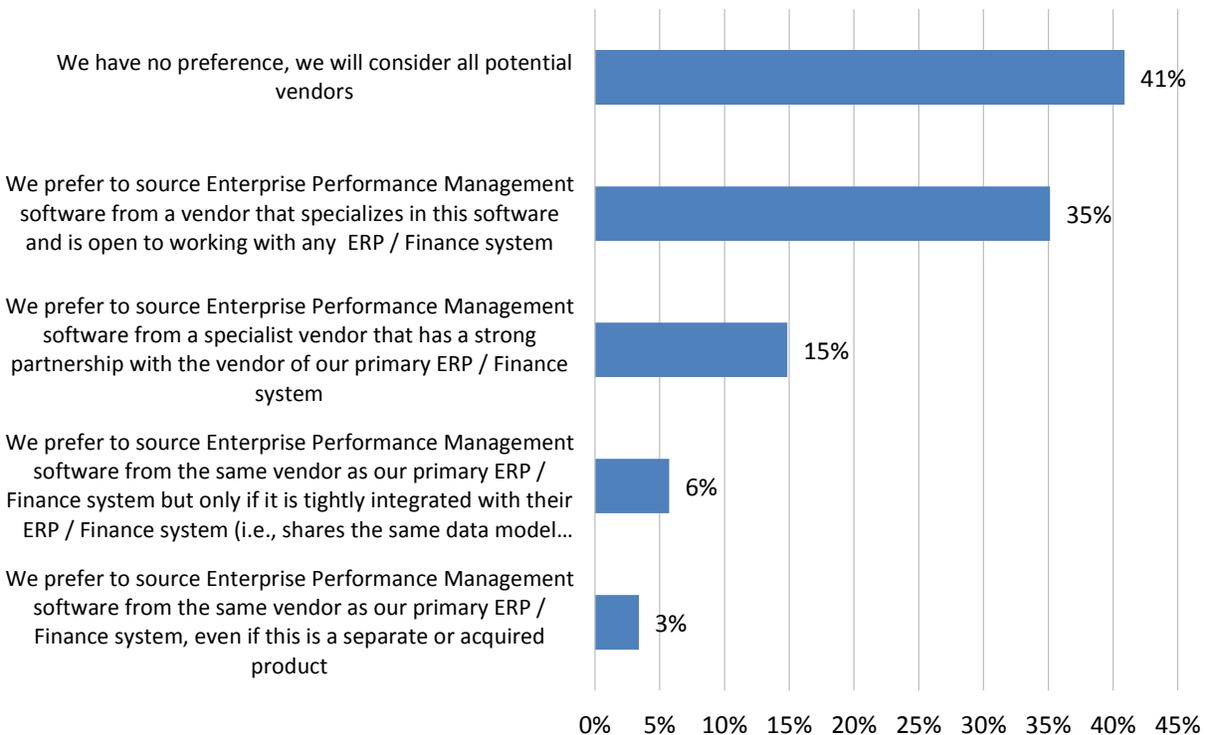


Figure 16 – EPM sourcing preferences

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The smallest and largest organizations have the greatest preference for sourcing enterprise performance management software that is closely aligned with their ERP software. Thirty-two percent of small organizations (1-100 employees) and 31 percent of the largest organizations (more than 10,000 employees) prefer to source enterprise performance management software either from the ERP vendor or from a vendor that has a strong partnership with their ERP vendor (fig. 17).

These preferences are likely because small organizations (which have limited IT capabilities) are attracted to the potential ease of integration and deployment of enterprise performance management solutions that are closely aligned with the ERP software, while the largest organizations likely see this as a way of leveraging their investment in ERP software. The investment in ERP by organizations with more than 10,000 employees is likely to be substantial, and ERP vendors offer attractive discounts on their enterprise performance management solutions as an “add-on” purchase.

EPM Sourcing Preferences by Organization Size

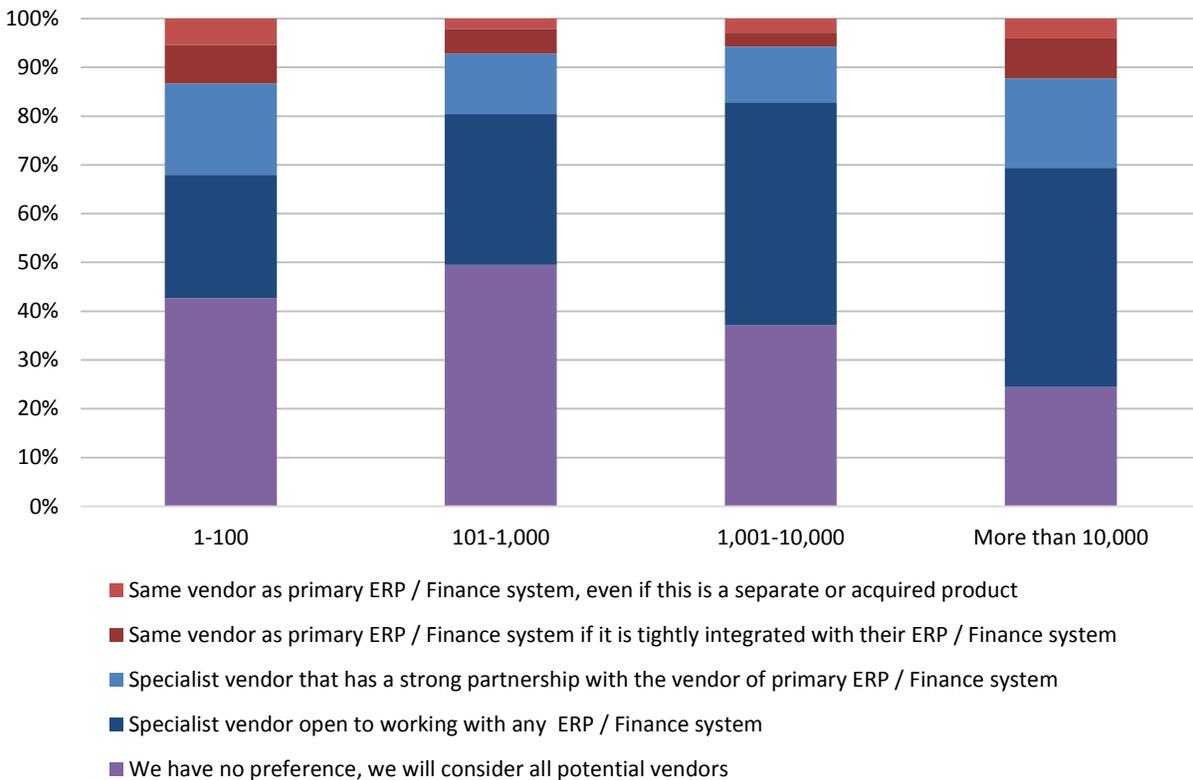


Figure 17 – EPM sourcing preferences by organization size

There are no significant differences in sourcing preferences by geography, although EMEA respondents have the lowest preference levels for enterprise performance management software from their ERP vendor or from a specialist vendor that partners with their ERP vendor (fig. 18).

EPM Sourcing Preferences by Geography

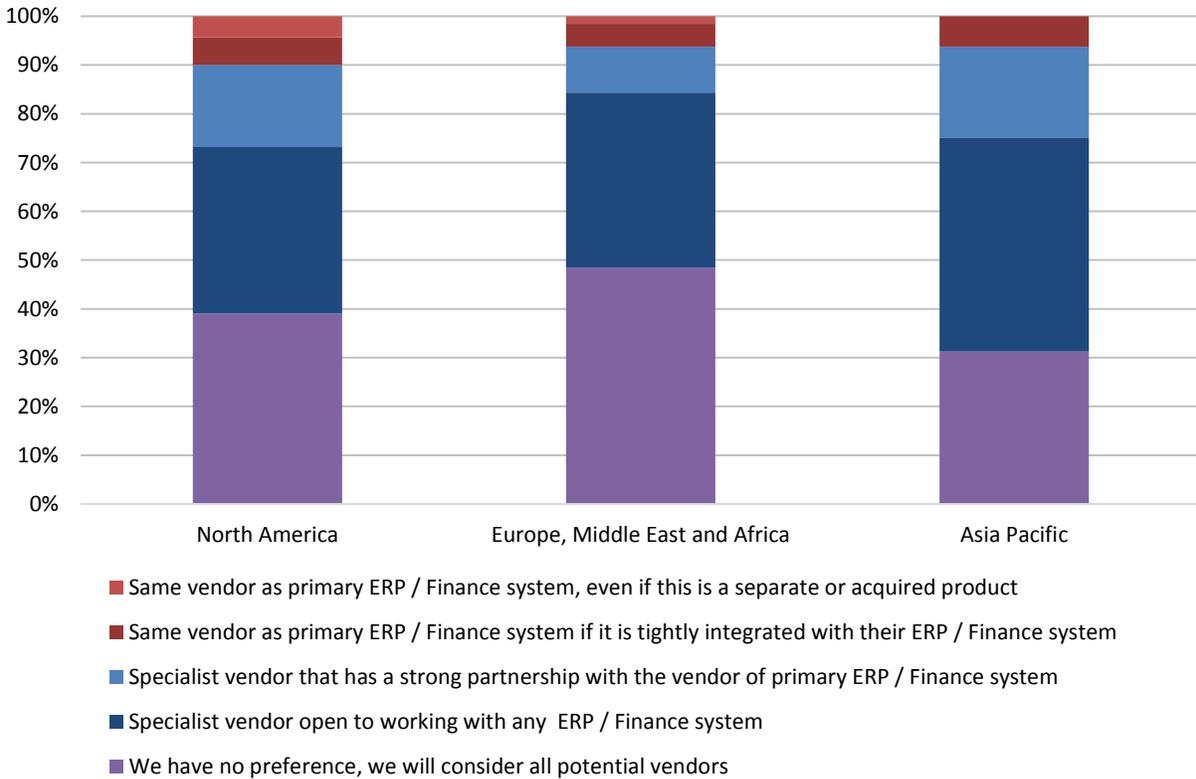


Figure 18 – EPM sourcing preferences by geography

Planning Priorities in Enterprise Performance Management

Planning capabilities are a foundational aspect of any enterprise performance management solution. Respondents in our 2019 study rate annual financial budgets as the most important planning capability (fig. 19), with a weighted mean importance of 4.5 out of 5. This shows that respondents widely view a long-established “traditional” budgeting capability as the most important aspect of EPM.

However, capabilities more associated with a “modern” approach to performance management also figure high in the list of planning priorities. Rolling forecasts, strategic planning, and linking strategic plans to annual budgets are all examples of these capabilities; these are rated fourth, sixth, and eighth out of the 20 capabilities analyzed in the survey.

Organizations implementing enterprise performance management therefore need to ensure they balance traditional budgeting and reporting needs with more innovative performance management capabilities.

EPM Planning Priorities

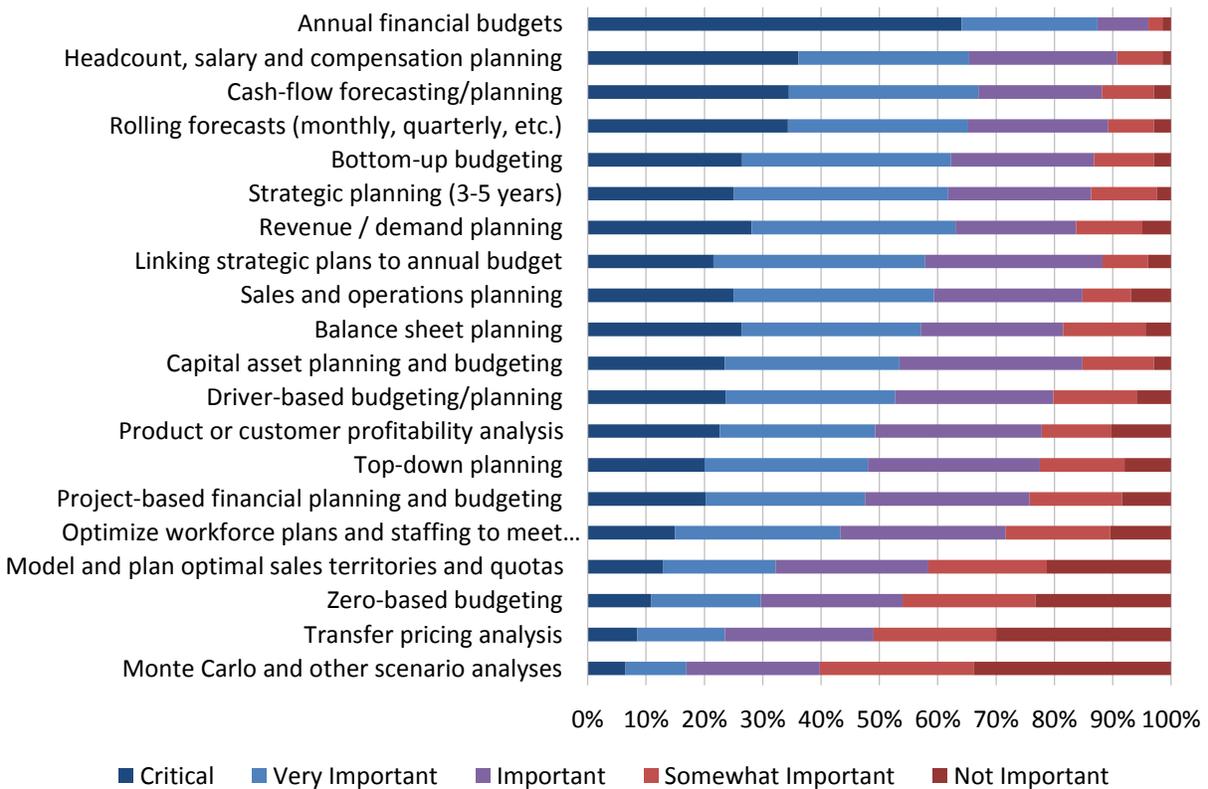


Figure 19 – EPM planning priorities

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There are no significant differences in planning priorities by organization size (fig. 20). Prioritization is similar for organizations of all sizes, apart from a lower importance rating by small organizations (1-100 employees) for annual financial budgets. However, annual financial budgets are still the joint top priority capability for small organizations.

Overall, this means vendors should not assume small and mid-sized organizations need a reduced functional footprint compared to large organizations.

EPM Planning Priorities by Organization Size

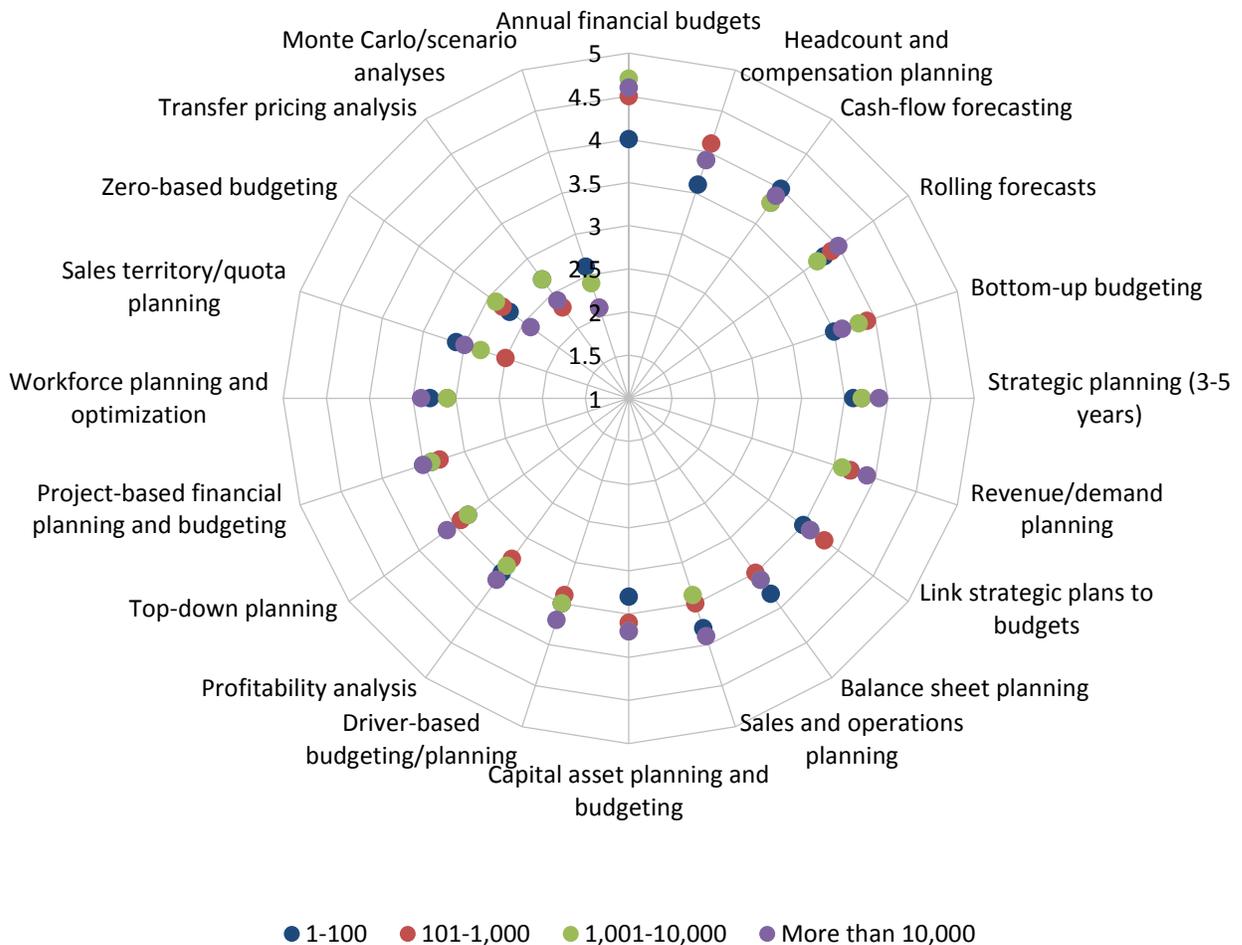


Figure 20 – EPM planning priorities by organization size

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There are greater variations in planning priorities by vertical industry. Although all industries rate annual financial budgets as most important, ratings for many other capabilities vary according to industry needs. For example, Financial Services and Insurance prioritize balance sheet planning and transfer pricing analysis ahead of other industries as these are key capabilities in that vertical. They also rate Monte Carlo and other scenario analyses as significantly more important than other industries.

Consequently, vendors and implementation partners need to develop appropriate functional capabilities and implementation templates for their target industries. End users should evaluate performance management software based on their industry needs.

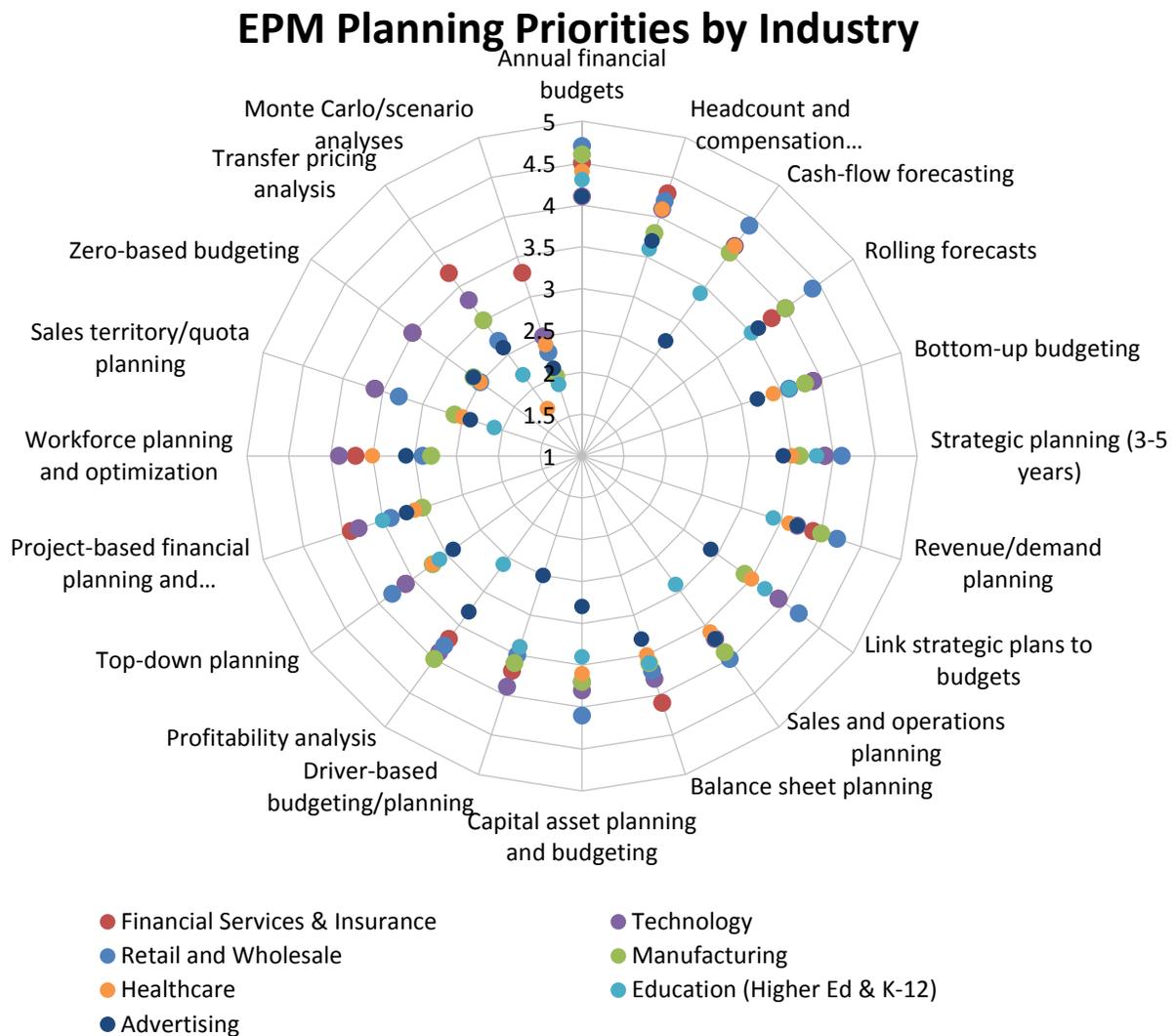


Figure 21 – EPM planning priorities by industry

Use of Rolling Forecasts in Enterprise Performance Management

Rolling forecasts are a method of continuous planning that allows management to look forward over a specific time period, typically 12 or 18 months. Organizations revise forecasts every month or quarter and provide a rolling forward view of predicted performance. This contrasts with traditional annual budgeting cycles, where the view of future performance narrows as the year progresses, creating a skew towards short-term goals.

Rolling forecasts can play a key role in improving performance management processes. The 2019 survey analyzed current and future use of rolling forecasts (fig. 22). Sixty-two percent of respondents use rolling forecasts today, and 14 percent replaced annual budgets with rolling forecasts. This is encouraging; with only 15 percent of respondents stating they have no plans to use rolling forecasts, it is evidence of improvement in the quality of enterprise performance management processes.

There is an opportunity for vendors and implementation partners to help organizations optimize use of rolling forecasts, as 23 percent plan to adopt in the future and 48 percent use rolling forecasts to complement annual budgets rather than using them as their primary planning tool.

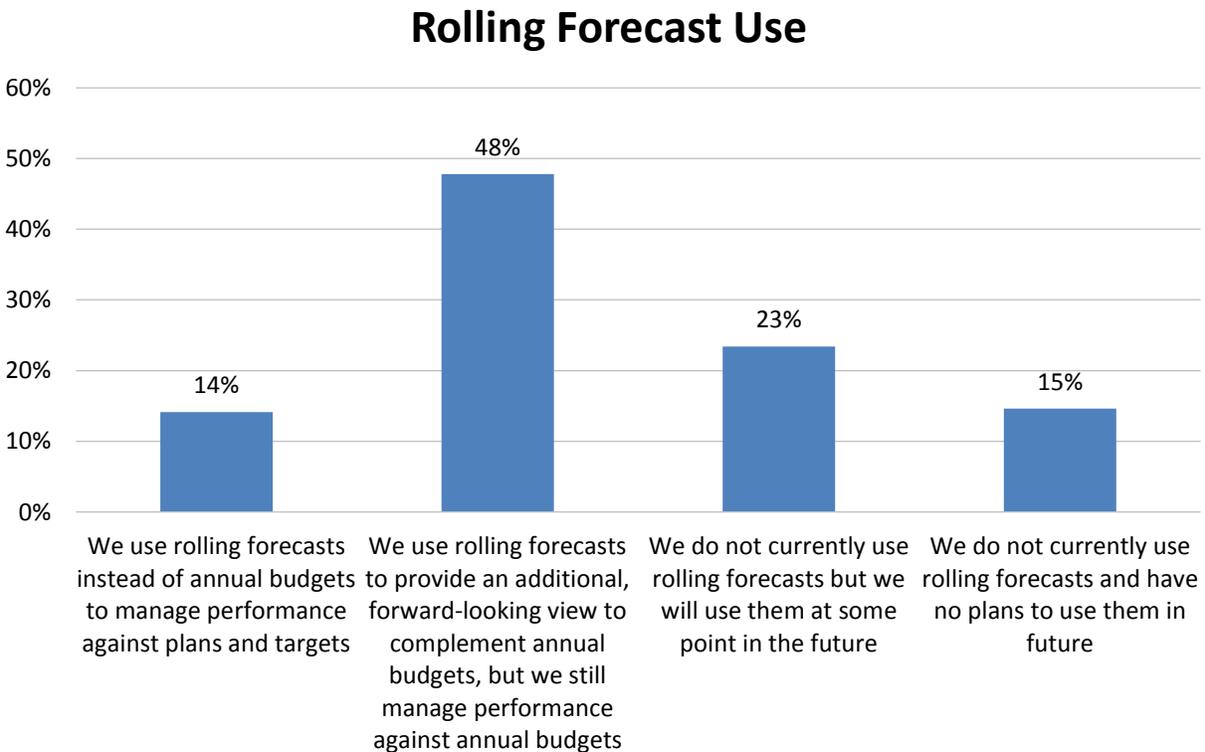


Figure 22 – Rolling forecast use

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There are no major significant differences in rolling forecast use by geography (fig. 23). Adoption levels follow a similar pattern across geographies, although the percentage of organizations that replaced annual budgets with rolling forecasts is somewhat lower in North America (12 percent) compared to EMEA (19 percent) and Asia Pacific (17 percent).

This data shows that improvements in performance management processes through adoption of techniques like rolling forecasts are not limited to a single geography.

Rolling Forecast Use by Geography

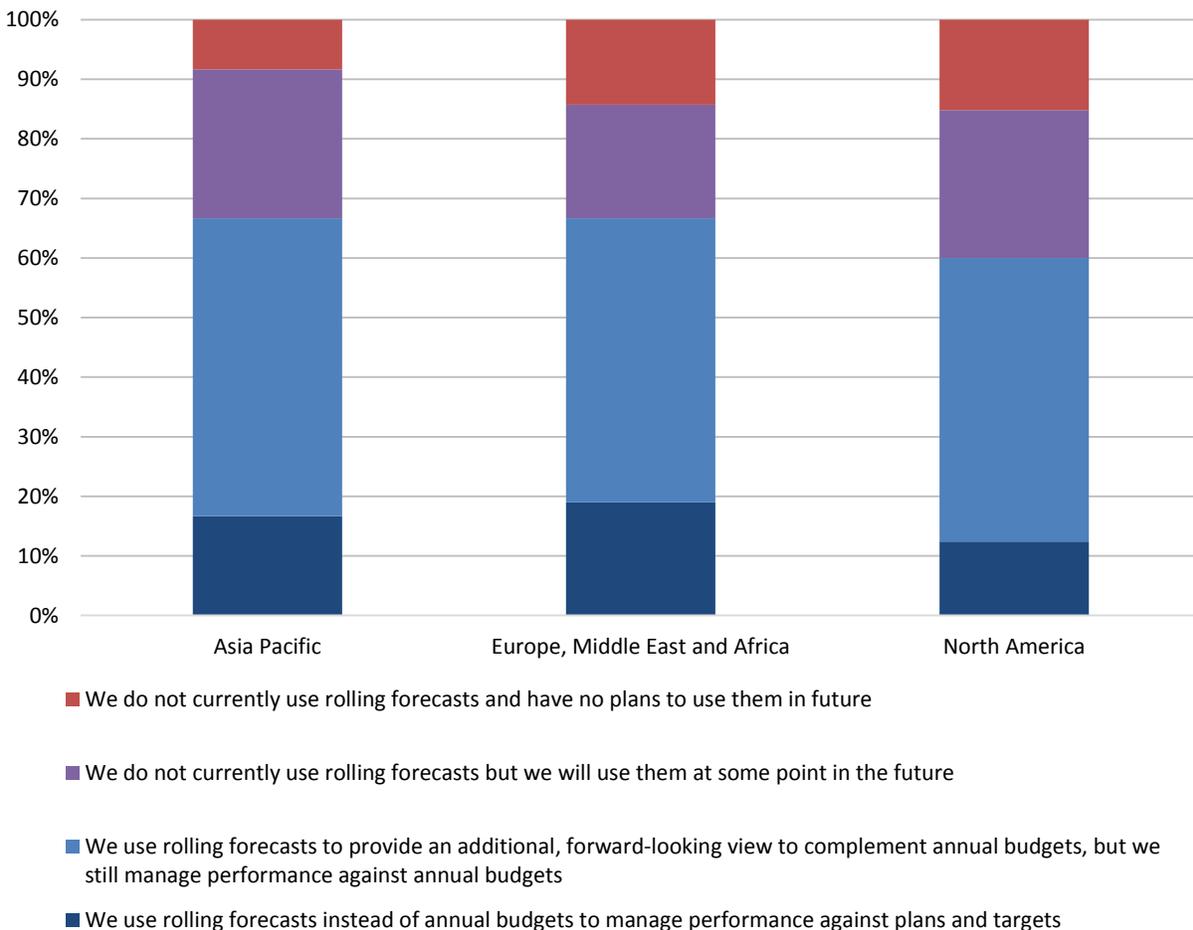


Figure 23 – Rolling forecast use by geography

2019 Wisdom of Crowds® EPM Market Study

The use of rolling forecasts is more nuanced by organization size. Although overall usage patterns are broadly similar, very large organizations (greater than 10,000 employees) have the highest level of current usage, with 16 percent using rolling forecasts instead of annual budgets and a further 55 percent using rolling forecasts in addition to annual budgets (fig. 24).

Rolling Forecast Use by Organization Size

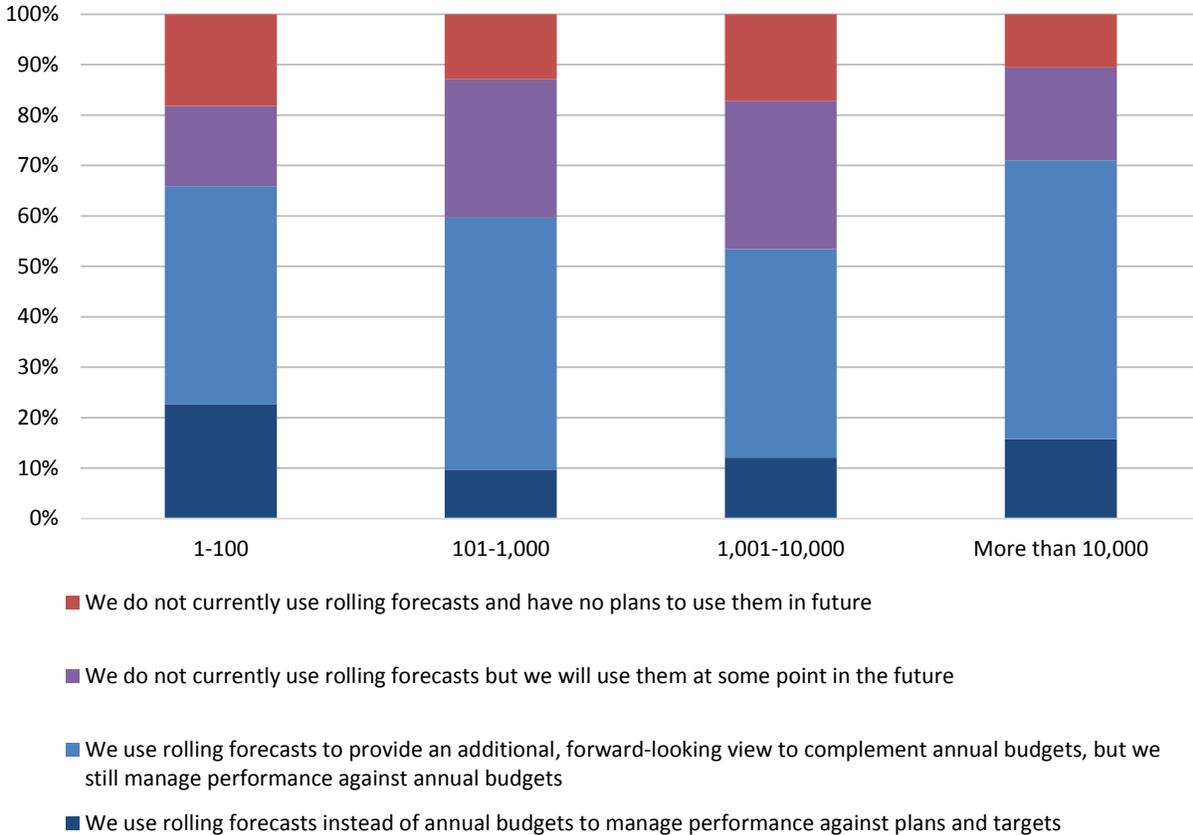


Figure 24 – Rolling forecast use by organization size

However, the results from small organizations (1-100 employees) show some apparent contradictions. Despite having the highest percentage with no plans to use rolling forecasts (18 percent), small organizations also have the highest percentage that replaced annual budgets with rolling forecasts (23 percent). This data shows that innovative use of rolling forecasts is not limited solely to large organizations.

Enterprise Performance Management and Data Driven Decision Making

Organizations use enterprise performance management software to replace informal and spreadsheet-based performance management practices and processes. This is reflected in 88 percent of enterprise performance management users in the survey stating they use data-driven decision-making either all the time or most of the time. Only 12 percent say they use data-driven decision-making some of the time, and only 1 percent use it infrequently (fig. 25).

This data shows that enterprise performance management can help improve the quality of decision-making in an organization. Also, because executive managers, finance and line-of-business managers frequently use enterprise performance management software, this can help overall penetration of BI capabilities in functions that can be harder to reach with more generic BI tools.

Data-Driven Decision-Making for EPM Users

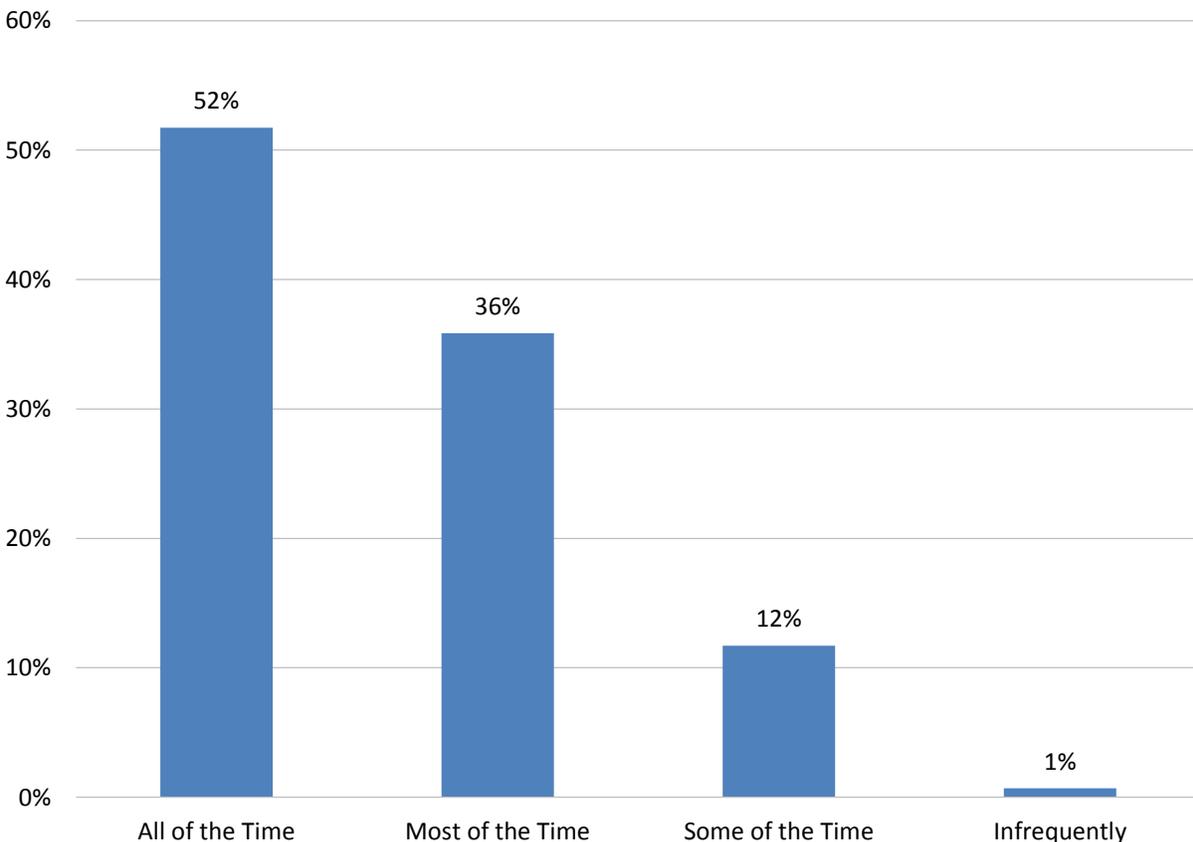


Figure 25 – Data-driven decision-making for EPM users

Impact of Artificial Intelligence on Enterprise Performance Management

Artificial intelligence (AI) and machine learning are nascent technologies in enterprise performance management. Machine learning has the potential to significantly improve forecast accuracy in planning applications, and it's possible to envisage a new generation of enterprise performance management applications built on AI platforms.

A small number of early adopters successfully leveraged machine learning with some vendors, taking early steps to embed machine learning and AI into enterprise performance management software. Consequently, the 2019 survey analyzes attitudes of users toward the use of machine learning and AI in EPM.

The results show a distinct split in opinion (fig. 26). Twenty-nine percent of respondents see significant potential in AI and machine learning, while 21 percent feel that users will resist its adoption due to suspicion of the capabilities of AI and machine learning to replace human “know-how” in planning and forecasting. Fifty percent of respondents are undecided; they see the technology as unproven and potentially costly, making it hard to build a compelling business case.

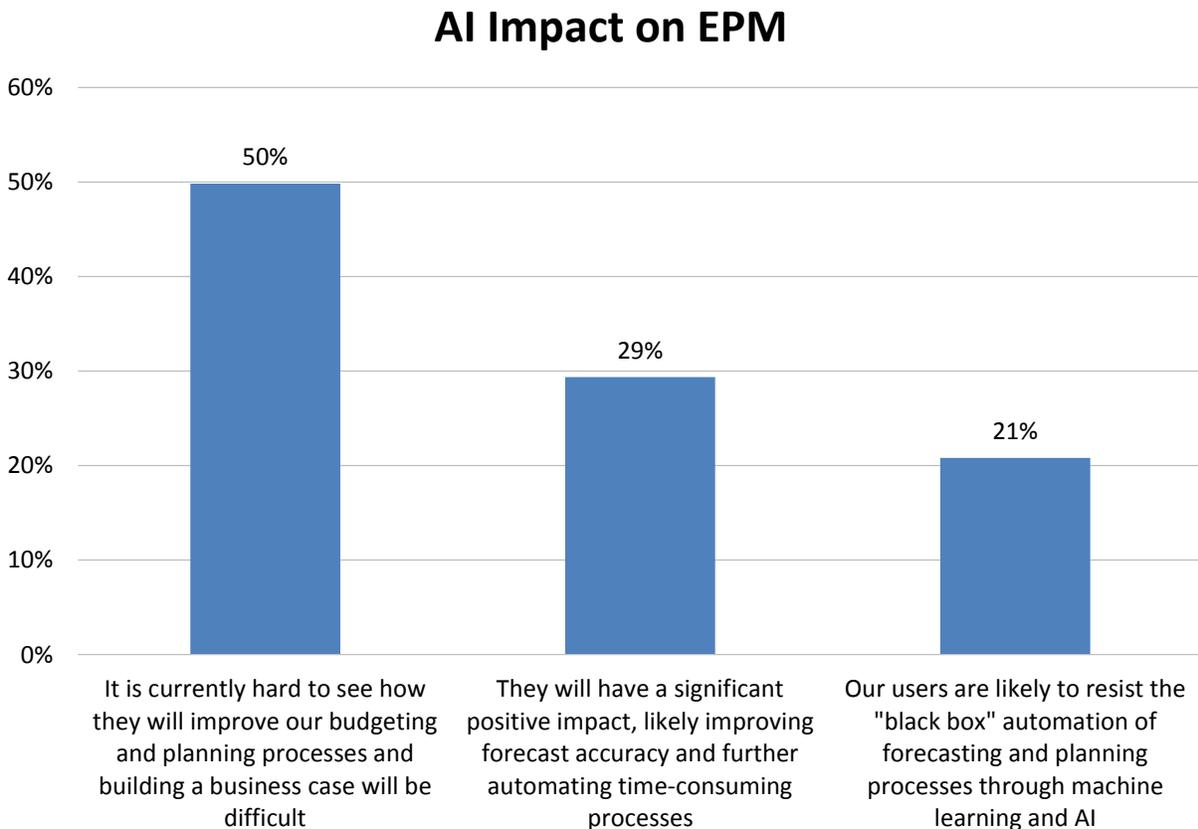


Figure 26 – AI impact on EPM

2019 Wisdom of Crowds® EPM Market Study

There are no major differences in attitudes to AI and machine learning in organizations of different sizes (fig. 27). However, the very largest organizations (more than 10,000 employees) exhibit the greatest reluctance to adopt these technologies, with 27 percent stating users would likely resist their use. This is likely because these organizations have teams of finance and strategic planning personnel who may feel threatened by these technologies.

Building the business case for machine learning and AI in enterprise performance management is challenging for most organizations. Vendors will need to bundle these capabilities in their enterprise performance management solutions at a price point that makes them attractive for small and mid-sized organizations.

AI Impact on EPM by Organization Size

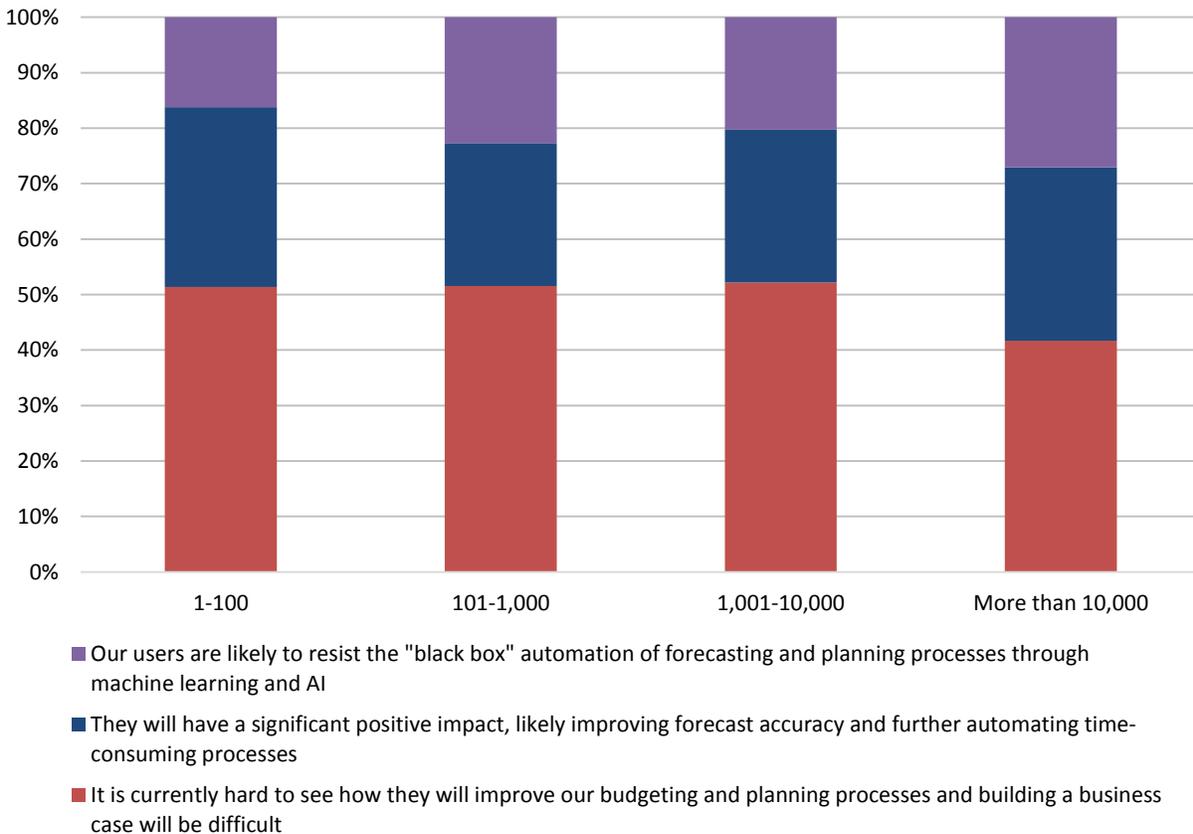


Figure 27 – AI impact on EPM by organization size

2019 Wisdom of Crowds® EPM Market Study

There are some important differences in views on the impact of AI and machine learning by function (fig. 28). Thirty-eight percent of Executive Management respondents see a significant positive impact from machine learning and AI, which is at least 12 percent higher than respondents from other functions. Conversely, functions like IT, Operations, and Finance show greater reluctance to adopt these technologies, with 28 percent, 25 percent, and 21 percent of respondents from those functions respectively stating users would likely resist adoption.

Consequently, Executive Management are likely to be strong sponsors of machine learning and AI in enterprise performance management but are likely to face user resistance from departments where jobs may be under threat.

AI Impact on EPM by Function

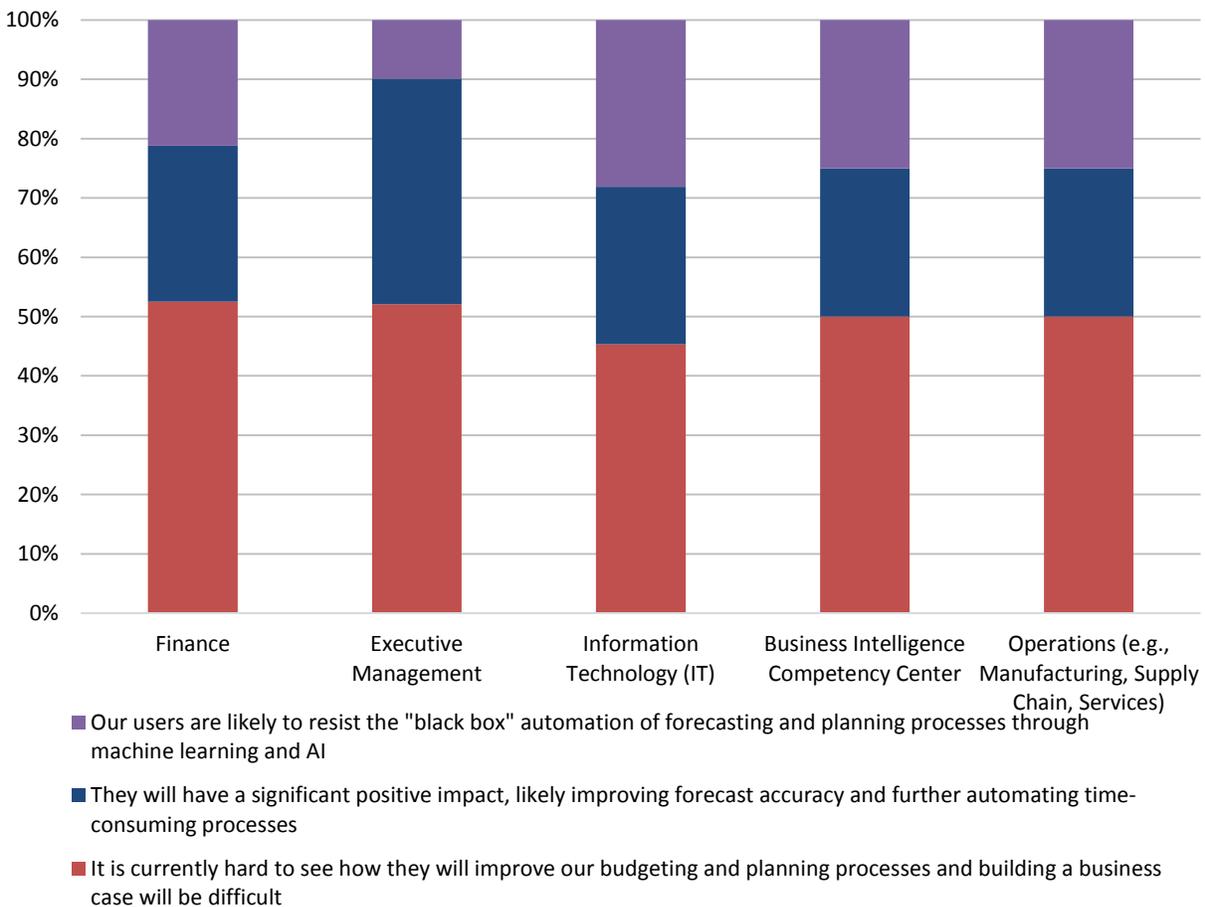


Figure 28 – AI impact on EPM by function

2019 Wisdom of Crowds® EPM Market Study

We also asked respondents how they would source machine learning and AI capabilities for EPM software (fig. 29). The results reinforce the split in opinion towards machine learning and AI. Thirty-six percent currently have no interest in deploying machine learning and AI to support enterprise performance management. However, 41 percent say they expect these capabilities to be delivered by their enterprise performance management vendor, while 23 percent are prepared to be early adopters by building their own solutions to augment their existing enterprise performance management solutions. This is the approach adopted by the small number of early adopters so far: they employed data scientists and used machine learning tools and AI platforms to create their own custom solutions.

EPM Deployment of Machine Learning and AI

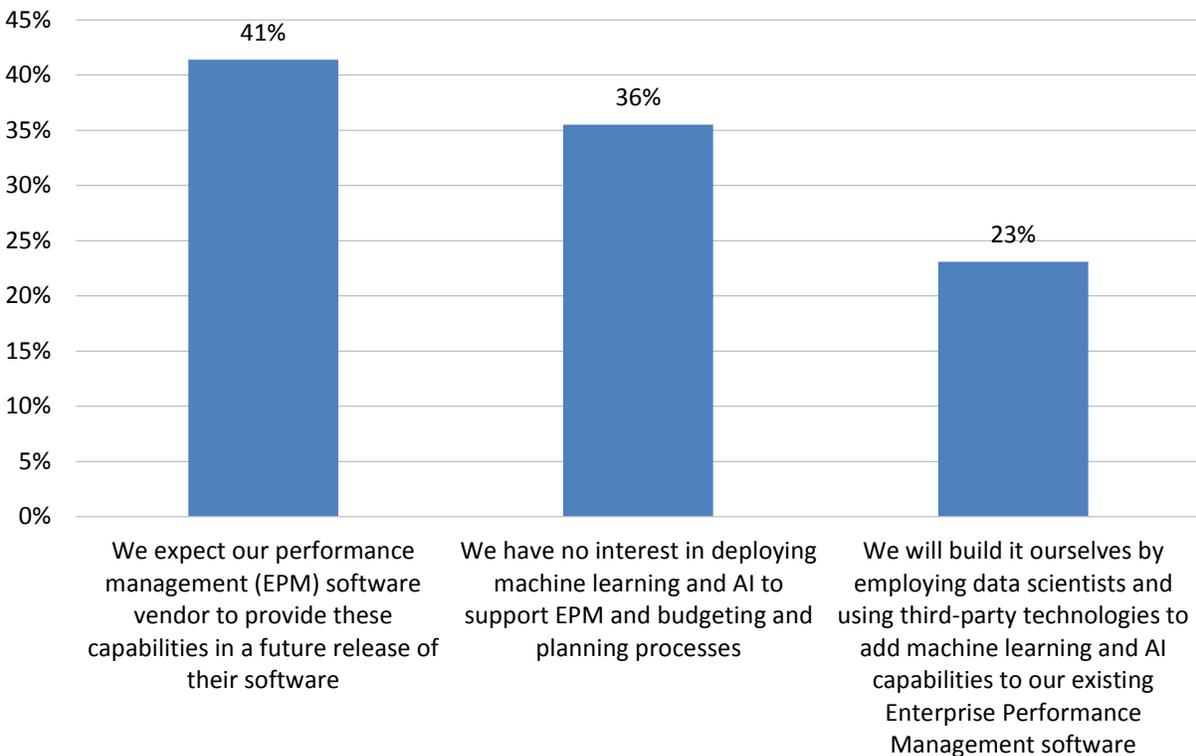


Figure 29 – EPM deployment of machine learning and AI

Overall, with 50 percent of respondents uncertain about the business value of machine learning and AI, and with 41 percent expecting these to be bundled with enterprise performance management software, there is a clear opportunity for vendors to differentiate themselves in the market with machine learning and AI.

Deployment Options for Enterprise Performance Management

Respondents have a clear preference for cloud enterprise performance management solutions compared to on-premises deployment (fig. 30). However, hosted/private cloud solutions are slightly preferred compared to public cloud SaaS.

The relatively low weighted mean scores (from 3.1 to 2.5) show that the deployment options for enterprise performance management systems are not as important to respondents as many of the functional capabilities, the majority of which have a weighted mean importance between 3.2 and 4.5. Consequently, vendors that do not yet have a comprehensive SaaS offering are not currently at a disadvantage in the market.

Importance of Deployment Options for EPM

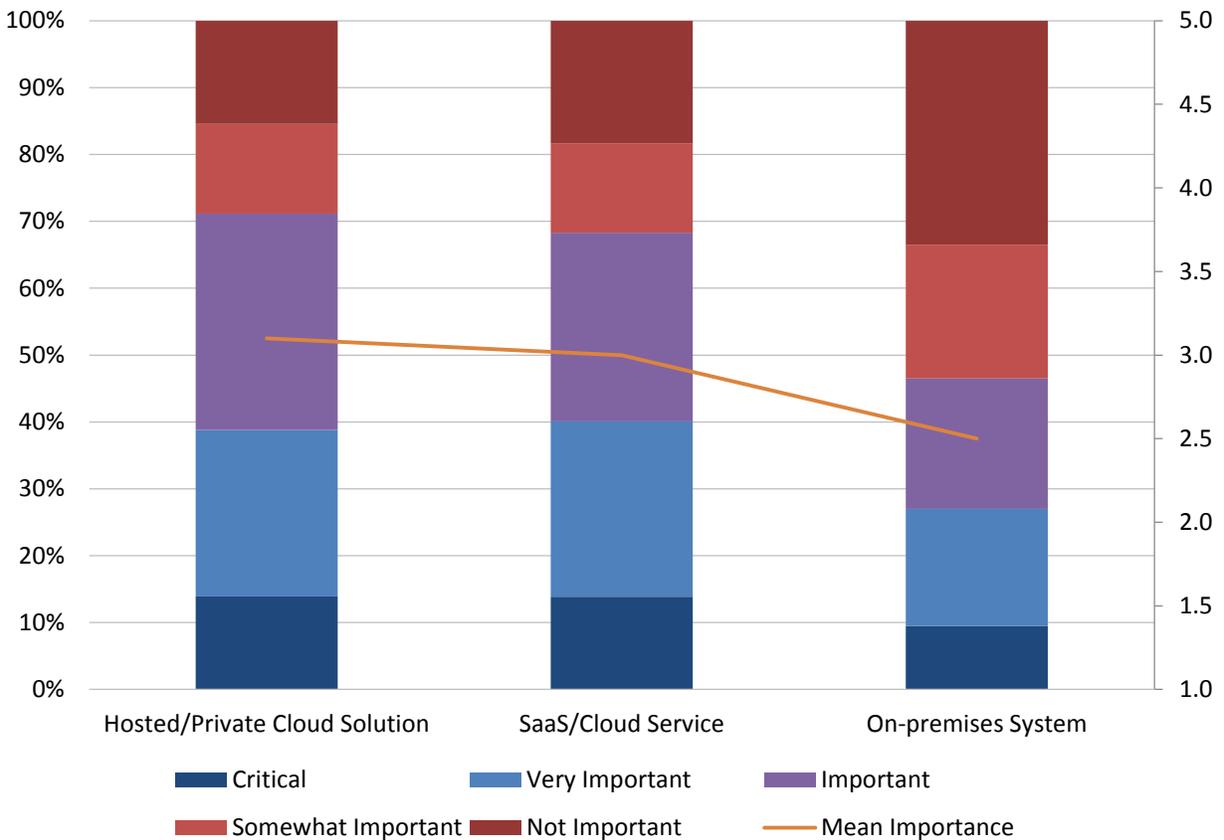


Figure 30 – Importance of deployment options for EPM

There are some differences in importance of deployment options by geography (fig. 31). North America has a stronger preference for cloud solutions compared to Asia Pacific and EMEA. Respondents from Asia Pacific rate deployment options as more important overall compared to EMEA and North America.

Mean Importance of EPM Deployment Options by Geography

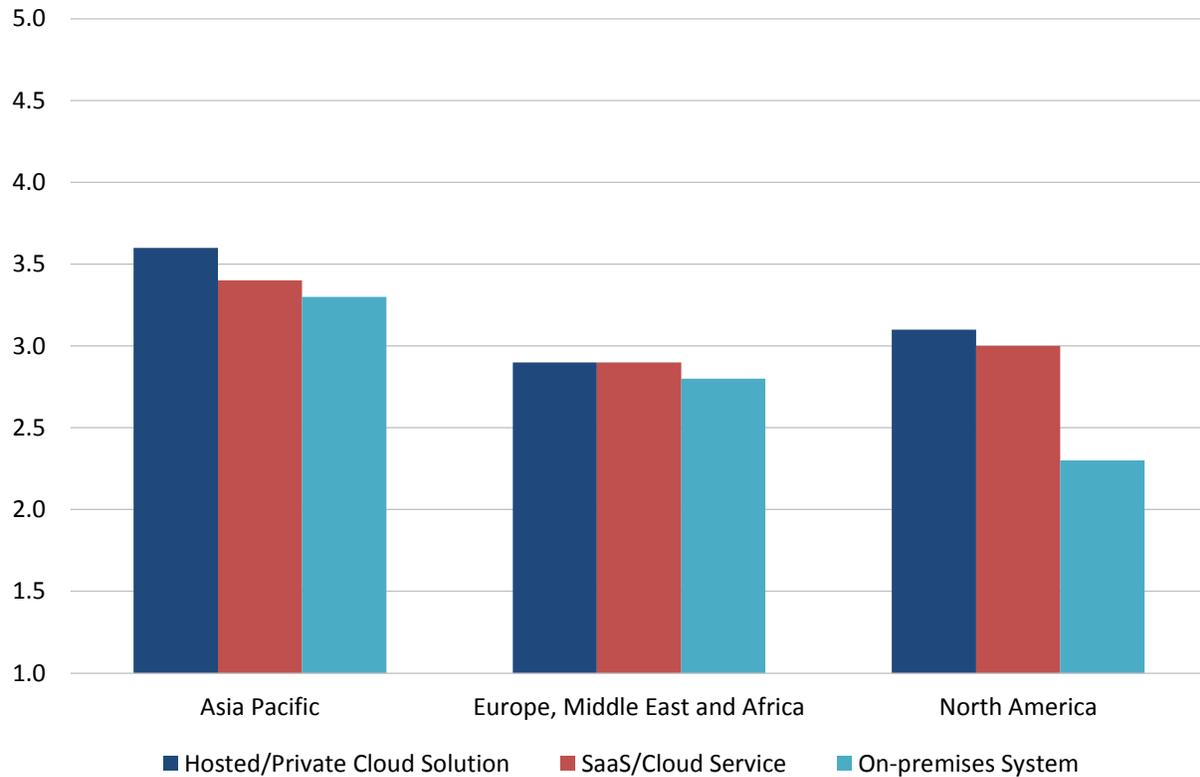


Figure 31 – Mean importance of EPM deployment options by geography

The importance of cloud as a deployment option varies by organization size (fig. 32). Small organizations (1-100 employees) rate SaaS and hosted/private cloud as significantly more important than on-premises deployment, with weighted mean importance of 3.6 for SaaS and 3.5 for hosted/private cloud, compared to 2.5 for on-premises deployment.

Mid-sized organizations (101-1,000 employees) also rate cloud deployment options more important than on-premises deployment, but the gap narrows for large organizations. The very largest (more than 10,000 employees) rate on-premises deployment as slightly more important than SaaS or hosted/private cloud deployment.

Mean Importance of EPM Deployment Options by Organizational Size

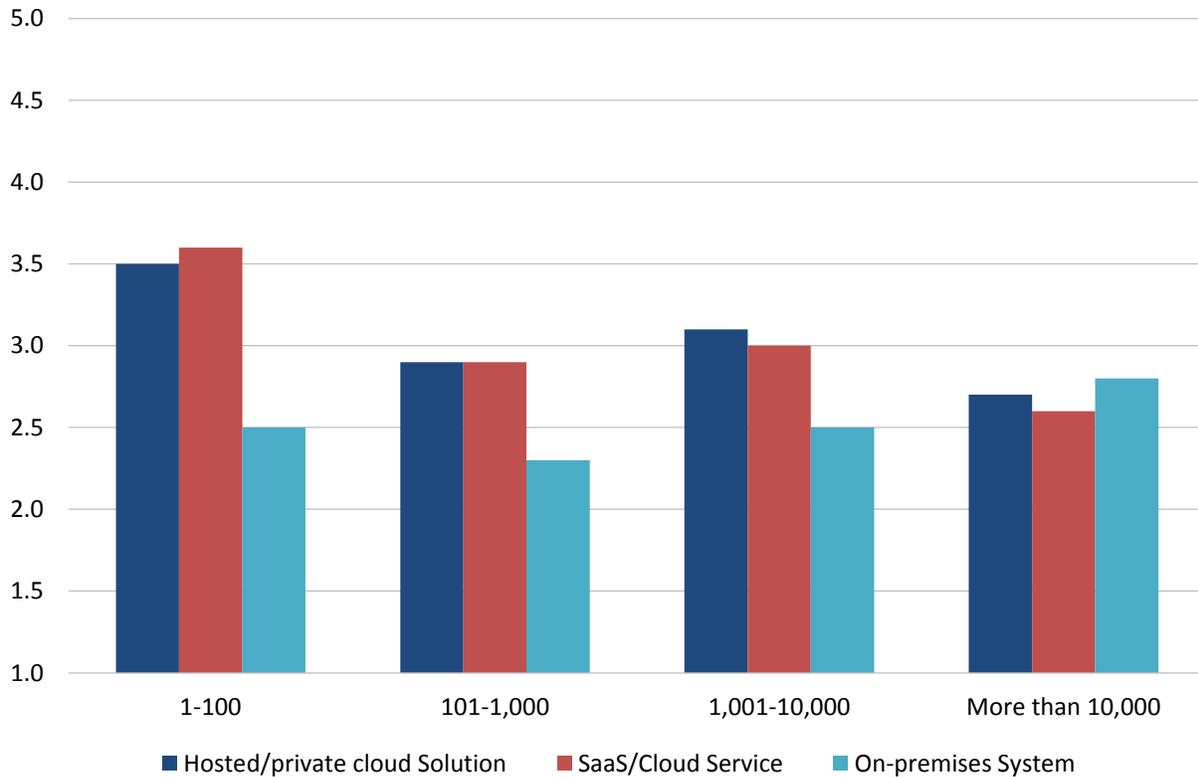


Figure 32 – Importance of EPM deployment options by organization size

Therefore, enterprise management software vendors need to ensure they have the appropriate deployment options for their target market. Vendors focusing on SaaS delivery as a sales tactic will likely be more successful in small and mid-sized organizations.



Industry and
Vendor
Analysis

Industry Capabilities

For our 2019 study, we analyzed vendor responses about the functional and architectural capabilities of their products in the following categories:

Strategy Management – features and functions that support setting high-level goals and objectives, creating strategic plans (typically higher level and with longer time horizons than financial and operational plans). They also model the impact of complex strategic decisions (such as acquiring a company and different corporate financing strategies) and 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 a comprehensive enterprise performance management solution.

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

Planning and 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.

Advanced Analytic Capabilities – capabilities that extend beyond reporting and ad hoc analysis to leverage sophisticated statistical and predictive techniques.

Technical Architecture – features of the underlying technical and application architecture, including delivery models supported and data architecture.

Industry – Strategy Management Capabilities

Vendors provide comprehensive support for most strategy management capabilities (fig. 33). Only debt vs. equity financing analysis lacks support from a small number of vendors, and those that do not support it have no plans to fill this gap.

Strategy management is one of the areas of enterprise performance management that elevates any implementation beyond a focus on budgeting and planning. Vendors offer good capabilities in these areas, so organizations evaluating enterprise performance management software need to challenge their users, particularly executive management, to consider how they will leverage this functionality.

Industry - Strategy Management Capabilities

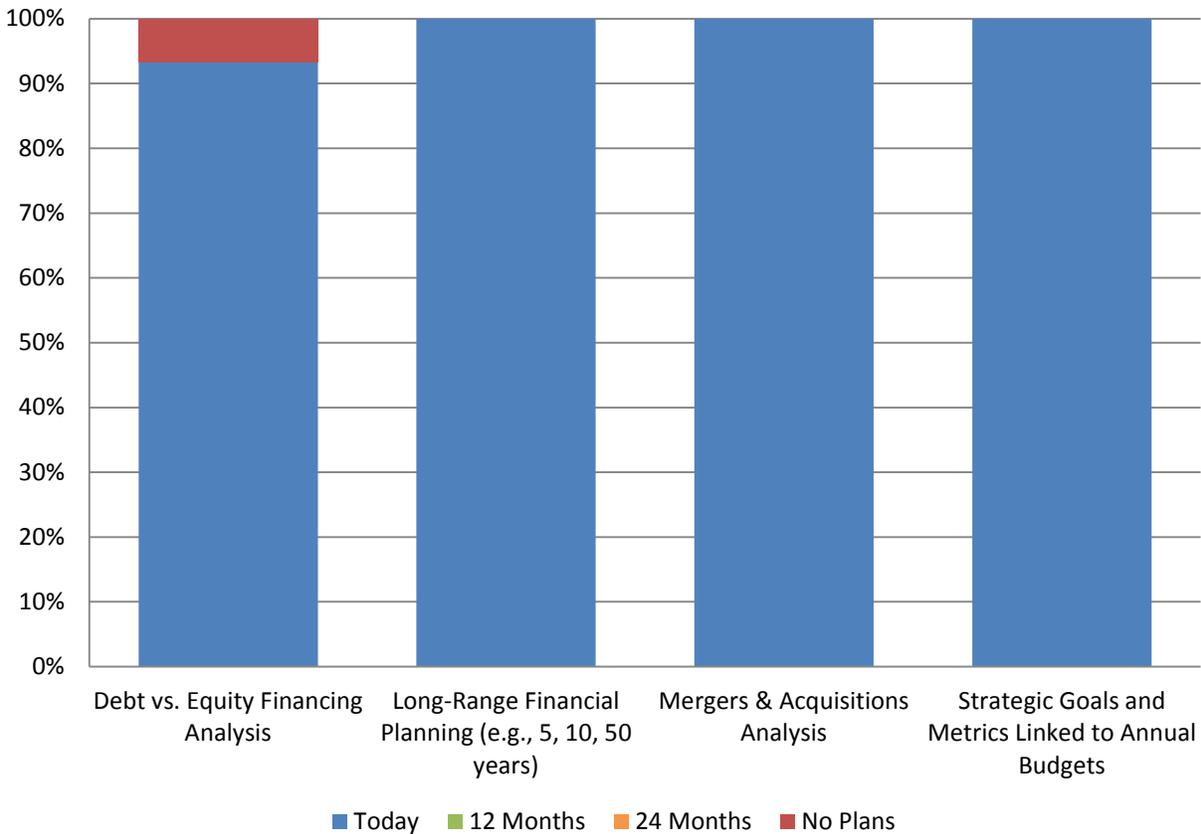


Figure 33 – Industry – strategy management capabilities

Industry – Financial Planning Capabilities

Financial planning capabilities are primarily targeted in the Finance function, and the CFO and Finance function needs heavily influence many enterprise performance management evaluations. Therefore, it is not surprising that vendors provide good coverage of capabilities in this area (fig. 34).

However, there are some notable areas where some vendor solutions lack support for key financial planning activities. For example, some vendors have no plans to support balance sheet planning, and support for industry variants of financial planning has some gaps (expected to be filled in 12 months by some). Also, lack of financial elimination and consolidation functionality may be a differentiating factor in some evaluations.

Organizations evaluating enterprise performance management software must ensure they clearly define and rank their financial planning requirements, as this will help differentiate between vendors.

Industry - Financial Planning Capabilities

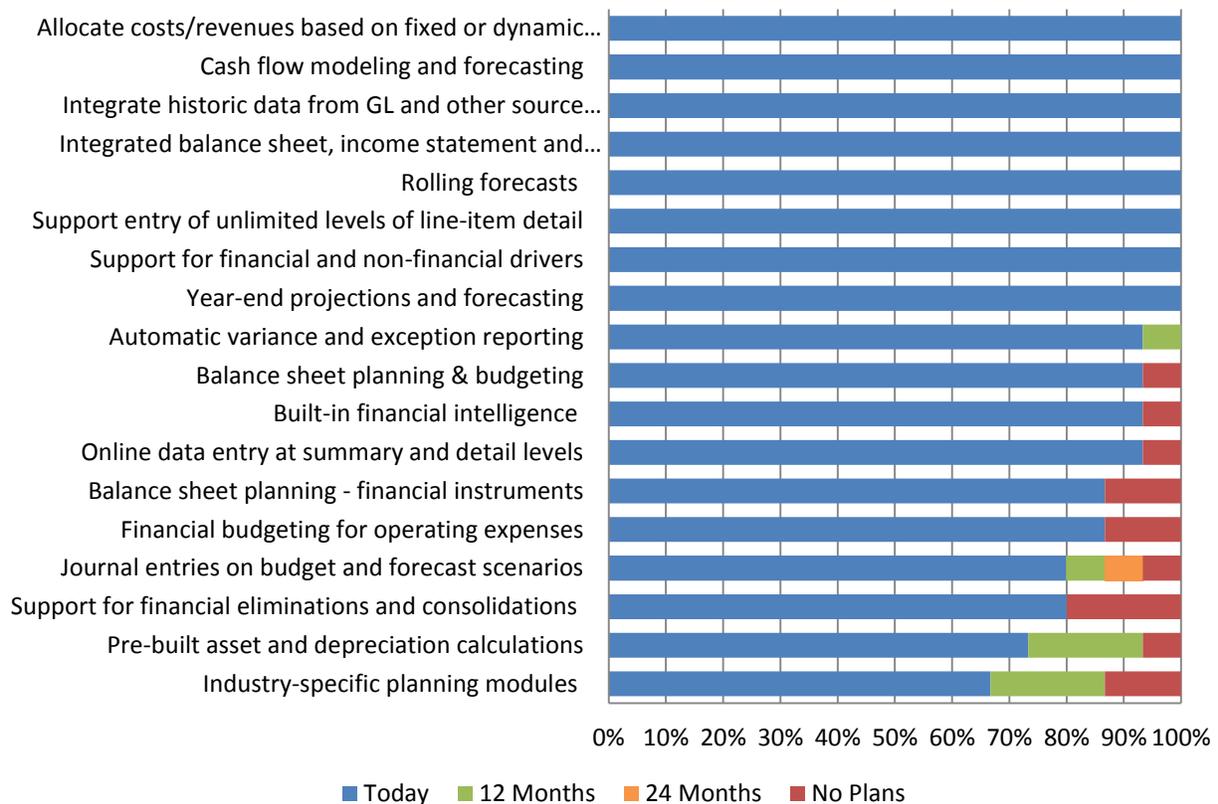


Figure 34 – Industry – financial planning capabilities

Industry – Operational Planning Capabilities

Support for operational planning capabilities is fairly broad (fig. 35). However, where there are gaps, most vendors do not have plans to fill them. This means enterprise performance management solutions will vary in their operational planning capabilities in the foreseeable future.

Therefore, organizations looking to source planning capabilities outside financial planning from an enterprise performance management vendor need to evaluate domain capabilities closely and consider augmenting an enterprise performance management solution with a domain specialist solution if these do not go deep enough.

Industry - Operational Planning Capabilities

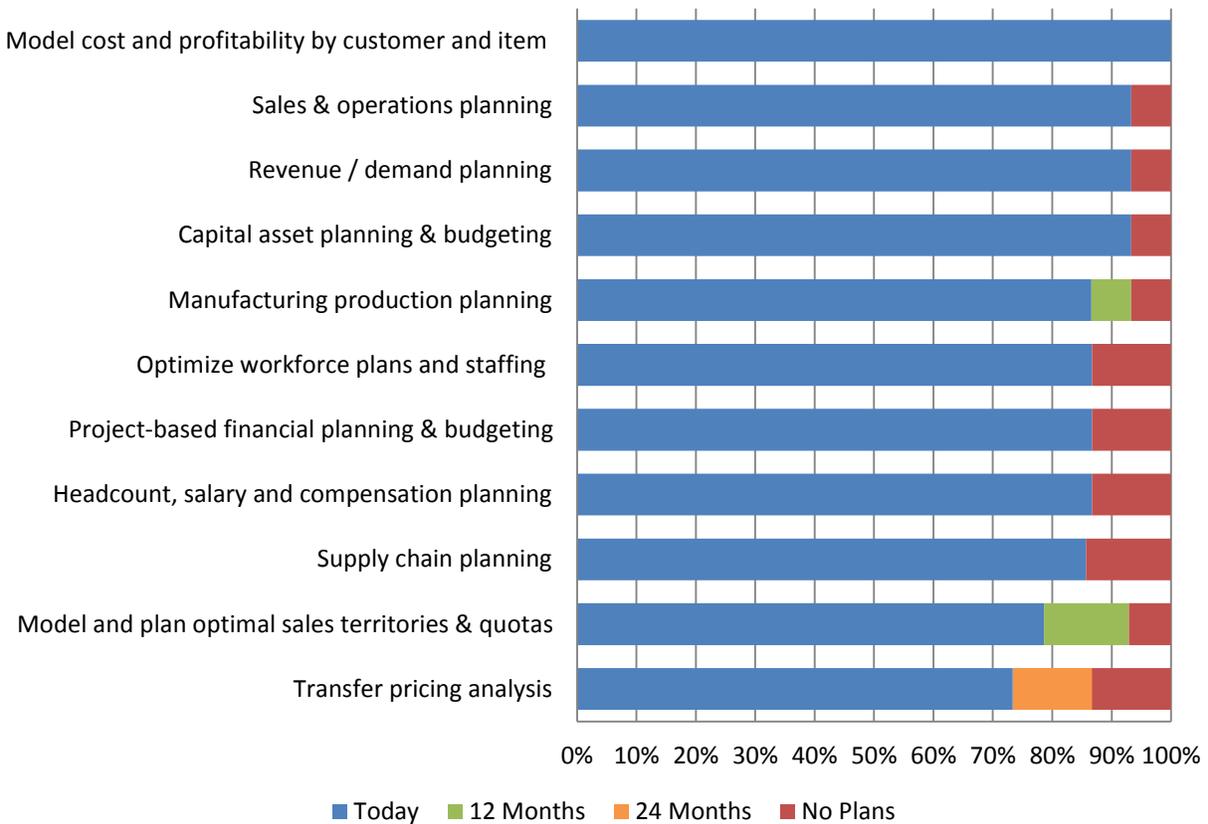


Figure 35 - Industry – operational planning capabilities

Industry – Budgeting and Planning Process Support

Most vendors provide comprehensive support for the processes that underpin the entry, amendment, review, and approval of budgets (fig. 36). 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 performance management solutions should not assume that all vendors will meet all their required budgeting and planning process needs.

Industry - Planning and Budgeting Process Support

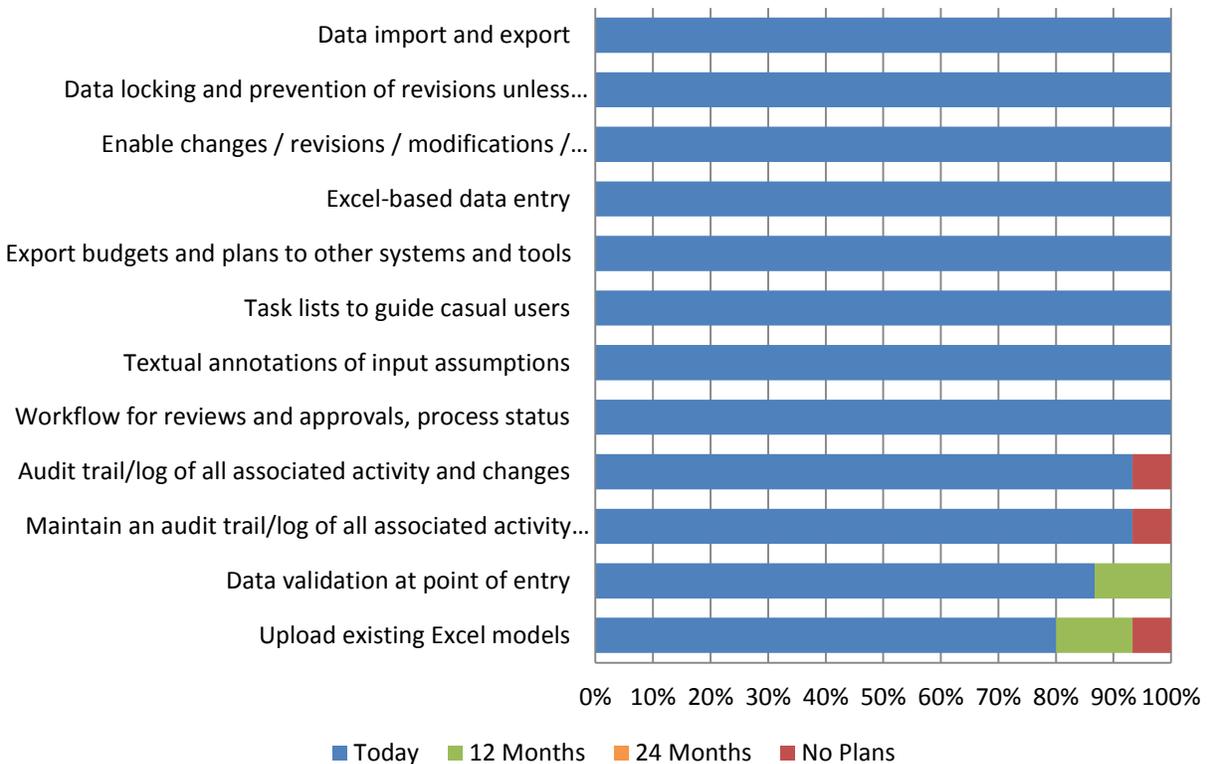


Figure 36 - Industry – planning and budgeting process support

Industry – Planning and Modeling Capabilities

The 2019 study shows a wide degree of support for many sophisticated planning and modeling functions (fig. 37). However, vendors lack functionality in areas such as break-back allocations and multidimensional modeling that can be key functionalities in more complex planning environments. Similarly, 13 percent of vendors lack multi-language support, which eliminates them as candidates for most global implementations. This should be addressed within 24 months.

Offline budgeting, planning, and modeling capabilities and mobile support for modeling have the lowest level of support from vendors. This is understandable, as the prevalence of SaaS reduces the need for mobile capabilities, especially in a core functionality such as modeling. However, for organizations deploying an on-premises solution, these could be key capabilities in enabling a mobile workforce to participate in planning processes while on the road.

Industry - Planning and Modeling Features

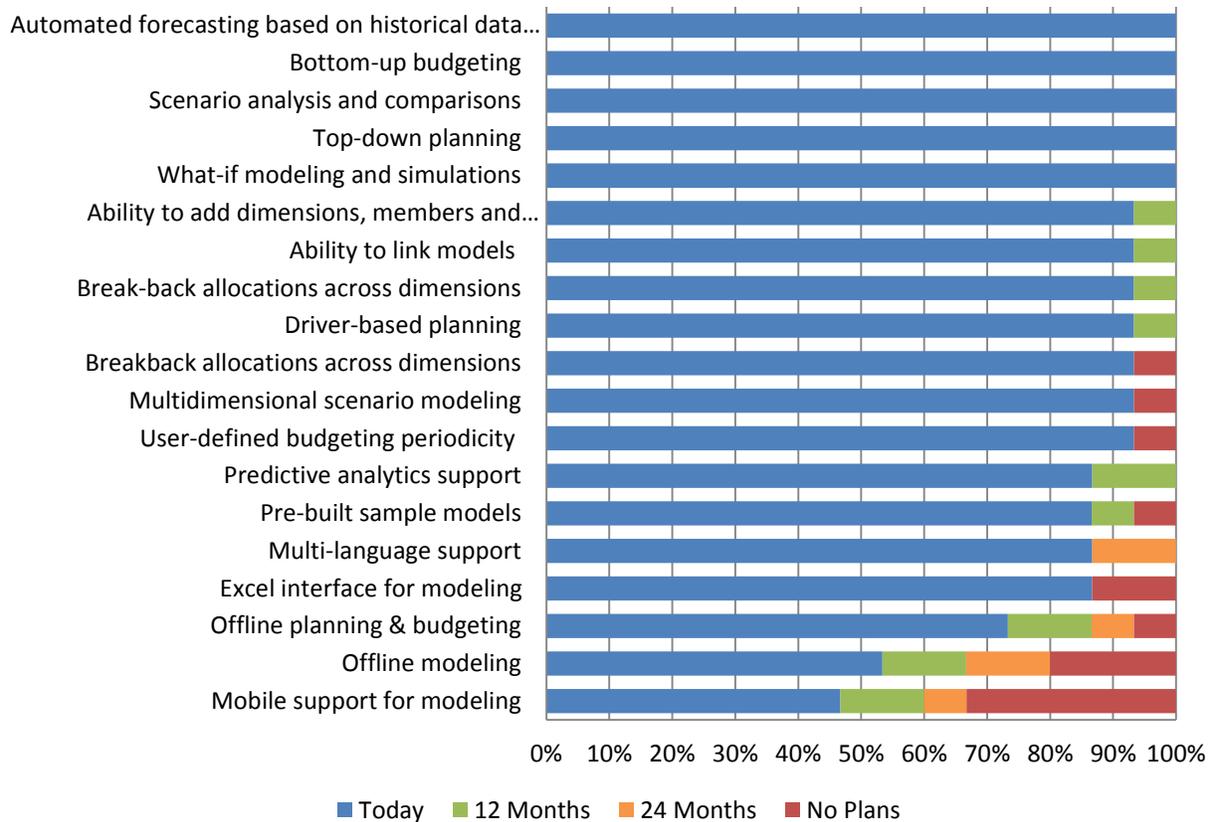


Figure 37 – Industry – planning and modeling capabilities

Industry – Advanced Analytic Capabilities

There are distinct gaps in vendor support for advanced analytic capabilities (fig. 38). Although the majority of vendors support predictive analytics (with those that do not have it in their 24-month road map), only 47 percent currently support prescriptive analytics. This is on the 12-24-month road map for all vendors, and it is an area in which we expect vendors to leverage machine learning and AI in the future.

Some vendors do not plan to support advanced statistical forecasting, and vendors are split over support for Monte Carlo analysis, with 53 percent supporting this capability while 27 percent have no plans to support it.

Advanced analytics can be key to the transformational impact of enterprise performance management, so any evaluation should use this as an area to identify differentiation between vendors.

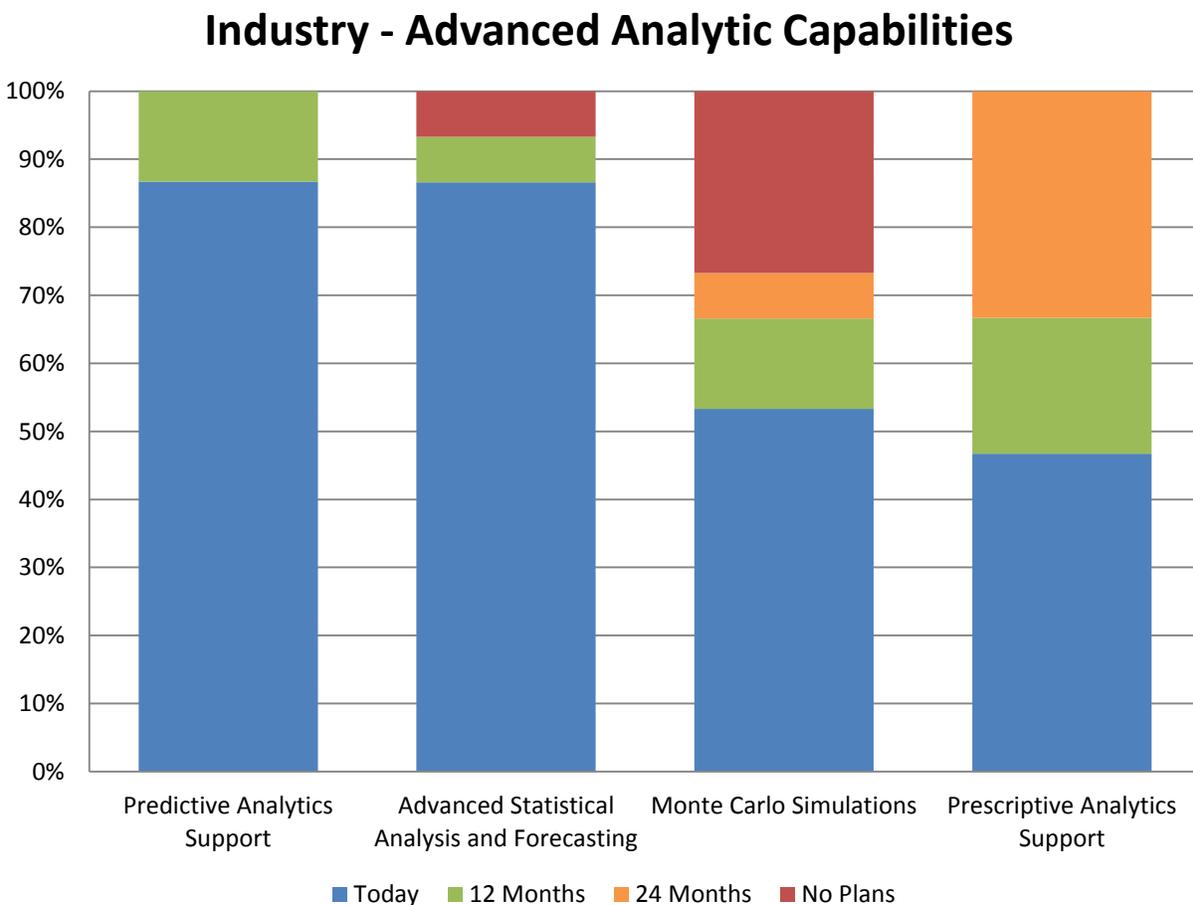


Figure 38 – Industry – advanced analytical capabilities

Industry – Technical Architecture Features

The 2019 study shows that all vendors support cloud/SaaS technology while support for hosted/single tenant and on-premises technology is limited to 73 percent and 67 percent respectively (fig. 39). Some organizations still view on-premises deployment as important, so any enterprise performance management evaluation needs to clearly define its preferred deployment model (or models) to ensure the appropriate vendors are shortlisted.

Support for in-memory databases and mobile support for data entry, workflow, and processing are technologies that are on the road map for some vendors, although 13 percent currently have no plans to support in-memory databases.

Organizations evaluating enterprise performance management software need to involve their IT strategy team in evaluations to identify how well the technology adopted by potential enterprise performance management 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 - Architectural Features

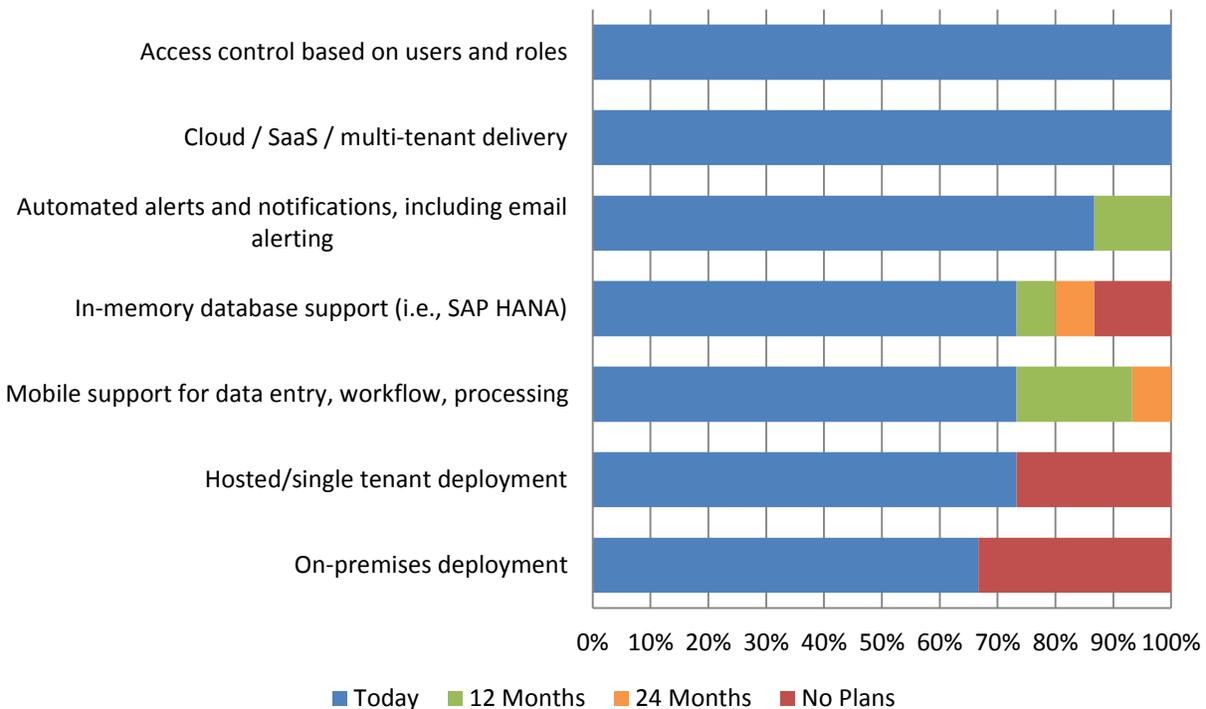


Figure 39 – Industry – architectural features

Vendor Rankings

In this section, we offer rankings of enterprise performance management 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

Although for 2019 we shifted this report from enterprise planning (EP) to full enterprise performance management (EPM), the rating system focuses on general capabilities and the set of vendors remains consistent. Therefore, the year-over-year comparison of vendor ratings remains meaningful.

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 Performance Management Market Models

In 2015, we developed two new models for examining and understanding markets. 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. 40). 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.

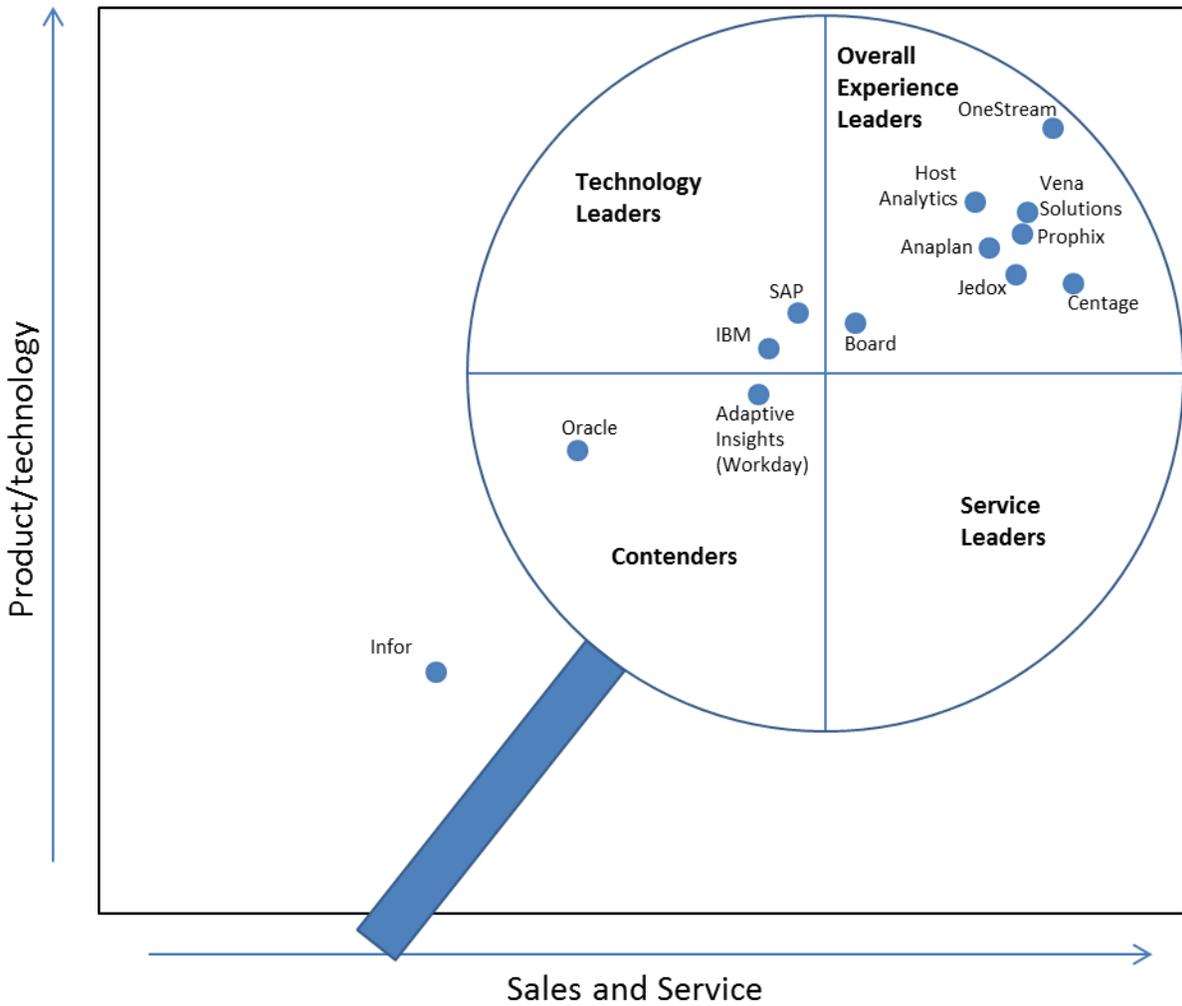


Figure 40 – Customer experience model

Vendor Credibility Model

The vendor credibility model considers how customers “feel” about their vendor (fig. 41). 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.

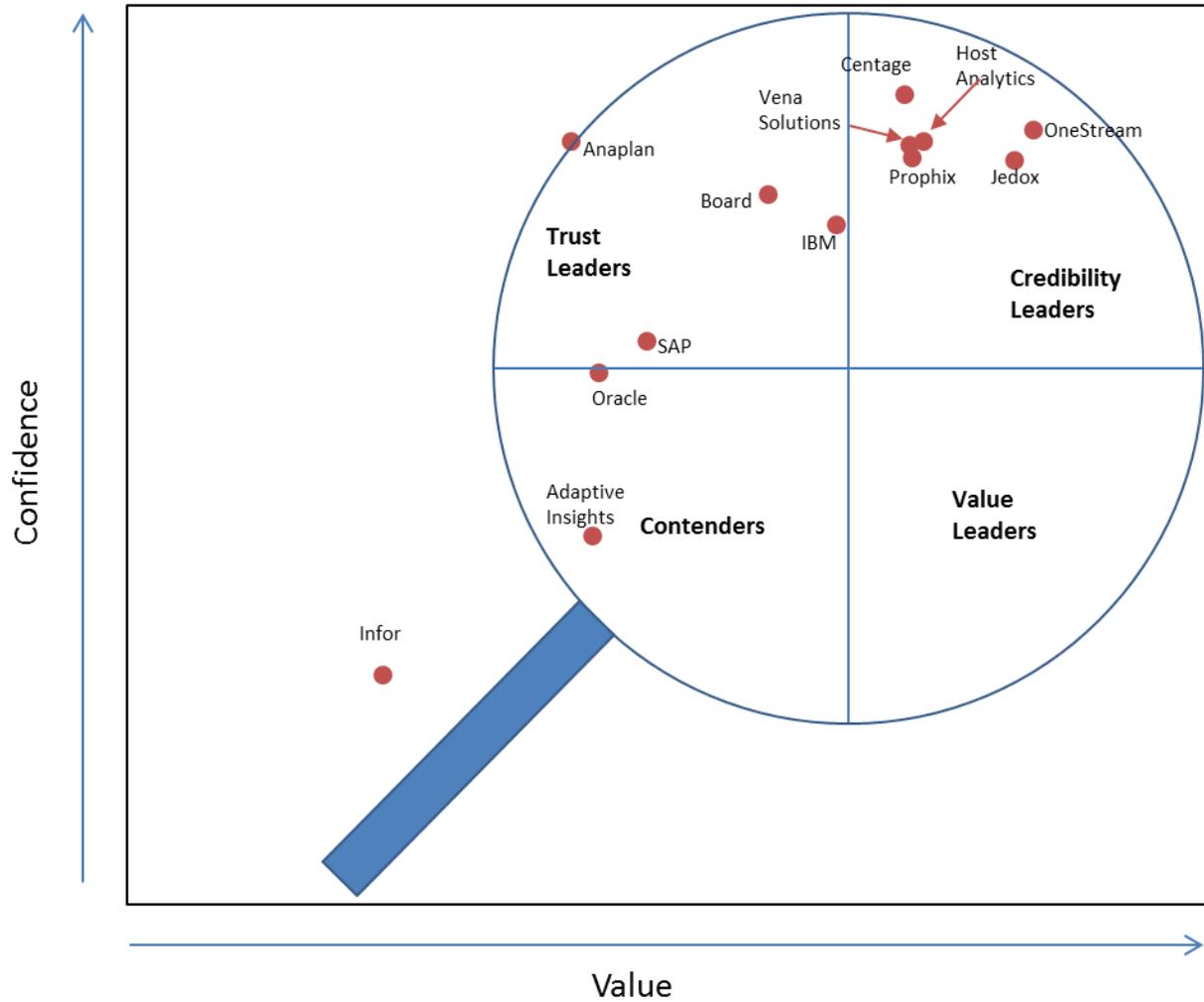


Figure 41 – Vendor credibility model

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

<ul style="list-style-type: none"> - Sales/acquisition experience (12 - 2 o'clock) <ul style="list-style-type: none"> o Professionalism o Product knowledge o Understanding our business/needs o Responsiveness o Flexibility/accommodation o Business practices o Contractual terms and conditions o Follow-up after the sale - Value for price (3 o'clock) - Quality and usefulness of product (3 - 7 o'clock) <ul style="list-style-type: none"> o Robustness/sophistication of technology o Completeness of functionality o Reliability of technology o Scalability o Integration of components within product o Integration with third-party technologies o Overall usability o Ease of installation o Ease of administration 	<ul style="list-style-type: none"> - Quality and usefulness of product (continued) <ul style="list-style-type: none"> o Customization and extensibility o Ease of upgrade/migration to new versions o Online forums and documentation - Quality of technical support (8 - 9 o'clock) <ul style="list-style-type: none"> o Professionalism o Product knowledge o Responsiveness o Continuity of personnel o Time to resolve problems - Quality and value of consulting services (9 - 10 o'clock) <ul style="list-style-type: none"> o Professionalism o Product knowledge o Experience o Continuity o Value - Integrity (11 o'clock) - Whether vendor is recommended (12 o'clock)
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Adaptive Insights (Workday) Detailed Score

Adaptive Insights (Workday)

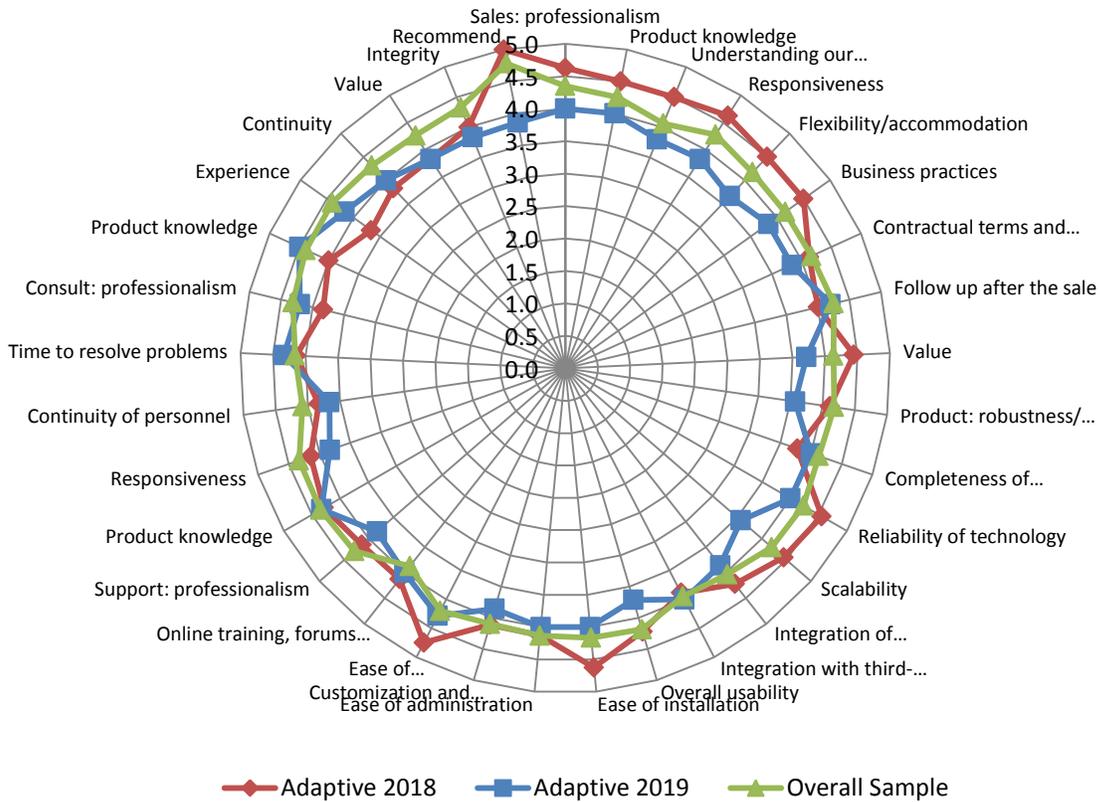


Figure 42 – Adaptive Insights (Workday) detailed score

In June 2018, Adaptive Insights was acquired by Workday.

With scores generally below the overall sample, Adaptive Insights declines in a number of key areas in 2019 including sales, value, product, and recommend. This may be due to the change of ownership, as it usually takes an acquiring vendor some time to deal with personnel transitions, new reporting structures, and clarity of product road map.

Adaptive Insights is considered a Contender in both the Customer Experience and Vendor Credibility models.

Anaplan Detailed Score

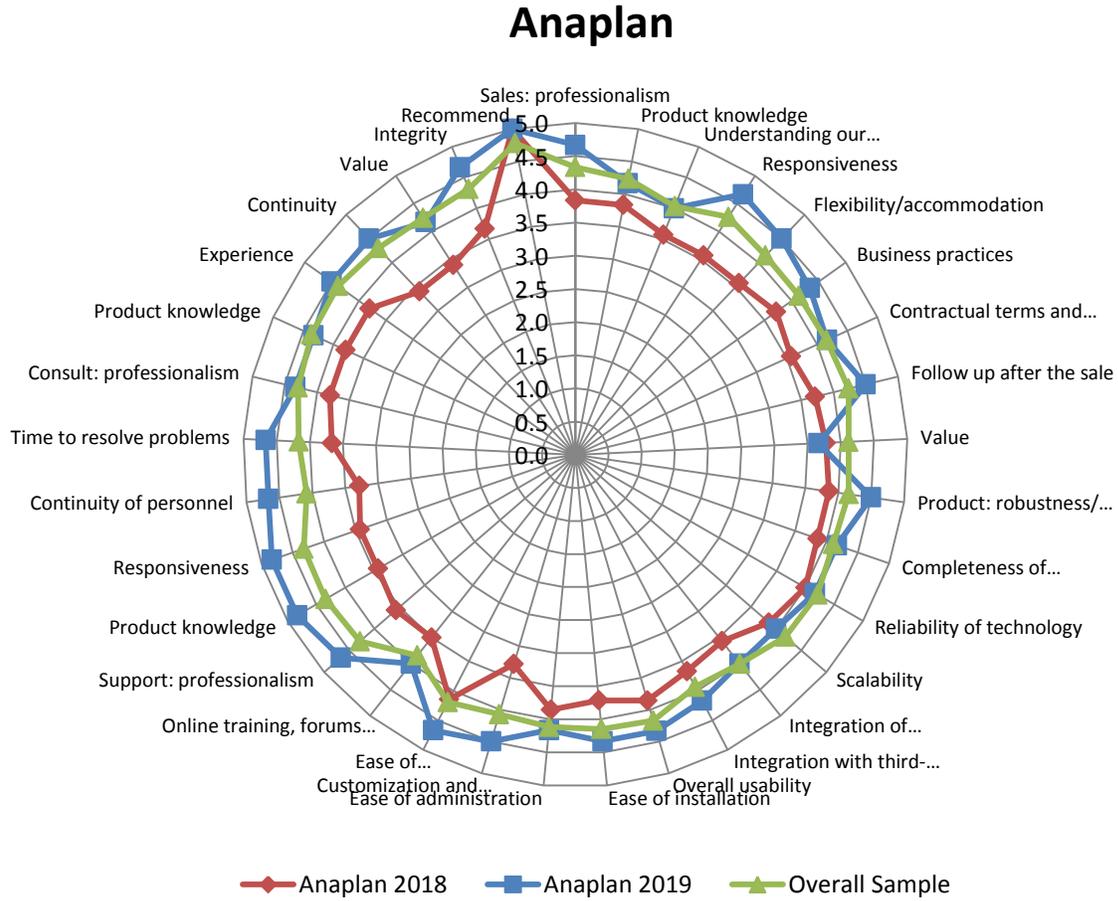


Figure 43 – Anaplan detailed score

For 2019, Anaplan shows substantial improvement in all categories of measurement including sales, value, product, support, consulting, integrity, and recommend. It is considered a leader in the Customer Experience Model and, marginally, a Trust Leader in the Vendor Credibility Model. It is best in class for: product customization and extensibility, support product knowledge, and continuity of support personnel. It maintains a perfect recommend score.

Board International Detailed Score

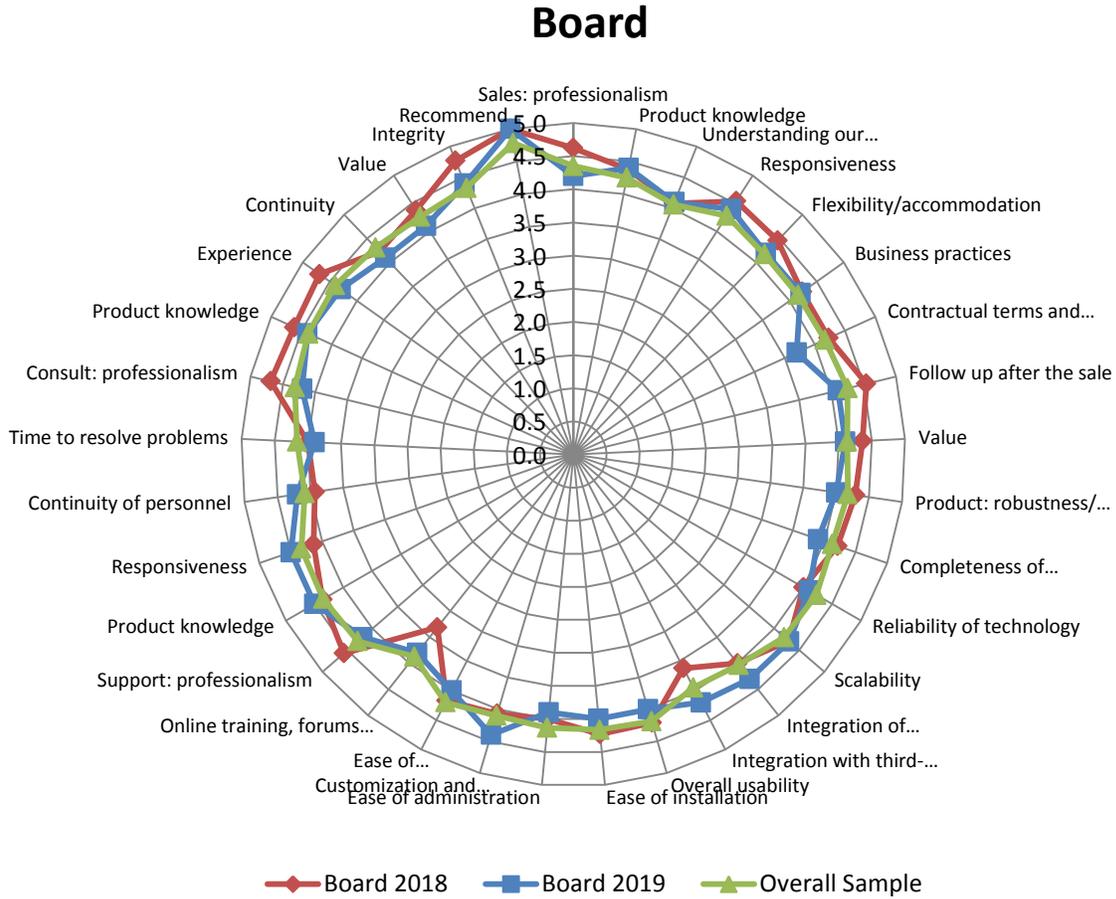


Figure 44 – Board International detailed score

For 2019, Board International’s scores are generally in line with or above the overall sample. It is considered an Overall Leader in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model. It maintains a perfect recommend score.

Budget Maestro (Centage) Detailed Score

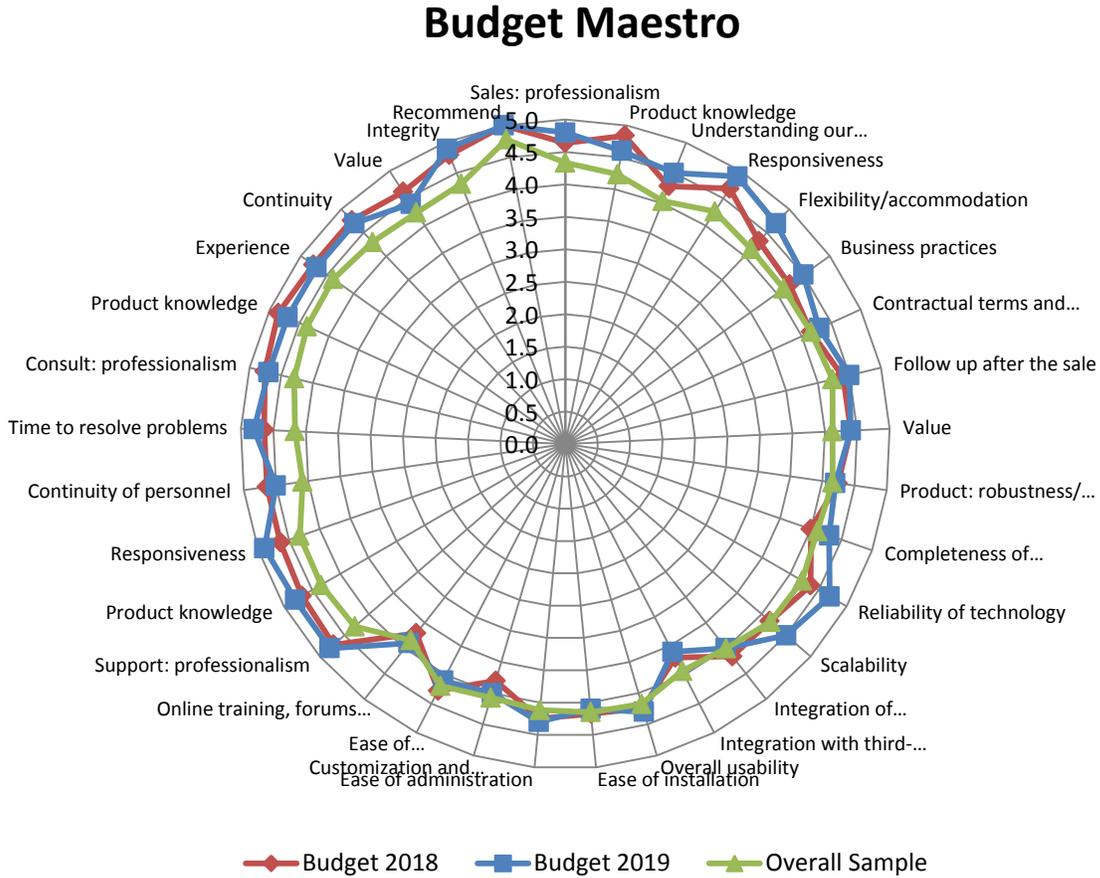


Figure 45 – Budget Maestro (Centage) detailed score

Budget Maestro (Centage) shows additional improvements in a number of key areas including sales and product. 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 sales professionalism, understanding business needs, sales responsiveness, flexibility and accommodation, support professionalism and responsiveness, time to resolve problems, and overall integrity. It maintains a perfect recommend score.

Host Analytics Detailed Score

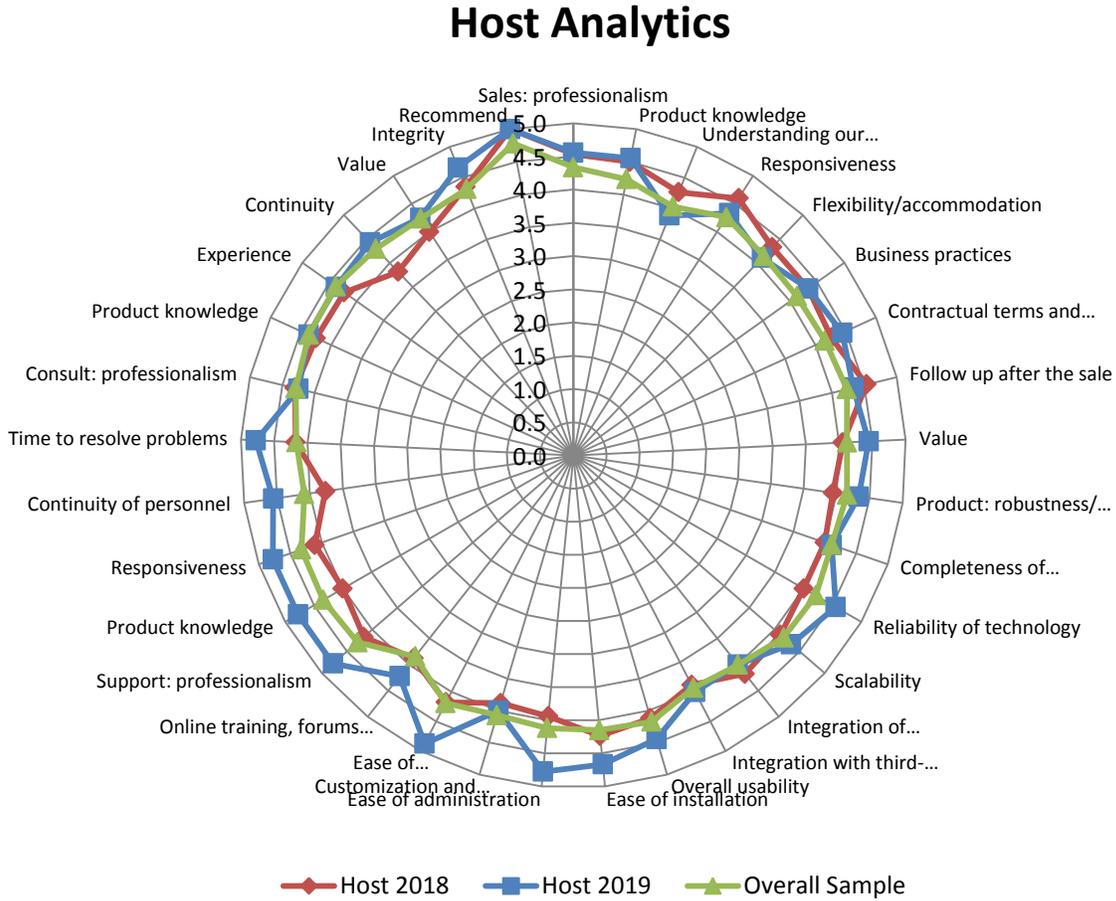


Figure 46 – Host Analytics detailed score

In 2019, Host Analytics has key improvements in all categories including sales, product, value, support, consulting, and integrity. An Overall Leader in both Customer Experience, and Vendor Credibility Models, Host Analytics is well above the overall sample for most measures. It is best in class for product ease of installation and administration, ease of upgrade/migration to new versions, and online training, forums and documentation. It maintains a perfect recommend score.

IBM Detailed Score

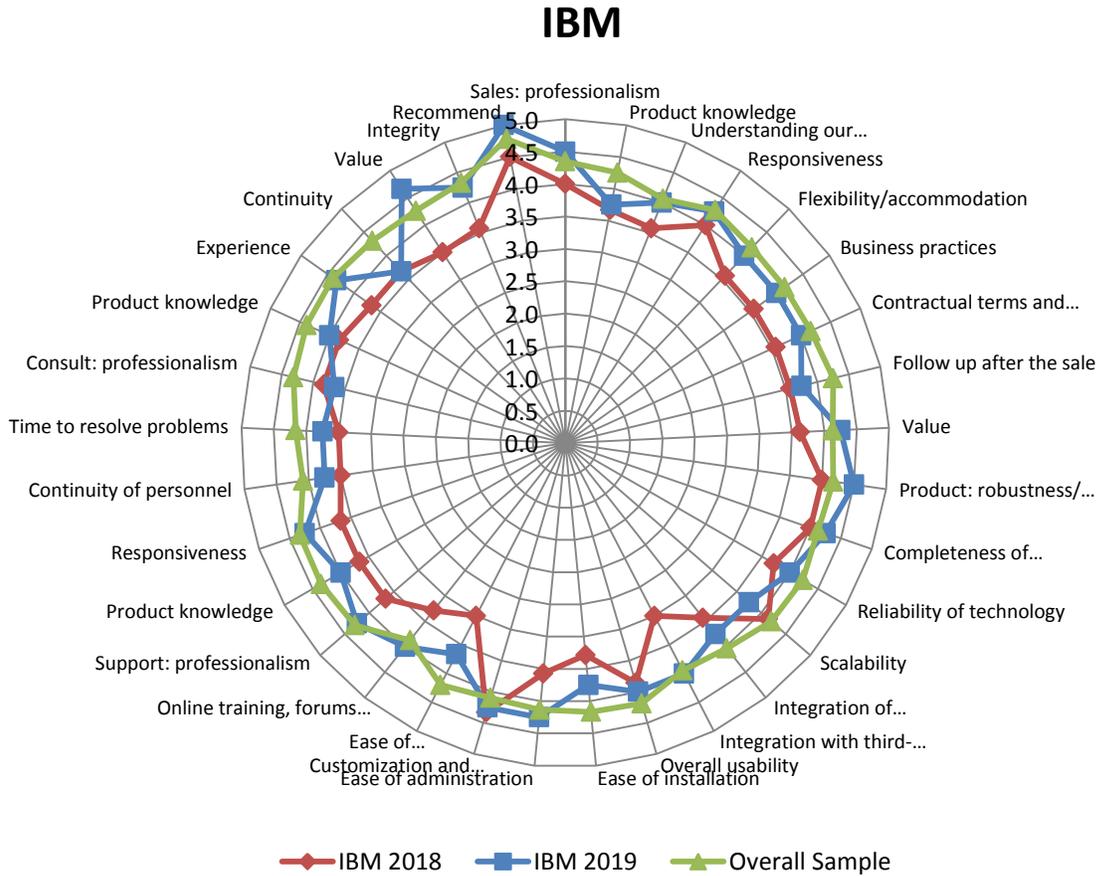


Figure 47 – IBM detailed score

Although its scores are generally below the overall sample, in 2019, IBM has key improvements in all categories of measurement. It is considered a Technology Leader in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model. It is best in class for consulting value.

Infor Detailed Score

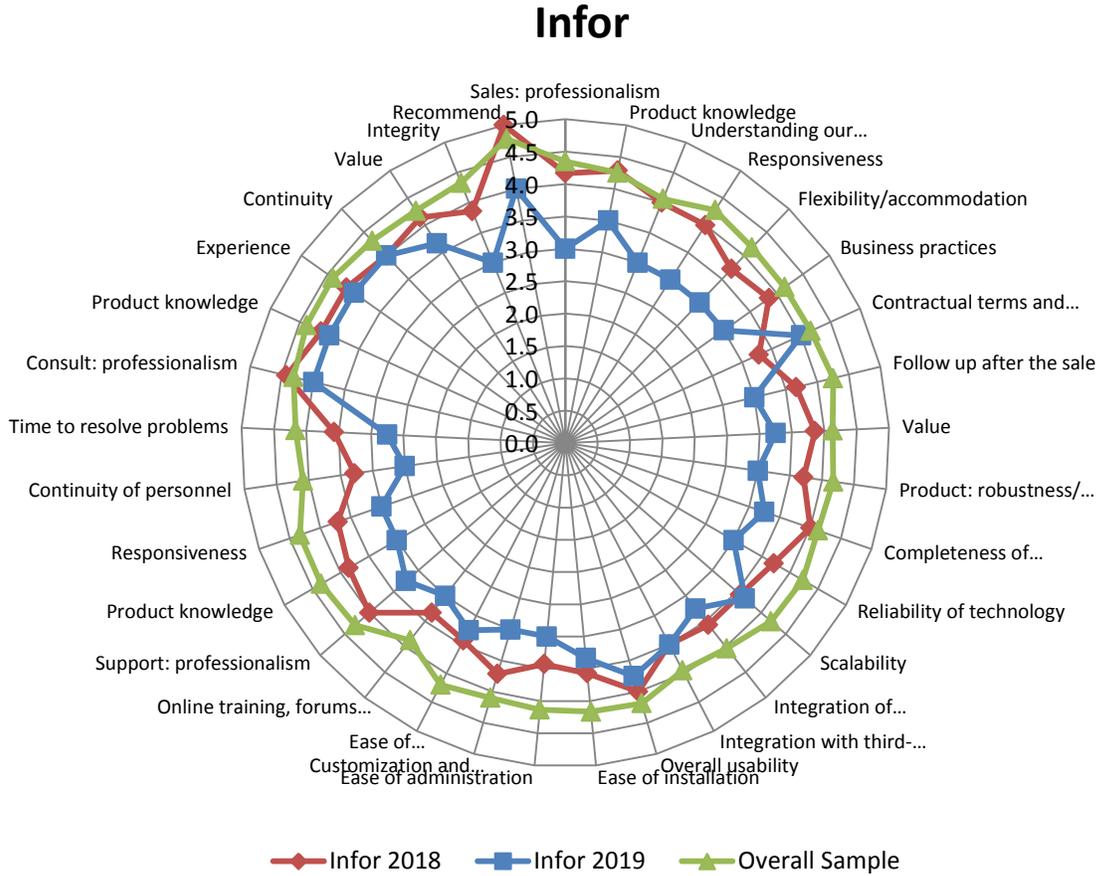


Figure 48 – Infor detailed score

Infor is an outlier in both Customer Experience and Vendor Credibility models. Its performance declined year-over-year, and its scores are well below the overall sample.

Jedox Detailed Score

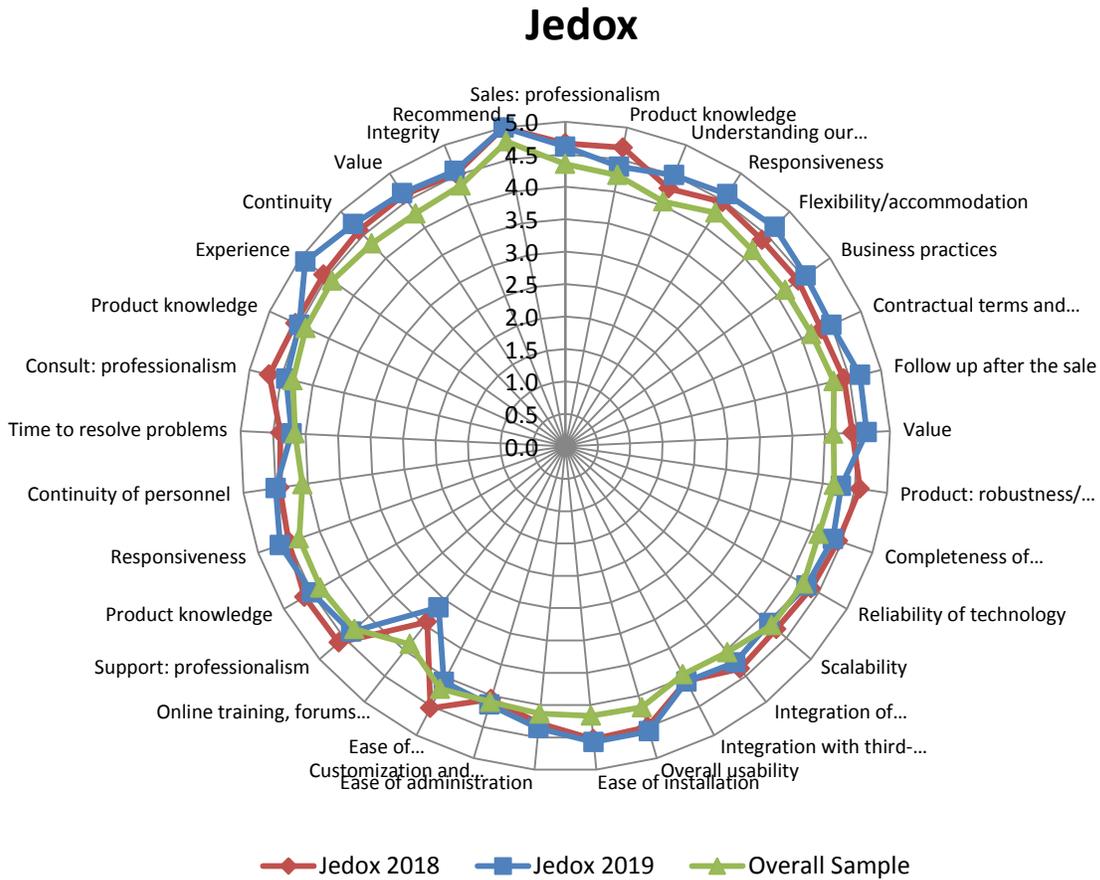


Figure 49 – Jedox detailed score

Generally above the overall sample, Jedox is an Overall Leader in both the Customer Experience and Vendor Credibility models. In 2019, it has improvements in sales, product, value, and integrity metrics. It is best in class for understanding customer business needs, contractual terms and conditions, overall product usability, and consulting experience. It maintains a perfect recommend score.

OneStream Detailed Score

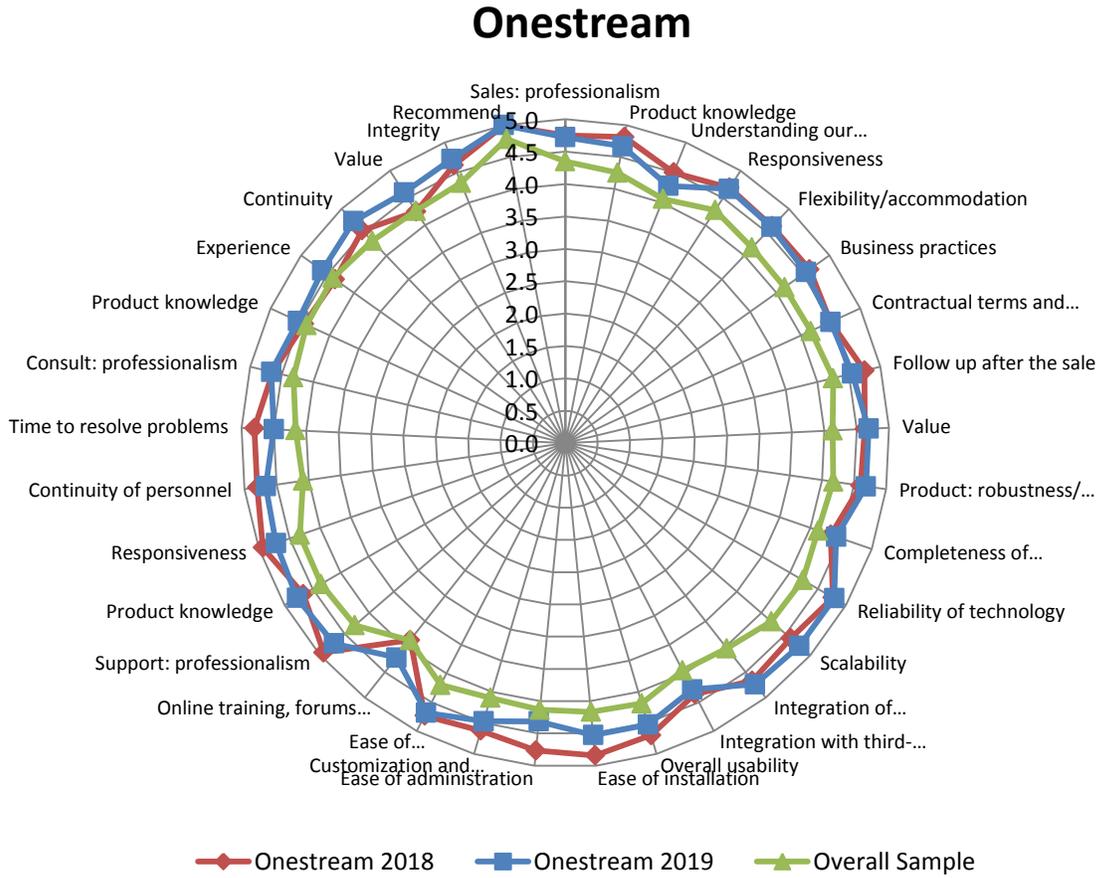


Figure 50 – OneStream detailed score

In 2019, OneStream remains consistently 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 number of measures in sales, value, and product. It has a perfect recommend score.

Oracle Detailed Score

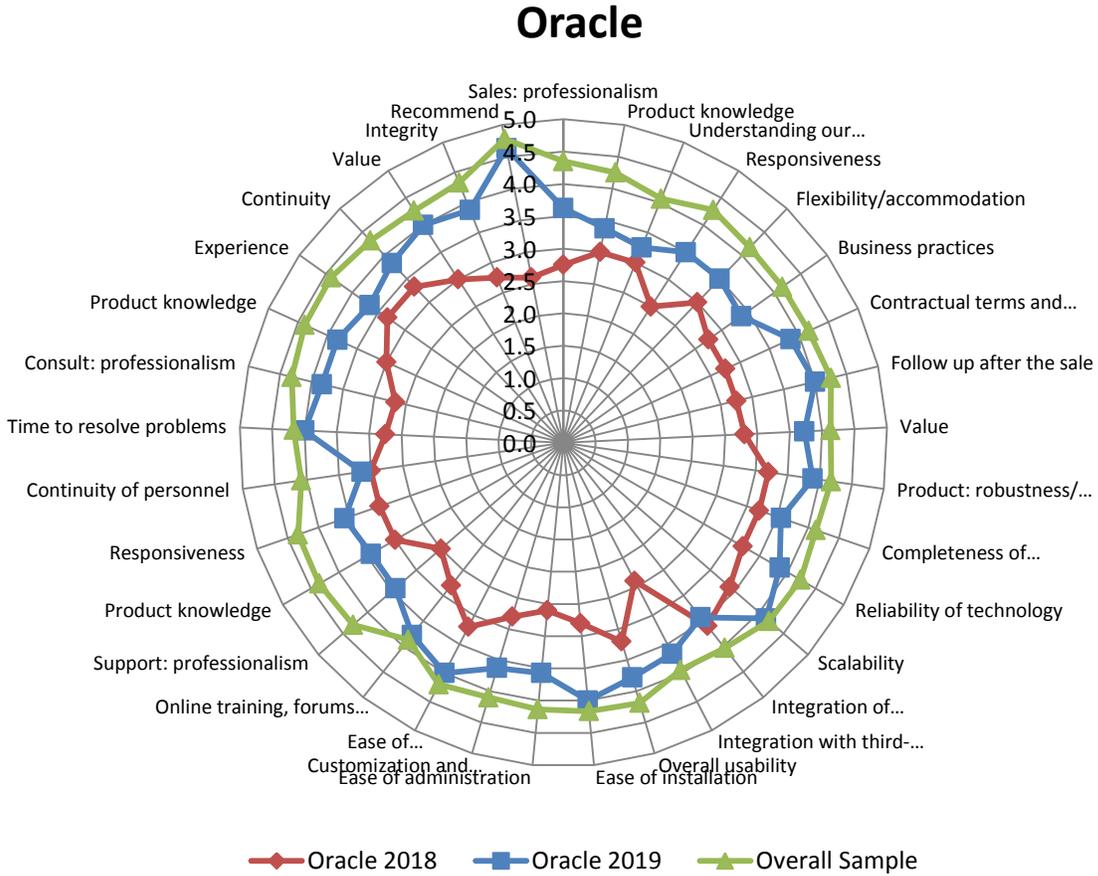


Figure 51 – Oracle detailed score

Although Oracle’s scores remains generally below the overall sample, for 2019, it has significant improvements across virtually all measures. It is considered a Contender in both Customer Experience and Vendor Credibility models.

Prophix Detailed Score

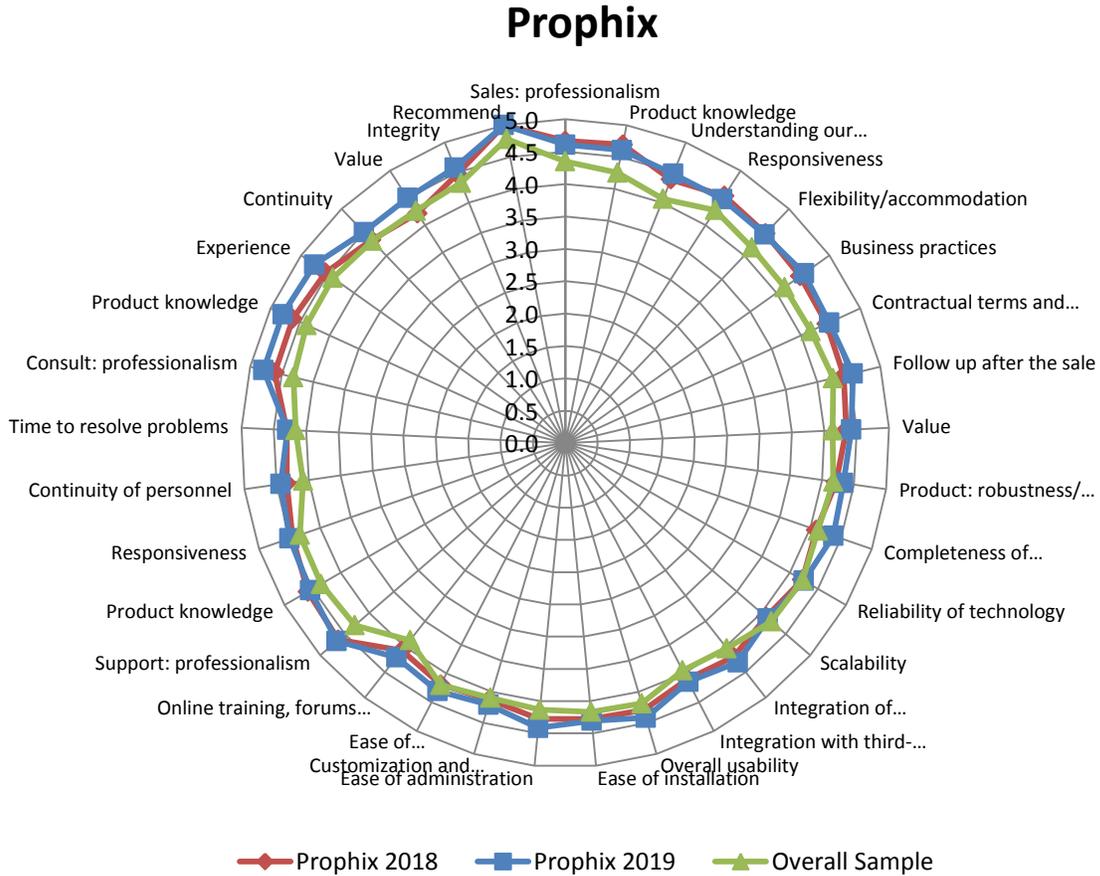


Figure 52 – Prophix detailed score

With scores consistently above the overall sample, Prophix is an Overall Leader in both Customer Experience and Vendor Credibility models. In 2019, it continues to improve across all categories of measurement including sales, product, technical support, consulting, and overall integrity. It is best in class for consulting professionalism and product knowledge. It maintains a perfect recommend score.

SAP Detailed Score

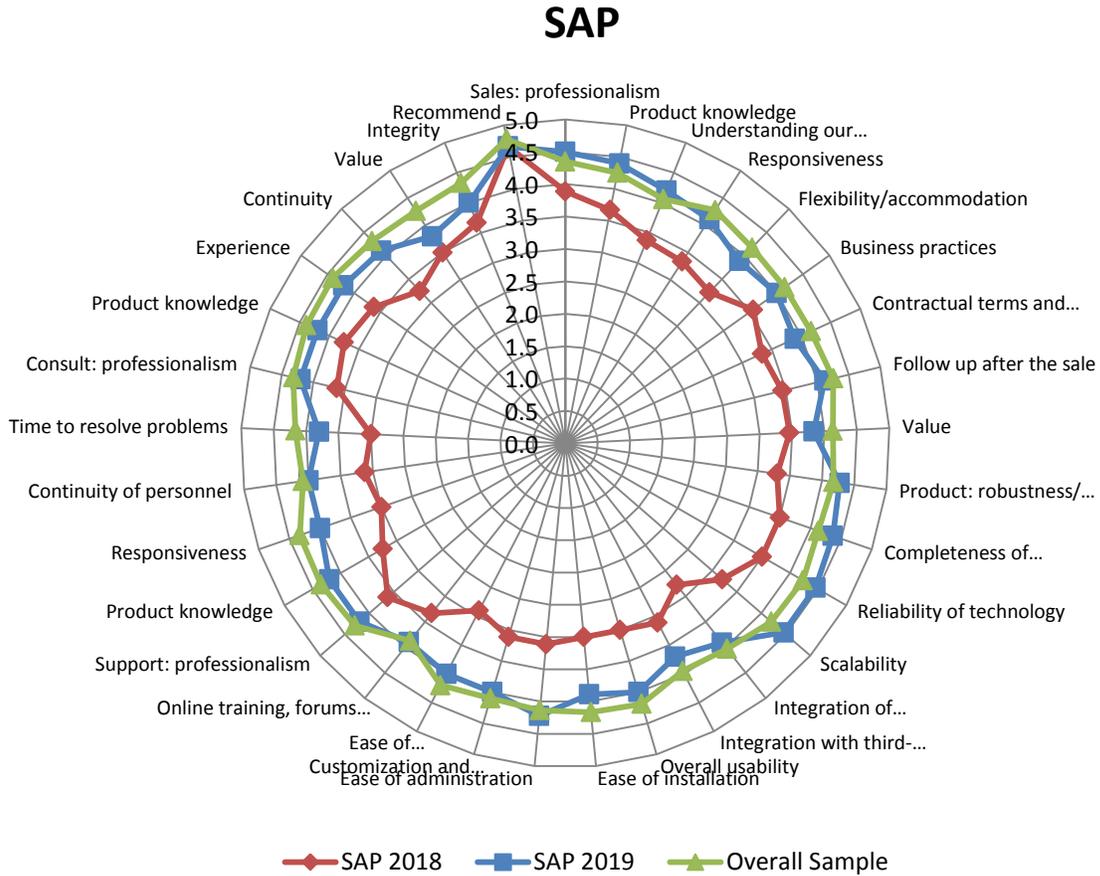


Figure 53 – SAP detailed score

In 2019, SAP shows substantial improvements across the board and now generally aligns with the overall sample. It is considered a Technology Leader in the Customer Experience Model and Trust Leader in the Vendor Credibility Model.

Vena Solutions Detailed Score

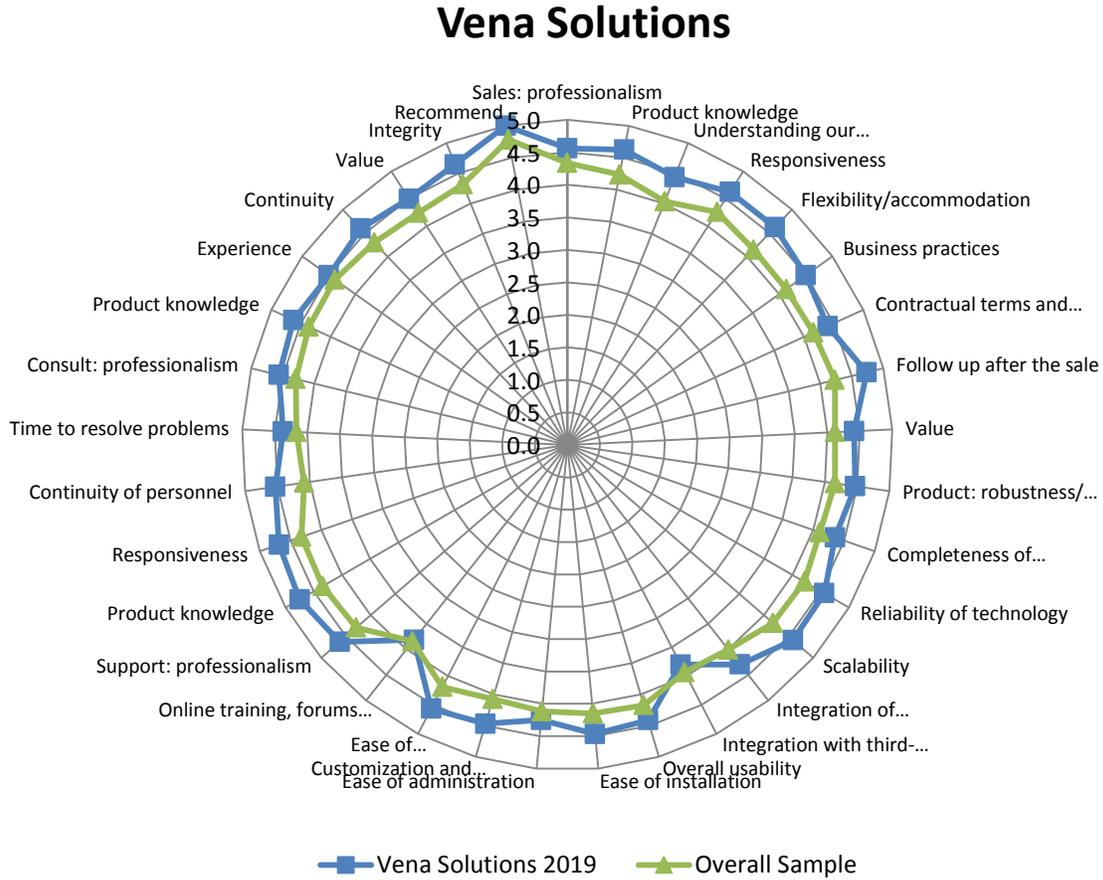


Figure 54 – Vena Solutions detailed score

In its first year of inclusion, Vena Solutions’ scores are generally above the overall sample. It is considered a leader in both the Customer Experience and Vendor Credibility models. It is best in class for follow-up after the sale and has a perfect recommend score.

Other Dresner Advisory Services Research Reports

- [Wisdom of Crowds® “Flagship” Business Intelligence Market study](#)
- [Advanced and Predictive Analytics](#)
- [Analytical Data Infrastructure](#)
- [Big Data Analytics](#)
- [Business Intelligence Competency Center](#)
- [Cloud Computing and Business Intelligence](#)
- [Data Catalog](#)
- [Embedded Business Intelligence](#)
- [Data Preparation](#)
- [IoT Intelligence®](#)
- [Location Intelligence](#)
- [Self-Service BI](#)
- [Small and Mid-Sized Enterprise Business Intelligence](#)

Appendix - The 2019 Wisdom of Crowds® Enterprise Performance Management 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

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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

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- 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

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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

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Does your organization use or intend to use enterprise performance management software?

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

What are your plans for enterprise performance management software in the future?

- Will Adopt This Year
- Will Adopt Next Year
- Will Adopt Beyond Next Year

What is your preference for enterprise performance management software?

- We prefer to source Enterprise Performance Management software from a vendor that specializes in this software and is open to working with any ERP/finance system
- We prefer to source Enterprise Performance Management software from a specialist vendor that has a strong partnership with the vendor of our primary ERP/finance system
- We prefer to source Enterprise Performance Management software from the same vendor as our primary ERP/finance system, even if this is a separate or acquired product
- We prefer to source Enterprise Performance Management software from the same vendor as our primary ERP/finance system but only if it is tightly integrated with their ERP/finance system (ie shares the same data model and technology platform)
- We have no preference, we will consider all potential vendors

How is Enterprise Performance Management software deployed in your organization?
Select all that apply.

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- At a departmental level in part of the organization
- At a country level in one or more countries
- As a regional solution in North America
- As a regional solution in Europe, Middle East and Africa
- As a regional solution in Latin America
- As a regional solution in Asia Pacific
- As a global solution (used widely across multiple regions)

How will machine learning and Artificial Intelligence impact your performance management (including budgeting and planning) processes in the next 3 to 5 years?

- They will have a significant positive impact, likely improving forecast accuracy and further automating time-consuming processes
- It's currently hard to see how they will improve our budgeting and planning processes and building a business case will be difficult
- Our users are likely to resist the “black box” automation of forecasting and planning processes through machine learning and AI

How do you expect to deploy machine learning and Artificial Intelligence to support your performance management (including budgeting and planning) processes?

- We will build it ourselves by employing data scientists and using third-party technologies to add machine learning and AI capabilities to our existing Enterprise Performance Management software
- We expect our performance management (EPM) software vendor to provide these capabilities in a future release of their software
- We have no interest in deploying machine learning and AI to support EPM and budgeting and planning processes

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How important is enterprise performance management to your organization?

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

Which functions use (or will use) enterprise performance management software/solutions in your organization?

	Use Today	Will Use in 12 Months	Will Use in 24 Months	No Plans
Finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Human Resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information Technology (IT)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manufacturing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research and Development (R&D)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Strategic Planning Function	()	()	()	()
Supply Chain	()	()	()	()
Customer Service	()	()	()	()

Please prioritize the following planning and budgeting capabilities for your organization.

	Critical	Very Important	Important	Somewhat Important	Not Important
Annual financial budgets	()	()	()	()	()
Balance sheet planning	()	()	()	()	()
Bottom-up budgeting	()	()	()	()	()
Capital asset planning and budgeting	()	()	()	()	()
Cash-flow forecasting/planning	()	()	()	()	()
Driver-based budgeting/planning	()	()	()	()	()
Headcount, salary and compensation planning	()	()	()	()	()
Linking strategic plans to annual budget	()	()	()	()	()
Model and plan	()	()	()	()	()

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optimal sales territories and quotas					
Monte Carlo and other scenario analyses	()	()	()	()	()
Optimize workforce plans and staffing to meet demand	()	()	()	()	()
Product or customer profitability analysis	()	()	()	()	()
Project-based financial planning and budgeting	()	()	()	()	()
Revenue / demand planning	()	()	()	()	()
Rolling forecasts (monthly, quarterly, etc.)	()	()	()	()	()
Sales and operations planning	()	()	()	()	()
Strategic planning (3-5 years)	()	()	()	()	()
Top-down planning	()	()	()	()	()
Transfer pricing analysis	()	()	()	()	()
Zero-based budgeting	()	()	()	()	()

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

	Daily	Weekly	Monthly	Quarterly	Bi-annually	Annually
Planning/budgeting	()	()	()	()	()	()
Forecasting	()	()	()	()	()	()

How does your organization use rolling forecasts?

- We use rolling forecasts instead of annual budgets to manage performance against plans and targets
- We use rolling forecasts to provide an additional, forward-looking view to complement annual budgets, but we still manage performance against annual budgets
- We do not currently use rolling forecasts and have no plans to use them in future
- We do not currently use rolling forecasts but we will use them at some point in the future

How important are the following deployment options for performance management?

	Critical	Very Important	Important	Somewhat Important	Not Important
Hosted Solution	()	()	()	()	()
Mobile Data Entry	()	()	()	()	()
Mobile Reporting	()	()	()	()	()
Modular CPM	()	()	()	()	()

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Solution					
On-premises System	()	()	()	()	()
SaaS/Cloud Service	()	()	()	()	()
Unified CPM Solution	()	()	()	()	()

Please specify your organizations current Enterprise Performance Management software vendor.*

- () Adaptive Insights (Workday)
- () Anaplan
- () Bitam
- () Board International
- () Budget Maestro
- () Cubeware
- () Host Analytics
- () IBM
- () Infor
- () Jedox
- () Kaufman Hall (Axiom)
- () KCI Computing
- () Longview Solutions
- () OneStream

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- Oracle Hyperion
- Planview
- Prevero (Unit4)
- Prophix
- SAP
- SAS Institute
- Sage Intacct
- Solver
- Tagetik (Wolters Kluwer)
- XLerant
- Vena Solutions
- 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?

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- () 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?

	Excellent	Very Good	Adequate	Poor	Very Poor	Don't Know
Professionalism	()	()	()	()	()	()
Product Knowledge	()	()	()	()	()	()
Understanding our Business Needs	()	()	()	()	()	()
Responsiveness	()	()	()	()	()	()
Flexibility/Accommodation	()	()	()	()	()	()
Business Practices	()	()	()	()	()	()
Contractual Terms and Conditions	()	()	()	()	()	()
Follow-up after the Sale	()	()	()	()	()	()

How would you characterize the value for the price paid?

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- () 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?

	Excellent	Very Good	Adequate	Poor	Very Poor	Don't Know
Robustness/sophistication of technology	()	()	()	()	()	()
Completeness of functionality	()	()	()	()	()	()
Reliability of technology	()	()	()	()	()	()
Scalability	()	()	()	()	()	()
Integration of components within product	()	()	()	()	()	()
Integration with third-party technologies	()	()	()	()	()	()
Overall usability	()	()	()	()	()	()
Ease of installation	()	()	()	()	()	()
Ease of administration	()	()	()	()	()	()
Customization and extensibility	()	()	()	()	()	()

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Ease of upgrade/migration to new versions	()	()	()	()	()	()
Online training, forums and documentation	()	()	()	()	()	()

How would you characterize the vendor's technical support?

	Excellent	Very Good	Adequate	Poor	Very Poor	Don't Know
Professionalism	()	()	()	()	()	()
Product Knowledge	()	()	()	()	()	()
Responsiveness	()	()	()	()	()	()
Continuity of Personnel	()	()	()	()	()	()
Time to Resolve Problems	()	()	()	()	()	()

How would you characterize the vendor's consulting services?

	Excellent	Very Good	Adequate	Poor	Very Poor	Don't Know
Professionalism	()	()	()	()	()	()
Product Knowledge	()	()	()	()	()	()
Experience	()	()	()	()	()	()

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Continuity	<input type="radio"/>					
Value	<input type="radio"/>					

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
