



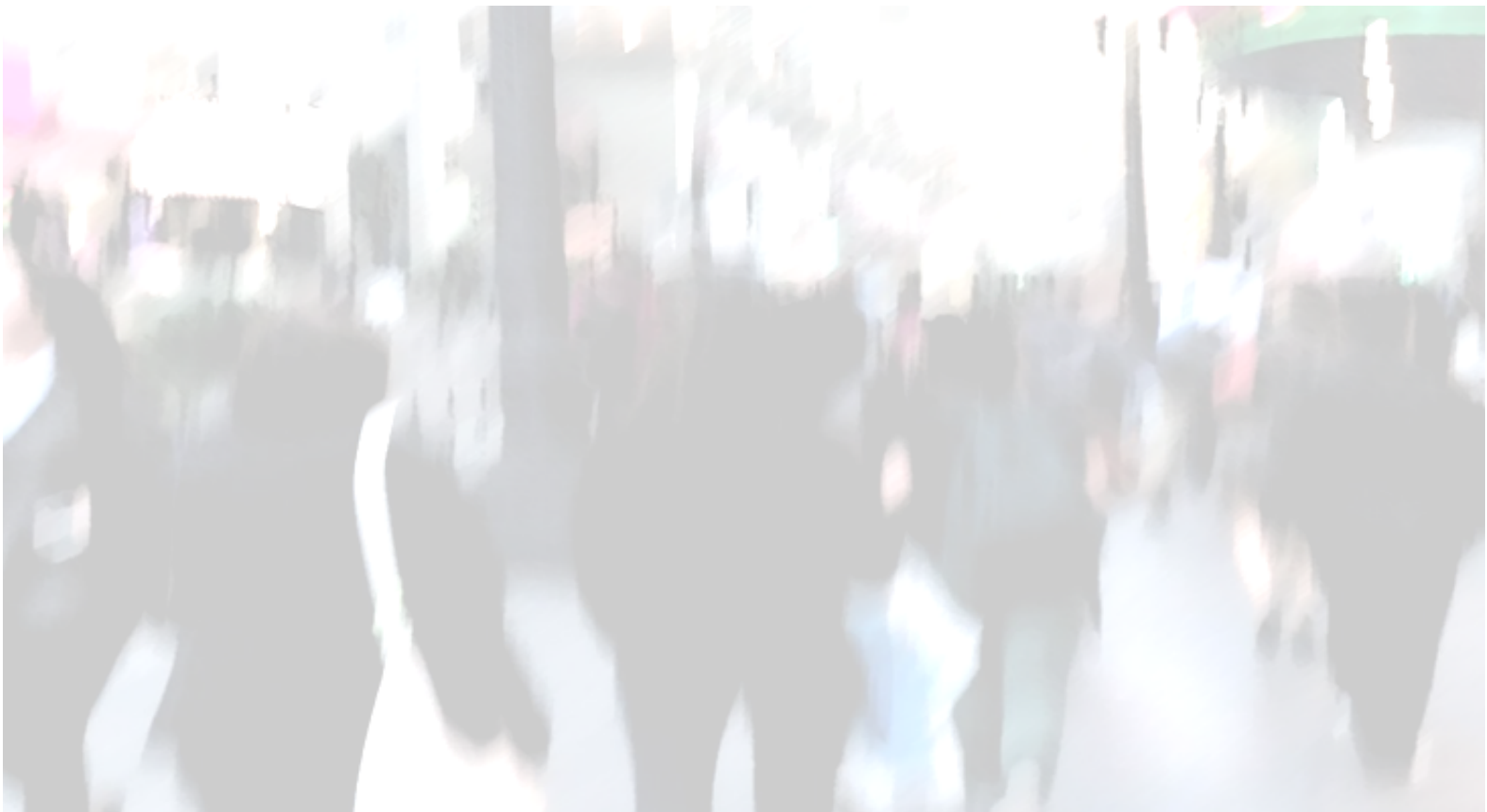
June 30, 2020

Dresner Advisory Services, LLC

2020 Edition

# **Wisdom of Crowds<sup>®</sup> Enterprise Performance Management Market Study (Excerpt)**

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### Introduction

This year marks the 13th anniversary of Dresner Advisory Services and the second anniversary of this “Flagship” Wisdom of Crowds Enterprise Performance Management (EPM) Market Study.

At the time of publication of this report, the COVID-19 pandemic affects millions worldwide and impacts businesses and how they leverage data and EPM.

As our data collection began in February and concluded in May of this year, the data and resulting analyses reflect the pandemic impact.

Through this period, we separately conducted specific COVID-19 research, which is not reflected in this report but is available on our [community site](#) at no cost. Additionally, we will continue to collect data at [www.covidbusinessimpact.com](http://www.covidbusinessimpact.com) and will continue to publish research through the duration of the pandemic.

As organizations strive to make sense of the changing market conditions and work to determine how best to proceed and invest in their businesses, we hope that this report will provide guidance and offer direction as the “new normal” becomes evident.

We wish you and yours the best as we manage through this challenging time.

Best



Howard Dresner  
Chief Research Officer  
Dresner Advisory Services

### Executive Summary

- Adoption of enterprise management software increased in 2020, evidence of growing market maturity in the last 12 months. Fifty-five percent of respondents already use or are currently evaluating enterprise performance management software.
- Organizations in EMEA and North America have higher adoption levels compared to Asia Pacific and Latin America. Current usage levels are slightly higher in EMEA compared to North America (51 percent and 49 percent, respectively), while more organizations in EMEA are currently evaluating enterprise performance management software.
- Adoption increased significantly in small and mid-sized organizations compared to 2019. However, small organizations remain the least likely to adopt enterprise performance management software.
- Enterprise performance management remains an important technology. Seventy-eight percent of respondents rate enterprise performance management as “critical,” “very important,” or “important,” although this is down somewhat from 2019 (87 percent).
- Operations overtakes Finance in 2020 as the function rating enterprise performance management most important overall, a further indication of increased market maturity.
- Sixty-nine percent of respondents use enterprise performance management at a country, regional, or global level, up from 56 percent in 2019.
- Fifty-nine percent of respondents prefer sourcing enterprise performance management from specialist vendors, up from 50 percent in 2019.
- Annual financial budgets remain the highest priority planning capability in enterprise performance management. Although usage of rolling forecasts is largely unchanged from 2019, rolling forecasts dropped in the planning priority rankings by three places.
- Attitudes toward AI and machine learning remain unchanged from 2019, with a split between respondents that see significant potential in AI and machine learning (31 percent) and those whose users will likely resist its adoption (20 percent). Fifty percent of respondents remain undecided about the benefits of these technologies.
- Respondents prefer cloud enterprise performance management solutions compared to on-premises deployment, although all deployment choices dropped in overall importance compared to 2019.

### 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

*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. 1). 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.

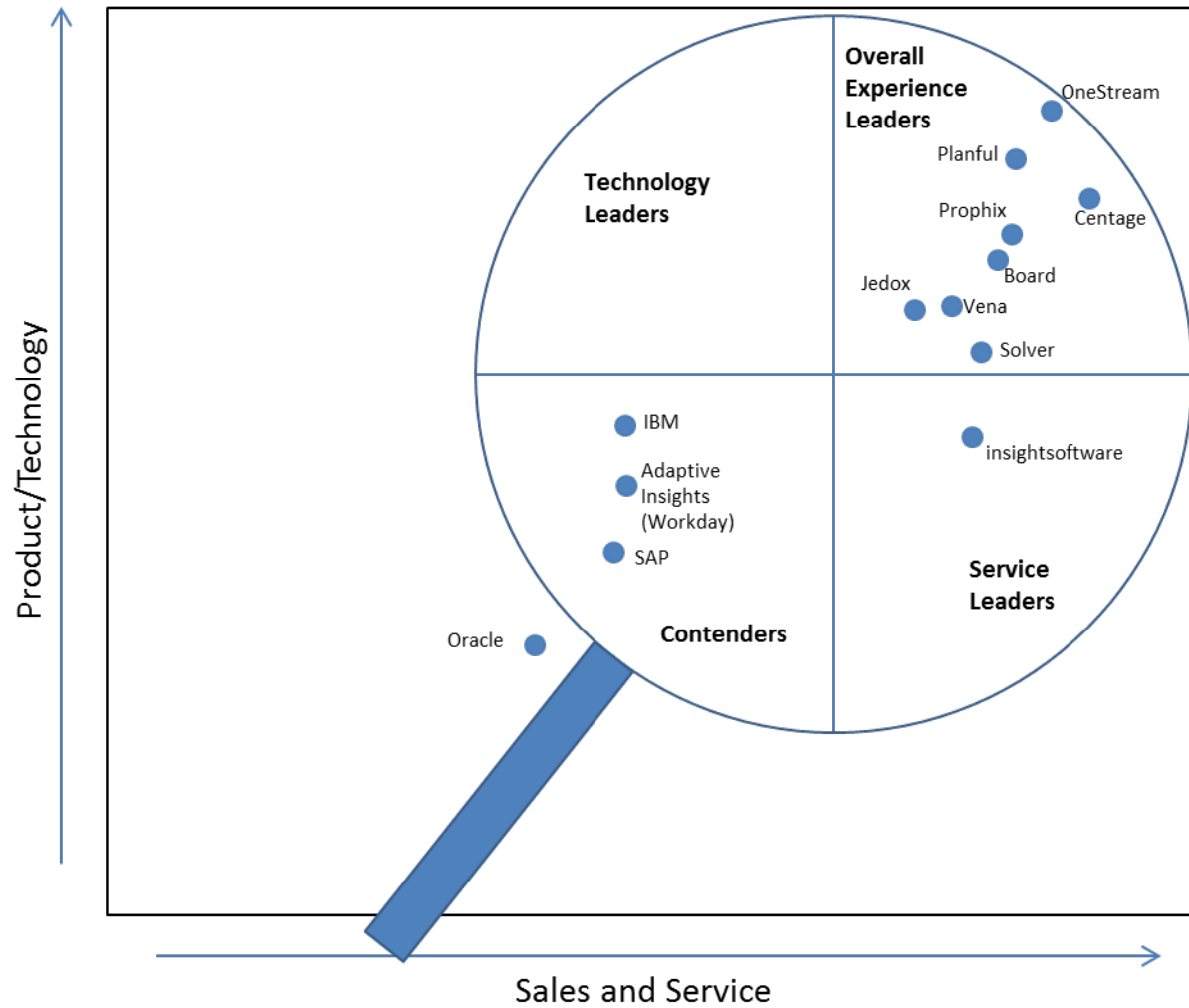


Figure 1 – Customer experience model

### Vendor Credibility Model

The vendor credibility model considers how customers “feel” about their vendor (fig. 2). 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.

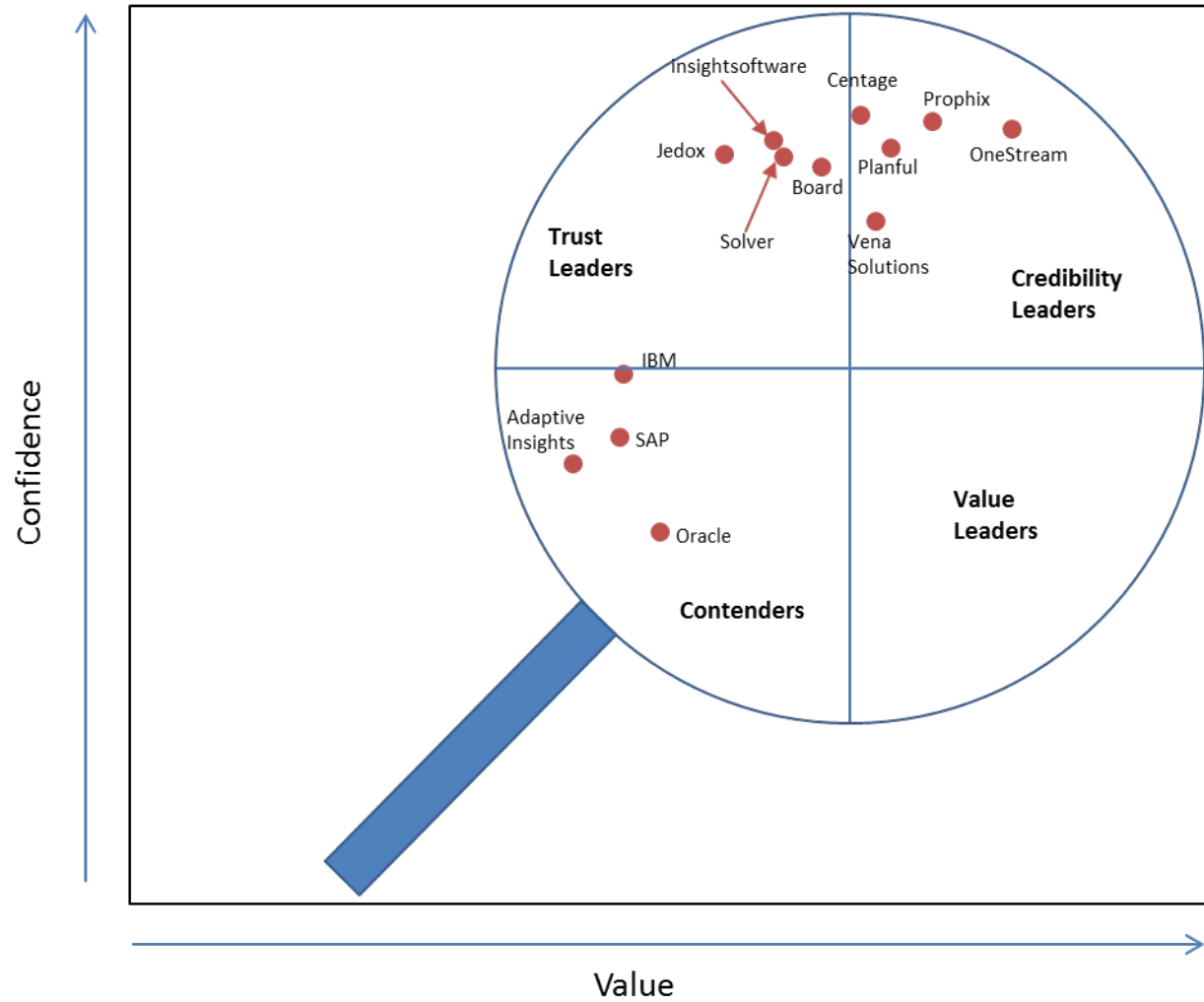


Figure 2 – Vendor credibility model



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

### Adaptive Planning (Workday)

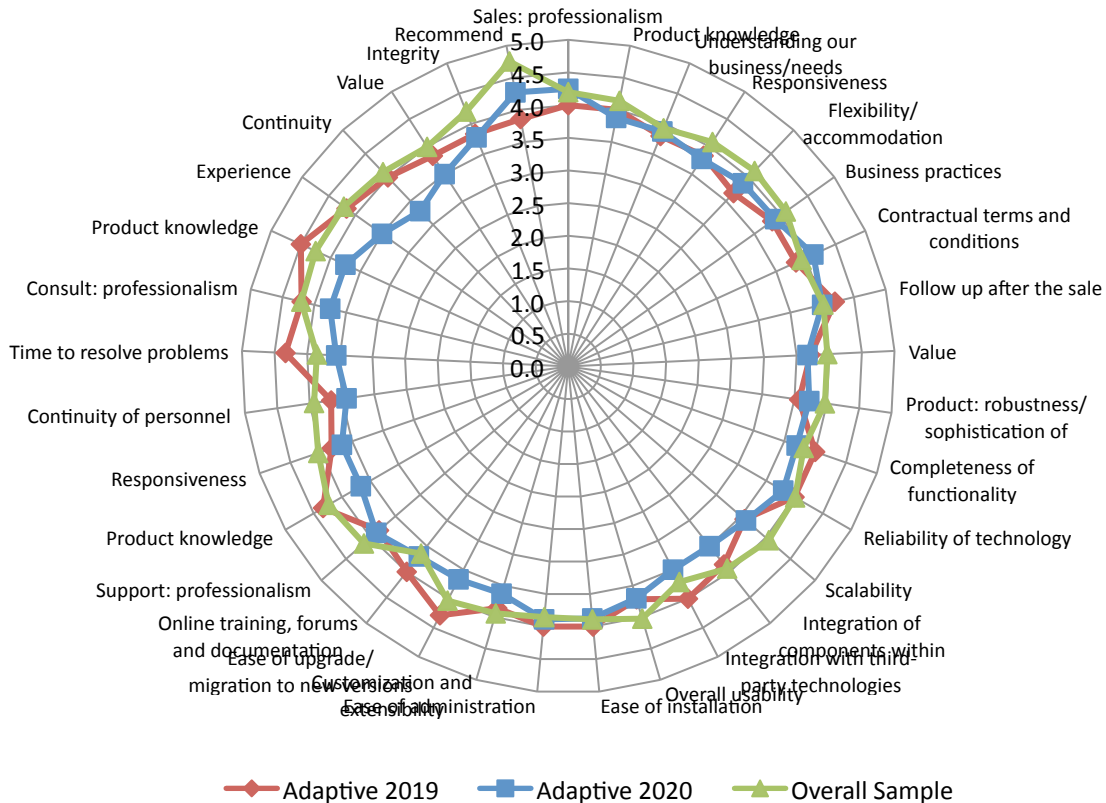


Figure 3 – Adaptive Planning (Workday) detailed score

Adaptive Planning (formerly Adaptive Insights) was acquired by Workday in 2018.

With scores generally below the overall sample, Adaptive Planning's scores declined compared to 2019 across most categories of measurement. Adaptive Planning's scores declined overall since its acquisition by Workday, indicating that its evolution to part of a broader solution may still be a work in progress.

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

## Board International Detailed Score

### Board International

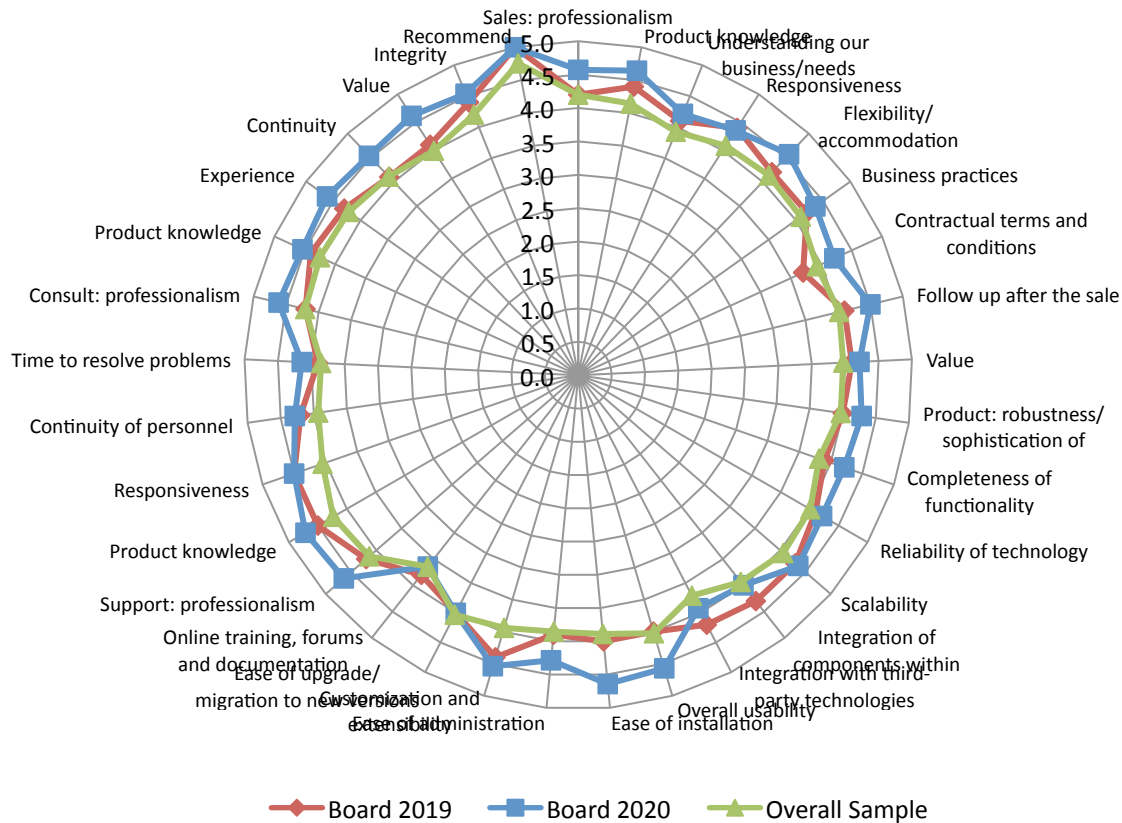
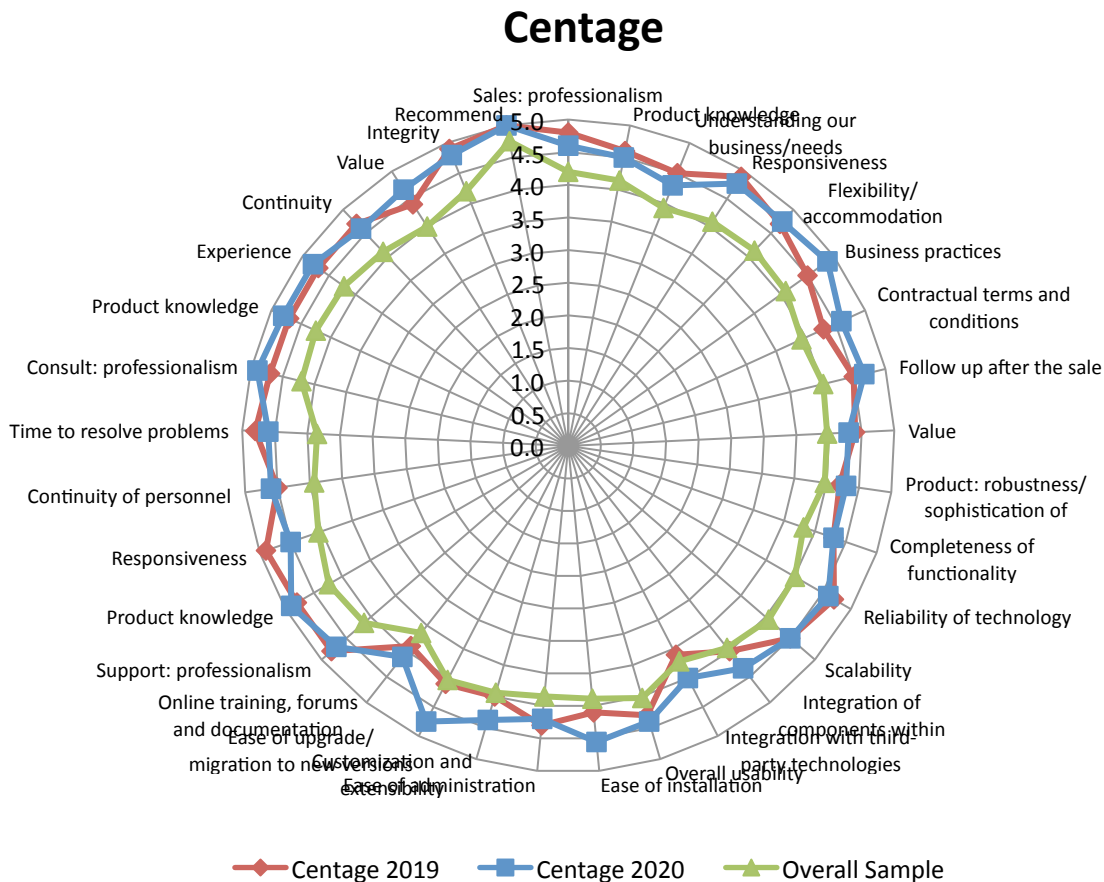


Figure 4 – Board International detailed score

For 2020, Board International's scores are well above the overall sample, with key improvements across all categories of measurement compared to 2019, including sales, support, and consulting. It is an Overall Leader in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model. It is best in class for product ease of installation and maintains a perfect recommend score.

## Centage Detailed Score

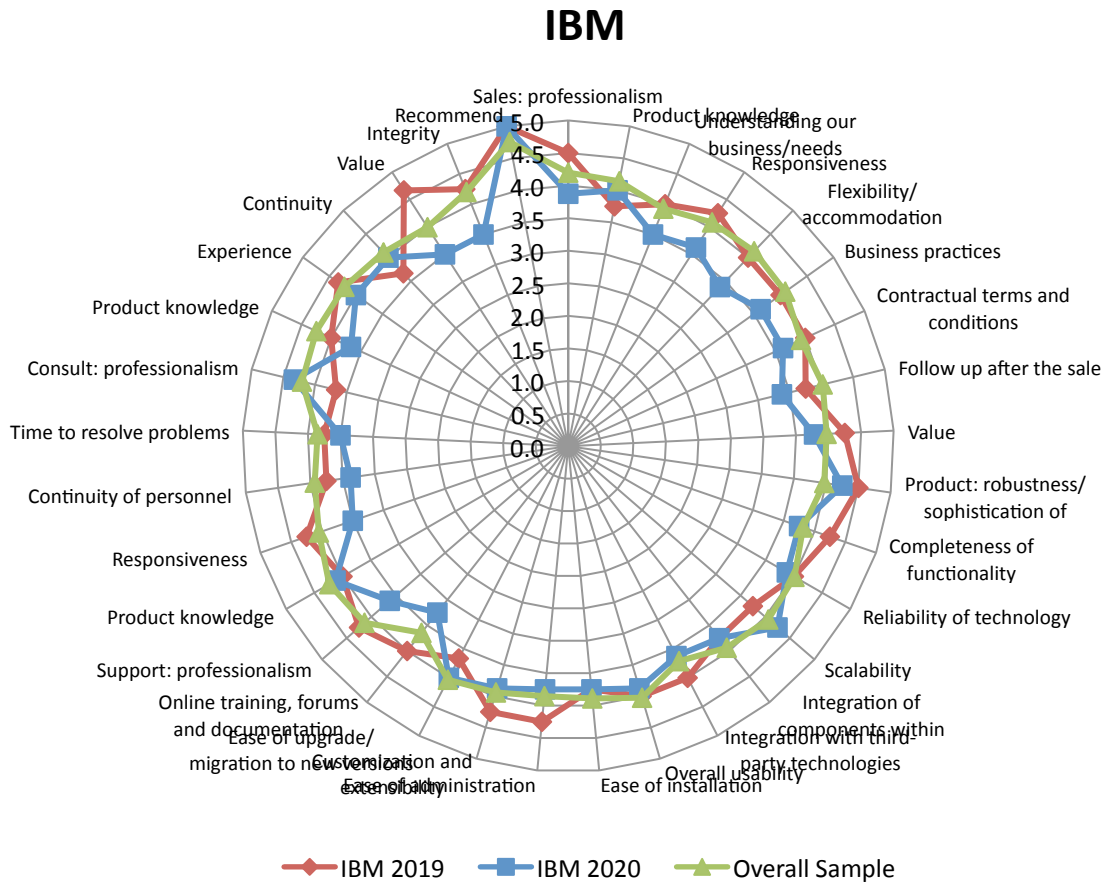


**Figure 5 – Centage detailed score**

In 2020, Centage’s scores are well above the overall sample with continued improvements across most categories of measurement and especially in product. It is an Overall Leader in both the Customer Experience and Vendor Credibility models. It is best in class for sales flexibility/accommodation, and business practices, support product knowledge, and consulting professionalism, product knowledge, experience, continuity and value, and overall integrity. It maintains a perfect recommend score.

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## IBM Detailed Score



**Figure 6 IBM detailed score**

For 2020, IBM's scores are generally below the overall sample with declines compared to 2019 across most categories of measurement. It is considered a Contender in both Customer Experience and Vendor Credibility Models.

## insightsoftware Detailed Score

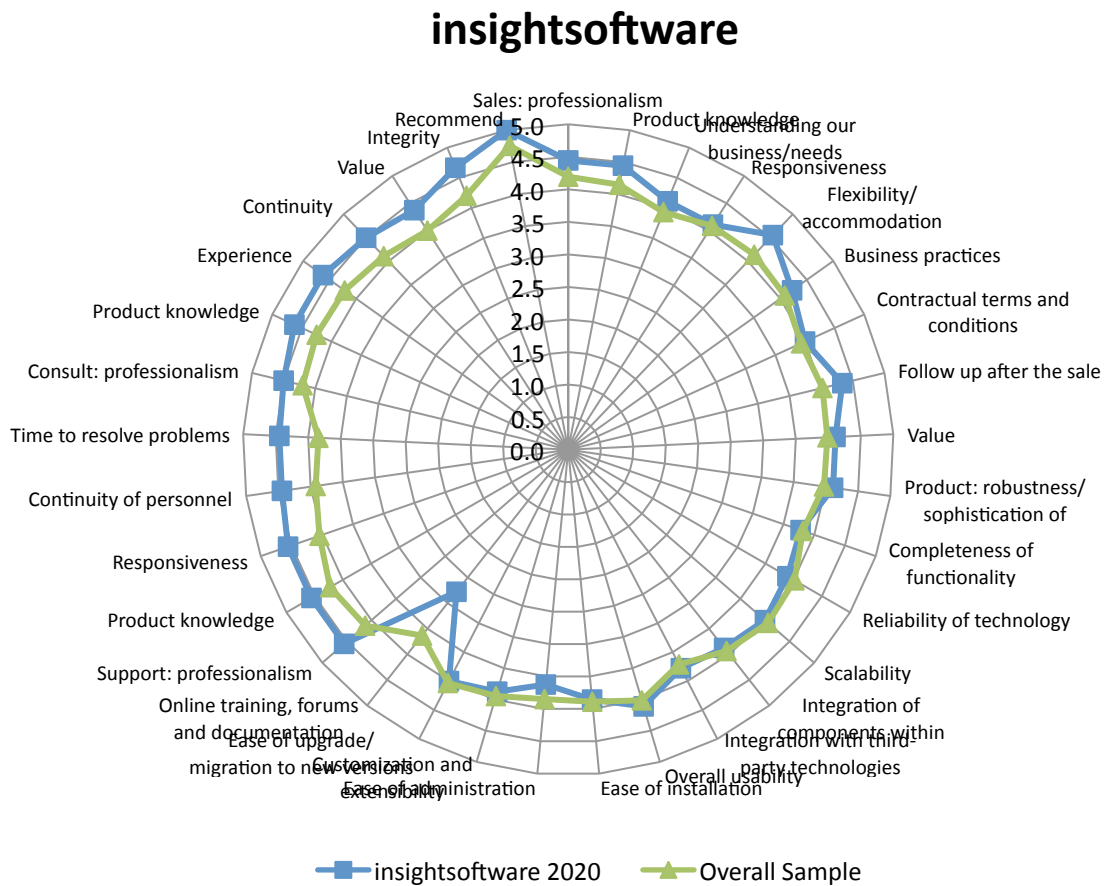
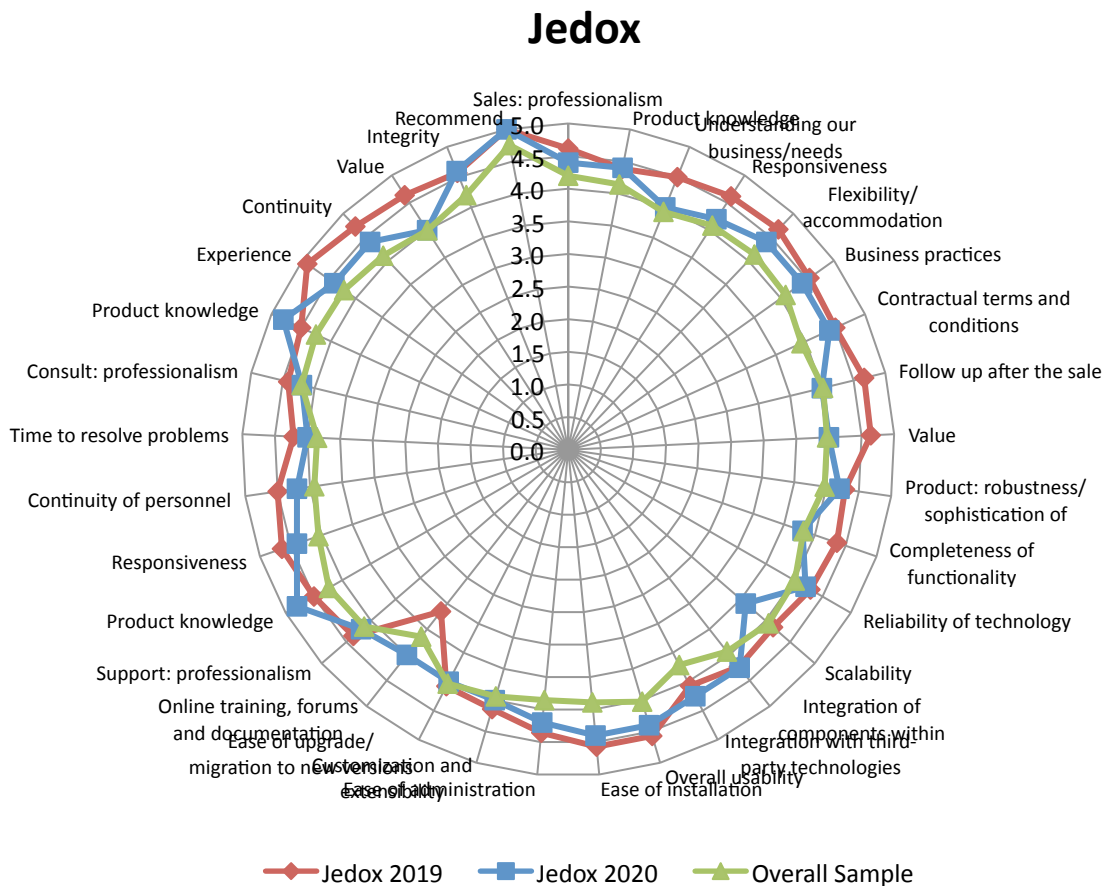


Figure 7 - insightsoftware detailed score

In its first year of inclusion, insightsoftware's scores are generally above, or in line with, the overall sample. It is considered a Service Leader in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model. It has a perfect recommend score.

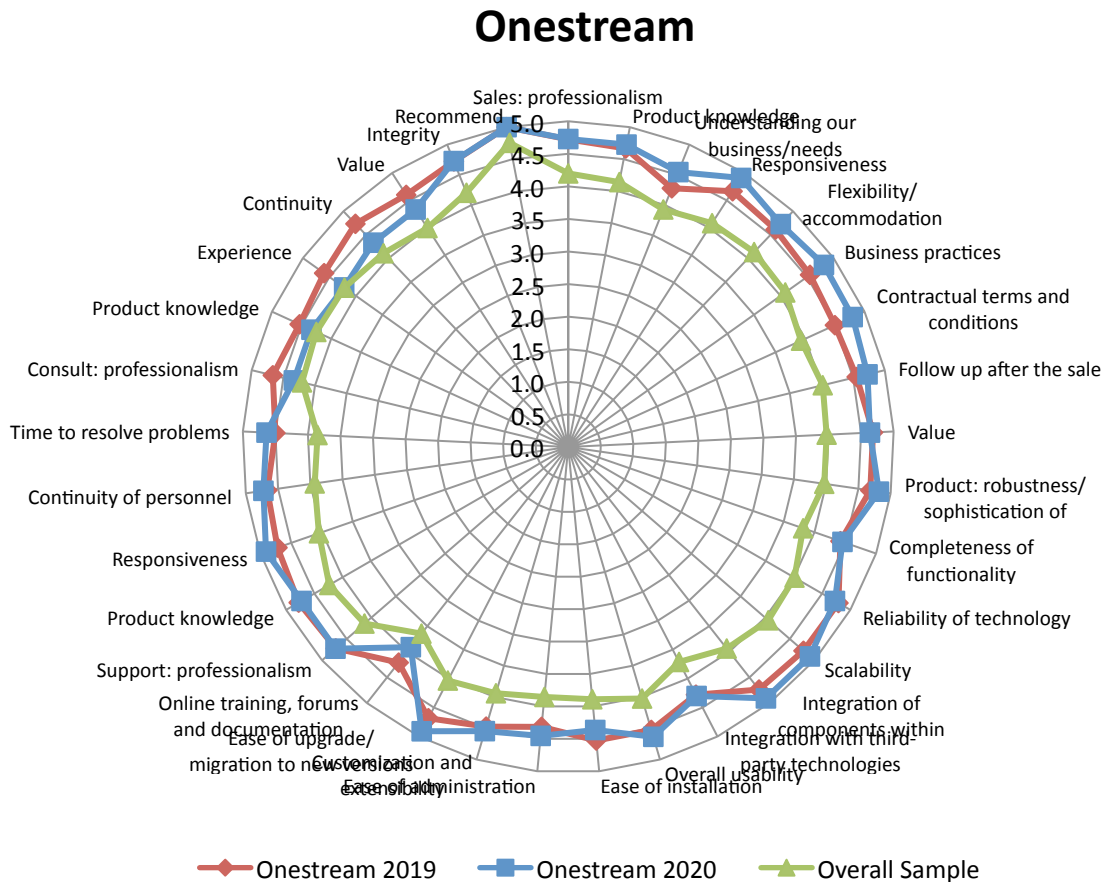
## Jedox Detailed Score



**Figure 8 – Jedox detailed score**

With scores generally above the overall sample, Jedox is an Overall Leader in the Customer Experience Model and a Trust Leader in the Vendor Credibility Model. It is best in class for consulting product knowledge and maintains a perfect recommend score.

## OneStream Detailed Score

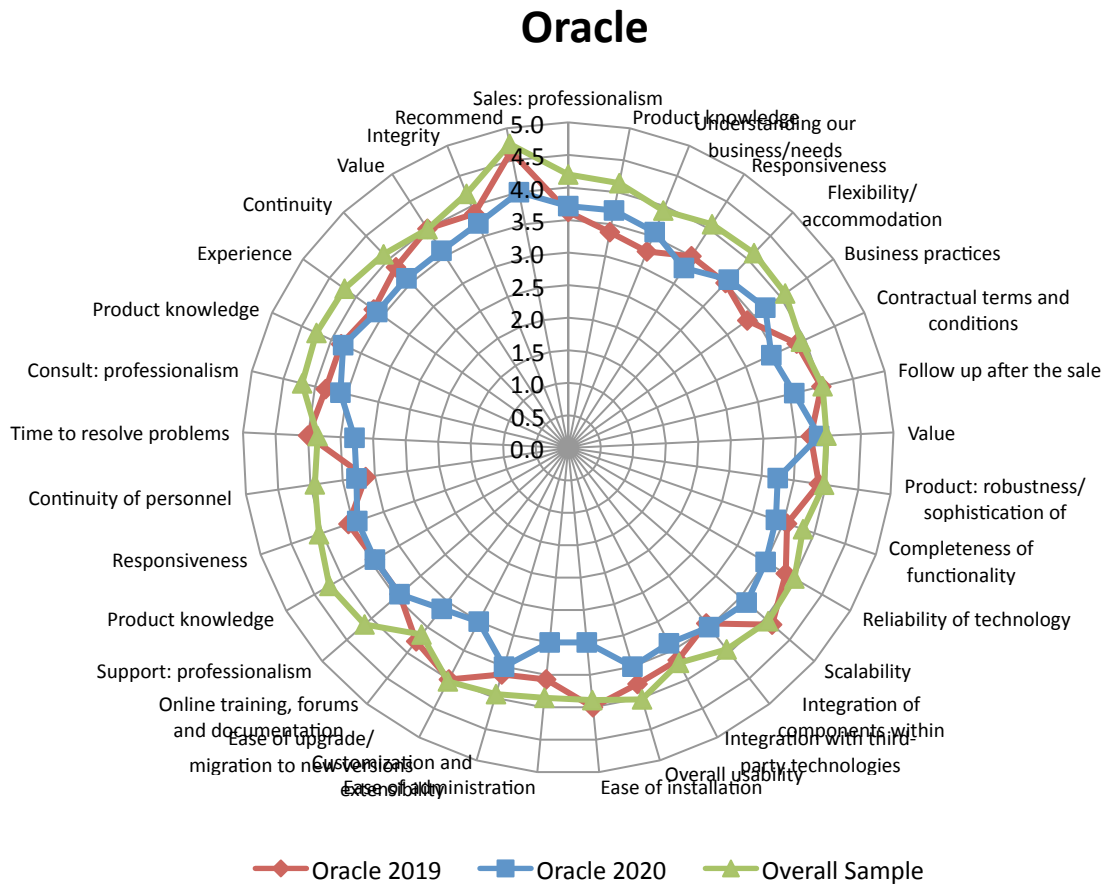


**Figure 9 – OneStream detailed score**

In 2020, 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 15 different measures across sales, value, technical support, and product. It maintains a perfect recommend score.



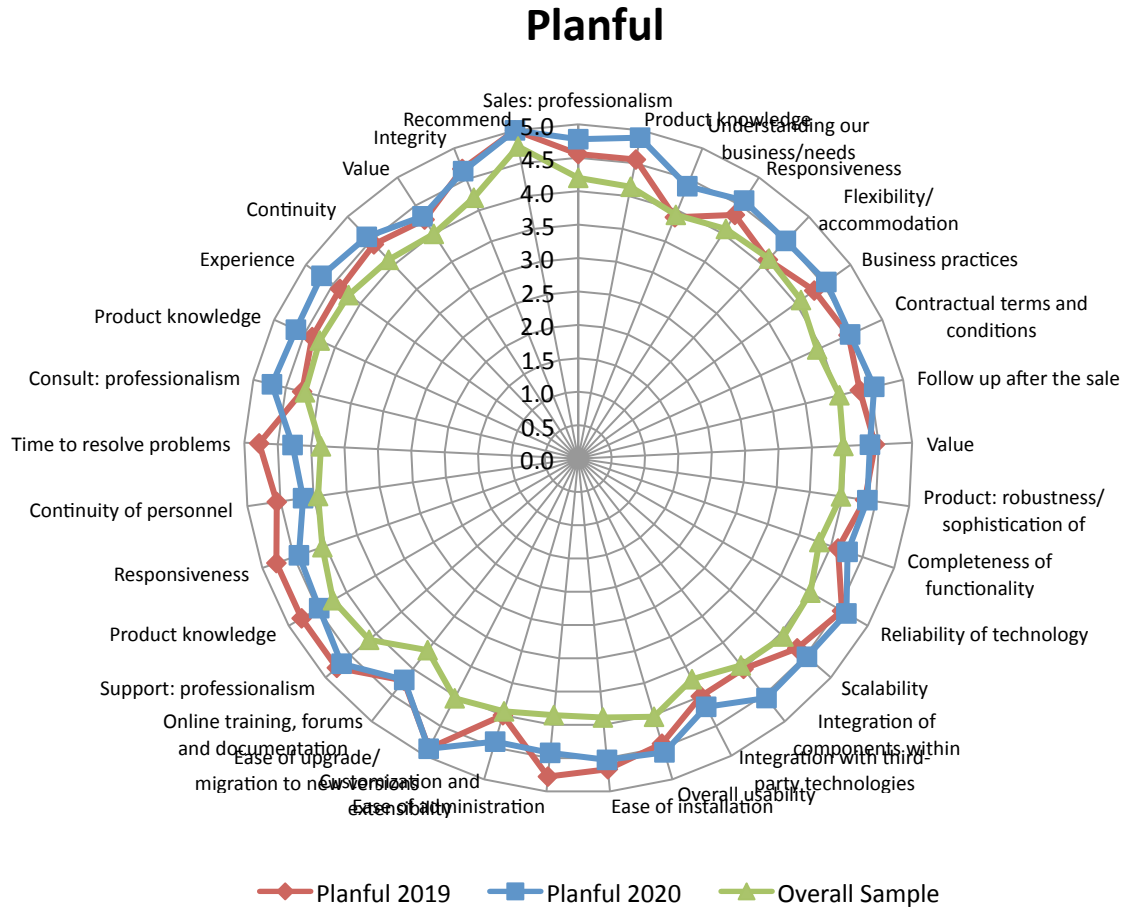
## Oracle Detailed Score



**Figure 10 – Oracle detailed score**

In 2020, Oracle’s scores remain generally below the overall sample, with declines for a majority of measures and overall score compared to 2019. It is considered an outlier in the Customer Experience Model and a Contender in the Vendor Credibility Model.

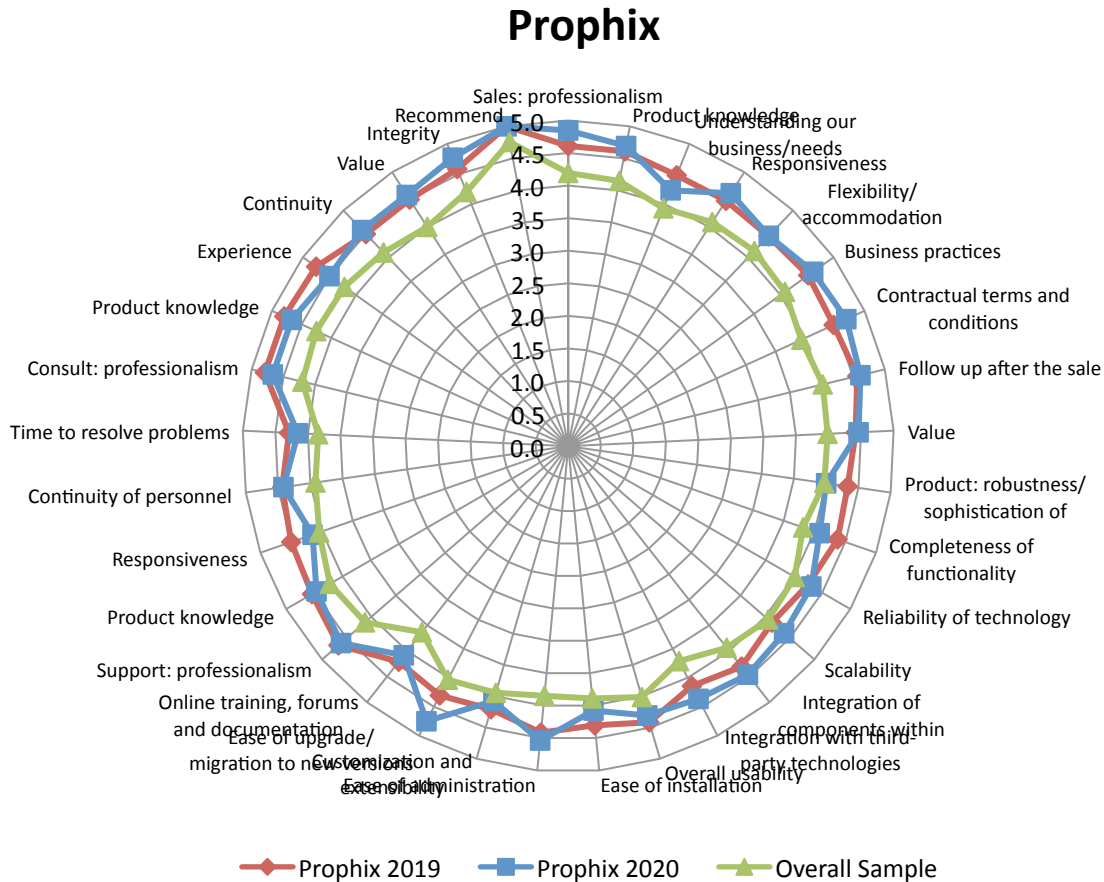
## Planful Detailed Score



**Figure 11 – Planful detailed score**

In 2020, Planful (formerly Host Analytics) has scores that remain well above the overall sample. It is an Overall Leader in both Customer Experience and Vendor Credibility Models and is best in class for sales product knowledge. It maintains a perfect recommend score.

## Prophix Detailed Score

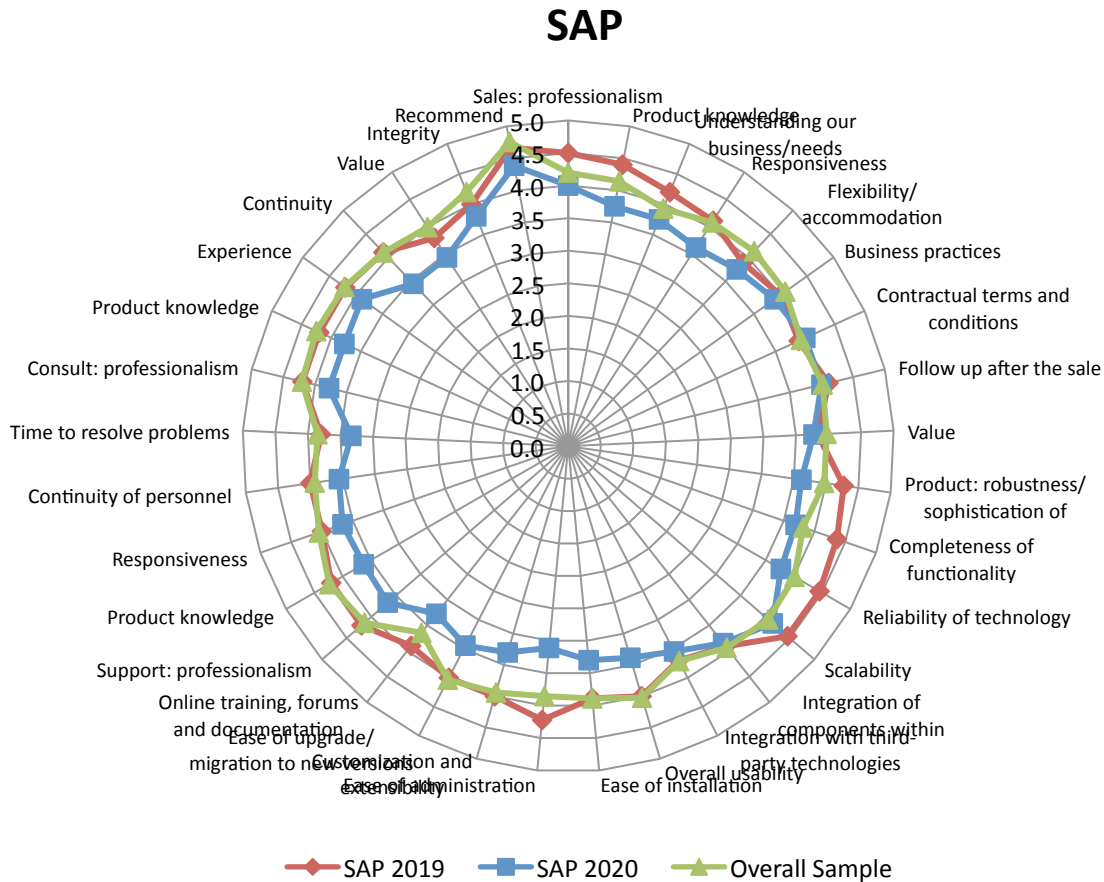


**Figure 12 – Prophix detailed score**

With scores consistently above the overall sample, Prophix is an Overall Leader in both Customer Experience and Vendor Credibility models. It is best in class for sales professionalism, product integration with third-party technologies, product ease of administration, and technical support professionalism. It maintains a perfect recommend score.

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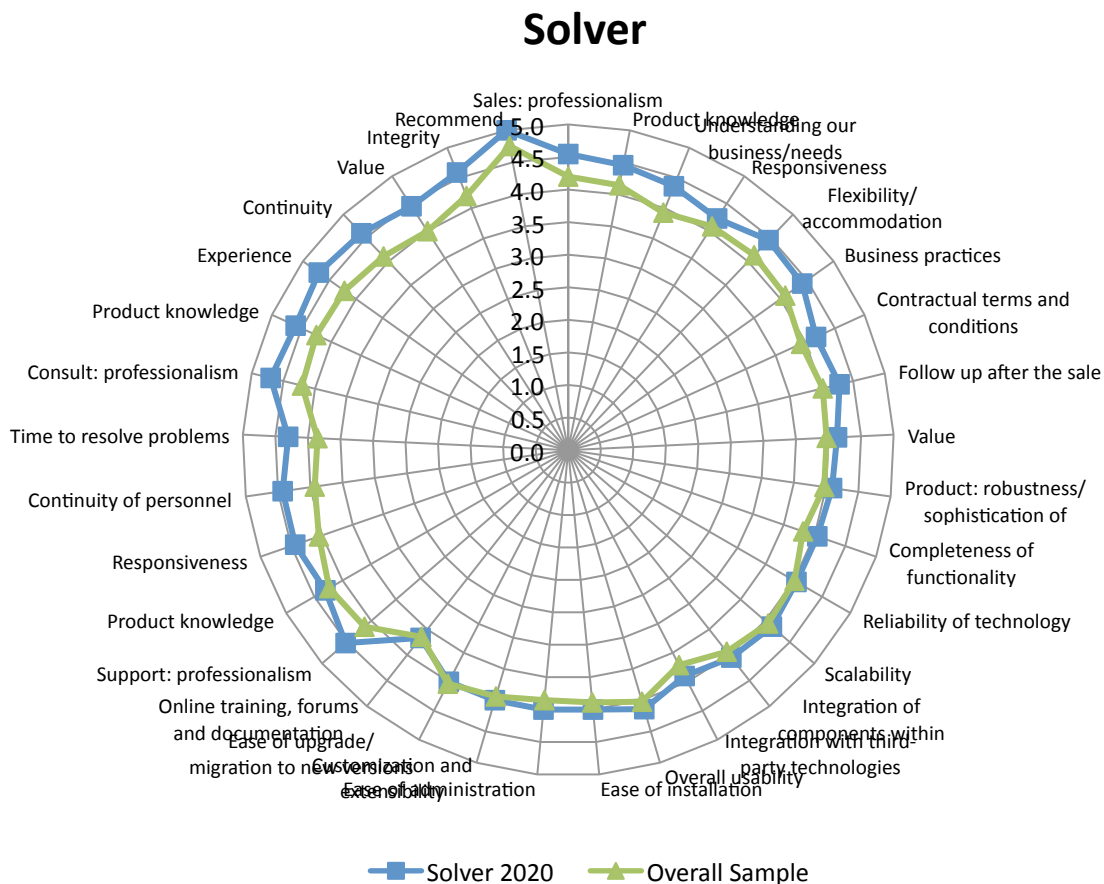
### SAP Detailed Score



**Figure 13 – SAP detailed score**

After a year of improvements in 2019, SAP's scores fall well below the overall sample in 2020. It is considered a Contender in both Customer Experience and Vendor Credibility models.

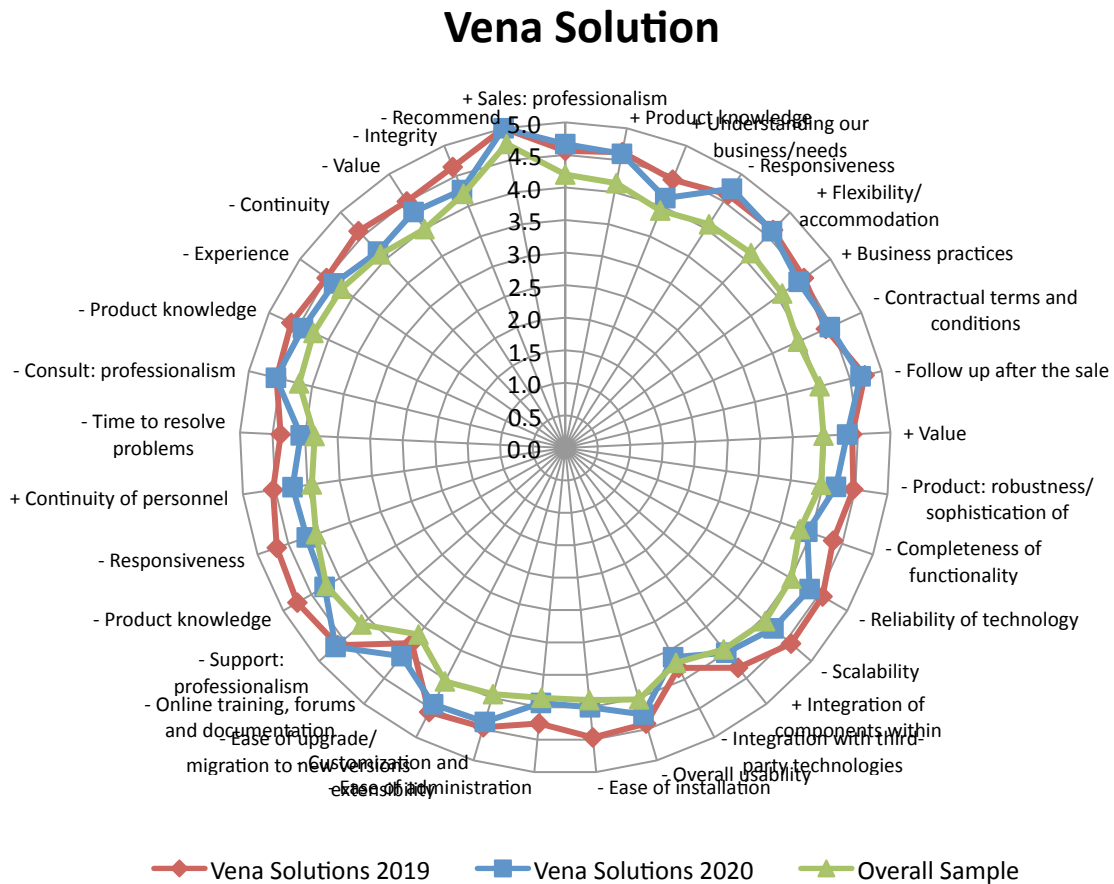
## Solver Detailed Score



**Figure 14 - Solver detailed score**

In its first year of inclusion, Solver's scores are generally 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 is best in class for consulting continuity and has a perfect recommend score.

## Vena Solutions Detailed Score



**Figure 15 – Vena Solutions detailed score**

For 2020, Vena Solutions' scores are generally above the overall sample. It is considered a leader in both Customer Experience and Vendor Credibility models and maintains a perfect recommend score.

### 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](#)
- [Cloud Computing and Business Intelligence](#)
- [Data Catalog](#)
- [Data Pipelines](#)
- [Data Preparation](#)
- [Data Science and Machine Learning](#)
- [Embedded Business Intelligence](#)
- [Self-Service BI](#)

Howard ([www.twitter.com/howarddresner](https://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](http://www.dresneradvisory.com).