

The Planning Survey 20

The voice of the planning software user community

This is a specially produced summary
by BARC of the headline results for

Unit4 FP&A





KPI results

2 top-rankings
and
19 leading
positions

*in 4 different
peer groups.*

THE PLANNING
SURVEY 20



Price-to-value

85%

of surveyed users rate
Unit4 FP&A's price-to-
value as **excellent**
or **good**.*

** Compared to 74% for the average
planning tool.*

THE PLANNING
SURVEY 20



Reporting

97%

of surveyed users rate
Unit4 FP&A's coverage
of additional reporting
requirements as
excellent or **good**.*

** Compared to 82% for the average
planning tool.*

THE PLANNING
SURVEY 20



Flexibility

63%

of surveyed users
chose Unit4 FP&A
because of its
flexibility.*

** Compared to 48% for the average
planning tool.*

THE PLANNING
SURVEY 20



Satisfaction

94%

of surveyed users
are **satisfied**
with Unit4 FP&A.*

** Based on the aggregate of
"Very satisfied" and "Somewhat satisfied".*

THE PLANNING
SURVEY 20



Requirements

97%

of surveyed users rate
Unit4 FP&A's coverage
of planning specific
requirements as
excellent or **good**.*

** Compared to 89% for the average
planning tool.*

THE PLANNING
SURVEY 20



Peer Group
Financial Performance Management Products

1. Top-ranked in

- Self-service
- Flexibility
-

Leader in

- Planning functionality
- Ease of use
- Customer experience

Peer Group
BI-focused Products

Leader in

- Business benefits
- Planning functionality
- Self-service
- Flexibility
- Ease of use
- Customer experience

Peer Group
European Vendors

Leader in

- Business benefits
- Planning functionality
- Self-service
- Flexibility
- Customer experience

Peer Group
Solution-focused Planning Products

Leader in

- Business benefits
- Planning functionality
- Self-service
- Flexibility
- Ease of use

Summary

With two top ranks and 19 leading positions across four different peer groups, Unit4 FP&A once again achieves a great set of results in this year's Planning Survey. Convincing ratings in numerous important KPIs help to consolidate its position as a market leading planning and analytics vendor that delivers considerable benefits to its customers. Companies can benefit from using Unit4 FP&A in terms of increased transparency of planning, more precise/detailed planning and reduced resource requirements for planning. Overall, these benefits lead for many customers to a better quality of planning results. 42 percent of Unit4 FP&A users say they would definitely recommend their planning product to other organizations. This result is a great indicator of customer satisfaction with the vendor and its product. Unit4 FP&A offers a comprehensive, flexible platform focused on planning, reporting, dashboarding, analysis and consolidation, which customers appear to be satisfied with.



The Planning Survey 20 Unit4 FP&A top ranks



Customer Quotes

The love for Prevero [Unit4 FP&A] increases the longer we use it.*

THE PLANNING SURVEY 20

Person responsible/Project manager for departmental BI, education, 100-2,500 employees

We operate in a fast-moving environment and Unit4 Prevero [Unit4 FP&A] gives us the flexibility to adapt our planning and forecasting in line with changes in our business...quickly.

THE PLANNING SURVEY 20

Person responsible/Project manager for departmental BI, financial services, 100-2,500 employees

We have implemented a very complex tool for sales/personnel cost management in our cooperative with Prevero [Unit4 FP&A] (high external influence, many surrounding systems). We would not have been able to do this with another partner and certainly not in this time span. We developed the tool together and the support was (and still is) excellent. We are currently working on a second tool with Prevero [Unit4 FP&A].*

THE PLANNING SURVEY 20

Person responsible/Project manager for departmental BI, retail/wholesale/trade, >2,500 employees

Very good cooperation, high professional competence, strong support in the development of new functions.*

THE PLANNING SURVEY 20

Head of business department, oil, gas and mining, <100 employees

Customized reporting and planning solution with great support.*

THE PLANNING SURVEY 20

Line of business employee, retail/wholesale/trade, 100-2,500 employees

*Translated by BARC





THE PLANNING SURVEY 20

The Planning Survey 20 is based on findings from the world's largest and most comprehensive survey of planning software users, conducted from November 2019 to February 2020. In total, 1,406 people responded to the survey with 1,211 answering a series of detailed questions about their use of a named product. Altogether, 23 products (or groups of products) are analyzed in detail.

The Planning Survey 20 examines user feedback on planning product selection and usage across 30 criteria (KPIs) including business benefits, project success, business value, recommendation, customer satisfaction, customer experience, planning functionality and competitiveness.

This document contains just a selection of the headline findings for [Unit4 FP&A](#). It does not show all the KPI results and focuses mainly on the positive findings.

For more information on the survey, visit [The BI Survey website](#).

Unit4 FP&A overview

Prevero was founded in 1994 to deliver corporate performance management (CPM) capabilities for planning, budgeting, forecasting, analytics and reporting. Acquired by enterprise resource planning (ERP) provider Unit4 in July 2016, Prevero has now been fully integrated into Unit4's ERP application ecosystem to provide its financial planning & analysis (FP&A) solutions (now called Unit4 FP&A). While Unit4 FP&A historically attracted a strong customer base in the DACH and EMEA region, its appeal has subsequently broadened to mid-market and enterprise-level customers in North America too.

Unit4 FP&A solutions focus on people-centric industries, namely professional services, the public sector, not-for-profit organizations and higher education, but they also have a strong customer base in the utilities, manufacturing and retail industries. These sectors are supported with predefined business applications for financial planning, statutory consolidation, workforce planning and people analytics, as well as IFRS 16. Unit4 FP&A solutions are available as both standalone applications and integrated into Unit4's People

Experience Suite. They deliver performance management technology with native integration with Unit4's enterprise solutions.

Built on a highly flexible platform, Unit4 FP&A applications are adaptable to various CPM and analytics use cases. The solutions give business users the platform and tools they need to configure their planning and reporting to meet individual requirements, without having to have a technical background. For data storage and navigation, Unit4 FP&A uses a ROLAP approach and offers typical OLAP navigation capabilities in its clients.

Unit4 FP&A provides comprehensive capabilities for supporting top-down, bottom-up and mixed planning processes. Planners can enter budget data in the full client, HTML5 web client or Excel add-in. Unit4 FP&A also offers predefined best practice models that can be reused and adjusted to the customer's requirements. The platform uses artificial intelligence to help build forecasts and detect deviations and anomalies in data entries. Functionality is also available for reporting and application creation with a spreadsheet format that closely resembles Excel in the full client.

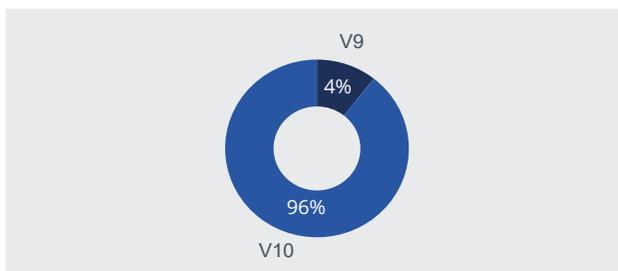
For consolidation purposes, Unit4 FP&A offers an application developed in-house. This application includes legal consolidation covering several consolidation standards and also offers reporting capabilities and predefined disclosure statements.

Unit4 FP&A customer responses

This year we had 33 responses from Unit4 FP&A users. At the time of the survey, 96 percent of them were using version 10 and 4 percent were using version 9.

Versions used

n=33





User and Use Case Demographics

BARC Comment

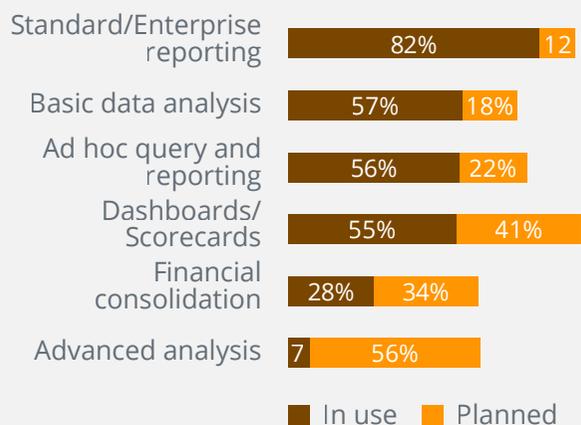
Besides planning, customers mainly use Unit4 FP&A today for standard/enterprise reporting (82 percent), basic data analysis (57 percent), ad hoc query and reporting (56 percent) and dashboards/scorecards (55 percent). 56 percent of respondents plan to use it for advanced analysis in the future.

Unit4 FP&A targets mid-sized and large companies across all industries. 73 percent of our sample of Unit4 FP&A customers come from mid-sized companies (100-2,500 employees) with a median of 50 users (including 30 using planning functionality), but the mean of 124 users (81 for planning) indicates there are also several larger implementations.

69 percent of Unit4 FP&A users are planning users – slightly above the survey average of 65 percent – reflecting the fact that Unit4 FP&A is essentially an integrated tool with both strong planning and analytics functionality.

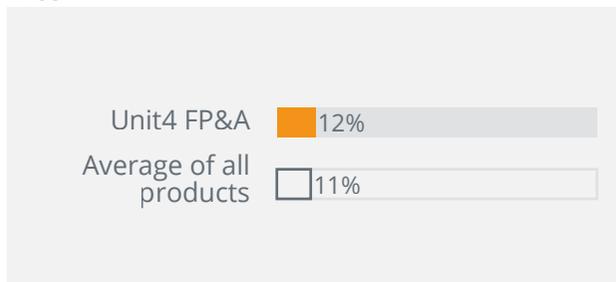
Current vs. planned use (besides planning)

n=29



Percentage of employees using Unit4 FP&A

n=33



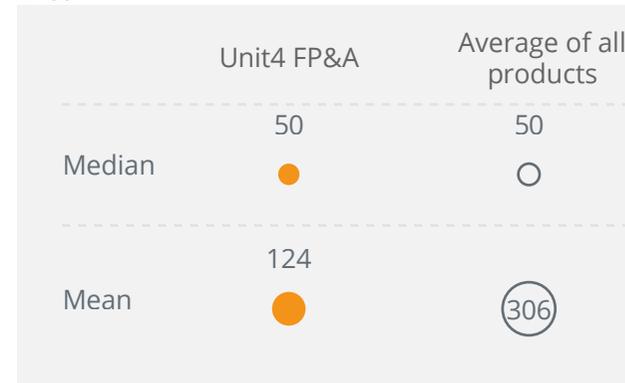
Planning users (as a percentage of all users)

n=33



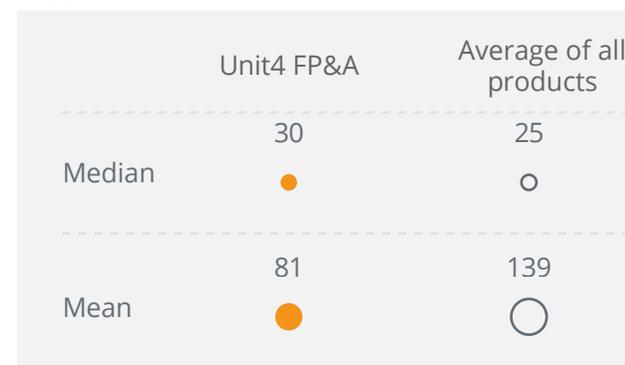
Total number of users per company

n=33



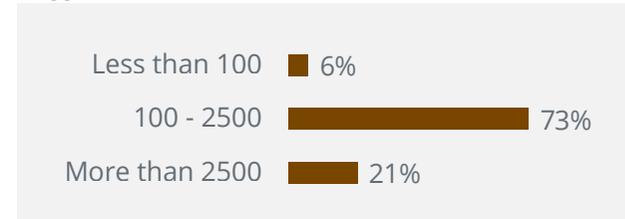
Planning users per company

n=33



Company size (employees)

n=33





Peer Groups and KPIs

The KPIs

The Planning Survey 20 provides the reader with well-designed KPI dashboards packed with concise information, which can be absorbed at a glance. The KPIs all follow these simple rules:

- Only measures that have a clear good/bad trend are used as the basis for KPIs.
- KPIs may be based on one or more measures from The Planning Survey.
- Only products with samples of at least 15 - 30 (depending on the KPI) for each of the questions that feed into the KPI are included.
- For quantitative data, KPIs are converted to a scale of 1 to 10 (worst to best).
- A linear min-max transformation is applied, which preserves the order of, and the relative distance between, products' scores.

The terms 'top-ranked' and 'leader' are used in the chart titles. 'Top-ranked' indicates first position. 'Leader' usually denotes a position in the top 25-35% of products listed in the chart.

Peer Group Classification

The Planning Survey 20 features a range of different types of planning, budgeting and forecasting products so we use peer groups to help identify competing products. The peer groups have been defined by BARC analysts using their experience and judgment, with segmentation based on the following key factors:

1. Category of planning product – Is the product focused on flexibly implementing completely individual planning requirements, on predefined planning solutions for particular topics or industries, or on supporting financial corporate management within companies?
2. Specialization – Is the vendor a performance management/planning specialist or does it offer a broader portfolio of enterprise software for a variety of business requirements?
3. Geographical reach – Geographical reach – Does the vendor have a truly global reach or does it do the vast majority of its business in a particular region?
4. Focus – Is the product focused on planning and performance management only or also on business intelligence?

Unit4 FP&A features in the following peer groups:

- Solution-focused Planning Products
- European Vendors
- Financial Performance Management Products
- BI-focused Products

Peer Groups Overview

Flexible Planning Platforms: Flexible planning platforms are most suitable for developing and implementing bespoke planning solutions to meet a unique set of requirements. They usually offer limited predefined content.

Solution-focused Planning Products: Solution-focused planning products are usually based on, or supplemented by, predefined planning solutions designed for particular applications (e.g., integrated financial planning, HR) or industries (e.g., energy, manufacturing).

Financial Performance Management Products: Financial performance management products are standardized applications that support use cases such as financial planning (P&L, balance sheet, cash flow), consolidation and financial reporting.

Enterprise Software Vendors: Enterprise software vendors have a broad portfolio including most (or all) types of business software.

Global Vendors: Global vendors have a truly global sales and marketing reach. They are present worldwide, and their products are used all around the world.

European Vendors: European vendors are headquartered in Europe and do the majority of their business there.

BI-focused Products: Besides planning and performance management, BI-focused products target use cases such as standard reporting, ad hoc reporting, analysis, advanced analytics and dashboarding.

North American Vendors: North American vendors are headquartered in North America and do the majority of their business there.

Business benefits

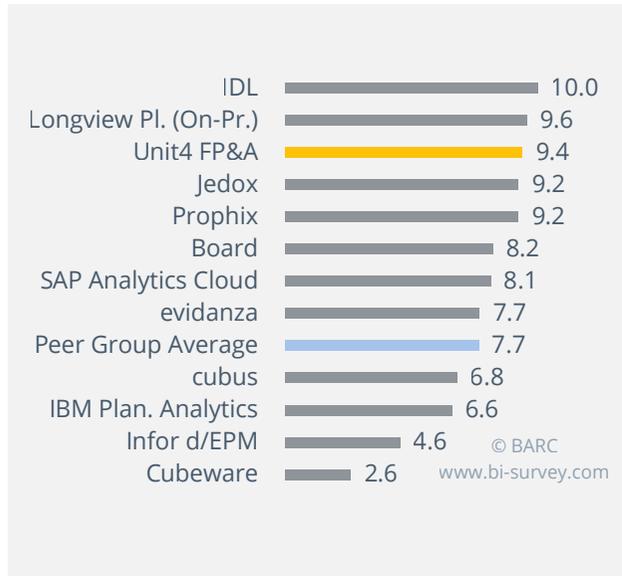


This KPI is based on the achievement level of a variety of business benefits.

Business benefits – Leader



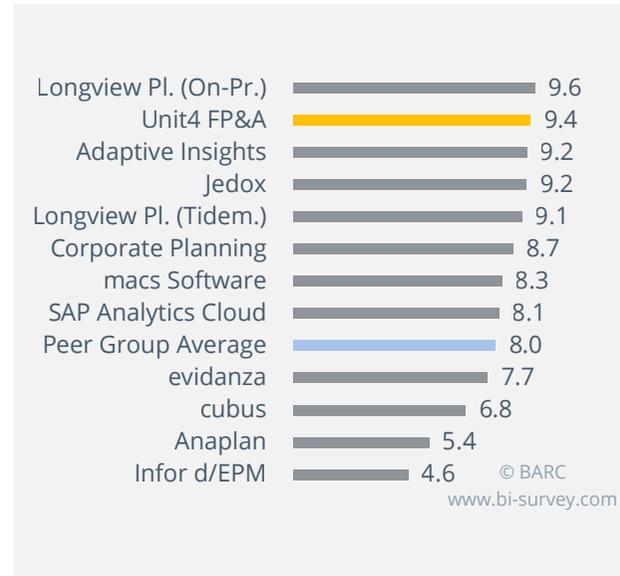
Peer Group: BI-focused Products



Business benefits – Leader



Peer Group: Solution-focused Planning Products



Business benefits



Business benefits – Leader

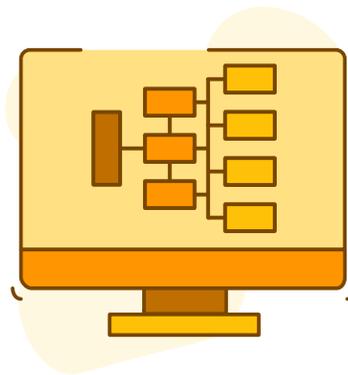


Peer Group: European Vendors



The 'Business benefits' KPI measures the achievement level of a variety of business benefits through the use of a planning product. Unit4 FP&A offers flexible and comprehensive planning functionality for integrated corporate planning and many customers benefit from using the product. Business benefits such as increased transparency of planning, more precise/detailed planning and reduced resource requirements for planning are achieved by an above-average proportion of Unit4 FP&A users compared to other planning products. Overall, these benefits lead for many customers to a better quality of planning results. In this year's Planning Survey, Unit4 FP&A is ranked as a leader for 'Business benefits' in three of its peer groups.

Planning functionality

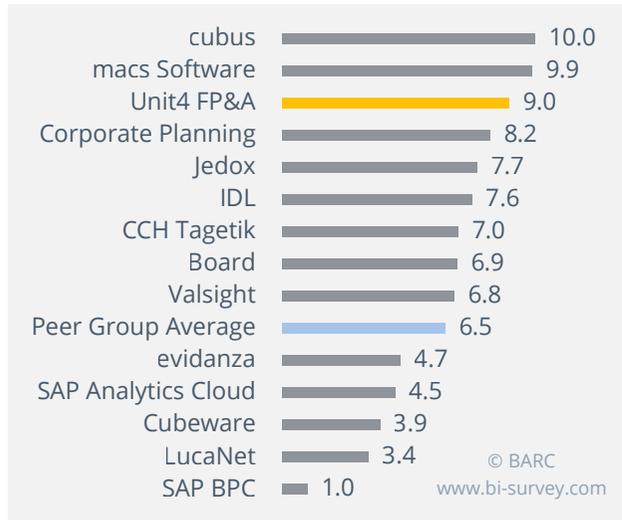


This KPI measures user ratings of the product's coverage of planning specific requirements.

Planning functionality – Leader



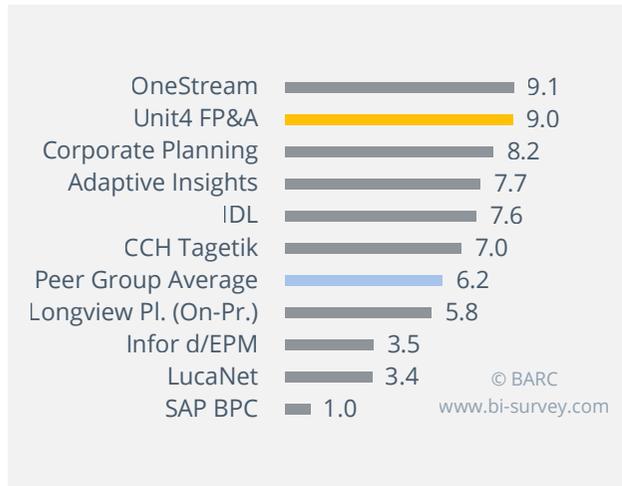
Peer Group: European Vendors



Planning functionality – Leader



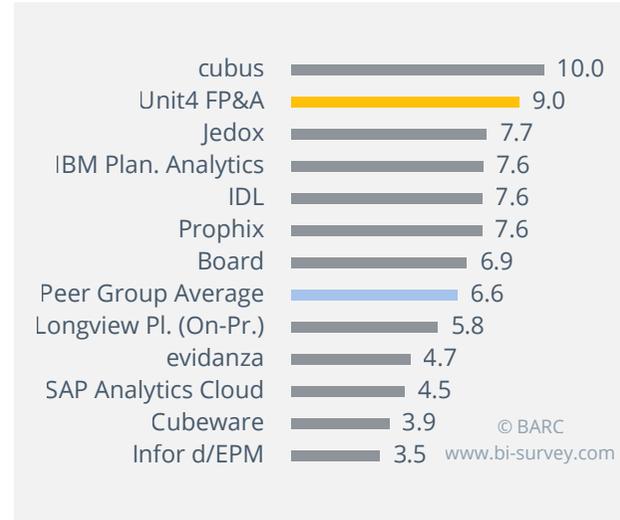
Peer Group: Financial Performance Management Products



Planning functionality – Leader



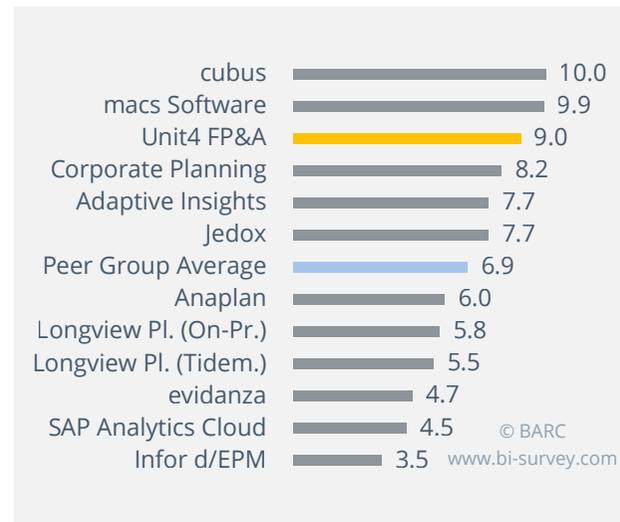
Peer Group: BI-focused Products



Planning functionality – Leader



Peer Group: Solution-focused Planning Products



Planning functionality



Unit4 FP&A's planning, budgeting and forecasting functionality is a key strength of the product and many customers confirm this fact. 'Good coverage of planning specific requirements' is therefore by far the number one reason why companies choose Unit4 FP&A (73 percent). The tool provides comprehensive capabilities for supporting top-down, bottom-up and mixed planning processes. The product's flexible development environment allows customers to address various planning topics on one common platform, with different aggregation levels (e.g., strategic as well as operational planning) for an integrated corporate planning approach (including financial planning). Moreover, the platform uses artificial intelligence to help build forecasts and detect deviations and anomalies in plan data entries. Consequently, Unit4 FP&A is rated among the leaders for 'Planning functionality' in all four of its peer groups.

Self-service

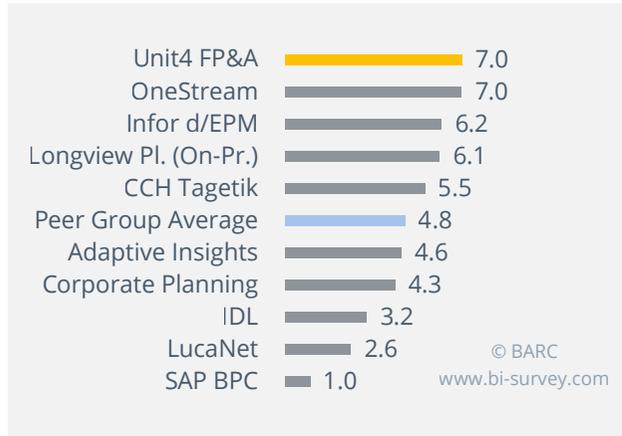


This KPI is based on the proportion of respondents' organizations currently using self-service planning features with their product.

Self-service – Top-ranked

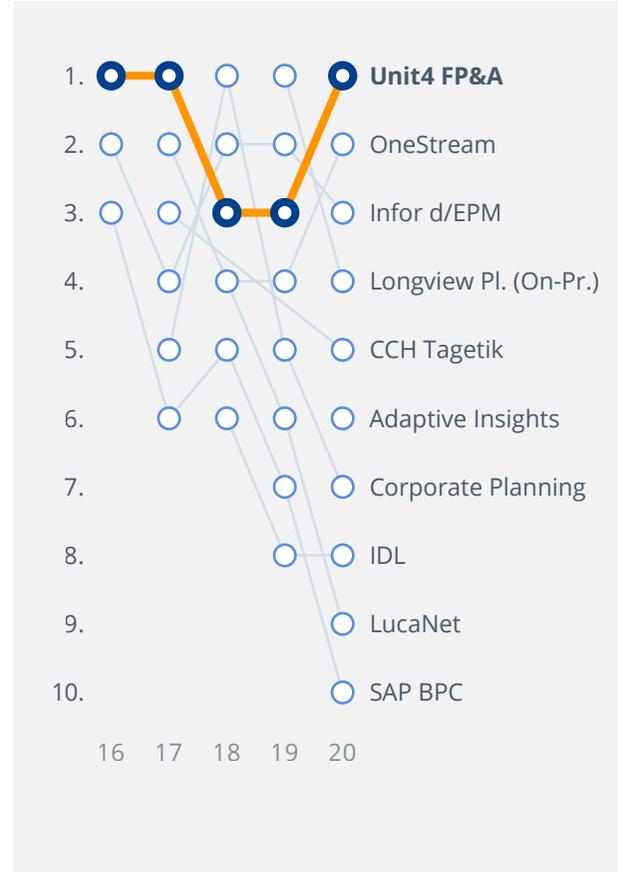


Peer Group: Financial Performance Management Products



Consistently outstanding in self-service

Peer Group: Financial Performance Management Products



Self-service



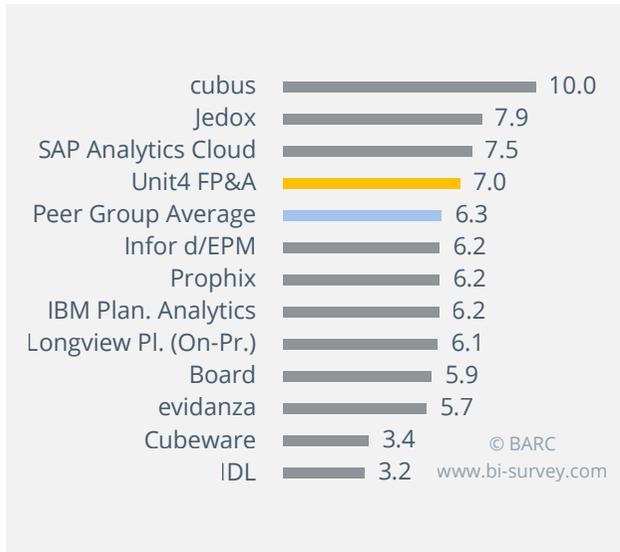
Viewpoint

Unit4 FP&A targets business departments in mid-sized and large companies across all industries. Many of its customers use the product in a self-service approach in business departments (typically the finance and controlling departments). The product is frequently considered to be easy to use and therefore self-service planning appears to be a frequent use case for the flexible development environment. Unit4 FP&A's Excel-like user interface generally seems to convince customers and therefore the initial barrier to working with the product is low. However, technical IT tasks such as data transfers from operational source systems and the implementation of the database environment in, for example, Microsoft SQL Server or Oracle require IT support. In this year's Planning Survey, Unit4 FP&A is ranked number one for 'Self-service' in the 'Financial Performance Management Products' peer group and achieves leading ranks in its other peer groups.

Self-service – Leader



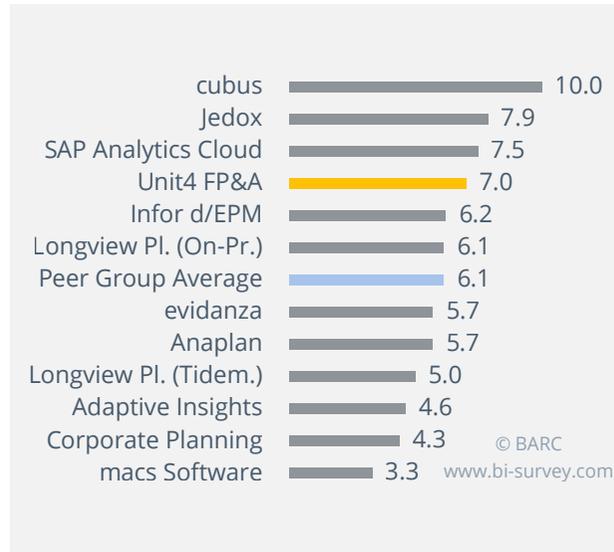
Peer Group: BI-focused Products



Self-service – Leader



Peer Group: Solution-focused Planning Products



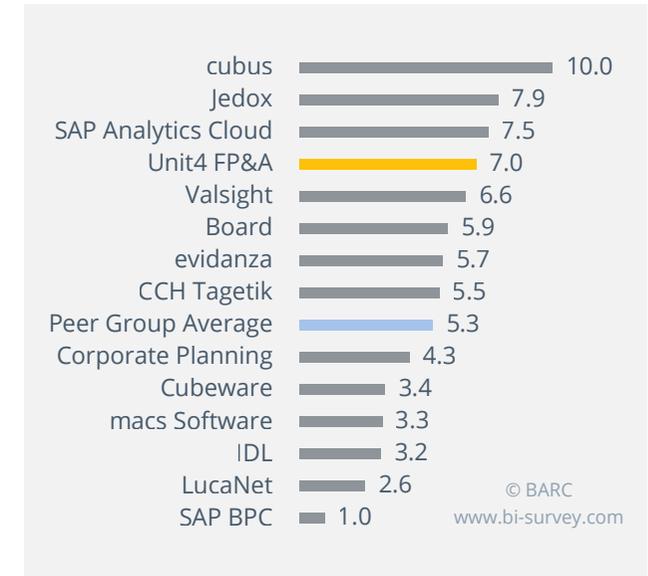
Self-service



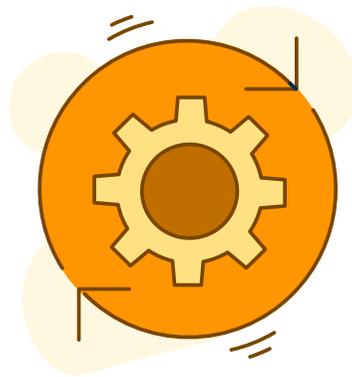
Self-service – Leader



Peer Group: European Vendors



Flexibility



This KPI is based on how often the product was chosen for its flexibility, and on the frequency of complaints about user flexibility post-implementation.

Flexibility – Top-ranked

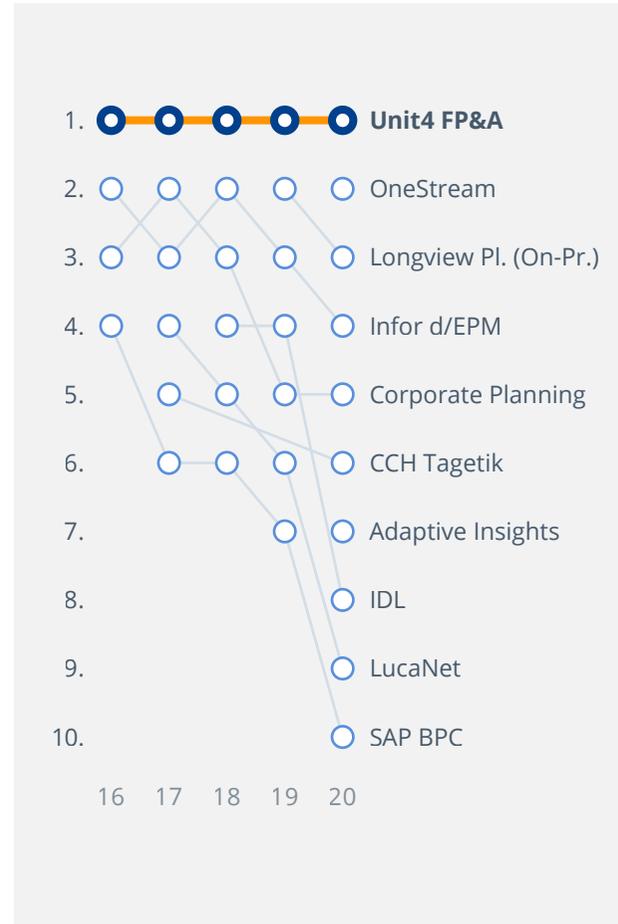


Peer Group: Financial Performance Management Products



Consistently top-ranked in flexibility

Peer Group: Financial Performance Management Products



Flexibility



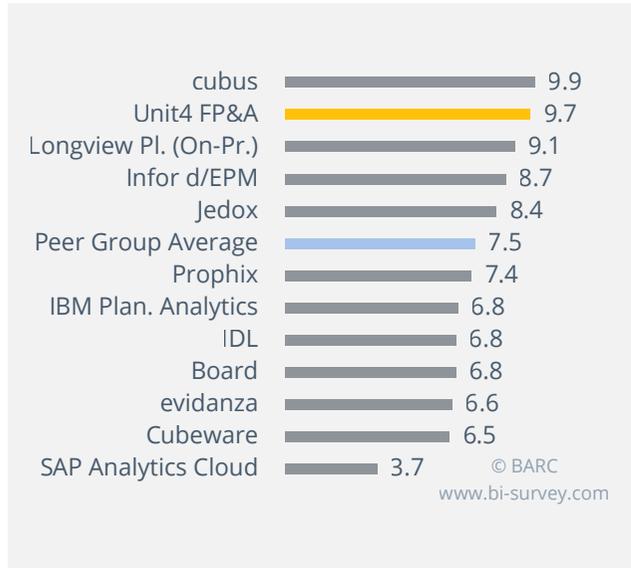
Viewpoint

Year after year, customers highlight Unit4 FP&A's flexibility, which is a significant reason why 63 percent of our sample of customers chose to buy the product. Unit4 FP&A once again takes the top spot for 'Flexibility' in the 'Financial Performance Management Products' peer group and is ranked among the leaders in its three other peer groups. Essentially, Unit4 FP&A is a flexible, integrated development environment for building individual planning and analytics applications for planning, reporting, dashboarding, analysis and consolidation. With its integrated platform approach, business power users in particular can create individual applications in an Excel-like environment without the need for programming skills. Unit4 FP&A does not focus on any one particular topic (e.g., financials, sales, HR, etc.) or industry. However, predefined content is available for various industries and business departments.

Flexibility – Leader



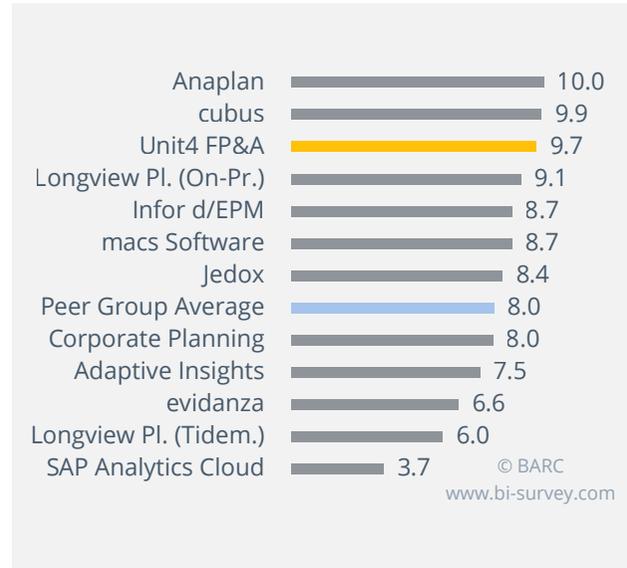
Peer Group: BI-focused Products



Flexibility – Leader



Peer Group: Solution-focused Planning Products

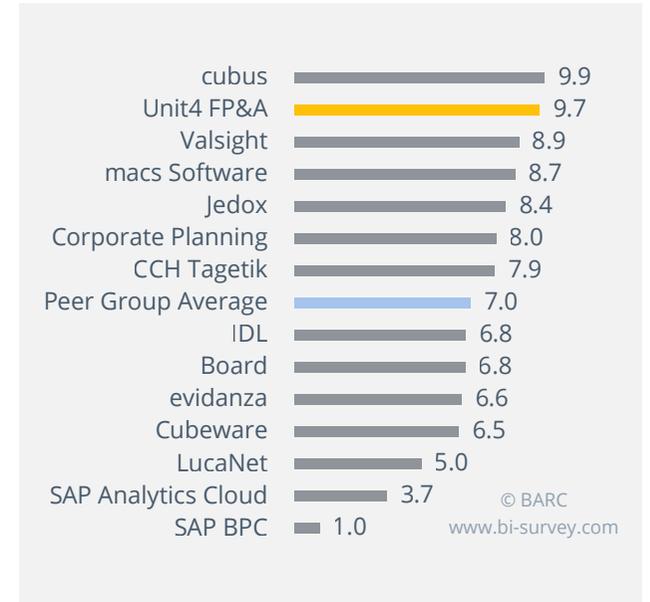


Flexibility

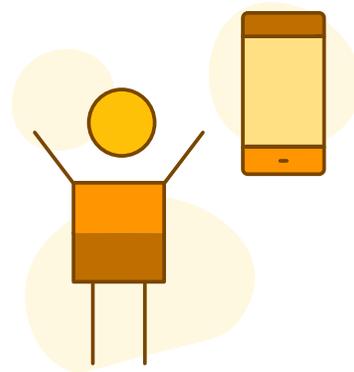
Flexibility – Leader



Peer Group: European Vendors



Ease of use

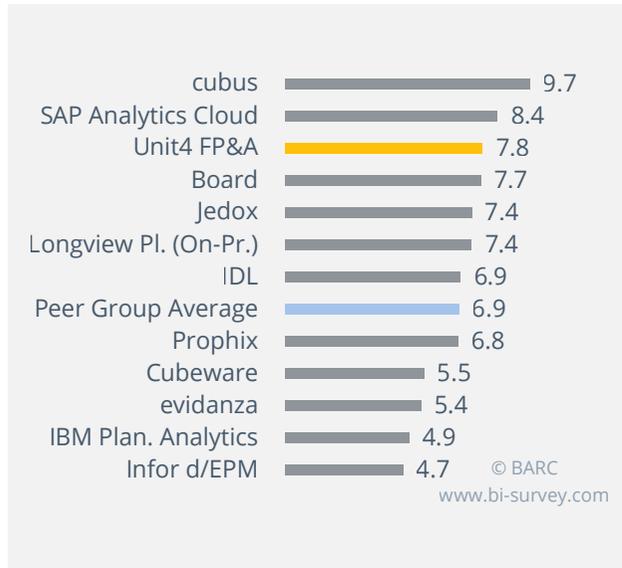


This KPI is based on how often the product was chosen for its ease of use, and on the level of complaints about ease of use post-implementation.

Ease of use – Leader



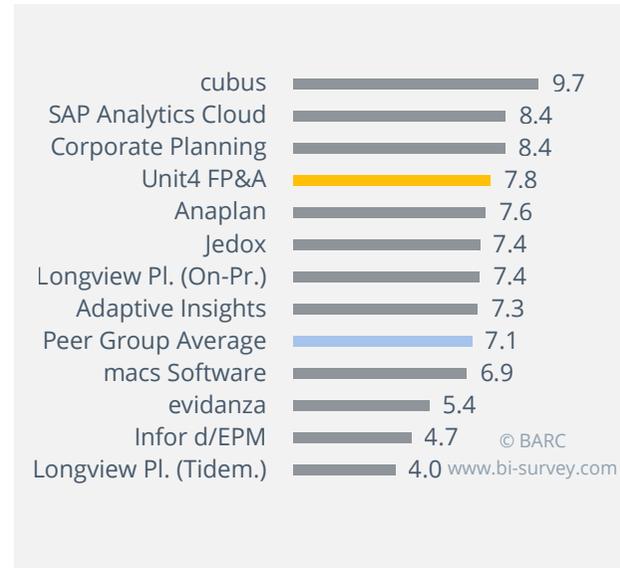
Peer Group: BI-focused Products



Ease of use – Leader



Peer Group: Solution-focused Planning Products



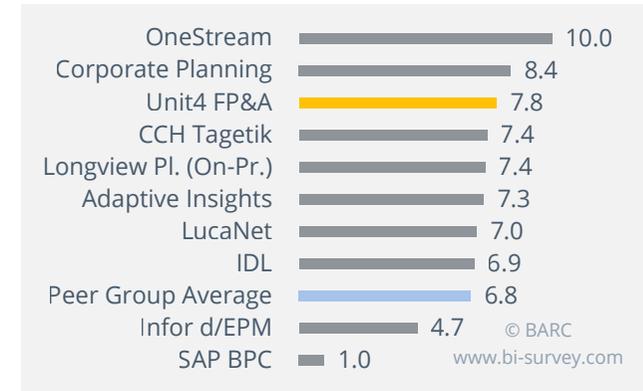
Ease of use



Ease of use – Leader



Peer Group: Financial Performance Management Products



A high proportion of customers confirm that Unit4 FP&A is easy to use, and this is the foundation for the vendor's leading ranks in three of its peer groups. In general, the product's Excel-like user interface requires little technical knowledge to use. Aside from technical IT tasks such as data integration and the implementation of the database environment, Unit4 FP&A can be used in a relatively self-service manner by business users, without the need for programming skills. Lucid user interfaces and integrated wizards help business users when setting up planning models, KPI calculations, planning forms and workflows. 'Software difficult to use' is a rare complaint, registered by just 6 percent of Unit4 FP&A users.

Customer experience

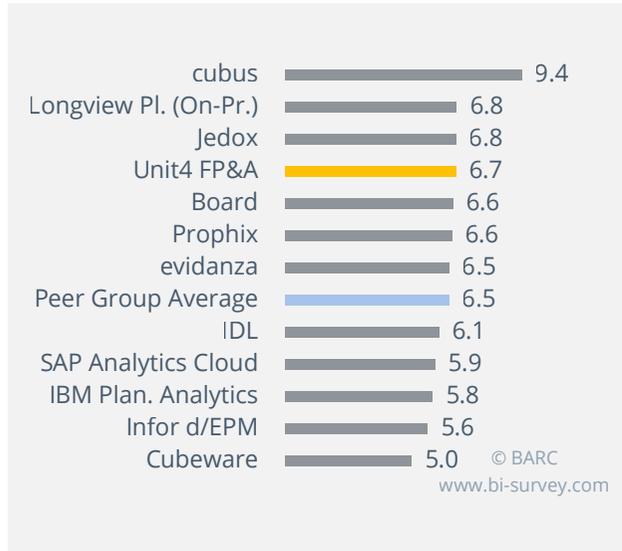


Combines the 'Self-service', 'Flexibility', 'Ease of use', 'Sales experience' and 'Performance satisfaction' KPIs.

Customer experience – Leader



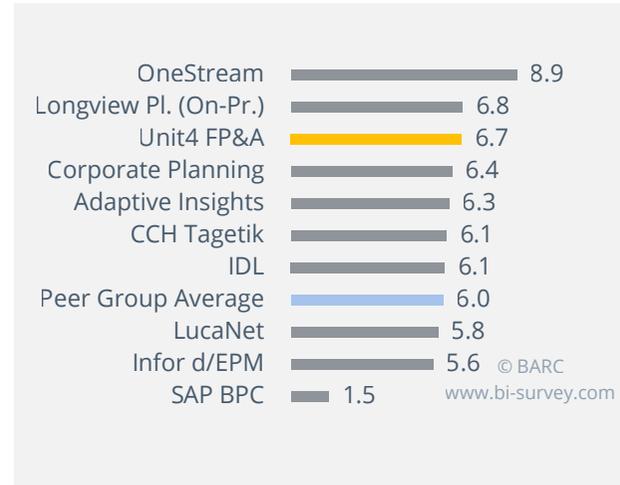
Peer Group: BI-focused Products



Customer experience – Leader



Peer Group: Financial Performance Management Products



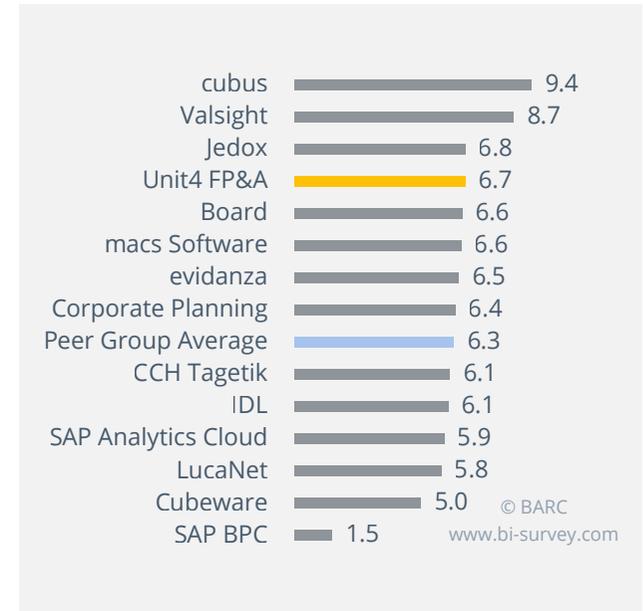
Customer experience



Customer experience – Leader



Peer Group: European Vendors



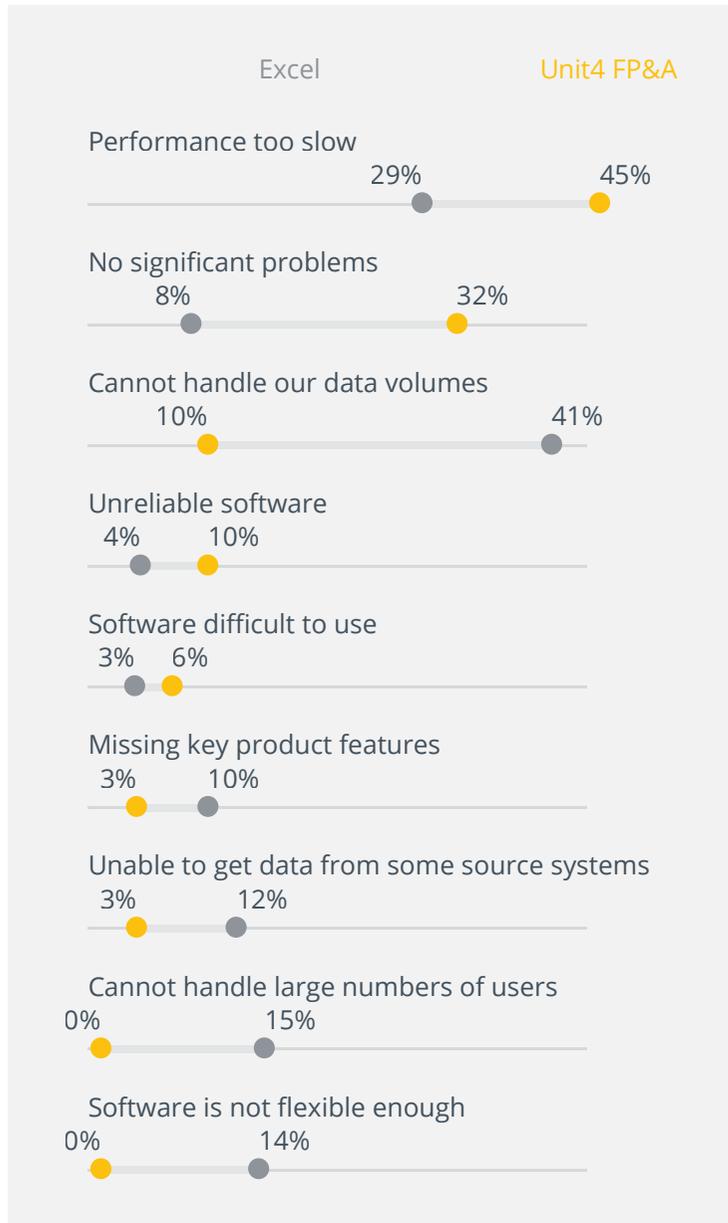
'Customer experience' is an aggregated KPI which combines the 'Self-service', 'Flexibility', 'Ease of use', 'Sales experience' and 'Performance satisfaction' KPIs. Strong results, especially for self-service, flexibility and ease of use, place Unit4 FP&A comfortably among the leaders in three of its peer groups. Due to its ease of use, many customers use the product in a self-service approach in business departments (typically the finance and controlling departments). Unit4 FP&A's Excel-like user interface generally seems to convince customers so the initial barrier to working with the product is therefore low. The product's flexibility allows customers to build individual planning and analytics applications and address various planning strategies and aggregation levels (e.g., top-down, bottom-up, strategic planning, operational planning, financial planning, etc.). Problems encountered by Unit4 FP&A users are few and far between. Indeed, 32 percent of respondents say they have experienced no significant problems at all when using it.

Unit4 FP&A vs. Excel



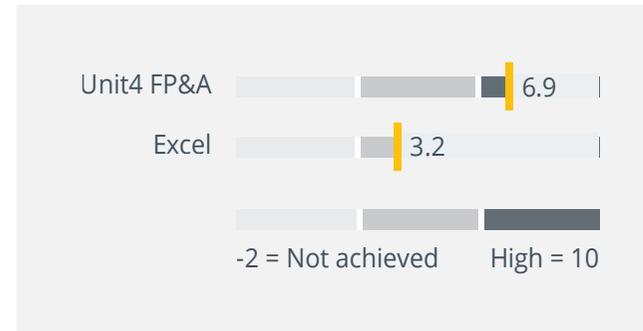
Problems encountered by Unit4 FP&A and Excel users

n=31/196



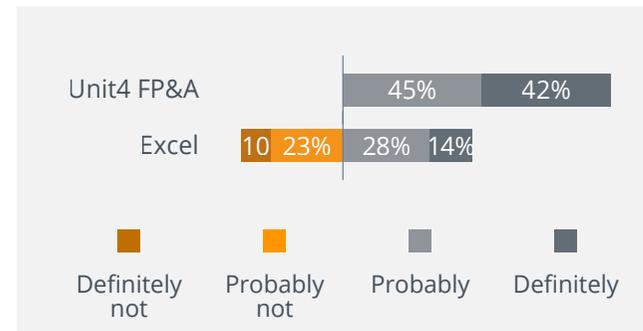
Business Benefits Index*

n=33/187



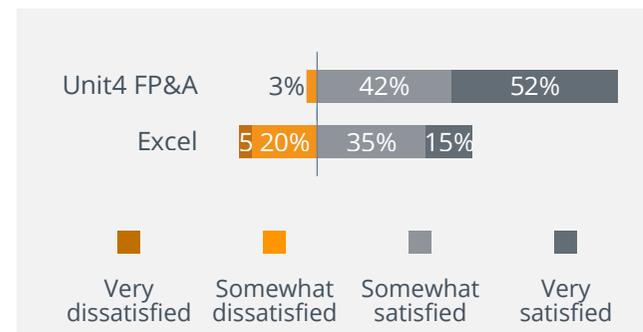
Recommendation**

n=33/188



Satisfaction level**

n=33/191



Unit4 FP&A vs. Excel



Excel remains one of the most widely used planning and analytics products in the world. However, many users and companies are dissatisfied with it. Unit4 FP&A software users have far fewer complaints than Excel users. Common issues in planning projects such as missing key product features (e.g., for planning), inflexibility and handling of large numbers of users or data volumes do not seem to be a problem for Unit4 FP&A software users. 32 percent of customers even report having no significant problems at all with the product. Business benefits regularly achieved with Unit4 FP&A software (and achieved more frequently than with Excel) include increased transparency of planning, more precise/detailed planning, reduced resource requirements for planning and better quality of planning results. 87 percent of Unit4 FP&A users say they would definitely or probably recommend their planning product to other organizations, while 94 percent of respondents are 'somewhat satisfied' or 'very satisfied' with Unit4 FP&A.

* For 12 potential benefits, respondents are asked to indicate the level of achievement, if any, with five levels. We use a weighted scoring system, from -2 to 10, to derive a composite score - the Business Benefits Index (BBI).

** Neutral category not shown

BARC is a leading enterprise software industry analyst and consulting firm delivering information to more than 1,000 customers each year. Major companies, government agencies and financial institutions rely on BARC's expertise in software selection, consulting and IT strategy projects.

For over twenty years, BARC has specialized in core research areas including Data Management (DM), Business Intelligence (BI), Customer Relationship Management (CRM) and Enterprise Content Management (ECM).

BARC's expertise is underpinned by a continuous program of market research, analysis and a series of product comparison studies to maintain a detailed and up-to-date understanding of the most important software vendors and products, as well as the latest market trends and developments.

BARC research focuses on helping companies find the right software solutions to align with their business goals. It includes evaluations of the leading vendors and products using methodologies that enable our clients to easily draw comparisons and reach a software selection decision with confidence. BARC also publishes insights into market trends and

developments, and dispenses proven best practice advice.

BARC consulting can help you find the most reliable and cost effective products to meet your specific requirements, guaranteeing a fast return on your investment. Neutrality and competency are the two cornerstones of BARC's approach to consulting. BARC also offers technical architecture reviews and coaching and advice on developing a software strategy for your organization, as well as helping software vendors with their product and market strategy.

BARC organizes regular conferences and seminars on Business Intelligence, Enterprise Content Management and Customer Relationship Management software. Vendors and IT decision-makers meet to discuss the latest product updates and market trends, and take advantage of valuable networking opportunities.

For further information see:

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Other Surveys



The BARC **BI Trend Monitor 2020** reflects on the trends currently driving the BI and data management market from a user perspective. We asked close to 2,900 users, consultants and vendors for their views on the most important BI trends.



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Business Application Research Center – BARC GmbH



Germany

BARC GmbH
Berliner Platz 7
D-97080 Würzburg
+49 931 880 6510
www.barc.de

Austria

BARC GmbH
Meldemannstraße 18 /
01.14
A-1200 Wien
+43 1890 1203 451
www.barc.at

Switzerland

BARC Schweiz GmbH
Täferstraße 22a
CH-5405 Baden-Dättwil
+41 76 340 3516
www.barc.ch

Rest of the World

+44 1536 772 451
www.barc-research.com