

Global CPM Trends and Priorities Report 2025

A unique and comprehensive global view of key planning
and additional performance management market trends

Joint BARC and BPM Partners research study

Research sponsored by:

UNIT4



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Table of Contents

Executive Summary	6	Recommendations	44
Survey Results	10	Sample / Methodology	48
Trends Overview	11	Company Profiles	50
Trends Development	13	About BARC.....	51
Leaders vs. Laggards	16	About BPM Partners	52
The Trends in Detail	18	Sponsor Profile	53
Self-Service Planning in Business Departments	19	About Unit4.....	53
Integrated Performance Management.....	21		
Use of Planning Product in the Cloud.....	25		
Integrated Corporate Planning.....	28		
Simulation and Analysis of Scenarios.....	33		
Value Driver-Based Planning	36		
Predefined Planning Solutions	38		
Predictive Planning and Forecasting.....	40		



Foreword

Welcome to the first annual edition of the BARC x BPM Partners Global CPM Trends and Priorities Report. We have combined selected results from both the BARC Planning Survey 24 and the 2024 BPM Pulse research study to produce what we believe is a unique and comprehensive global view of key planning and additional performance management market trends. The benefits to you of our working together and combining our data are many, including:

- The larger combined sample size ensures greater accuracy and diminishes the impact of outliers, particularly as the surveys branch into follow-on questions that naturally have a smaller number of responses.
- Since the two firms have different geographic focus areas, the combined survey data uniquely provides a more global view of the state of planning and other elements of performance management, also enabling us to understand differences by region.
- Having two senior analysts from two different firms analyze the results allows for a diversity of opinion and insights based on their different backgrounds and field experiences.

Our primary goal for this report is to equip end-user organizations with the most current and complete information as they embark on new or expanding performance management projects.

The data and analysis contained herein should support both project benchmarking as well as provide data from peers that may encourage discussions around areas previously not considered for inclusion in projects. Benchmarking is most useful when the data comes from similar organizations; this usually means similar industries and company size. With this report, similar geographic regions can now be added to that list.

Although our focus is on end-user organizations, vendors can benefit from the data and analysis contained in this report as well, which in turn also benefits end users. Vendors looking to expand their success outside of their home region can leverage this data for product planning as they try to address the needs of the new markets they are entering. It can also help them sharpen their messaging to speak to what is most important in each region.

We'd like to thank the vendors that have supported our efforts and enabled us to distribute this report to the widest possible audience. Most importantly, we hope that we have achieved our primary goal and you find the analysis and recommendations provided in this report useful in your own performance management projects.



Dr. Christian Fuchs, Craig Schiff
September 2024

Executive Summary



Executive Summary



A challenging economic environment continues to create new demand for planning and additional performance management (CPM) solutions. In addition, earlier waves of adoption have created an active replacement market – legacy on-premises software being replaced by modern cloud-based CPM suites. There are more vendors today offering complete or partial CPM suites than in the recent past. All of this creates a robust marketplace of buyers and sellers of planning and broader performance management solu-

tions. There is however a significant disconnect between what is possible with these modern solutions, and how they are actually being used. To put it another way: vendors have over-delivered (or are really just ahead of the curve) and customers have under-adopted (really just focused on the basics or putting out fires first). This does vary somewhat by geography, but overall most organizations are not taking full advantage of their new performance management solutions.

1 Hot Spot – Self-Service and Ease of Use

One area of modern performance management solutions that is being taken advantage of by a majority of users is self-service planning and reporting.

This means business users can enter updated plans and forecasts, run reports and analyze results with minimal outside assistance. That translates into less demand on IT and consultants.

The resulting benefits include shorter cycle times (no waiting for someone to help you perform your routine tasks in the system) and greater and more rapid adoption (new users able to start using the system with minimal training).

To make self-service planning a reality, vendor solutions need to support finance self-sufficiency. This means a system designed for business end users: intuitive, easy to use, utilizes business terminology, no code/low code and integrated with existing BI and analysis tools that users are already familiar with. Workflow and task management can guide the user through the steps to create a new budget or update a forecast. Automation could reduce the number of manual steps in the process. A cloud-based solution adds the additional ease of use benefits of no software to install and easy access from anywhere.

2 Hot Spot – Modern Cloud-Based Solutions

In some regions, almost all new CPM sales are cloud-based solutions. Other geographies are not quite there yet. In all territories, there are large pockets of companies still running on-premises solutions.

Those companies not yet on a modern cloud-based CPM solution are missing out on significant benefits. A partial list includes:

- Elasticity and scalability
- Ease of access enabling anywhere anytime planning collaboration
- Immediate access to the latest updates and innovations
- Reduced demand on internal IT resources
- Ongoing support and continued enhancement; many on-premises offerings are nearing the end of their active support period

Many of the latest CPM capabilities discussed throughout this report are only available in a vendor's current cloud solution. Native cloud vendors don't even offer an on-premises option so are not a viable choice for organizations unwilling to consider cloud solutions. The large number of organizations that have already successfully implemented cloud-based solutions should prove to the remaining holdouts that it is safe, secure and the most efficient way forward.



3 Hot Spot – Scenario, Driver-Based Planning

For many years, direct entry has been the primary way forecasts have been created. That is still largely the case, but change is happening. There is significant interest in simulation and analysis of scenarios, and some interest in value driver-based planning. This is in addition to all of the organizations already using these forecast approaches.

Scenario planning has the greater interest of the two, and with good reason. With the volatile economic environment of the past few years, it has become harder to predict what will actually happen in the next period. Scenario planning enables you to plan for multiple futures, understand the implications of each, proceed with your base case assumptions, and be ready to switch over to your best case or worst case scenario model as conditions warrant.

Many of today's solutions offer special capabilities making it easier to use scenario planning. They offer ready-made areas to store your various potential future cases, provide the ability to easily leverage existing actuals and plans to seed your scenarios, and provide reporting that facilitates side-by-side reporting of various versions with each other or with actual results.



4 Hot Spot – Integrated Planning

Integrated planning: the integration of financial planning, operational planning and strategic planning is the most fundamentally important aspect of performance management that a sizeable number of organizations have not yet achieved.

While almost every organization uses their CPM solution for financial planning, a smaller but growing number now also use it for operational planning. An even smaller number use it for strategic planning.

The full value and benefits of a performance management solution are only achieved when these three major planning categories are integrated. How can you develop a current year detailed financial plan without having access to the more summary-level, but longer-term strategic plan? How can you expect to deliver on your current financial plan without having more granular operational plans that tie back to the targets in the financial plan? These three planning types work together to help an organization plan, monitor and execute on its strategy. Whether it's part of a system or not, the strategy needs to come first.

CPM solutions today enable you to easily move between these planning types leveraging the same or expanded dimensions, security and user experience.



5 Hot Spot – Integrated Financial Consolidation

For many groups, financial consolidation is essential to combine the financial actual data of multiple legal entities into consolidated financial statements, eliminating intercompany transactions to accurately reflect the group's financial performance. Since financial planning at corporate level also requires the consolidation of planning data from individual legal entities, the integration of both disciplines is becoming an increasingly important requirement for corporations in the software selection process.

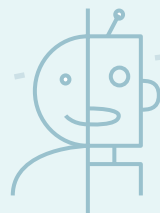
Financial consolidation is an even more integral part of performance management solutions today than in the past. Since internal management reporting is one of the primary drivers for the adoption of CPM solutions in the first place, financial consolidation provides the actual data needed to properly report on performance variances.

In addition to planning-related use cases, financial consolidation can also be used for legal/statutory external reporting with support for current regulatory requirements, account reconciliation, close and disclosure management, narrative reporting etc. Vendors that offer the most complete consolidation solutions can support both management and external reporting use cases. There is a large pool of vendors that offer more basic consolidation (aggregation) capabilities that may be adequate for straightforward internal reporting use. The financial consolidation solution market has evolved significantly in the past few years, and you really need to have a solid handle on your requirements to make sure you get the right solution.

6 Hot Spot – Predictive and AI

Predictive technologies, and AI in general, have tremendous potential to take performance management solutions to the next level: faster, easier and more accurate plans and forecasts. Unfortunately, we are some way from achieving that potential. It's not for lack of trying by the vendors. They have been rolling out AI (or AI-like) solutions for several years now. Maybe that's the problem. These early solutions were often difficult to use, without clear definitions of their intended use case and purpose, and sometimes didn't really leverage AI at all, but attempted to deliver similar results through other means.

Those early missteps, coupled with a natural corporate tendency to not want to pioneer new technologies in their finance department, have resulted in a slow adoption curve for AI capabilities in CPM solutions. That's understandable, but unfortunate. The AI solutions that are being delivered today by the major CPM vendors are impressive, polished, focused and provide real benefits. These solutions leverage generative AI, anomaly detection, machine learning, natural language processing and robotic process automation, all targeting specific use cases (anomaly detection for data quality for example). Much like cloud, acceptance and adoption will occur over time and vary by geography.



Survey Results



Survey Results

Trends Overview



Self-service planning is established in two-thirds of companies, while every second organization plans to use predictive planning and forecasting

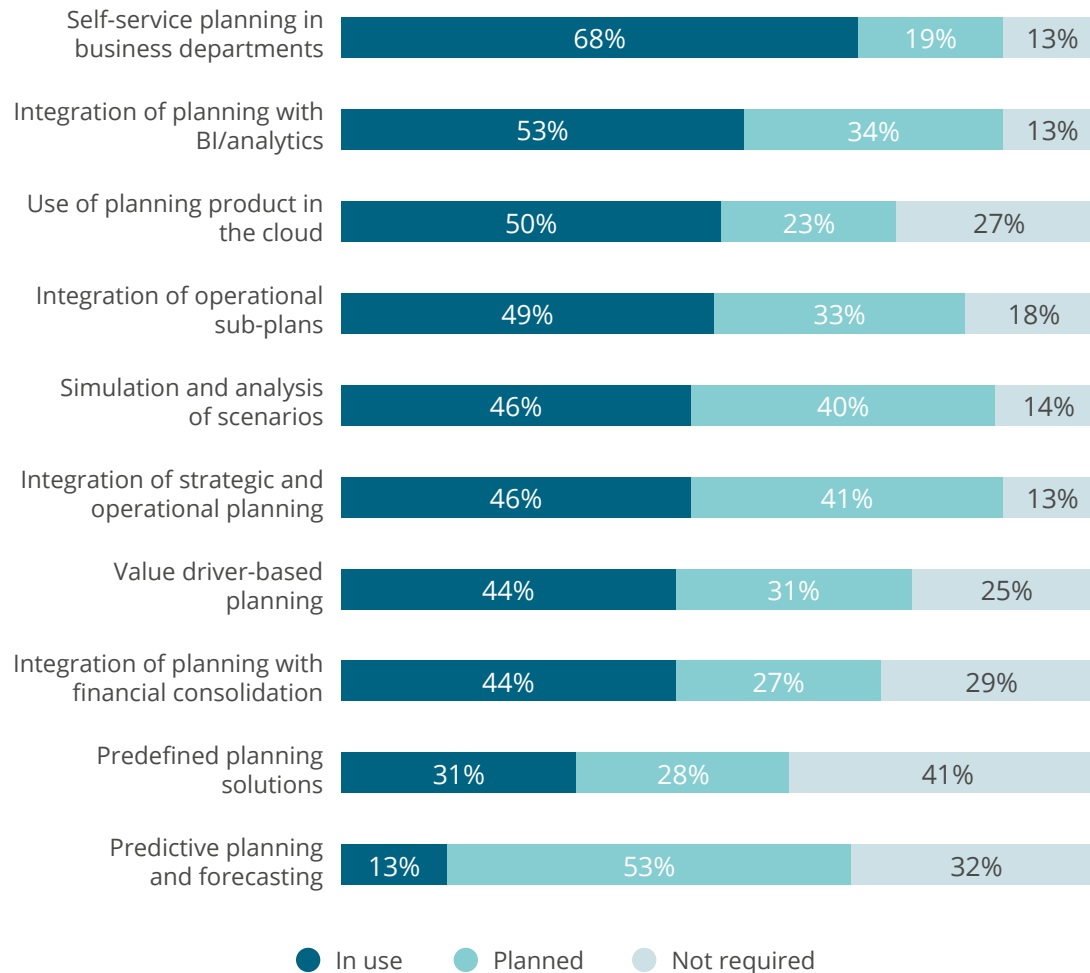


Figure 1: Which of the following does your company do/use with the product for planning and budgeting?
(n=1,100)

Viewpoint



The most important trending topics in terms of planned adoption in the future are:

- Predictive planning and forecasting (53 percent)
- Integration of strategic and operational planning (41 percent)
- Simulation and analysis of scenarios (40 percent)

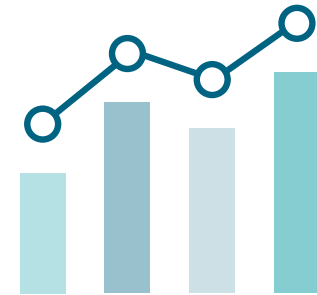
Other topics such as 'value driver-based planning' (31 percent), 'integration of planning with BI/analytics' (34 percent) and 'integration of operational sub-plans and with financial planning' (33 percent) trail some way behind.

While vendors have been offering predictive planning and forecasting capabilities for several years now (initially with just statistical algorithms and later leveraging machine learning), we have been surprised by the slow uptake in the user community. The large number of organizations now planning to take advantage of this capability indicates a significant shift in thinking. This may of course be driven by challenging economic conditions which require more frequent forecast updates while at the same time also needing greater accuracy.

Self-service planning in use (68 percent) is to be expected with a continuing push for finance self-sufficiency (less reliance on IT and consultants), which helps reduce cycle times.

Survey Results

Trends Development



Use of modern planning approaches and performance management concepts

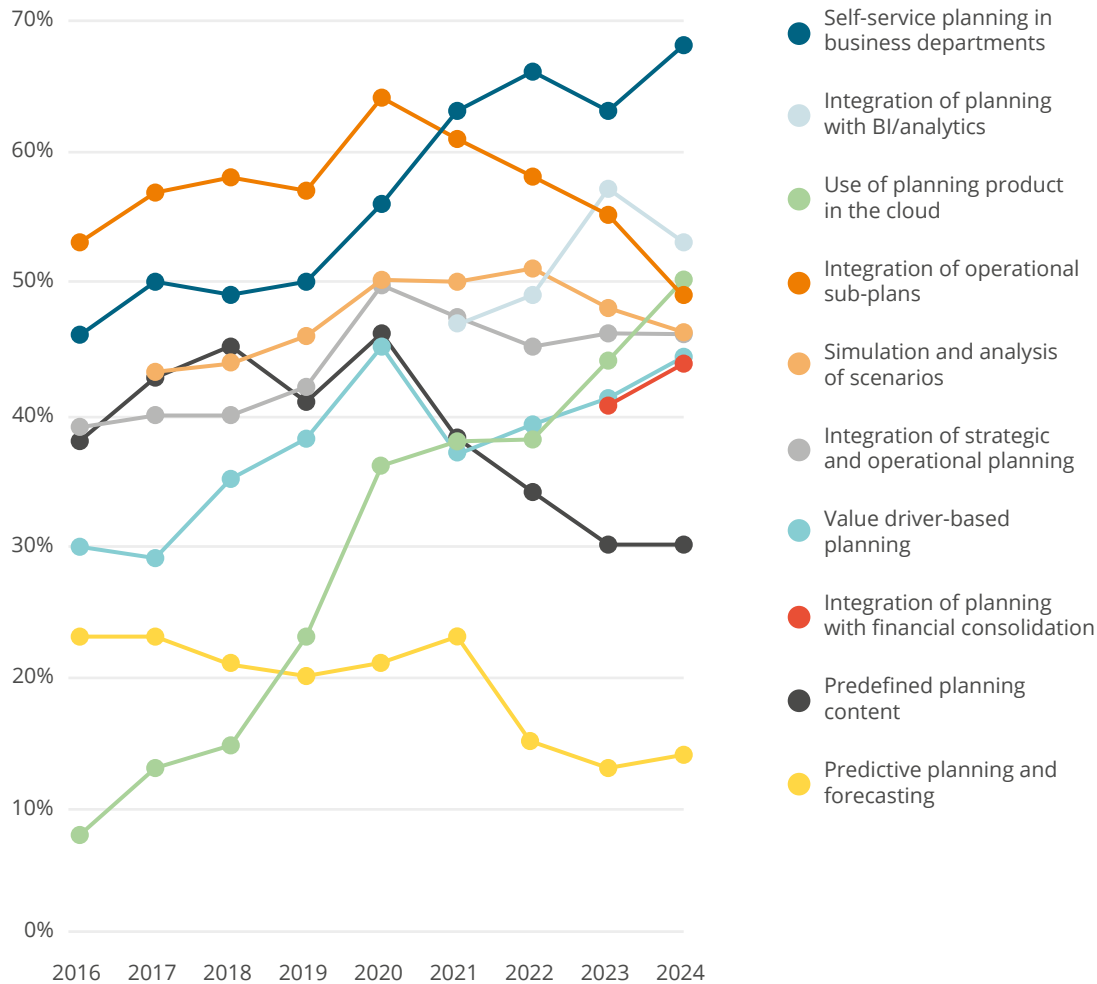


Figure 2: Which of the following does your company do/use with the product for planning and budgeting? – Chosen answer option: "In use"

(n₂₀₁₆=573; n₂₀₁₇=1,169; n₂₀₁₈=812; n₂₀₁₉=932; n₂₀₂₀=908; n₂₀₂₁=884; n₂₀₂₂=832; n₂₀₂₃=783; n₂₀₂₄=1,100)

Viewpoint



The results confirm our experience in customer projects that planning approaches within companies, as well as the planning market in general, are constantly maturing and many organizations now possess profound expertise in this area. It is no surprise to us that advanced planning topics such as value driver-based planning and improved integration in planning and with other elements of performance management are gaining in importance as many companies strive to reach the next level of maturity. Also, software vendors are reacting to trends in the market, providing additional advanced planning functionality and integrated platforms to support customers' needs.

The most significant trend from 2016 to 2024 is clearly the use of planning products in the cloud. As planning has become more collaborative, while at the same time work environments have become more decentralized, the cloud has facilitated easy planning system access and collaboration from anywhere. It has also allowed vendors to increase the frequency of updates and enhancements. However, this is an area where there are measurable differences when looked at on a regional basis. Europe's use of planning products in the cloud (42 percent) is significantly behind both Asia and North America (68 percent and 62 percent respectively).

The planned use of modern planning approaches and performance management concepts over time

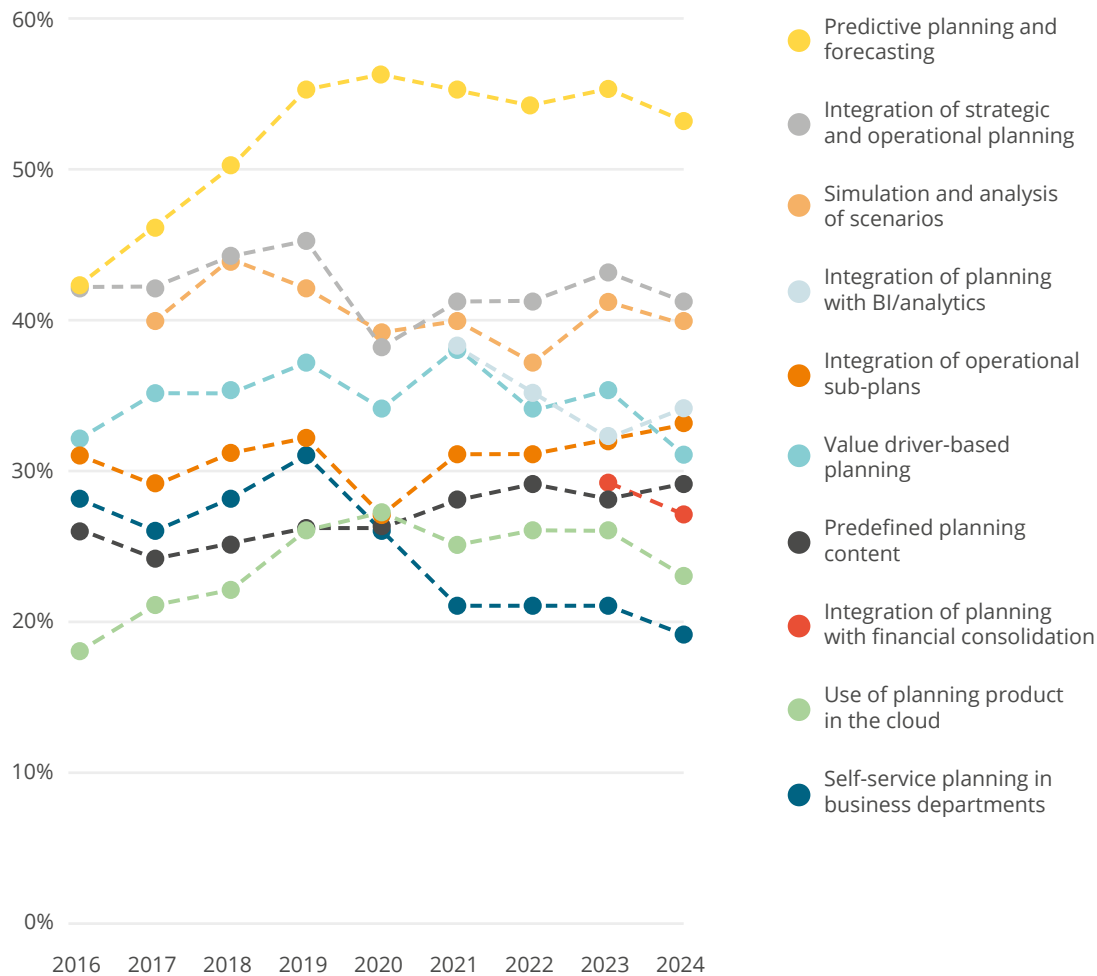
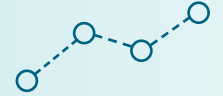


Figure 3: Which of the following does your company do/use with the product for planning and budgeting? – Chosen answer option: “Planned”

(n₂₀₁₆=573; n₂₀₁₇=1,169; n₂₀₁₈=812; n₂₀₁₉=932; n₂₀₂₀=908; n₂₀₂₁=884; n₂₀₂₂=832; n₂₀₂₃=783; n₂₀₂₄=1,100)

Viewpoint



As the 'in use' analysis shows, the implementation of some trending topics and concepts has significantly increased over time. Many organizations now possess profound expertise in advanced planning approaches. As a result, the 'planned' rates for many trending topics are stagnating or decreasing over time. Interest in the following trends is growing over time:

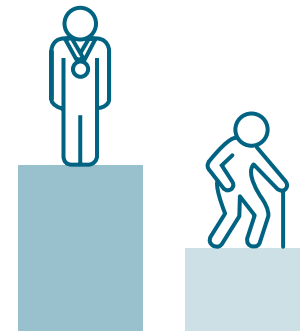
- Predictive planning and forecasting (53 percent)
- Integration of operational sub-plans and with financial planning (33 percent)
- Predefined planning content (28 percent)
- Use of planning product in the cloud (23 percent)

The trends with increased interest all provide significant benefits to user companies:

- The benefits of predictive planning and the use of the cloud have already been discussed.
- Predefined planning content accelerates time to value – enabling organizations to get up and running more quickly, or to more easily expand into additional use cases based on pre-built solutions and models.
- The integration of operational sub-plans and with financial planning has two major benefits: it creates a more holistic view of the business which increases the likelihood that the financial plans will come to pass by having the operational details supporting those plans in place and monitored, which leads to the second benefit sometimes called financial and operational signaling – monitoring the operational plans provides leading indicators of changes that may positively or negatively impact the financial plans.

Survey Results

Leaders vs. Laggards



Learning from the best: How leaders and laggards see the importance of modern planning approaches and performance management concepts

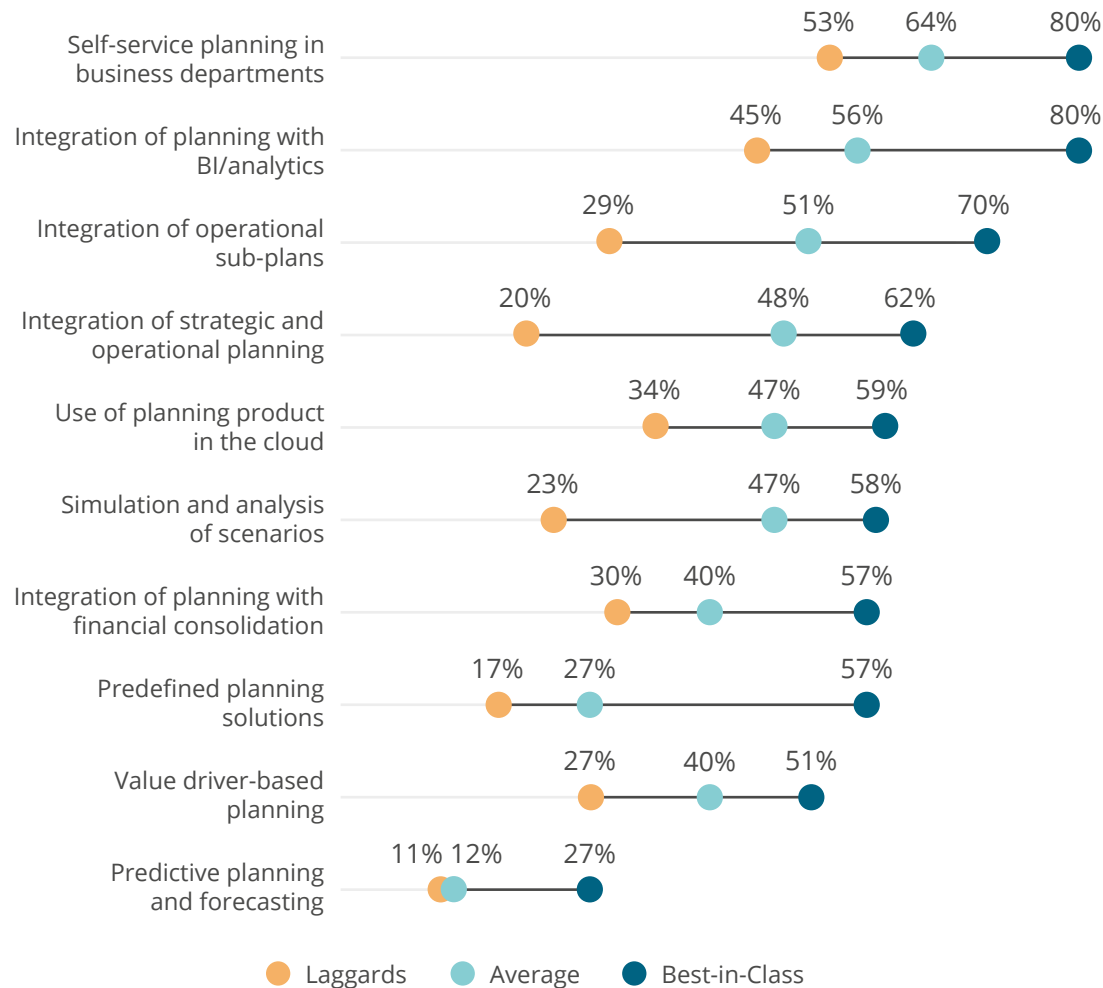


Figure 4: Best-in-Class x Which of the following does your company do/use with the product for planning and budgeting? Chosen answer option "in use"
(n=1,402)

Viewpoint



To examine correlations between what the most successful companies do differently to less successful ones, we classify companies as 'leaders' and 'laggards'. Leaders comprise the top 10 percent of companies based on their achievement of business benefits with planning and other elements of performance management, while the lowest 10 percent are classed as laggards. The in-depth analysis shows that leaders have a significantly higher level of maturity and are prioritizing the improvement of their performance management activities through modern approaches and technology trends. They are able to focus on more trends at the same time.

The integration of strategic and operational planning, integration of operational sub-plans and the use of predefined planning solutions stand out the most here, showing the greatest difference in adoption between leaders and laggards. Leaders also see more benefits in the simulation and analysis of scenarios as well as the integration of planning with BI/analytics. These findings show that leaders are focused on better integrating their overall performance management activities, leveraging solution best practices, and better anticipating future developments with detailed scenario analysis for decision-making.

With all the hype around the use of AI, generative AI and machine learning, it is interesting to note that leaders are apparently way ahead of laggards in using them in planning and forecasting processes.

The Trends in Detail



The Trends in Detail



Self-Service Planning in Business Departments

Self-service planning in business departments and finance self-sufficiency continue to be top priorities

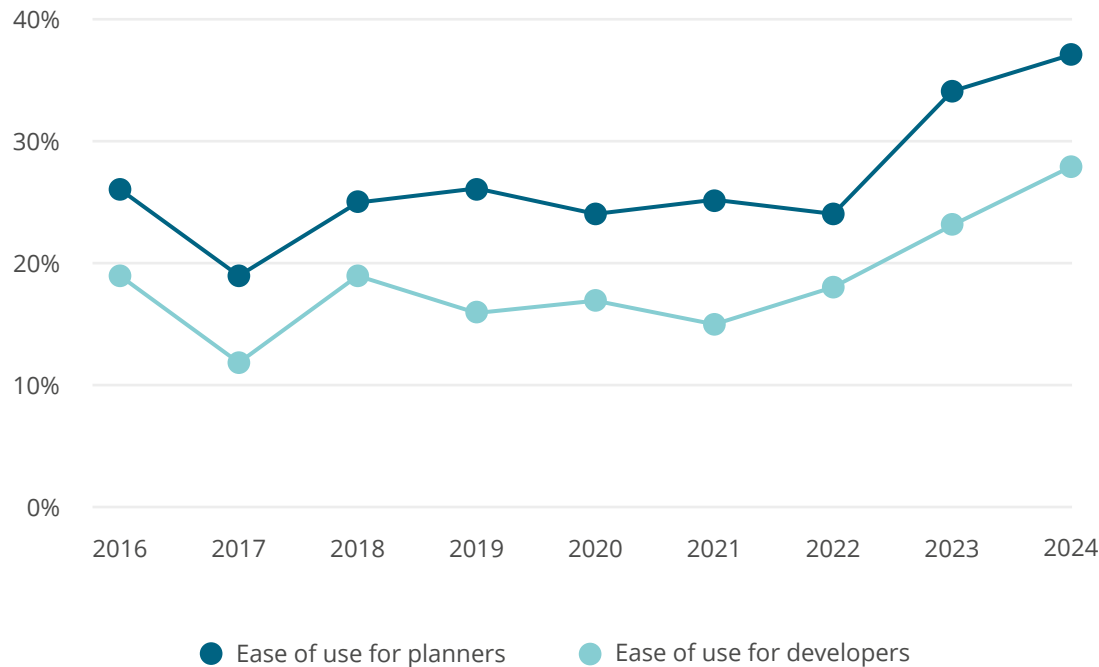


Figure 5: Time series 'Why was your product chosen?' – Most important reasons to buy planning and other CPM products

(n₂₀₁₆=565; n₂₀₁₇=1158; n₂₀₁₈=808; n₂₀₁₉=911; n₂₀₂₀=904; n₂₀₂₁=867; n₂₀₂₂=808; n₂₀₂₃=774; n₂₀₂₄=760)

Viewpoint



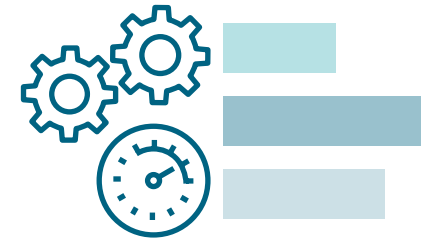
Self-service planning in business departments and finance self-sufficiency are already a reality in 7 out of 10 companies (68 percent). In order to reduce cycle times and to be less reliant on IT, companies are increasingly paying attention to user-friendliness and ease of use when selecting performance management software. This of course has accelerated in the past few years as the frequency of required plan updates has increased along with the need to shorten cycle times.

In our field work with customers who are evaluating planning systems, ease of use almost always tops the requirement list, often followed by the related finance self-sufficiency. Many of our planning system replacement projects are driven not by the need for some new capability, but by the need for a system that is easier to use (for both planners and administrators/developers) than their current solution. The existing system is usually an older on-premises solution or a collection of standalone spreadsheets. One change we have noted of late is that it is no longer just the large population of planners in the company clamoring for an easier system, but the handful of system administrators have now joined the fray, sometimes even leading the charge.

One of the biggest challenges organizations have with planning systems is adoption and utilization. People are already overwhelmed and don't have the time nor interest to learn a new system. At the same time, companies are reluctant to push users to adopt these systems, instead relying on the pull of the availability of a useful new tool to make life easier for all concerned. Ease of use is critical to this approach.

The Trends in Detail

Integrated Performance Management



Unified performance management requires an integration of planning with other aspects of performance management

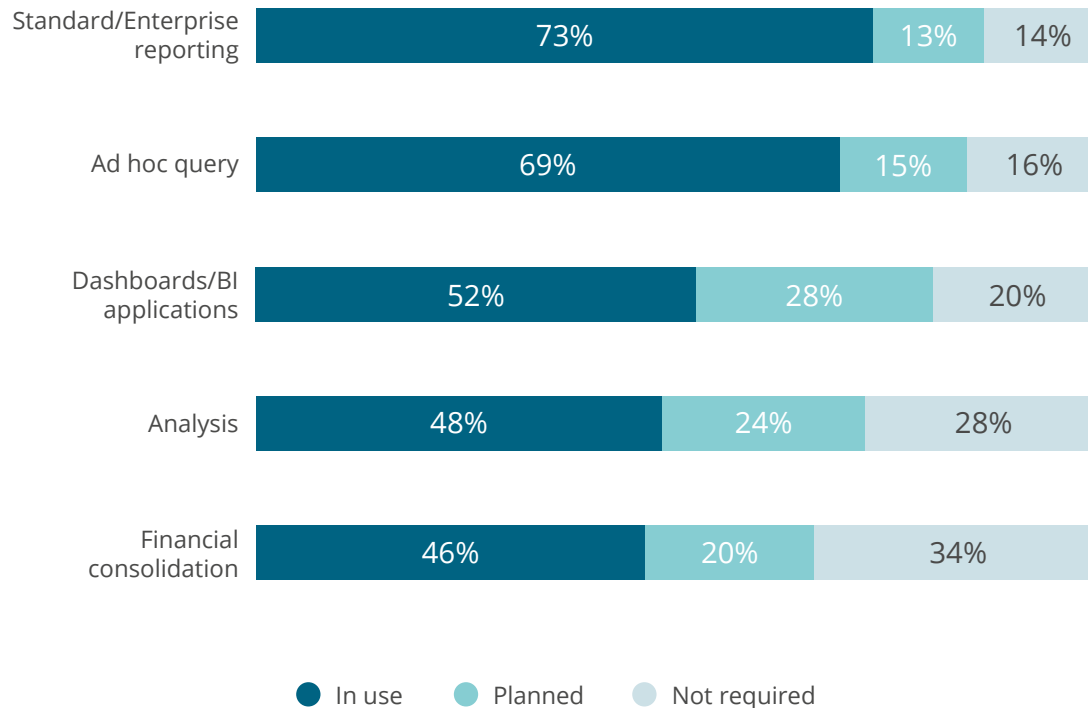


Figure 6: Do you use or plan to use the product (aside from planning) for the following tasks? (n=1,112)

Viewpoint



Decision-making in an increasingly complex and volatile world requires transparent plans and data analyses. The seamless integration of performance management helps to support decision-making processes optimally.

Besides planning, standard/enterprise reporting and ad hoc query are the main BI and analytics requirements companies look for in their CPM products today. Moreover, dashboards/BI applications and analysis are also frequent use cases. In particular, dashboards are emerging as a requirement for the future as our "visual" age of charts, emoticons and infographics continues and insights from millions of records need to get condensed into a single icon. What's interesting is that when performance management projects first became a priority companies started with (performance) dashboards and connected them to existing data warehouses. Over time planning itself became the key focus area.

Experience from consulting projects shows also that financial consolidation is becoming a requirement for an increasing number of companies (20 percent plan to use their software for financial consolidation in the future). In particular, the planning of an organization's financial results (e.g., balance sheet, income statement, cash flow) may also require a consolidation of the financial plans of individual companies and subgroups if viewed at group level. For this reason, functionality for financial consolidation is often needed in financial planning and is an increasing requirement for some companies but not all. However, some companies think financial consolidation is only for external reporting when in fact it is key to providing that 'one version of the truth' required for management reporting as well. That's why most of our consulting projects include at least some aspects of financial consolidation.

Integration of planning, budgeting and forecasting with analytics and business intelligence (BI)

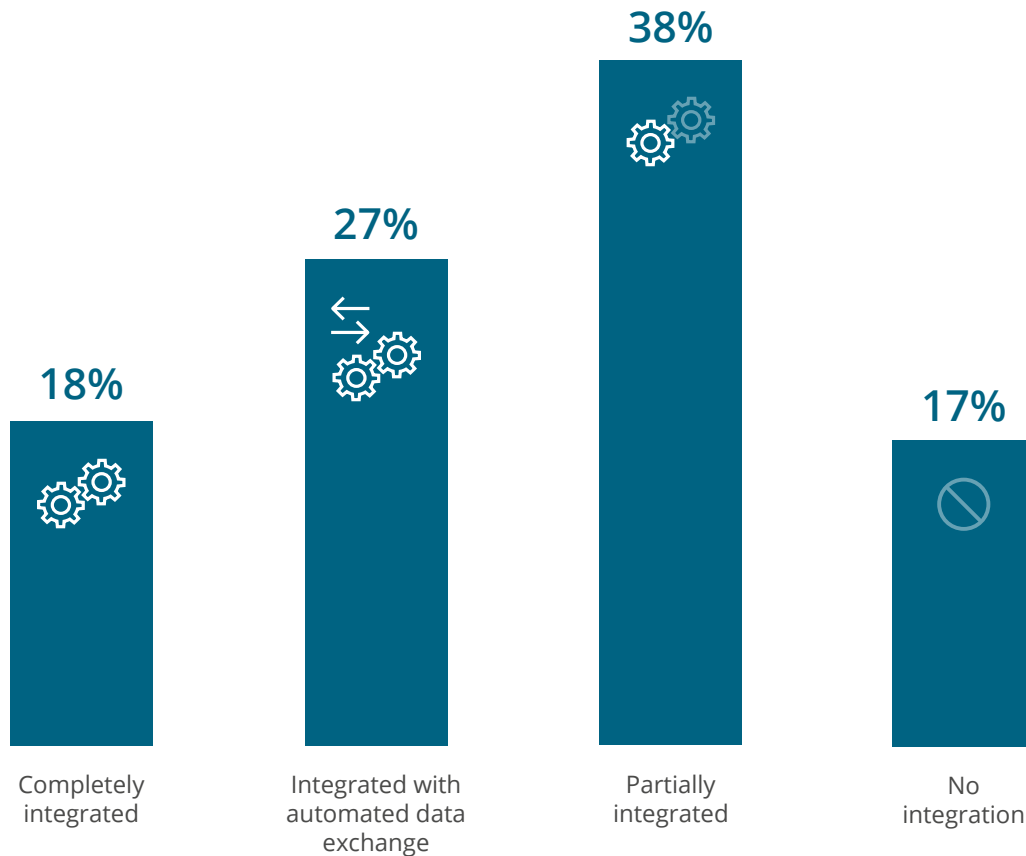


Figure 7: How far advanced is the integration of planning and budgeting with analytics and BI?

(n=664)

Viewpoint



The management of organizations profits from a seamless integration of analytics and planning functionality. Only this integration allows the comprehensive and – at the same time – efficient verification of the achievement of objectives as well as the successful application of statistical methods and machine learning in planning and forecasting.

As of today, just 45 percent have largely automated or fully integrated both areas. Despite an extensive range of products on the market that offer this capability, only 18 percent have managed to build a uniform model for plan and actual data based on the same software. Therefore, four out of five companies first have to carry out time-consuming data transfers between planning and analytics for important analyses or to check the achievement of objectives. Some organizations perform this data exchange automatically, but this also requires uniform master data, coordinated processes and sufficient resources to adapt and maintain the interfaces.

Being able to utilize the latest BI and analytics tools with direct real-time access to performance management data (planning and in many cases actual data that has been brought over as part of integrated financial consolidation) is becoming a new priority. Performance management vendors are slowly but surely working to make this specific integration capability more widely available with new and updated certified connectors for the top BI solutions (e.g., Microsoft Power BI).

Integration of planning, budgeting and forecasting with financial consolidation

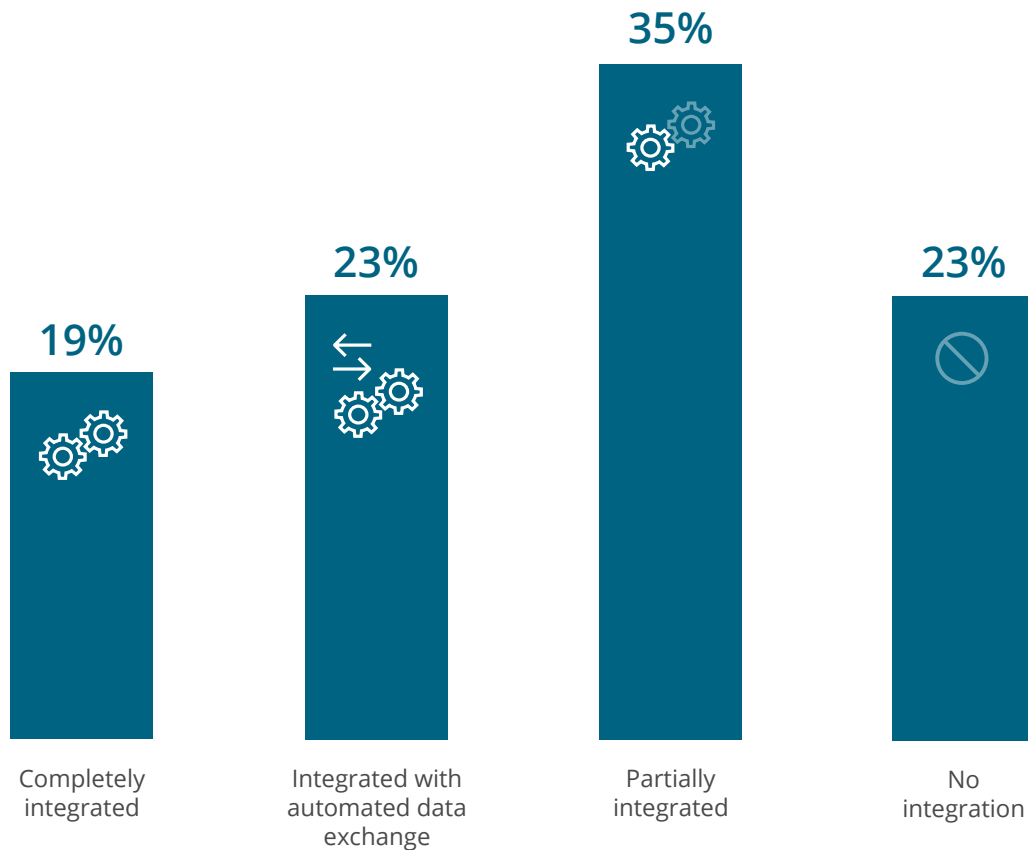
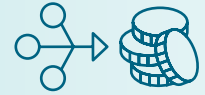


Figure 8: How far advanced is the integration of planning and budgeting with financial consolidation?

(n=664)

Viewpoint



Financial consolidation is essential to combine the financial data of several legal entities in group financial statements, eliminating intercompany transactions (IC) to accurately present the group's financial performance according to legal requirements (consolidated P&L, balance sheet, cash flow). The preparation of consolidated financial statements for all the individual legal entities of a group is not only obligatory from a financial and legal point of view, but also serves as orientation for all decisions relevant to the group as well as for the planning and controlling of the entire organization. In addition to consolidating actuals, financial planning at group level also requires a consolidation of the data from individual legal entities.

42 percent of the companies surveyed have largely automated or fully integrated both areas. As of today, 23 percent of organizations have not integrated planning and budgeting with financial consolidation. The number of vendors offering financial consolidation alongside planning and budgeting has been steadily increasing, largely through acquisitions, but also through organic development. This increases the options available to more easily accomplish this goal.

The Trends in Detail

Use of Planning Product in the Cloud



New solutions are predominantly implemented in the cloud – also for planning and other performance management use cases

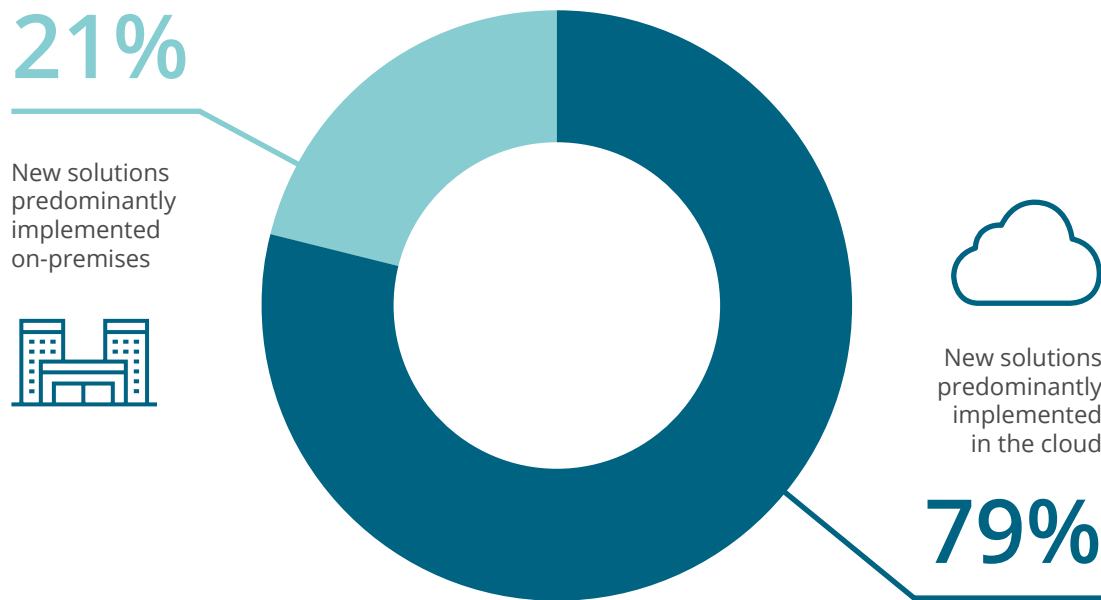


Figure 9: Which statement about your general IT strategy is most applicable?
(n=661)

Viewpoint



The use of software in the cloud is a trend that can no longer be dismissed and is also a valid implementation option for performance management software. Several purely cloud-based products have been released in recent years and some have already gained significant market share.

The use of cloud-based planning has jumped from just 8 percent in 2016 to 50 percent in 2024. In contrast, the number of respondents claiming their company does not require a cloud-based planning and performance management product is declining fast. This finding shows that companies increasingly recognize the benefits of the cloud and that adoption levels continue to progress.

Today, new implementations are predominantly cloud-based. Reasons for this include increasing cost pressures, the efficient processing of large volumes of data, flexibility, scalability and a lack of internal IT resources. The introduction or modernization of software solutions is a necessary investment for optimization and many companies leverage cloud-based deployments for new implementations.

Vendor actions will only serve to accelerate this trend. Several vendors no longer market or sell their on-premises versions, and they have notified existing customers of the date when updates and support will cease for their on-premises product.

Europe and particularly the DACH region are still cautious when it comes to cloud-based planning

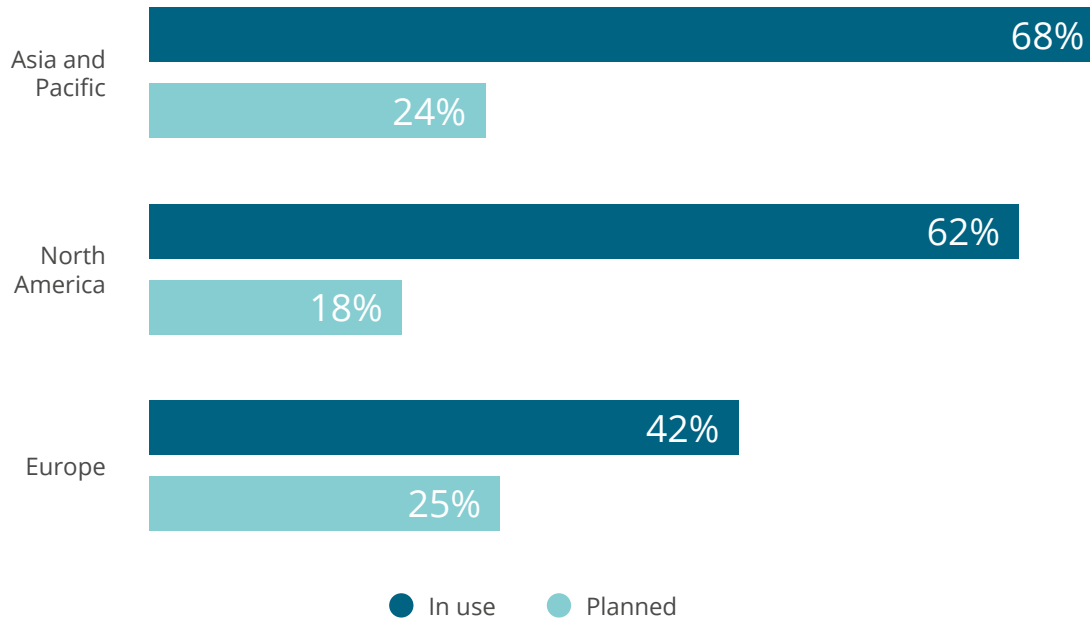


Figure 10: Which of the following does your company do/use with the product for planning and budgeting? Use of planning product in the cloud, by region

(n=1,404)

Viewpoint



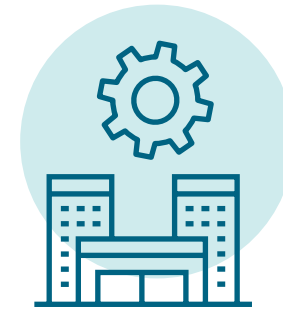
The general view on cloud-based planning is clearly colored by regional variations. Europe and particularly the DACH region are still cautious when it comes to cloud-based planning and other performance management use cases, whereas companies in Asia-Pacific and North America are much more open to the cloud. For example, 68 percent of respondents from the Asia and Pacific region are already using performance management software in the cloud, compared to only 42 percent in Europe.

However, attitudes to cloud-based solutions – even in Europe – are changing fast. Many organizations claimed that cloud-based planning was neither planned nor conceivable in the past. This figure has since dropped to less than 10 percent today.

The main reason for using cloud-based planning software is the desire for greater flexibility and elasticity (54 percent). Because planning is subject to strong seasonal variation, there is a high usage pattern during budgeting and forecasting periods but the tools are used significantly less frequently at other times of the year. Furthermore, 'reduction of maintenance efforts', 'speed of implementation' and 'performance' are also compelling reasons for choosing a cloud-based planning product over an on-premises solution.

The Trends in Detail

Integrated Corporate Planning



Companies leverage their planning software for all kinds of planning for an integrated corporate planning approach

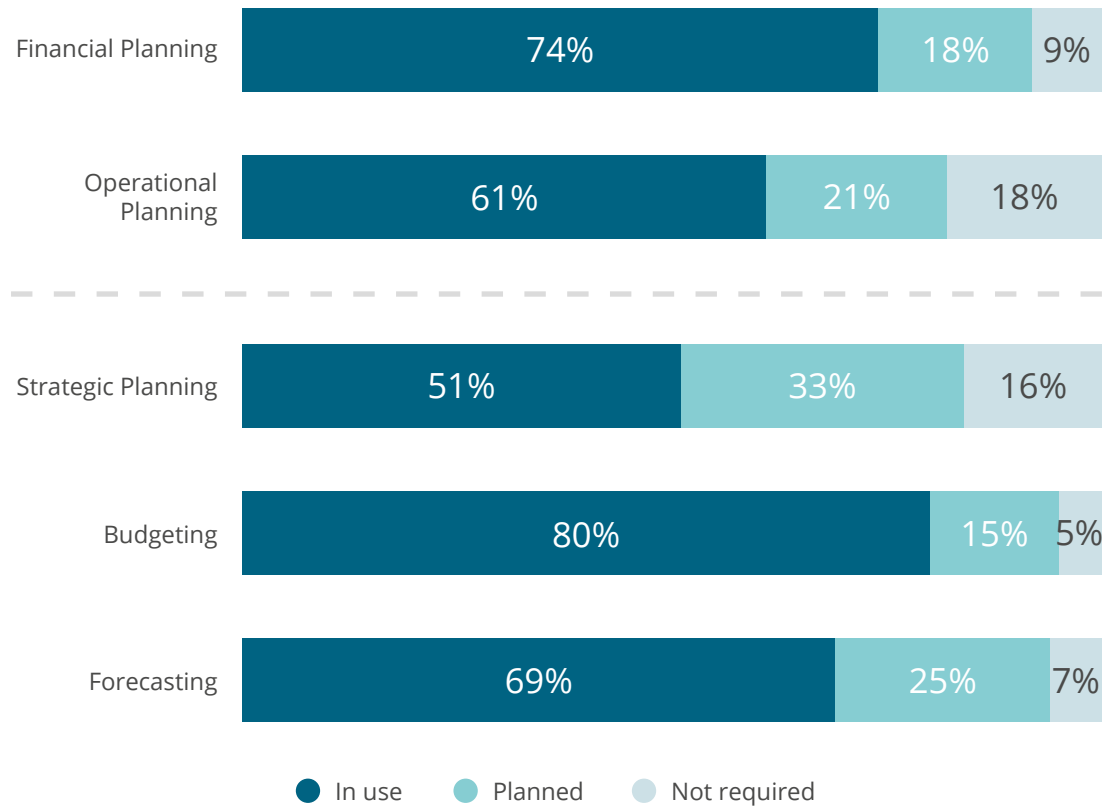


Figure 11: Do you use or plan to use the product for the following tasks? (n=1,130)

Viewpoint



Corporate management and sound business decisions need clear objectives. Using an integrated corporate planning approach, medium and short-term goals must be derived from strategic business objectives and operational planning needs to be integrated with financial results planning.

The survey results show that companies leverage their planning software solutions for financial planning (74 percent) but also increasingly for operational planning use cases (61 percent). Here, planning takes place at different aggregation levels. 80 percent of organizations support their traditional annual budgeting processes with planning products. However, many are of the opinion that in the future it will be more important to rely on efficient forecasts and projections instead of tedious budgeting, which is reflected in the growing use of products for forecasting (69 percent). Planned use cases for the future notably include strategic planning (33 percent) and further expansion in the area of forecasting (25 percent). The increased interest in both strategic planning and forecasting is related to the challenging economic environment of the past several years. As companies have been forced to make dramatic short-term adjustments, they have had to update their forecasts more frequently and, in many cases, also incorporate some of those changes into their longer-term strategic plan.

92% of companies confirm that the integration of strategic, financial and operational planning creates high added value to corporate management

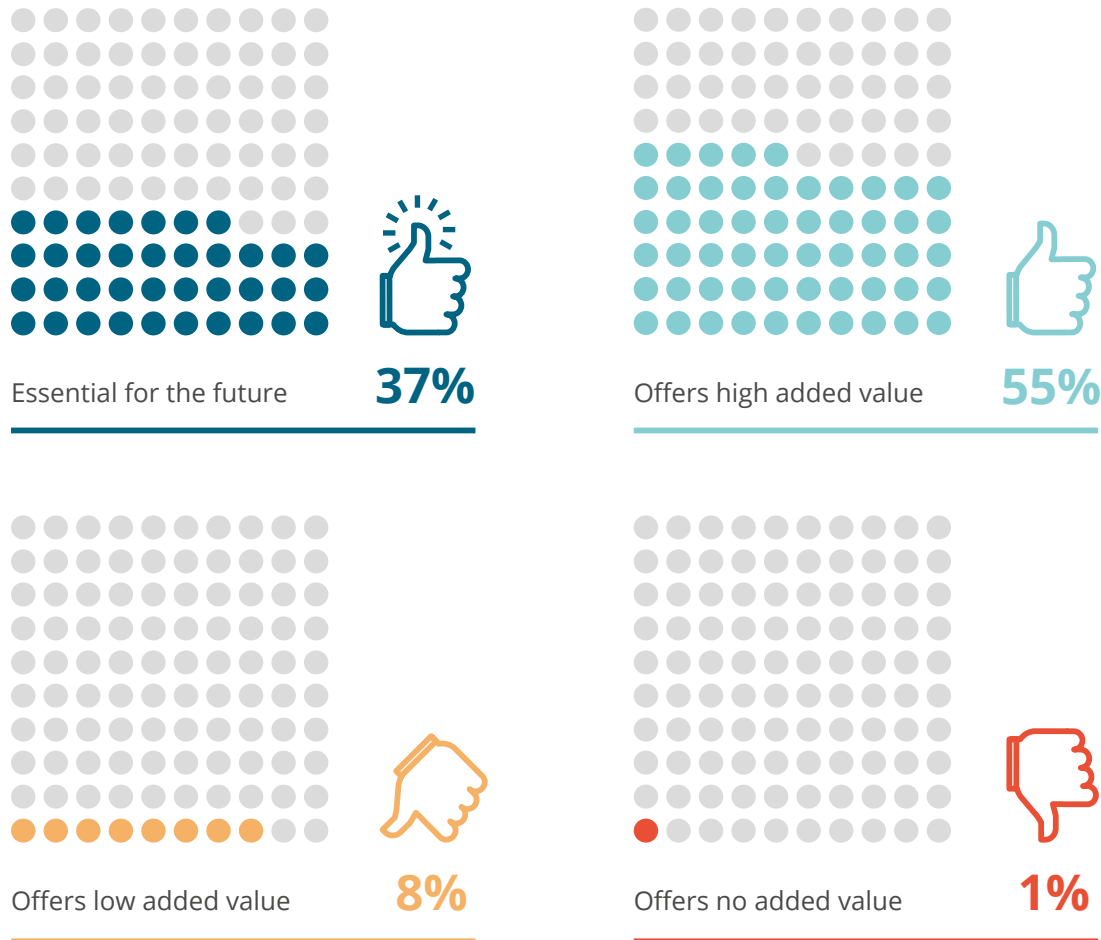


Figure 12: How important is the integration of strategic, financial and operational planning to the management of your company?
(n=697)

Viewpoint



Determined corporate management requires prompt and well-founded decisions. Organizations face an increasingly dynamic environment with more frequent and comprehensive forecasts, simulations and analyses. Increasing market dynamics and growing time pressure are forcing companies to update their targets and forecasts at ever shorter intervals. Planning, budgeting and forecasting must be adapted to these new requirements. With markets becoming more dynamic and fast-moving, it is expected that the relevance of carefully integrated corporate planning, which provides valuable information and insights to management, will continue to increase. The hope is that excelling in this area will give companies a clear competitive advantage.

Holistic integration of strategic, tactical and operational plans, but also all sub-plans with each other and with results planning, is the essential foundation for high-quality results in corporate planning. More than that, it is the backbone for the use of modern planning approaches. This applies not only to value driver-based planning but also to the use of statistical methods and machine learning (predictive planning and forecasting). For as many as 91 percent of respondents, it is clear that the integration of strategic, financial and operational planning creates high added value or is even essential for corporate management. It all ties back to the original and straightforward definition developed by BPM Partners: Performance Management enables an organization to plan, monitor and execute on its strategy.

The integration of strategic plans with operational planning is essential to ensure consistency of long-term goals with short-term objectives

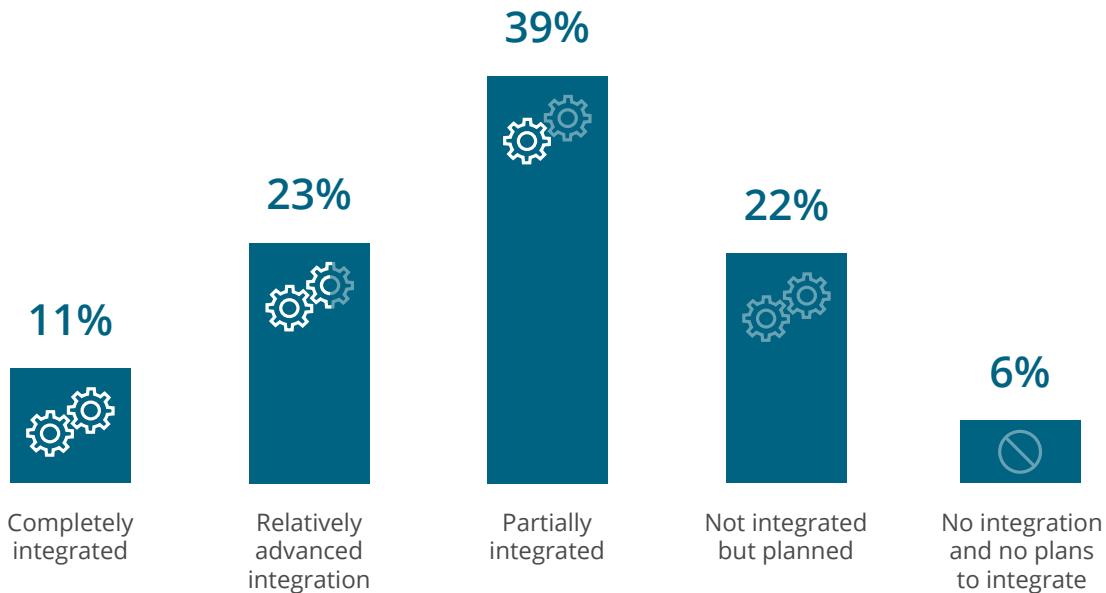


Figure 13: How far advanced is the integration of your strategic plans (long term, medium term) with operational planning (short term)?

(n=693)

Viewpoint



Integration must be implemented conscientiously at all levels to maximize its benefits. Integrated corporate planning quickly provides reliable and relevant information for corporate management only when all facets of integration are addressed simultaneously. However, organizations must not underestimate the effort required to thoroughly integrate all sub-plans.

Objectives and assumptions from strategic planning must automatically be incorporated into annual planning. This is the only way to ensure that a company's long-term goals are consistent with its medium and short-term goals. Corporate strategy provides the framework for annual planning and budgeting. It is essential to fully convey the strategic guidelines into the detailed annual planning data in order to provide orientation and content for tactical and operational management. Many companies plan to invest in strategic planning, making it the planning use case most likely to expand in the future.

Today, just one-third of the companies surveyed (34 percent) have largely or completely integrated strategic and operational short-term planning. The majority of organizations (61 percent) currently only have partial integration or are planning to merge strategic and operational planning in the future. In these organizations, planning medium to long-term strategic corporate goals is thus isolated from operational, short-term planning. Changes to strategic plans do not directly affect operational plans and have to be merged at great (manual) effort. Similarly, the impact of short-term changes dictated by current market conditions may also need to be factored into strategic plan updates.

The integration of operational plans with financial results planning is important for corporate planning

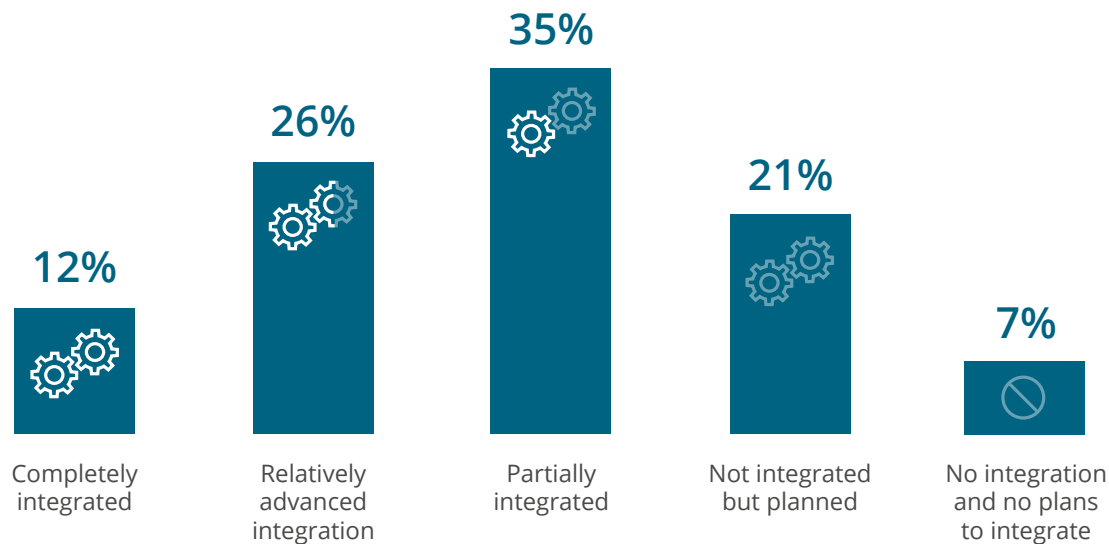


Figure 14: How far advanced is the integration of your financial planning (e.g., P&L, balance sheet, cash flow) with non-financial sub-plans (e.g., sales, production, resources)?

(n=682)

Viewpoint



The linking of all sub-plans with each other (e.g., sales, production, resources) and with financial results planning (balance sheet, P&L, cash flow) is at the core of integrated corporate planning. All integrated sub-plans must be linked to results planning too in order to correctly represent the financial view of an enterprise. Results planning only has the necessary informative value if the dependencies between individual sub-plans are taken into account and these are fully integrated, and also that results from sub-plans are included in results planning. The effects of operational plans on the financial results of a company are only directly visible and conclusive when plans are fully integrated.

Currently, only 38 percent of the companies surveyed have largely or completely integrated financial planning with operational sub-plans. In 56 percent of organizations, integration is either limited or planned for the future. This is a critical situation as increasing demands on the frequency and speed of the provision of adjusted forecasts mean that comprehensively integrated functional models are a must. Isolated models with cumbersome and error-prone data transfers can no longer satisfy the requirements of today's decision-makers. Specifically, how can they have confidence in achieving their financial plans if they cannot easily access and/or trust the operational plans that support the financial plans? An important approach to achieving rapid response capability is to reduce the level of detail in planning. Companies should look to dispense with details and focus instead on the bigger picture using sophisticated simulations and intensive analyses to derive insights for management in a timely manner.

The Trends in Detail

Simulation and Analysis of Scenarios



Only one in two companies claims that using simulations to better estimate the impact of important decisions is highly relevant to them

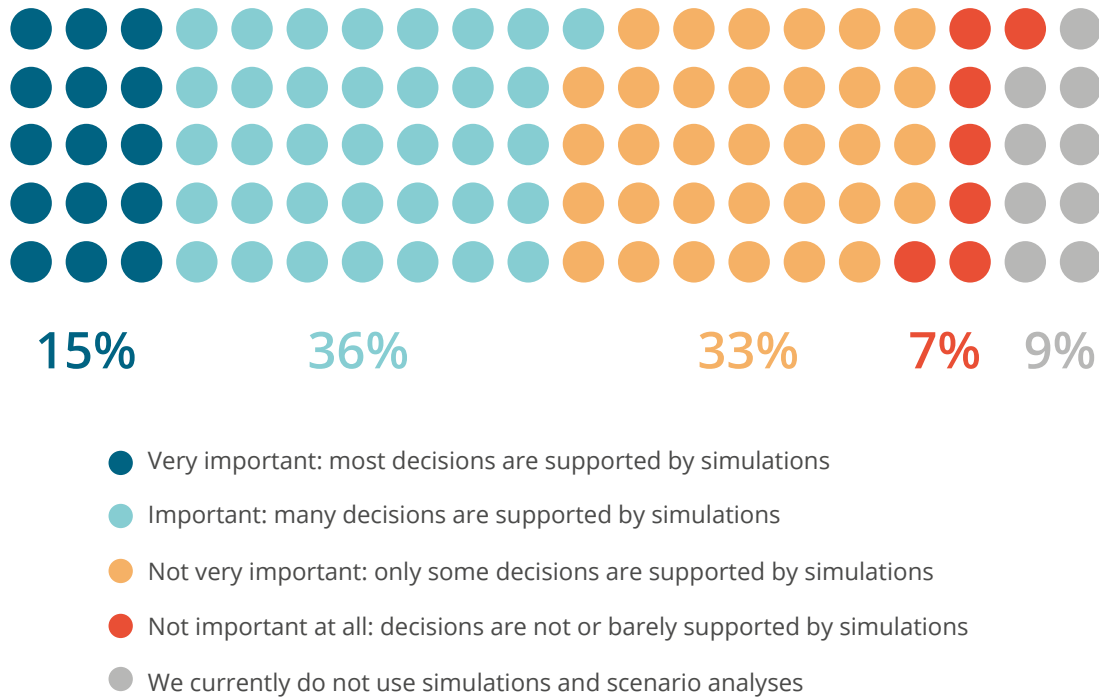


Figure 15: How important are simulations and scenario analyses in your company for corporate management and decision support?

(n=707)

Viewpoint



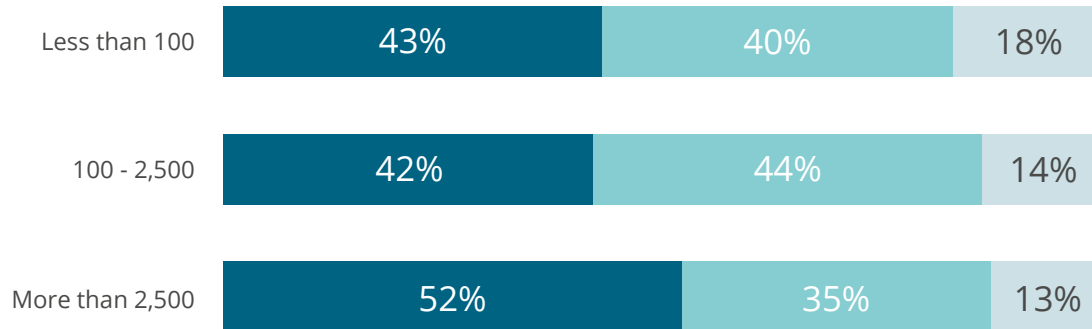
Simulations are essential for corporate management and the well-founded evaluation of alternative courses of action. They can provide important information for decision-makers, particularly in dynamic and uncertain situations, to better evaluate possible future developments as well as a company's own measures.

The survey results show that the importance of simulations for corporate management has increased. Increasing market dynamics and the associated uncertainty are major reasons for this. 51 percent of the organizations surveyed confirm that using simulations to better estimate the impact of important decisions is highly relevant to them. Only a few organizations do not use simulations for corporate management.

When using simulations, companies analyze and compare different scenarios in a well-founded manner so they can evaluate possible future developments as well as external effects. This allows important information to be obtained for corporate management as a basis for decisions. Scenarios – both positive and negative – must be enriched with risk assessments and measures to evaluate probabilities and possible action alternatives. The simulation of scenarios is a decisive factor in competition to prepare for future developments in the best possible way and to identify opportunities and risks.

Simulations and scenario analyses are a common tool in daily finance and controlling practice in large organizations – North America slightly behind

Importance of simulation and analysis of scenarios by company size



Importance of simulation and analysis of scenarios by region

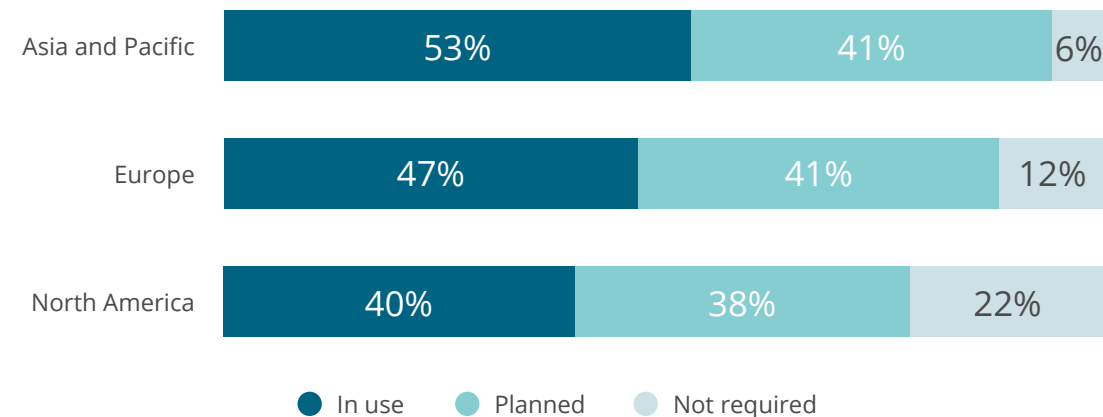


Figure 16: How important are simulations and scenario analyses in your company for corporate management and decision support? By company size and region
(n=1,097 and 1,100)

Viewpoint



Simulations and scenario analyses are among the capabilities that help provide the agility companies seek today. Many organizations recognize the value of analyzing different scenarios before making a decision leveraging mathematical business models and variable input values (parameters).

In recent years, vendors have been enhancing their offerings in this area to provide for easy set-up of best-case, worst-case and expected (or base) case scenarios, as well as storing multiple versions and allowing side-by-side comparisons. Through AI augmentation and generative AI, leading solutions even enable natural language scenario building and analysis to improve business user experience.

Independent of the potential of simulations and the capabilities of market-leading software, our experience from research and consulting shows that their use is far from universal.

While simulations are a common tool in daily finance and controlling practice in more than 50 percent of the large companies and groups surveyed, small and medium-sized enterprises are lagging somewhat behind in this respect. However, more than 40 percent of SMEs are planning to expand their use in the medium to long term.

From a regional perspective, Europe and Asia-Pacific (47 percent and 53 percent respectively) have seen greater adoption of simulations and scenario analyses so far than North America (40 percent).

The Trends in Detail

Value Driver-Based Planning



Almost one in two companies confirm the use of value driver-based planning models to focus planning activities on the main influencing factors of business

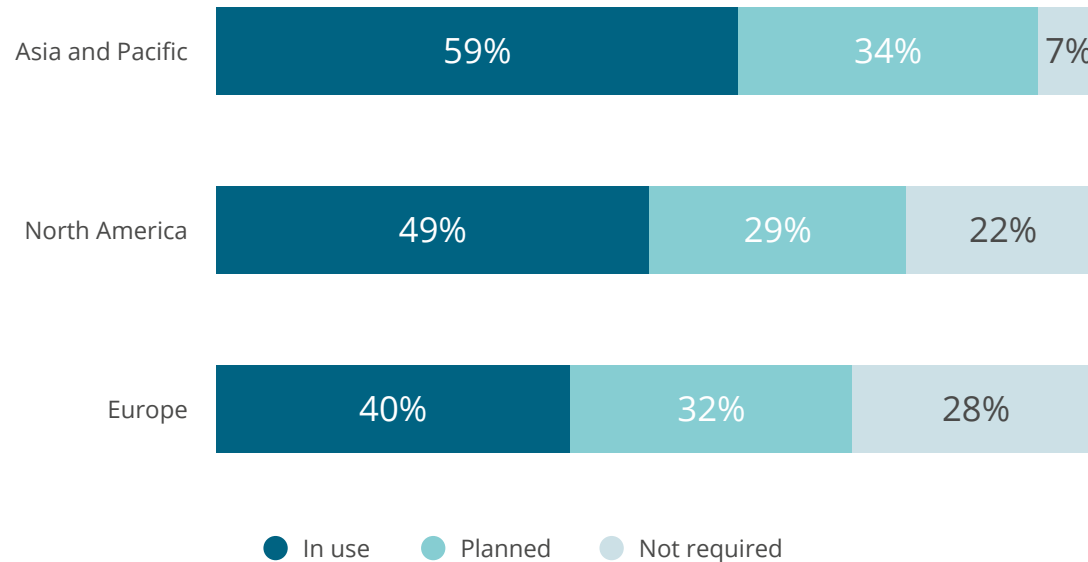


Figure 17: Which of the following does your company do/use with the product for planning and budgeting? Value driver-based planning, by region (n=1,042)

Viewpoint



Planning based on real value drivers with consideration of cause-and-effect relationships can help to reduce planning efforts and ease the burden on planners. The goal behind this approach is usually to focus a company's planning activities on the main business influencing aspects without wasting resources. Driver models describe the essential business contexts of a business model and are suitable for flexible simulations of effects, as the effects of changes in individual factors or measures can be shown quickly and transparently. Value driver orientation often goes hand in hand with a stronger top-down orientation.

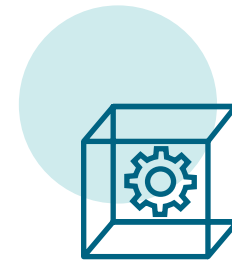
44 percent of the companies surveyed have already implemented value driver-based planning models and another 31 percent plan to use driver-based planning approaches in the future. A value-driver-oriented approach can improve informative value and efficiency, and also forms the basis for elaborate simulations.

Value driver-based planning is primarily a business planning approach, not a technical one. This is why the biggest challenges in its implementation are often non-software-related (e.g., lack of resources and methodological expertise, implementation effort, difficulty identifying the main drivers, their influencing factors and dependencies).

As adoption grows, vendors are looking to enhance their capabilities in this area by, for example, leveraging AI to help identify the most impactful drivers. It is interesting to note that Asia and Pacific (59 percent) is significantly ahead of North America (49 percent) and Europe (40 percent) in adoption.

The Trends in Detail

Predefined Planning Solutions



Organizations, particularly in the Asia-Pacific region, use predefined planning solutions to accelerate time to value and benefit from vendor best practices

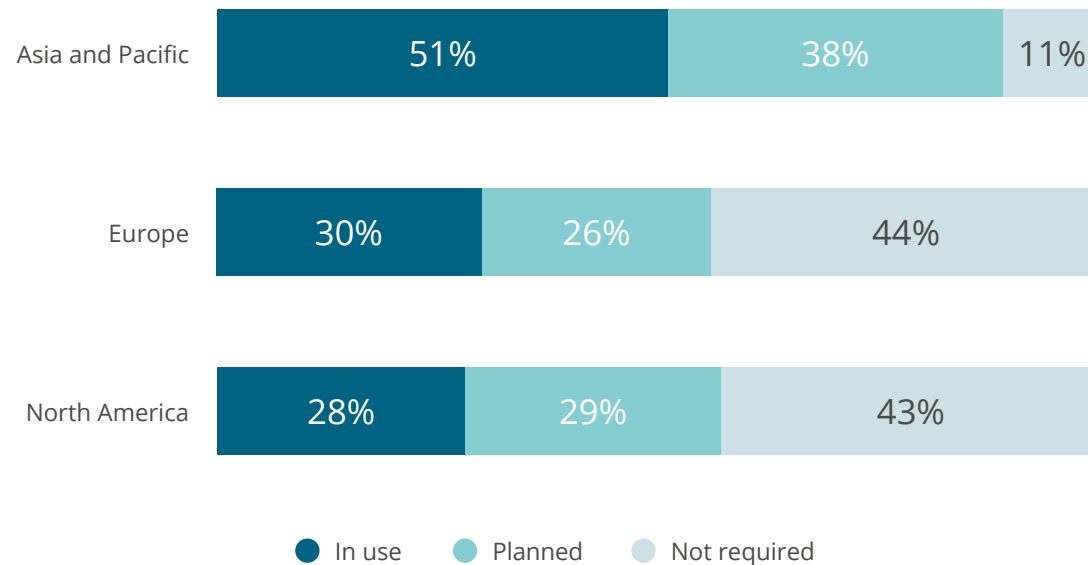


Figure 18: Which of the following does your company do/use with the product for planning and budgeting? Predefined planning solutions, by country

(n=988)

Viewpoint



Predefined planning solutions and applications are the next frontier for vendors to differentiate themselves. These solutions can save companies significant time and money in terms of implementation. While many appreciate the openness and flexibility of vendor offerings that lean more towards the platform end of the spectrum, these predefined solutions are often a better approach for business users who are less comfortable using a platform's tools to build their own solutions. Built on top of a vendor's platform by the vendor or a partner, end users get the best of both worlds: the option to use the platform to address unique needs, and predefined solutions for more universal needs (with configuration to personalize). In addition to shortening time to value, these solutions also incorporate vendor-determined best practices which should minimize errors and optimize performance. Today, predefined solutions are available for many operational areas, regulatory requirements, and industry-specific use cases.

While predefined planning solutions currently have the lowest interest globally (41 percent not required), we believe that will increase in the future as more vendors roll out appealing options that address more and more use cases and fast time to value is an important requirement for companies. We also believe there is some hesitation tied to experience with earlier iterations of these solutions, which were fairly basic. Today, predefined planning solutions are especially relevant in the Asia-Pacific region (in terms of actual and planned usage), while their relevance is significantly lower in Europe and North America.

The Trends in Detail

Predictive Planning and Forecasting



Two-thirds of companies think that predictive planning and forecasting have high relevance to their corporate planning

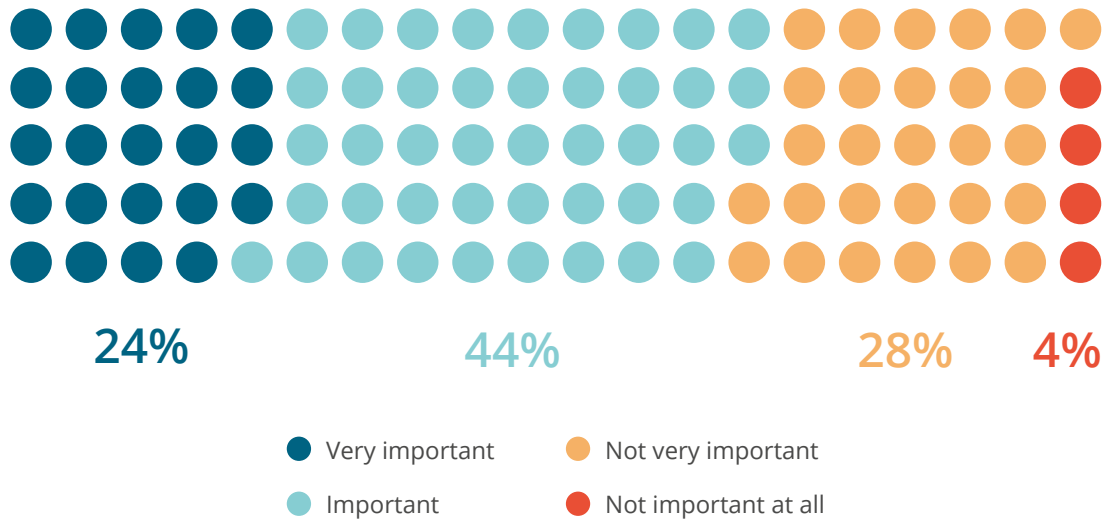


Figure 19: How important or relevant are predictive planning and forecasting for your company?
(n=719)

Viewpoint



AI and predictive technologies are major trends in almost all areas of the IT market. As a result, many organizations are looking to leverage their potential for planning, budgeting and forecasting. A key challenge in corporate planning is to generate meaningful, high-quality planning figures with minimal effort and short cycles. This applies to traditional budgeting, but increasingly also to short-term forecasting. For more than two-thirds of the companies surveyed (68 percent), predictive planning and forecasting are of high to very high relevance.

A better quality of extrapolations and simulations, the relief of planners through automated processes and easier identification and evaluation of drivers are the top three benefits companies expect from predictive planning and forecasting. The quality of planning results and the high level of effort required by planners are major criticisms of today's planning processes in many companies. In terms of automation, predictive planning does not have to replace human planners but it can relieve them by calculating proposals for plan values that they can then adapt. In this way, planners stay involved in planning processes but are spared some of the routine tasks. The goal of predictive planning is to support rather than replace human planners.

While interest remains high, adoption has been relatively slow. Part of the reason is that business users have been hesitant to trust AI in general with their data and decisions. Early vendor messaging didn't help as it made it appear that predictive forecasting would take the lead, as opposed to augmenting the work of business users.

More than 50 percent of companies plan to leverage AI and machine learning in planning and forecasting

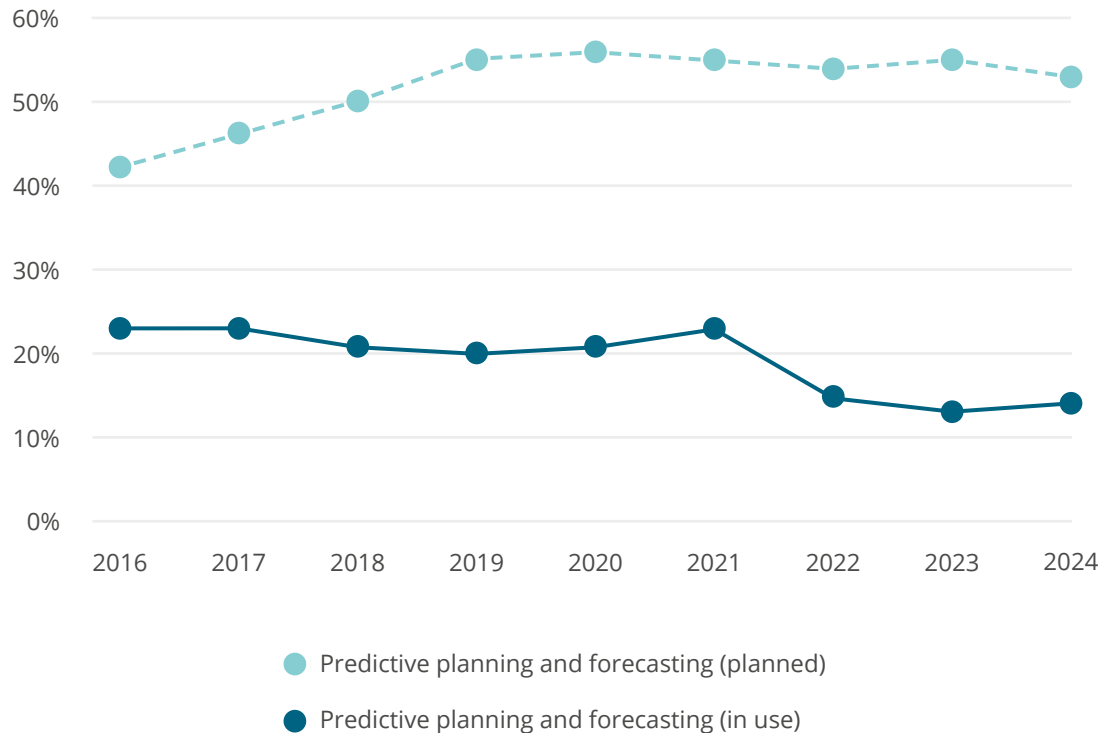


Figure 20: Predictive planning and forecasting usage timeline

(n₂₀₁₆=573; n₂₀₁₇=1,169; n₂₀₁₈=812; n₂₀₁₉=932; n₂₀₂₀=908; n₂₀₂₁=884; n₂₀₂₂=832; n₂₀₂₃=783; n₂₀₂₄=1,100)

Viewpoint



Until 2019, the percentage of companies planning to make use of predictive planning was increasing. However, it has stagnated somewhat in recent years and the rate of 'planned' use is now at 53 percent. Nonetheless, more than half of the companies surveyed are interested in predictive planning and plan to implement it in the future. In sharp contrast to the 'planned' usage rate, the proportion of companies that are already using it has dropped significantly in recent years to just 14 percent. On a global basis, current usage is highest in Asia (37 percent), followed by North America (14 percent) and Europe (11 percent).

The successful implementation of predictive planning presents a number of challenges. Companies need to identify appropriate use cases and establish the necessary prerequisites (know-how, financial and human resources, etc.). In addition, a lack of data quality and availability is a major obstacle to accurate forecasting. Only the right data, of the right quality, with the necessary granularity and sufficient history, allows solid predictions of likely future developments. Accurate forecasting requires a sufficiently large and well-maintained data set to train algorithms. A deep understanding of cause-and-effect relationships and a high degree of integration and maturity of planning and analytics are essential. Information gaps in historical data must be filled and the possibility of unprecedented events must be considered. In addition, accurate forecasting requires perfectly selected and continuously trained algorithms. Ultimately, business decision-makers must trust the algorithms, which is especially challenging when using potentially intransparent or "black box" algorithms.

Companies expect predictive planning and forecasting to bring about extensive improvements in their planning

Suggested values for planners in budgeting and forecasting process



Validation and quality assurance of manual planning



Greater use of internal data



Identification and validation of driver dependencies



Automated execution of simulations and scenario calculations



Use of statistical methods



Use of machine learning and artificial intelligence



Fully automated forecasting



Increased involvement of external factors



Use of big data



Other



Figure 21: With which approaches do you plan to use predictive planning and forecasting in your company?

(n=597)

Viewpoint



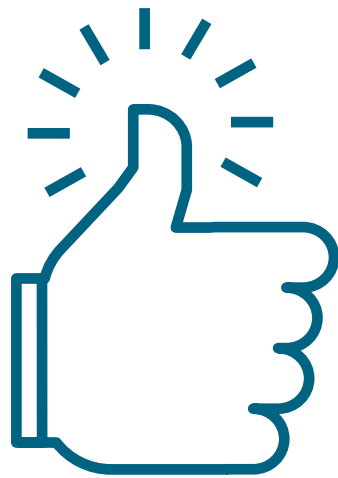
Companies expect predictive planning and forecasting to bring about extensive improvements in their planning. The majority of survey participants want to achieve greater efficiency and effectiveness, above all through suggested values for planners (64 percent). The validation and quality assurance of manual planning is also a common approach (46 percent). Both approaches – suggested values and validation – are suitable for testing and improving the models used against reality.

High-quality forecasts and consistent plans require conclusive driver models to capture dependencies within the enterprise on a value basis. With advanced analysis, correlations can be identified (36 percent) that remain hidden by classical analysis. Internal data not previously used for corporate planning must be used more intensively (38 percent).

Only 24 percent of companies see fully automated forecasting as a realistic goal. This reflects the expectation that predictive algorithms will deliver better results than human planners, primarily in selected areas but not generally.

By analyzing vast quantities of historical data using machine learning/deep learning, predictive forecasting can identify trends, seasonality, impacts of external factors, key drivers and more that individual business users would not be able to easily do on their own. If properly trained on the customer's data, made easy to use, secure, trustworthy and transparent, and positioned as a solution to supplement (not replace), predictive planning and forecasting should see wider adoption.

Recommendations



Recommendations



Sound planning and forecasting are becoming increasingly important for business management. For the future orientation of corporate planning, several major challenges need to be addressed: Lack of efficiency, excessive bureaucracy, long cycle times and lack of transparency in planning processes. Many of the planning approaches and performance management

concepts analyzed in this study can help address these challenges. The increasing importance of many of the trends covered in this report also supports this observation. Based on our survey findings, we have the following recommendations on how best to embrace the trends described in this study:

1

Use a modern CPM solution to boost productivity in your planning and related performance management processes

The right software is a key lever for effective and efficient performance management. If you are still relying primarily on Microsoft Excel or spreadsheets, the move to a modern CPM solution will deliver a dramatic improvement in terms of accuracy / reduction of errors, ease of use and user satisfaction. It will also be much less labor-intensive and deliver faster planning, closing and reporting cycles.

For many companies, especially laggards, Excel is still the tool of choice to support planning and additional performance management processes. However, Excel spreadsheets without an underlying database or specific planning functionality are devastating in today's increasingly dynamic world where the need for data-driven management decisions is paramount. Problems, dissatisfaction and low levels of business value are the inevitable consequences of using Excel as a performance management product. You can be assured that dedicated tools for planning and other performance management use cases will provide comprehensive functional support, ease of use for business users, consistent data and great value to your organization.



2

Plan to move to a modern cloud-based performance management solution if you haven't already

If your organization is now primarily purchasing and implementing cloud-based solutions, as the majority of companies in this study are, CPM should not be an exception.

You have read in this report about the significant benefits of cloud-based performance management solutions and the growing adoption and plans around the world. Consider joining the crowd that is already using, or will soon be using, a planning product in the cloud. Of course, you will be moving to a solution that has years of support and enhancements ahead of it.

If you are still using an on-premises performance management solution the upgrade to a cloud-based CPM solution will bring significant benefits. The cloud provides scalability for modern planning. The move to the cloud is motivating organizations to modernize their planning approaches and offers the opportunity to leverage all the new innovations discussed in this report around AI, operational planning, scenario simulation and analysis, predefined planning solutions, self-service planning and more.



Recommendations



3

Start working towards the full integration of strategic planning, financial planning and operational planning

While each of these planning areas provides benefits on its own, as we discussed in this report, integration magnifies the possible results that can be achieved.

If you are already using your system for financial planning, consider a simple expansion to one aspect of operational planning. Based on your current priorities and industry, it might be sales performance management, supply chain planning and analysis, ESG planning and reporting, or one of the most common first operational steps: workforce planning, which focuses on HR resource management. Each of these operational plans will underpin the validity and traceability of your financial results planning. Workforce planning, for example, focuses on having the right people with the right skills and the right incentives to achieve your financial plans (not to be confused with salary planning).

In today's environment, it is highly likely that you also need to revise your strategic plans more frequently than in the past and integrating that into your current CPM solution will make that easier to do, and then it can also feed high-level parameters into your next financial planning cycle. Only a holistic integration of all planning levels - strategic, financial and operational - can provide a reliable basis for sound and transparent decision-making.



4

Leverage better integration of performance management to make informed decisions

Many companies are realizing the benefits of linking corporate planning, financial consolidation, BI and analytics to make better decisions. Key benefits of integrated performance management include reduced manual effort, improved data and decision quality, accelerated task and process execution, and faster delivery of information to decision-makers.

Unified software platforms that provide integrated support for multiple performance management disciplines provide an ideal foundation for an integrated approach. If your vendor offers them, take advantage of integrated analytics and financial consolidation capabilities that work with your planning capabilities to improve the accuracy of your management reporting, reduce the time it takes to produce those reports, and instill greater confidence in the numbers among report consumers. In addition, if your solution offers comprehensive consolidation support, you can also address legal/ statutory reporting, if required.

If you are still deciding on your software, make sure you get comprehensive support for all your performance management needs. Flexible and easy-to-use software platforms with a wide range of functionality promise high user acceptance and agility for a variety of application scenarios.



Recommendations



5 Evaluate existing AI capabilities in your CPM product to best support your users

There is still significant skepticism and concern around the use of AI capabilities in performance management, especially for planning and forecasting financial results. The answer is to take it slowly. Business users should work with IT to understand what capabilities their current CPM solution offers and if IT is comfortable with testing them in a non-production environment.

Most CPM solutions incorporate some version of predictive forecasting (not always powered by AI, but you can get the general idea of the benefits). It is usually a fairly easy process to let the system create a proposed forecast for the remainder of the year based on historical data and trends. You can evaluate the forecast to see how close it comes to what you would have come up with on your own. You can also watch it over time to see how accurate it is compared to actuals as they come in. Once it proves itself (or not), you can determine how to make it available as a tool for other users to consider when creating their forecasts.

If that first experiment worked well, you can take a similar strategy with other AI capabilities. Simple ones to try are anomaly and outlier detection as well as natural language querying – asking the system to find some data using simple language commands. Some of the newer CPM releases use a GenAI chatbot for this which also handles more advanced use cases. Over time, you and the team will likely grow more comfortable leveraging these AI capabilities to make your jobs easier.

6 Focus on more than just software to achieve performance management excellence

Understand that excellence in planning and other elements of performance management is not just about technology and software. Processes, methodology and organization play a critical role in whether CPM is effective and delivers value to the business.

Optimize technology, methods and organization in a coordinated way. Isolated adjustments often result in short-term improvements. New methods usually require different software, but new software always enables new approaches and often more efficient processes. Software alone does not solve problems; it is merely the technological foundation for an agile and flexible environment.

The approaches and concepts described in this study offer the potential to take your performance management to the next level. However, in addition to technological support, processes and organization must play their part in the improvement.



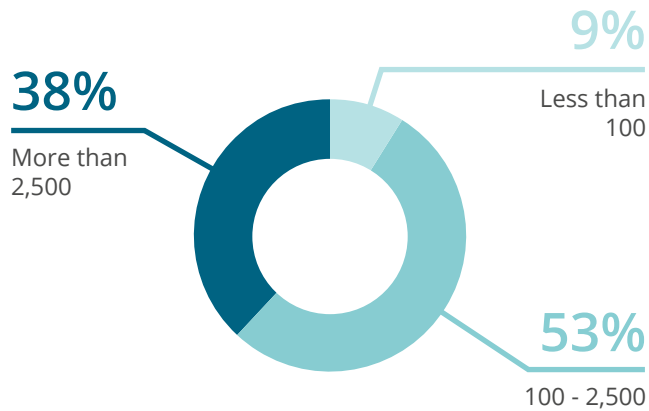
Sample / Methodology



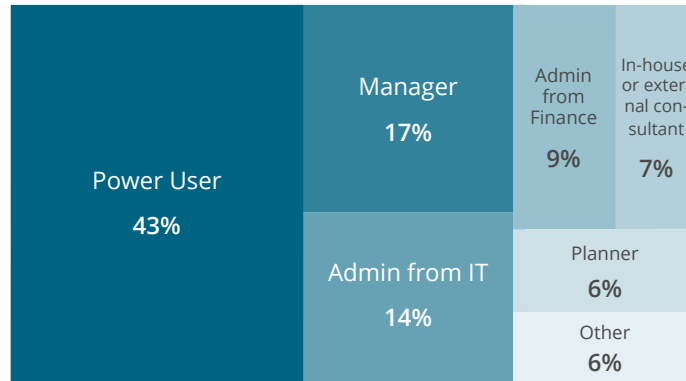
1,355 participants in total. Wide coverage of different industries, company sizes and regions



Number of Employees



Role



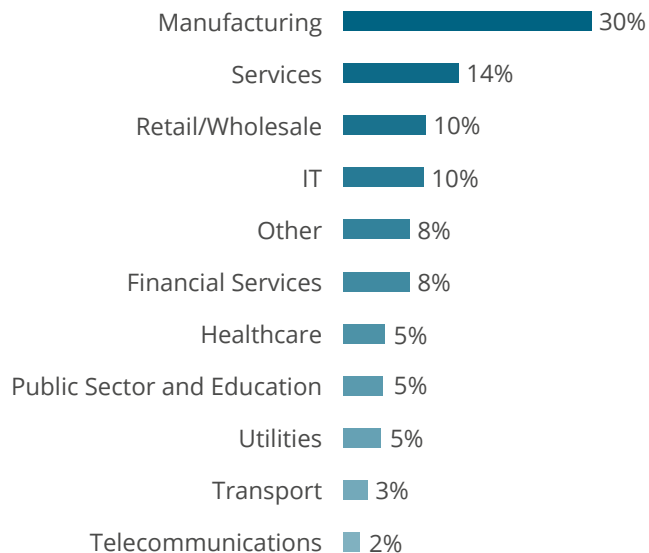
Information on the Survey

The data used in the Global CPM Trends and Priorities Report 2024 was sourced from two online user surveys conducted by BARC and BPM Partners. The field phases were conducted worldwide between November 2023 and May 2024. BARC and BPM Partners promoted the surveys on websites, at events and in email newsletters.

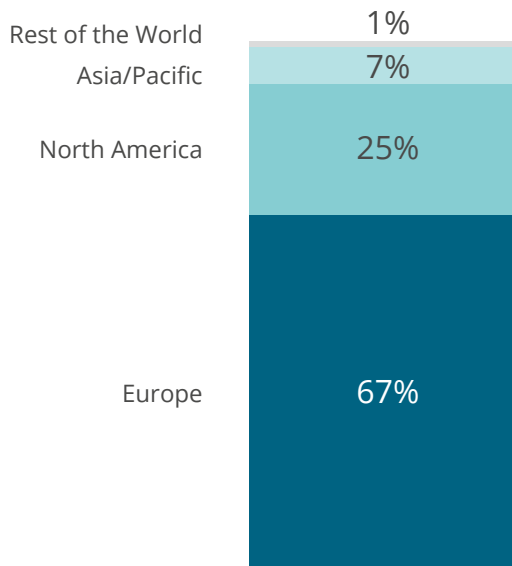
After data cleansing, a total of 1,355 survey responses remained. Respondents came from a wide range of industries, countries, professional backgrounds and company sizes.

The data for the trends development analyses originated from BARC's The Planning Survey from previous years.

Industry



Region



Company Profiles



About BARC

BARC is the leading analyst firm in Europe for technology and the successful use of data & analytics. Our BARC Digital Workplace division complements this focus with expertise in ECM, BPM, CRM and ERP.

Research

BARC user surveys, software tests and analyst assessments in blogs and research notes give you the confidence to make the right decisions. Our independent research gets to the heart of market developments, evaluates software and providers thoroughly and gives you valuable ideas on how to turn data, analytics and AI into added value and successfully transform your business.

Consulting

The BARC Advisory practice is entirely focused on translating your company's requirements into future-proof decisions. The holistic advice we provide will help you successfully implement your data & analytics strategy and culture as well as your architecture and technology. Our goal is not to stay for the long haul. BARC's research and experience-founded expert input sets organizations on the road to the successful use of data & analytics, from strategy to optimized data-driven business processes.

Events

Leading minds and companies come together at our events. BARC conferences, seminars, roundtable meetups and online webinars provide more than 10,000 participants each year with information, inspiration and interactivity. By exchanging ideas with peers and learning about trends and market developments, you gain new impetus for your business.

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About BPM Partners

Guiding Finance to Performance Management Success

BPM Partners is the leading independent authority on business performance management (BPM/CPM/EPM) and related business intelligence solutions. The company helps organizations address their budgeting, planning, financial consolidation, close and reporting, regulatory compliance, profitability optimization, key performance indicator (KPI) development, and operational performance challenges. Utilizing a comprehensive, rapid, and cost-effective methodology vendor-neutral experts guide companies through their BPM initiatives from start to finish while both reducing risk and minimizing costs. BPM Partners has specialized packages that lead clients through project justification, finance transformation, requirements definition, vendor selection and deployment of departmental or enterprise-wide systems.

Research and Events

We are the authors of the Performance Management Vendor Landscape Matrix, the most comprehensive analyst report covering this market. We present the annual Pulse of Performance Management webcast in conjunction with IndustryWeek that reviews major trends and key vendors. BPM Partners also conducts the annual BPM Pulse Research Study which gathers data for project benchmarking and detailed vendor customer satisfaction ratings. BPM Partners also shares its research in an annual Buyers Guide for Budgeting and Planning Solutions, and also one for Financial Consolidation and Reporting.

Expertise

The people of BPM Partners each have on average 25+ years experience in the space. We were a founding member of the BPM Standards Group, an industry group dedicated to accelerating the successful adoption of BPM across the enterprise by providing clear and consistent definitions, frameworks, best practices, and implementation roadmaps. BPM Partners has provided its expertise to organizations such as APQC (American Productivity & Quality Center), TDWI (The Data Warehousing Institute), CFO Magazine, TechTarget, IndustryWeek, Business Finance, Information Management, AFP (Association for Financial Professionals), IMA (Institute of Management Accountants) and other leading finance and technology focused publications and conferences. We have been recognized by Consulting Magazine as one of seven 'Small Jewels of Consulting', by CFO Tech Outlook as a Top 10 Performance Management Consulting Company, and by Forbes as one of America's Best Management Consulting Firms.



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Sponsor Profile



About Unit4

Unit4's next-generation enterprise resource planning (ERP) and financial planning and analysis (FP&A) solutions power many of the world's mid-market organizations, bringing together the capabilities of Finance, Procurement, Project Management and HR, with a single source of truth, to help organizations deliver greater insights and to become more effective. By combining our mid-market expertise with a relentless focus on people, we've built flexible solutions to meet customers'

unique and changing needs. Unit4 serves more than 5,100 customers globally across a number of sectors including professional services, nonprofit and public sector, with customers including Southampton City Council, Metro Vancouver, Buro Happold, Devoteam, Save the Children International, Global Green Growth Institute and Oxfam America. For further information visit www.unit4.com.

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