The Planning Survey 24

The voice of the planning software user community

BARC

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

Unit4 FP&A

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The Planning
Survey 24

4 Top ranks   **16** Leading

in 4 peer groups

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#1
Flexibility
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Leader
Self-Service
in 4 peer groups
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BARC
Leader
Implementer
Support
in 2 peer groups
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" *Unit4 has enabled us to raise our budgeting and reporting to a new level.*

Person responsible for planning from business department, Education, 100 - 2,500 employees

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The Planning Survey 24

The Planning Survey 24 is based on on the world's largest survey of planning software users conducted from November 2023 to February 2024, with 1,272 respondents and analysis of 21 products. It evaluates user feedback on 33 criteria (KPIs), such as *Business Benefits, Project Success* and *Customer Satisfaction.*

This summary highlights key findings for Unit4 FP&A, emphasizing positive results without displaying all KPI outcomes.

The KPIs

The Planning Survey 24 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:

1. Only measures that have a clear good/bad trend are used as the basis for KPIs.

2. KPIs may be based on one or more measures from The Planning Survey.

3. 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.

4. For quantitative data, KPIs are converted to a scale of 1 to 10 (worst to best).

5. 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 22-33% or (in peer groups of five vendors) the top 2 products listed in the chart.

Peer Group Classification

The Planning Survey 24 categorizes the different planning, budgeting and forecasting products into peer groups, based on three criteria (specialization, usage scenario and global presence) and defined by BARC analysts' expertise and judgment:

• **Products for Planning, Budgeting and Forecasting**: Designed for planning, budgeting and forecasting, these products cater to various sub-plans, offering flexibility and predefined planning solutions for specific applications. Since The Planning Survey is focused on exactly this use case, this peer group includes all the products featured in the survey.

• **Integrated Products for Planning & Financial Consolidation**: With a strong emphasis on financial performance management, these products provide built-in financial intelligence and predefined business rules for an integrated approach to (financial) planning and financial consolidation.

• **Integrated Products for Planning and BI & Analytics:** Beyond planning and performance management, these products integrate comprehensive reporting, dashboarding, ad hoc query and analysis capabilities, expanding their scope beyond pure planning functionality.

• **Midsize/Departmental Implementations**: Products in this peer group are typically (but not exclusively) used in small and midsize scenarios and/or departmental implementations with a moderate number of users.

• **Large/Enterprise-Wide Implementations**: Products in this peer group are typically (but not exclusively) used in large scenarios and/or enterprise-wide implementations with many users.

• **Worldwide Implementations**: These vendors have a truly global sales and marketing reach. They are present worldwide, and their products are used all around the world.

Unit4 FP&A features in the following peer groups:

• Products for Planning, Budgeting & Forecasting

• Integrated Products for Planning and Financial Consolidation

• Midsize/Departmental Implementations

• Worldwide Implementations

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Unit4 FP&A overview

Unit4 is a global provider of cloud-based enterprise software for HCM, financials and FP&A. To strengthen its offerings for CPM and analytics, Unit4 acquired the German vendor Prevero in 2016. Prevero originally delivered CPM software to support planning, budgeting and forecasting; analytics and reporting processes and has now been fully integrated into Unit4's ERP application ecosystem to provide its Financial Planning & Analysis (FP&A) solutions. While Unit4 FP&A historically attracted a strong customer base in the DACH and EMEA regions, its appeal has subsequently broadened to mid-market and enterprise-level customers worldwide.

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 prebuilt business applications for financial planning; sales and operations planning; people planning and analytics; reporting and analytics;

financial consolidation and IFRS 16. Unit4 FP&A solutions are available as standalone applications or integrated into Unit4's ERP suite. They deliver CPM technology with native integration to Unit4's enterprise solutions. Unit4 FP&A is available for deployment in the Microsoft Azure cloud.

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, budgeting and forecasting; analytics; reporting and financial consolidation applications 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.

For planning, budgeting and forecasting, Unit4 FP&A provides comprehensive capabilities to support top-down, bottom-up and mixed planning processes. Its flexible development environment allows customers to address various planning topics on one common platform, with different aggre-

gation levels (e.g., strategic as well as operational planning) for an integrated corporate planning approach (including financial planning). Planners can enter budget data in the FP&A Designer (rich client), web client or Excel add-in. In addition to Unit4 FP&A's core capabilities, comprehensive predefined business applications and solutions for specific use cases and industries enhance the platform.

Unit4 FP&A also offers complementary reporting and analytics functionality. Report creation is done in a tabular, Excel-like grid ('worksheets') in the FP&A Designer using tables and different chart types. Flexible options are available for formatting the tabular grid. Moreover, individual dashboards can be created in the web browser via drag-and-drop including existing worksheets and a wide variety of widgets (for visualization, analysis and input of data).

For financial consolidation purposes, Unit4 FP&A offers a prebuilt application that includes legal consolidation covering several consolidation standards as well as reporting capabilities and predefined disclosure statements.
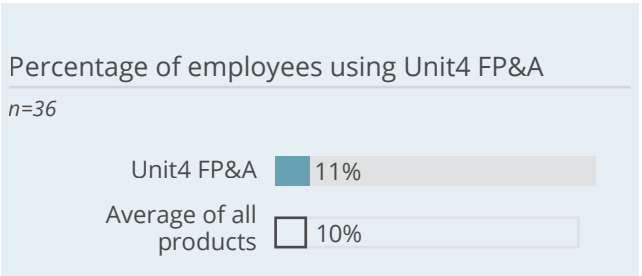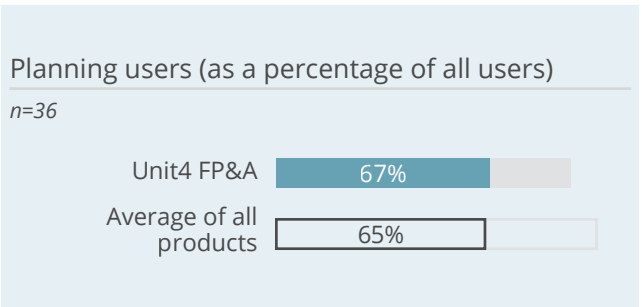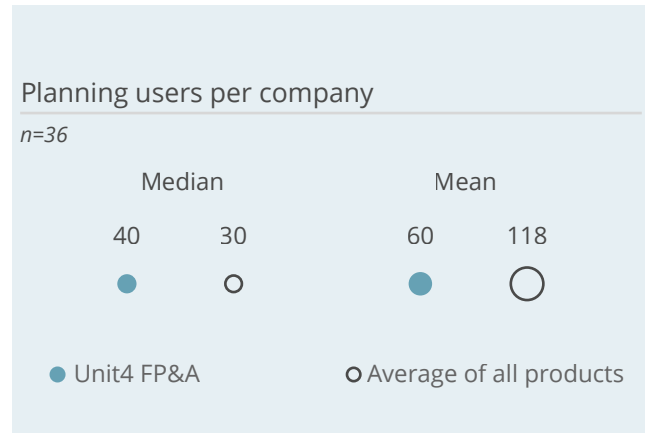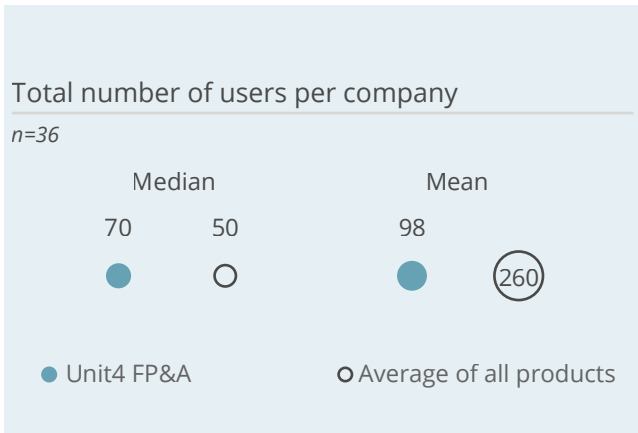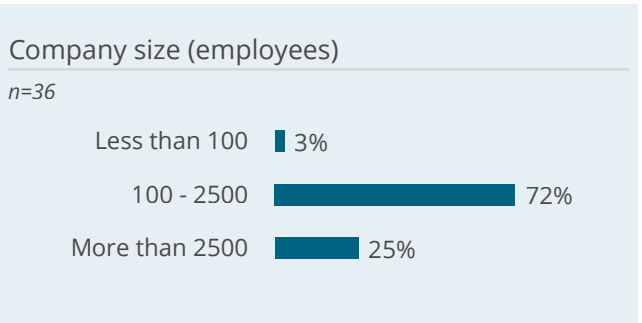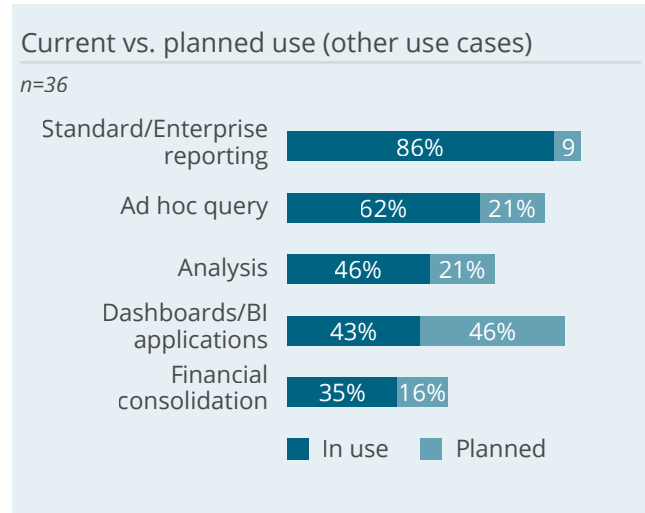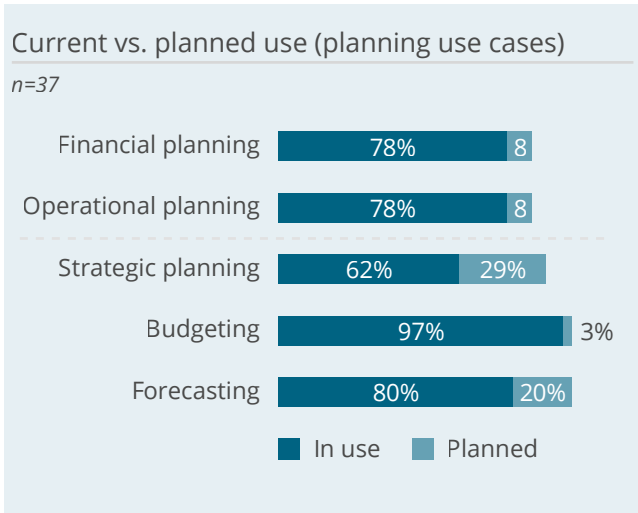
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User and Use Case Demographics

This year we had **37 responses** from Unit4 FP&A users. At the time of the survey, 65 percent of them were using version 23, 23 percent version 22, 10 percent version 21 and the remaining 3 percent were running version 10.

Current vs. planned use (planning use cases)

n=37

	In use	Planned
Financial planning	78%	8
Operational planning	78%	8
Strategic planning	62%	29%
Budgeting	97%	3%
Forecasting	80%	20%

■ In use ■ Planned

Current vs. planned use (other use cases)

n=36

	In use	Planned
Standard/Enterprise reporting	86%	9
Ad hoc query	62%	21%
Analysis	46%	21%
Dashboards/BI applications	43%	46%
Financial consolidation	35%	16%

■ In use ■ Planned

Company size (employees)

n=36

Less than 100	3%
100 - 2500	72%
More than 2500	25%

Planning users (as a percentage of all users)

n=36

Unit4 FP&A	67%
Average of all products	65%

Total number of users per company

n=36

	Median		Mean	
	70	50	98	260
	●	○	●	○

● Unit4 FP&A   ○ Average of all products

Planning users per company

n=36

	Median		Mean	
	40	30	60	118
	●	○	●	○

● Unit4 FP&A   ○ Average of all products

Percentage of employees using Unit4 FP&A

n=36

Unit4 FP&A	11%
Average of all products	10%

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Implementer Support
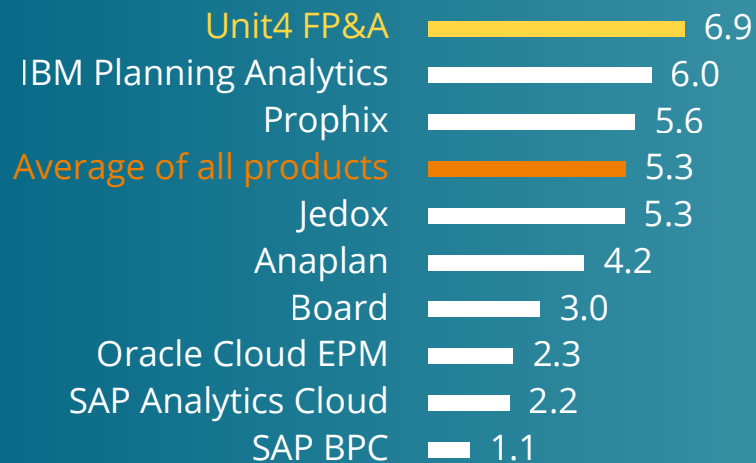
BARC
Implementer
Support
Leader
The Planning Survey 24
Worldwide
Implementations

BARC
Implementer
Support
Leader
The Planning Survey 24
Integrated Products for Planning
and Financial Consolidation

This KPI is based on how respondents rate the implementer's support for the product.

Implementer Support

Product	Score
Unit4 FP&A	6.9
IBM Planning Analytics	6.0
Prophix	5.6
Average of all products	5.3
Jedox	5.3
Anaplan	4.2
Board	3.0
Oracle Cloud EPM	2.3
SAP Analytics Cloud	2.2
SAP BPC	1.1

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This chart represents the results for one KPI
and includes only a subset of the products featured in the survey.

75% of surveyed users rate Unit4 FP&A's **implementer support** as **excellent** or **good**.

Most liked

Beratungspartner, der immer zur Verfügung steht und unterstützt sowie eine hervorragende Fachexpertise besitzt.

Line of business employee, Process industry, > 2,500 employees

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Most liked

Vielfältigkeit der Lösungsmöglichkeiten, Auswertungsmöglichkeiten, Fachkompetenz und Lösungsorientierung unseres Unit4-Beraters.

Head of business department, Utilities, 100 - 2,500 employees
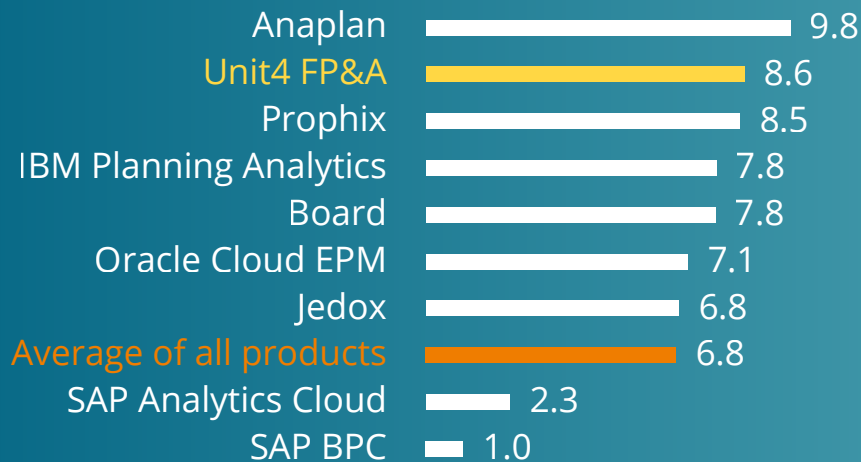
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Self-Service

This KPI is based on the proportion of respondents' organizations currently using the product in a self-service manner in business departments and how respondents rate the product's ease of use for planners and developers.

Self-Service

Product	Score
Anaplan	9.8
Unit4 FP&A	8.6
Prophix	8.5
IBM Planning Analytics	7.8
Board	7.8
Oracle Cloud EPM	7.1
Jedox	6.8
Average of all products	6.8
SAP Analytics Cloud	2.3
SAP BPC	1.0

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This chart represents the results for one KPI
and includes only a subset of the products featured in the survey.

75% of surveyed users use **self-service planning in business departments** with Unit4 FP&A.

Most liked

Self-Service BI, modellierbar frei nach eigenen Wünschen und Vorstellungen.

Line of business employee, Utilities, 100 - 2,500 employees
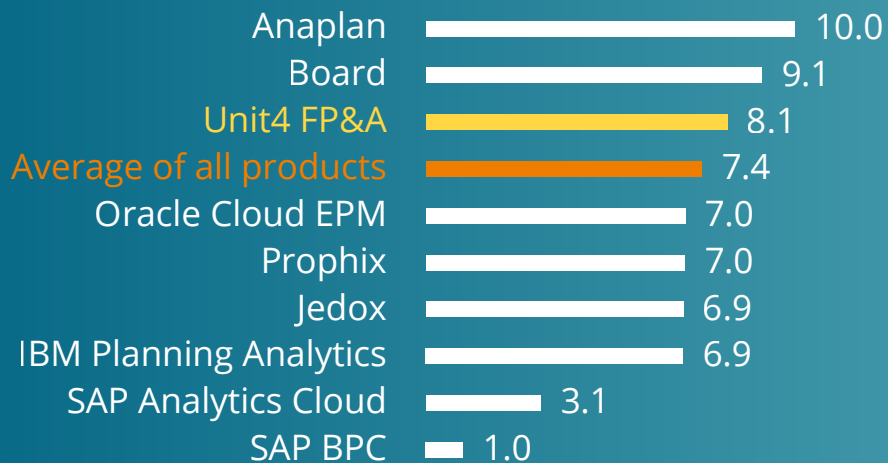
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Ease of Use

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Ease of Use
Leader
The Planning Survey 24
Midsize/Departmental
Implementations

This KPI is based on how respondents rate the product's ease of use for planners and developers.

Ease of Use

Product	Score
Anaplan	10.0
Board	9.1
Unit4 FP&A	8.1
Average of all products	7.4
Oracle Cloud EPM	7.0
Prophix	7.0
Jedox	6.9
IBM Planning Analytics	6.9
SAP Analytics Cloud	3.1
SAP BPC	1.0

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This chart represents the results for one KPI
and includes only a subset of the products featured in the survey.

81% of surveyed users rate Unit4 FP&A's **ease of use for planners** as **very good** or **good**.

Most liked

" *Leichte Bedienung durch die Enduser - stabiles System - funktioniert immer.*

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

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Most liked

" *Die einfache Modellierung, die keine speziellen Programmierkennt-nisse erfordert.*

Line of business employee, Utilities, > 2,500 employees
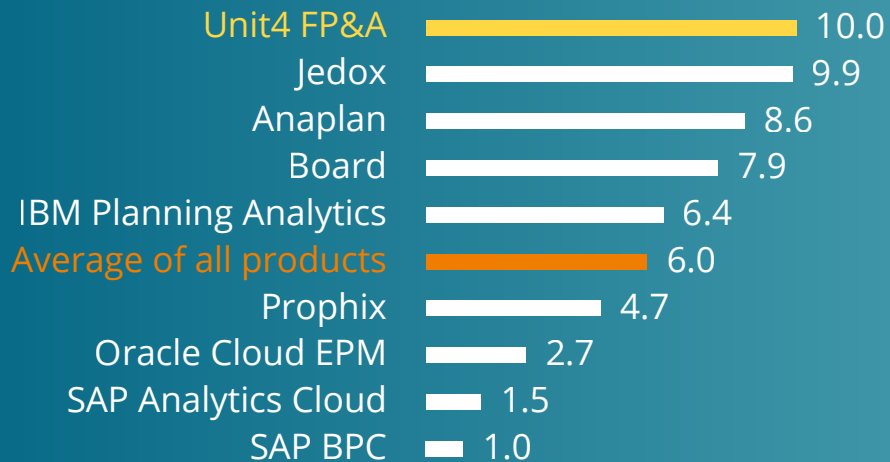
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Flexibility

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

Product	Score
Unit4 FP&A	10.0
Jedox	9.9
Anaplan	8.6
Board	7.9
IBM Planning Analytics	6.4
Average of all products	6.0
Prophix	4.7
Oracle Cloud EPM	2.7
SAP Analytics Cloud	1.5
SAP BPC	1.0

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This chart represents the results for one KPI and includes only a subset of the products featured in the survey.

71% of surveyed users chose Unit4 FP&A because of its **flexibility.**

Most liked

Hohe Flexiblität in Modellierung und schnelle Anforderungsumsetzung.

Person responsible for planning from business department, Retail/wholesale/trade, > 2,500 employees

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Most liked

Die Möglichkeit, komplexe Modelle aufzubauen und selbstständig zu verwalten.

Line of business employee, Process industry, 100 - 2,500 employees

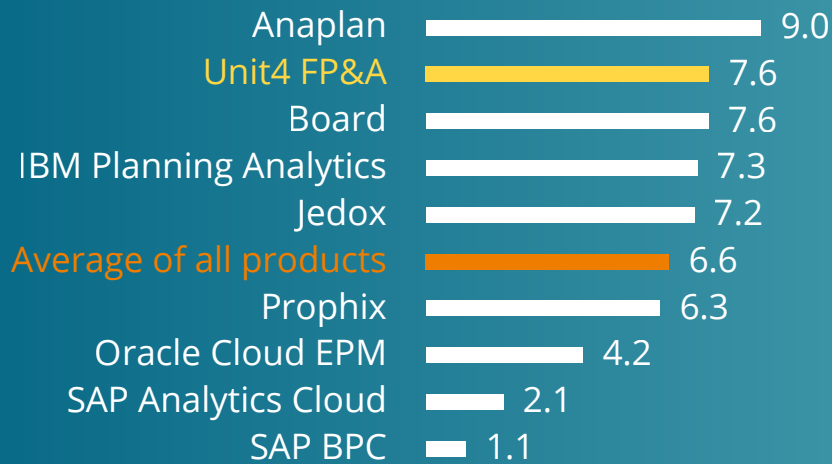BARC   The Planning Survey 24

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User Experience

This KPI combines the *Self-Service, Ease of Use, Flexibility* and *Performance Satisfaction* KPIs to assess the user experience with the product.

User Experience

Product	Score
Anaplan	9.0
Unit4 FP&A	7.6
Board	7.6
IBM Planning Analytics	7.3
Jedox	7.2
Average of all products	6.6
Prophix	6.3
Oracle Cloud EPM	4.2
SAP Analytics Cloud	2.1
SAP BPC	1.1

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This chart represents the results for one KPI
and includes only a subset of the products featured in the survey.

> " *The ability to create custom design to meet the organization's needs.*
>
> Financial analyst, Municipal government, 100 - 2,500 employees

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The Planning Survey 24: Unit4 FP&A Highlights

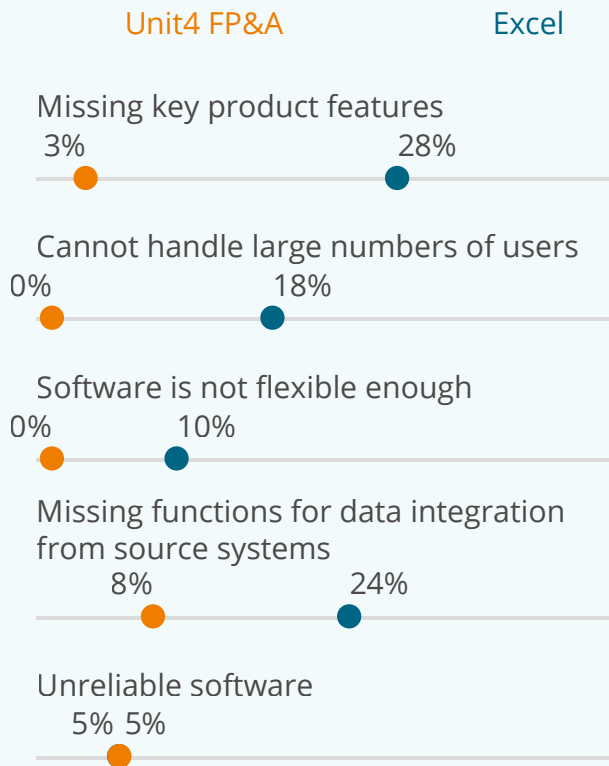|	Peer Group **Midsize/Departmental Implementations**	Peer Group **Integrated Products for Planning and Financial Consolidation**	Peer Group **Worldwide Implementations**	Peer Group **Products for Planning, Budgeting & Forecasting**
Top-ranked in	Flexibility	Flexibility	Flexibility	Flexibility
Leader in	Business Benefits Planning Functionality Workflow Self-Service Ease of Use User Experience Predictive Planning	Implementer Support Planning Functionality Simulation Self-Service User Experience Predictive Planning	Implementer Support Self-Service	Self-Service

BARC Comment

With 4 top ranks and 16 leading positions, Unit4 FP&A achieves an excellent set of results in this year's Planning Survey. High ratings in KPIs such as *Implementer Support, Self-Service, Ease of Use* and *Flexibility* underline Unit4 FP&A's solid position in the planning software market. Its functionality for planning, workflow and simulation is robust. These features are essential for organizations seeking streamlined planning processes and effective management of planning, budgeting and forecasting operations. Companies can benefit from using Unit4 FP&A in terms of better integration of financial planning with operational planning, reduced planning complexity and more precise/detailed planning. 78 percent of Unit4 FP&A users say they would "definitely" or "probably" recommend their planning product to other organizations – a great indicator of customer satisfaction with the vendor and its product.
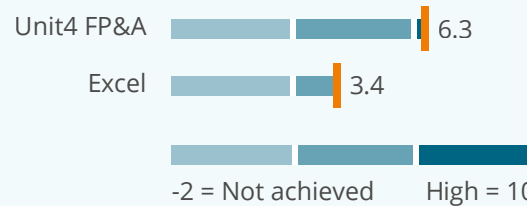
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Problems encountered by Unit4 FP&A and Excel users

Unit4 FP&A   Excel

Missing key product features
3%   28%

Cannot handle large numbers of users
0%   18%

Software is not flexible enough
0%   10%

Missing functions for data integration from source systems
8%   24%

Unreliable software
5% 5%

Business Benefits Index*

Unit4 FP&A ▮ 6.3
Excel ▮ 3.4

-2 = Not achieved   High = 10

Recommendation**

Unit4 FP&A   3%   44%   33%
Excel   7   19%   30%   23%

■ Definitely not   ■ Probably not   ■ Probably   ■ Definitely

Satisfaction level**

Unit4 FP&A   3%   53%   42%
Excel   5 16%   35%   21%

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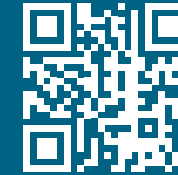
* For 12 potential benefits, respondents are asked to indicate the level of achievement, if any, with five levels. We use a weighted scoring system, from -2 to 10, to derive a composite score – the Business Benefits Index (BBI).

** Neutral category not shown

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Data Decisions. Built on BARC.

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BARC is one of Europe's leading analyst firms for business software, focusing on the areas of data, business intelligence (BI) and analytics. The company was founded in 1999 as a spin-off of the chair of Business Administration and Information Systems at the University of Würzburg, Germany. Today, BARC combines empirical and theoretical research, technical expertise and practical experience, and a constant exchange with all market participants to provide market-leading research publications, events and advisory.

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, round-table 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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