The Planning Survey 22

The voice of the planning software user community

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

Unit4 FP&A

BARC

The Planning Survey 22: Unit4 FP&A Highlights Dashboard

KPI results

7 top rankings

and

24 leading positions

in 5 different peer groups.

THE PLANNING SURVEY 22

Requirements

95%

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

THE PLANNING SURVEY 22

Flexibility

77%

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

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

THE PLANNING SURVEY 22

Recommendation

86%

of surveyed users say they would **recommend** Unit4 FP&A.*

** Based on the aggregate of "Definitely" and "Probably".*

THE PLANNING SURVEY 22

Satisfaction

93%

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

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

THE PLANNING SURVEY 22

Ease of Use

88%

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

THE PLANNING SURVEY 22

Peer Groups and KPIs

The KPIs

The Planning Survey 22 provides the reader with well-designed KPI dashboards packed with concise information, which can be absorbed at a glance. The KPIs all follow these simple rules:

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

The terms 'top-ranked' and 'leader' are used in the chart titles. 'Top-ranked' indicates first position. 'Leader' usually denotes a position in the top 22-33% or (in peer groups of five vendors) the top 2 products listed in the chart.

Peer Group Classification

The Planning Survey 22 features a range of different types of planning, budgeting and forecasting products so we use peer groups to help identify competing products. The peer groups have been defined by BARC analysts using their experience and judgment, with segmentation based on the following key factors:

1. Focus – Is the product focused on and typically used for operational planning (e.g., sales & operations planning, HR planning, production planning, etc.), financial planning and consolidation or business intelligence and analytics?
2. Specialization – Is the vendor a performance management/planning specialist or a business software generalist, offering a broader portfolio of enterprise software for a variety of business requirements?
3. Usage scenario – Is the product typically used in midsize/departmental implementations or large/enterprise-wide implementations?
4. Global presence – Does the vendor have a global reach and offer its products worldwide?

Unit4 FP&A features in the following peer groups:

- Operational Planning-Focused Products
- Financial Planning & Consolidation-Focused Products
- Business Software Generalists
- Midsize/Departmental Implementations
- Global Vendors

Peer Groups Overview

Operational Planning-Focused Products: Operational planning-focused products flexibly support a wide range of individual sub-plans, such as sales and operations planning, HR planning, production planning and many more. Often, these products offer predefined planning solutions designed for particular applications.

Financial Planning & Consolidation-Focused Products: Financial planning & consolidation-focused products are often standardized applications that support use cases such as financial planning (P&L, balance sheet, cash flow) and financial consolidation. Typically, these products offer built-in financial intelligence with predefined business rules for financial management.

BI & Analytics-Focused Products: Besides planning and performance management, BI and analytics-focused products also target use cases such as reporting, dashboarding, (ad hoc) analysis and advanced analytics.

Business Software Generalists: Business software generalists have a broad product portfolio including most (or all) types of enterprise software for a variety of business requirements (e.g., ERP).

Performance Management Specialists: Performance management specialists are software vendors who focus solely on performance management and/or planning. Often, they have just one product in their portfolio.

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 a large number of users.

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

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The Planning Survey 22: Unit4 FP&A Highlights

Peer Group
Global Vendors

1. Top-ranked in

Implementer Support
Flexibility

Leader in

Predefined Connectors
Planning Functionality
Self-Service
Ease of Use
Customer Experience
Competitive Win Rate

Peer Group
Financial Planning & Consolidation-Focused Products

1. Top-ranked in

Implementer Support
Flexibility

Leader in

Planning Functionality
Self-Service
Ease of Use
Customer Experience
Competitive Win Rate

Peer Group
Business Software Generalists

1. Top-ranked in

Flexibility

Leader in

Implementer Support
Predefined Connectors
Planning Functionality
Self-Service
Customer Experience
Competitive Win Rate

BARC Summary

With seven top ranks and 24 leading positions across five different peer groups, Unit4 FP&A once again achieves a great set of results in this year's Planning Survey. Convincing ratings in numerous important KPIs help to consolidate its position as a market-leading CPM platform. Companies can benefit from using Unit4 FP&A in terms of increased transparency of planning, improved integration of planning with reporting/analysis and more precise/detailed planning. In turn, these benefits lead to a better quality of planning results for many customers. 86 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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The Planning Survey 22: Unit4 FP&A Highlights

Peer Group
Midsize/Departmental Implementations

1. Top-ranked in

Flexibility

Leader in

Implementer Support
Planning Functionality
Self-Service
Ease of Use

Peer Group
Operational Planning-Focused Products

1. Top-ranked in

Flexibility

Leader in

Implementer Support
Ease of Use
Competitive Win Rate

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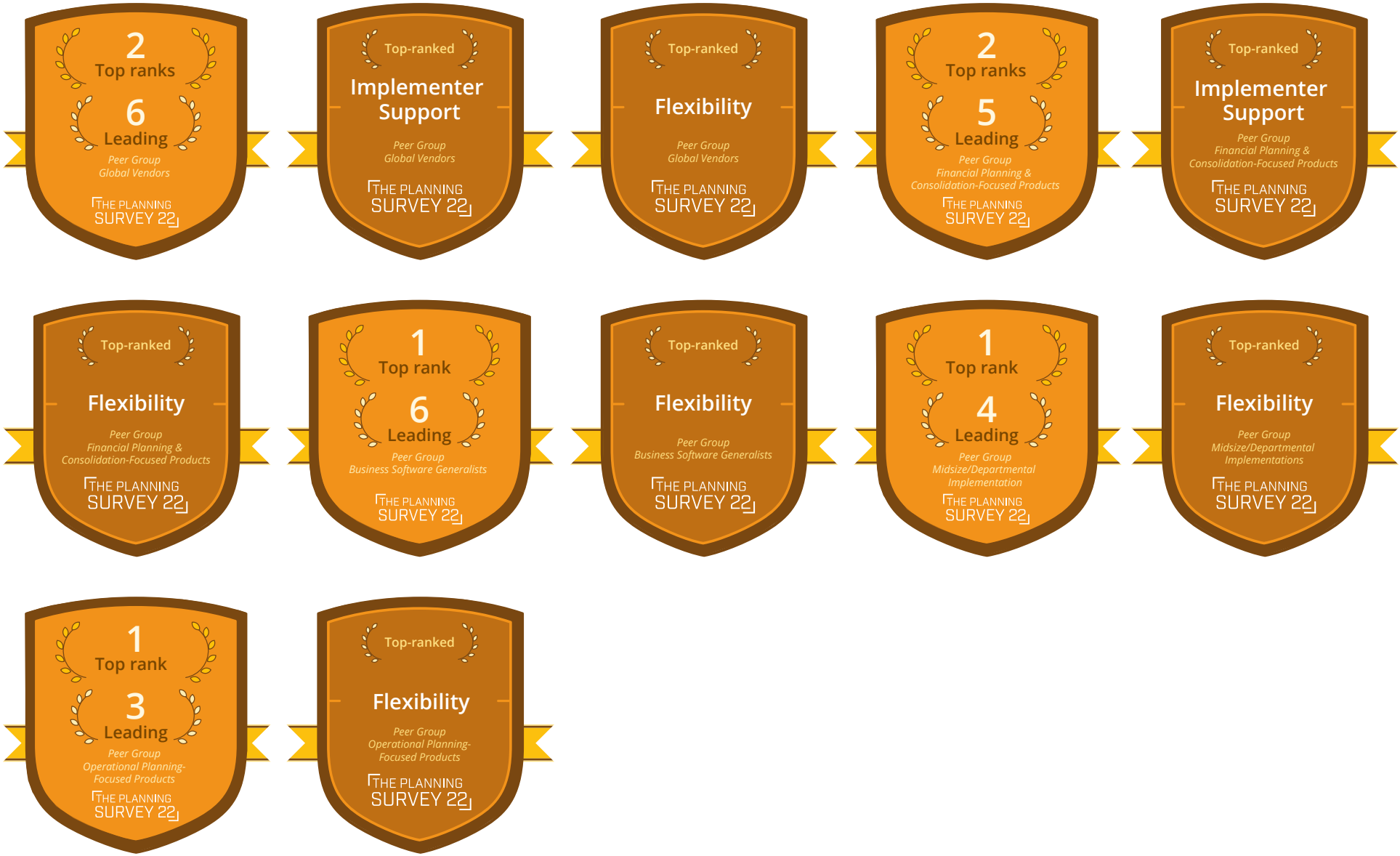
The Planning Survey 22: Unit4 FP&A Top Ranks



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Customer Quotes

> Flexible planning tool or planning software that can be managed independently by the department.*
>
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Head of business department, Services, >2,500 employees

> Powerful tool, self-service is at the forefront and it fits perfectly with our corporate philosophy.*
>
> THE PLANNING SURVEY 22

Head of business department, Services, 100-2,500 employees

> High satisfaction due to continuous further development with a good price-performance ratio.*
>
> THE PLANNING SURVEY 22

Referent Budgetmanagement, Financial Services, 100-2,500 employees

> Tailor-made solution introduced with competent consultants within the time and price target.*
>
> THE PLANNING SURVEY 22

Line of business employee, Services, >2,500 employees

> A great experience! I would purchase FP&A again any time.*
>
> THE PLANNING SURVEY 22

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

*Translated by BARC

What Customers Like Most

> Flexibility in the data model, single point of truth, integration of all areas through decentralized planning.*
>
> THE PLANNING SURVEY 22

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

> Flexibility of the software, self-design option, qualified support from Smart.pm Solutions.*
>
> THE PLANNING SURVEY 22

Line of business employee, Manufacturing, >2,500 employees

> The flexibility to update the model ourselves and not always be dependent on consultants. We have a great partner who works to solve our issues quickly when they are more complex and require a sparring partner to evaluate best path.
>
> THE PLANNING SURVEY 22

Person responsible/Project manager for departmental BI, Transport, >2,500 employees

> Power users can do a lot internally themselves (self-service approach). Good personal support.*
>
> THE PLANNING SURVEY 22

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

> Full administration and responsibility in specialist areas possible without IT. Very intuitive interface programming and cube creation.*
>
> THE PLANNING SURVEY 22

Head of business department, Manufacturing, >2,500 employees

*Translated by BARC

Unit4 FP&A Overview

Unit4 is a global provider of cloud-based enterprise software for financials, HCM 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 Financial Planning & Analysis (FP&A) solutions.

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 & operations planning, people planning & analytics, reporting & 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.

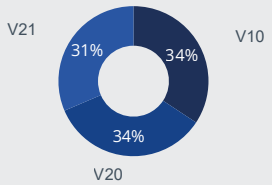
Built on a highly flexible platform, Unit4 FP&A applications are adaptable to various CPM and analytics use cases. The solutions give business users the platform and tools they need to configure their planning, budgeting & forecasting, analytics, reporting and financial consolidation applications to meet their 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. The product's flexible development environment allows customers to address various planning topics on one common platform, with different aggregation levels (e.g., strategic as well as operational planning) for an integrated corporate planning approach (including financial planning). Planners can enter budget data in the FP&A Designer, HTML5 web client or Excel add-in. In addition to planning, Unit4 FP&A also offers complementary analytics functionality (e.g., report creation with a tabular grid that closely resembles Excel).

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.

Versions used

n=35



Unit4 FP&A customer responses

This year we had 42 responses from Unit4 FP&A users. At the time of the survey, 34 percent of them were using version 10, 34 percent of them were using version 20 and 31 percent were using version 21.

THE PLANNING SURVEY 22

The Planning Survey 22 is based on findings from the world's largest and most comprehensive survey of planning software users, conducted from November 2021 to February 2022. In total, 1,325 people responded to the survey with 1,104 answering a series of detailed questions about their use of a named product. Altogether, 19 products (or groups of products) are analyzed in detail.

The Planning Survey 22 examines user feedback on planning product selection and usage across 33 criteria (KPIs) including *Business Benefits, Project Success, Business Value, Recommendation, Customer Satisfaction, Customer Experience, Planning Functionality* and *Competitiveness*.

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

For more information on the survey, visit The BI Survey website.

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User and Use Case Demographics

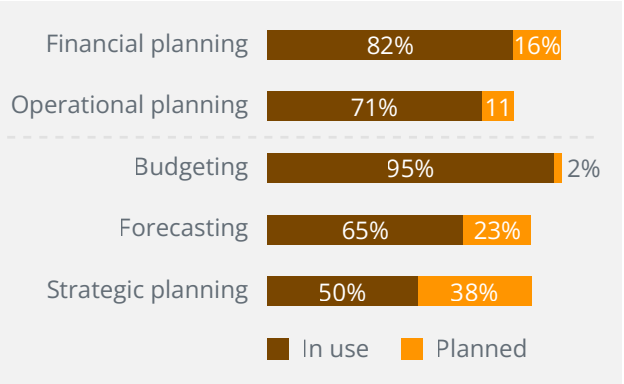
BARC Comment

67 percent of Unit4 FP&A users are planning users – slightly above the survey average of 64 percent – reflecting the fact that Unit4 FP&A is essentially an integrated CPM platform with planning but also BI and analytics functionality. This is also reflected in the area of planning use cases and other use cases. Customers leverage Unit4 FP&A mainly for financial planning (82 percent) but also operational planning (71 percent). Here, planning takes place at different aggregation levels. Unit4 FP&A is particularly used for budgeting (95 percent) and forecasting (65 percent). Besides planning, customers mainly use Unit4 FP&A for standard/enterprise reporting (78 percent), ad hoc query (63 percent) and dashboards/scorecards (54 percent). Many respondents plan to use it for strategic planning (38 percent) and dashboards/scorecards (34 percent) in the future.

Unit4 FP&A targets mid-sized and large companies across all industries. 71 percent of our sample of Unit4 FP&A customers come from mid-sized companies (100-2,500 employees) with a median of 71 users (including 48 using planning functionality), but the mean of 157 users (95 for planning) indicates there are also several larger implementations.

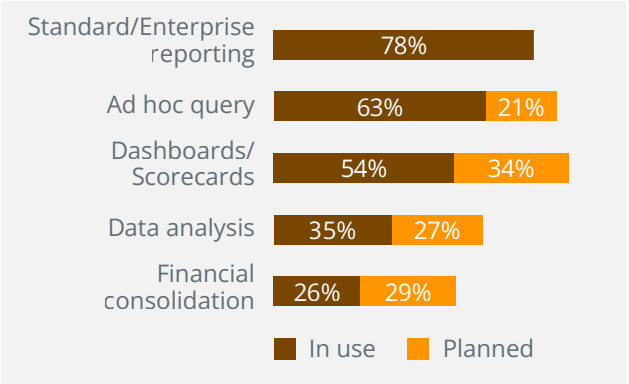
Current vs. planned use (planning use cases)

n=42



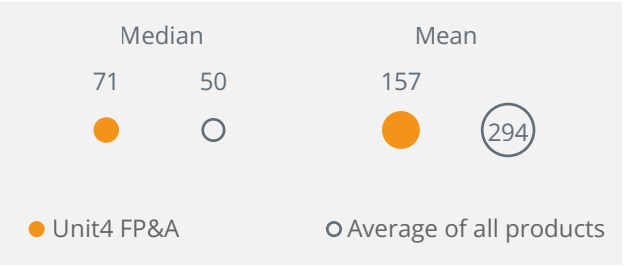
Current vs. planned use (other use cases)

n=42



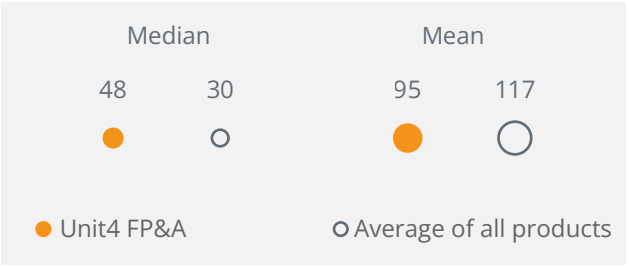
Total number of users per company

n=42



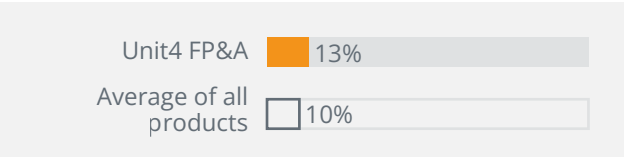
Planning users per company

n=42



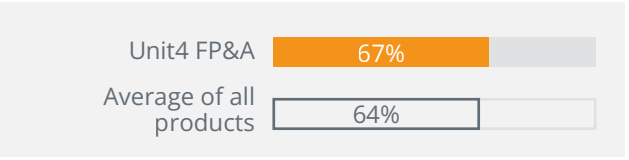
Percentage of employees using Unit4 FP&A

n=42



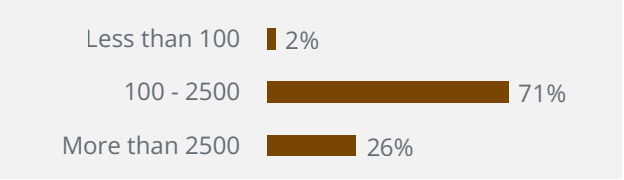
Planning users (as a percentage of all users)

n=42



Company size (employees)

n=42



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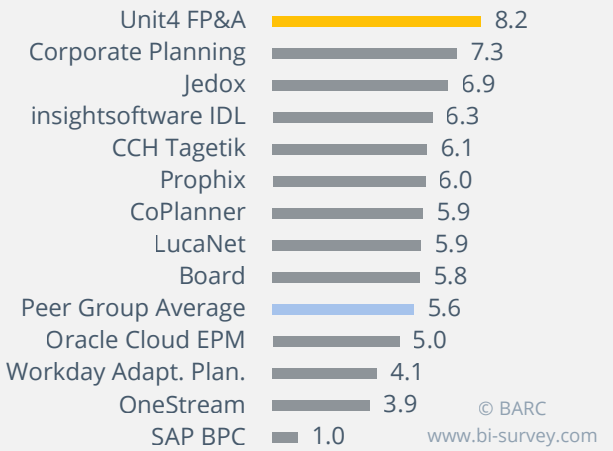
Implementer Support

This KPI measures user satisfaction with the level of the implementer’s support for the product.

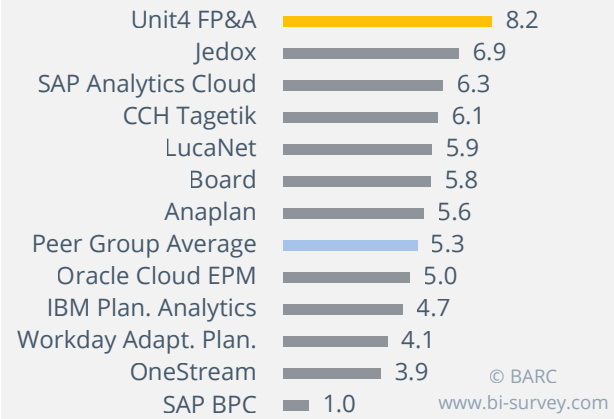
Implementer Support – Top-ranked

Peer group: Fin. Plan. & Consolidation-Focused Products



Implementer Support – Top-ranked

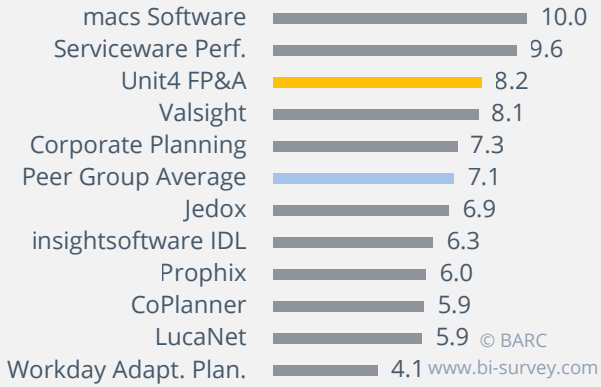
Peer group: Global Vendors



Implementer Support

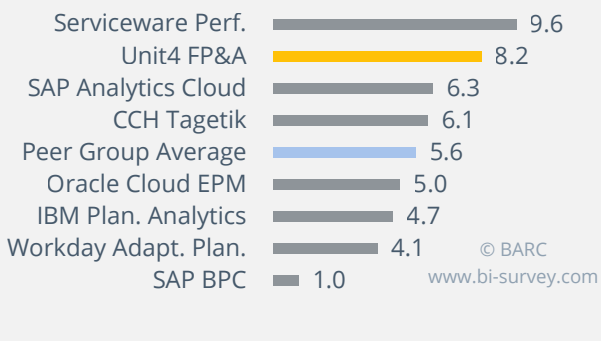
Implementer Support – Leader

Peer group: Midsize/Departmental Implementations



Implementer Support – Leader

Peer group: Business Software Generalists



BARC Viewpoint

A high proportion of customers confirm that their implementation projects with Unit4 FP&A have been successful. Projects are either implemented by the vendor itself or by experienced partners. Unit4 has a worldwide network of partners, who focus on specific solutions, industries and regions. Two top ranks and leading positions its remaining peer groups confirm that Unit4 and its partner network satisfy customers with their support services in implementation projects. Implementer support plays a crucial role in successful software implementations. The level of implementation satisfaction and the frequency of projects completed on time and on budget with Unit4 FP&A are both high.

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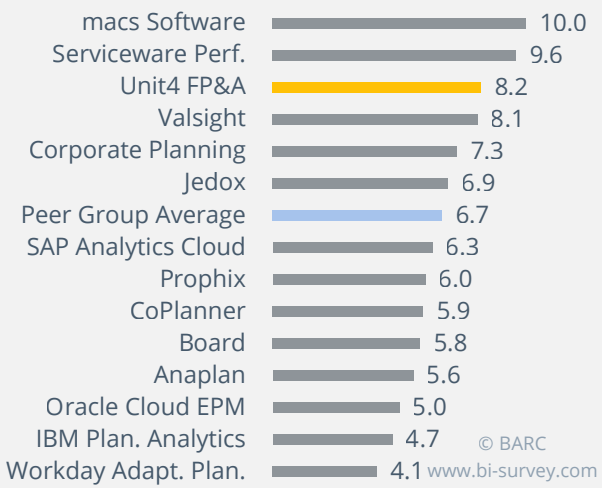
Implementer Support – Leader

Peer group: Operational Planning-Focused Products

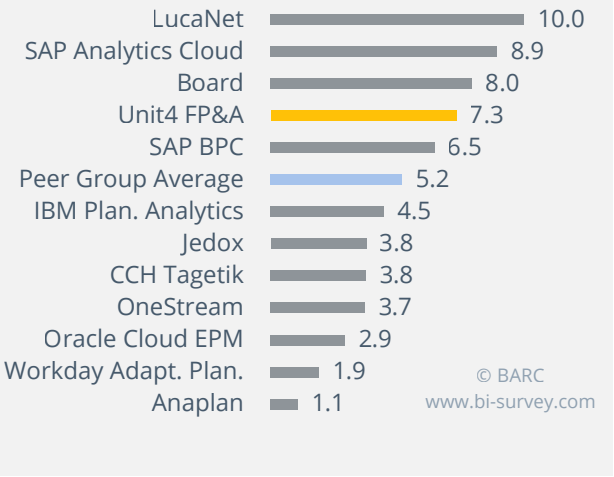


Predefined Connectors

This KPI is based on how often the product was chosen for its predefined data connection to systems in use, and on the frequency of complaints about being unable to access data from source systems.

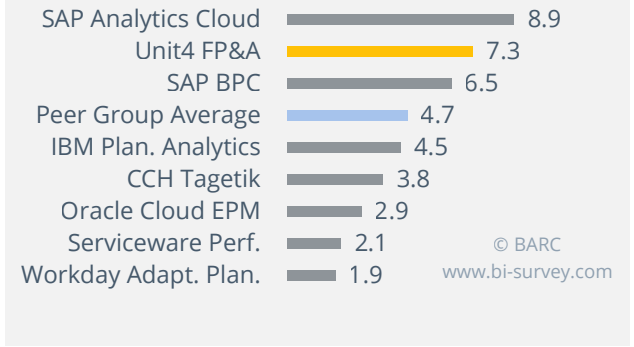
Predefined Connectors – Leader

Peer group: Global Vendors



Predefined Connectors – Leader

Peer group: Business Software Generalists



BARC Viewpoint

'Predefined data connection' is a popular reason why companies buy Unit4 FP&A (33 percent). As a result, the product ranks among the leaders for *Predefined Connectors* in two of its peer groups. For data integration purposes, Unit4 FP&A offers flexible data integration capabilities using dedicated ETL software or database functionality (e.g., leveraging Microsoft SQL Server Integration Services). Data from on-premises systems is integrated via DirectTouch (standard connectors for more than 30 source systems) and Theobald Software for SAP. When leveraged together with Unit4 ERP systems, preconfigured interfaces are available via APIs to integrate data in Unit4 FP&A. All in all, customers are clearly satisfied with the product's predefined data connectivity.

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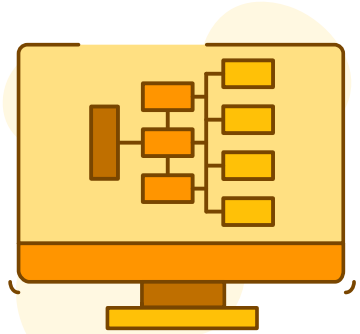
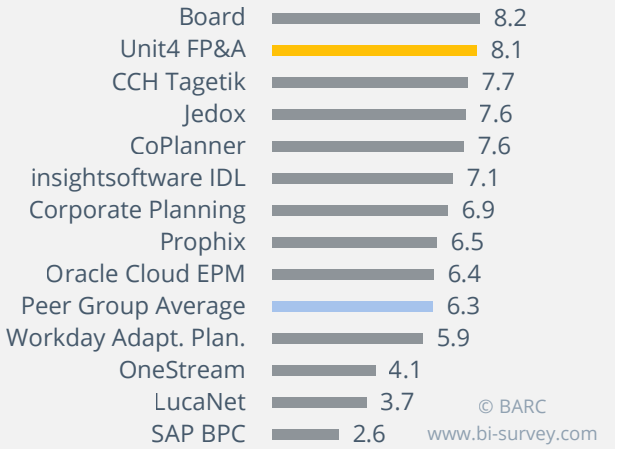
Planning Functionality



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

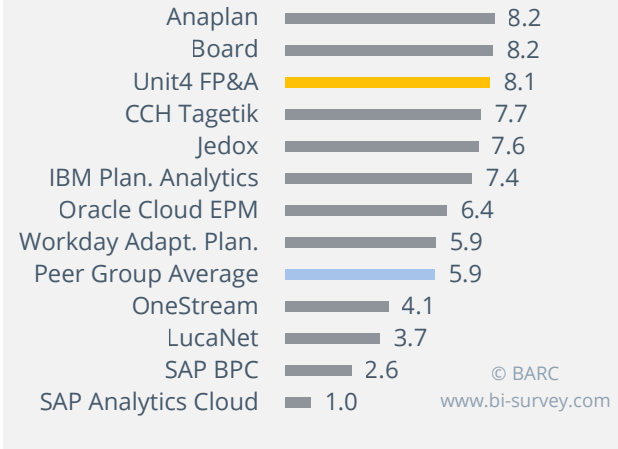
Planning Functionality – Leader

Peer group: Fin. Plan. & Consolidation-Focused Products



Planning Functionality – Leader

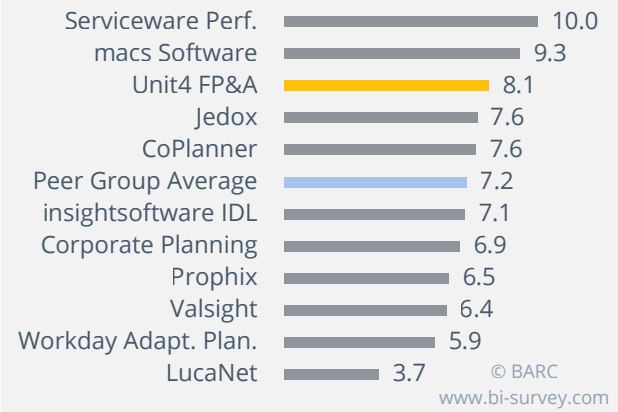
Peer group: Global Vendors



Planning Functionality

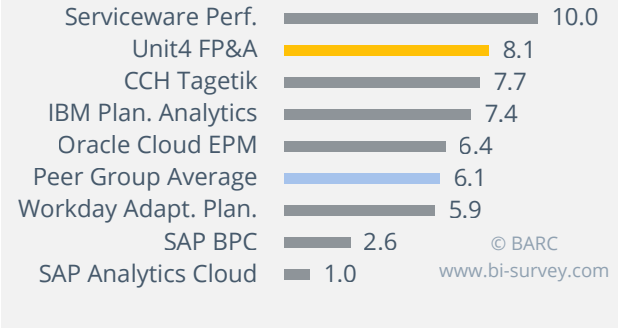
Planning Functionality – Leader

Peer group: Midsize/Departmental Implementations



Planning Functionality – Leader

Peer group: Business Software Generalists



BARC Viewpoint

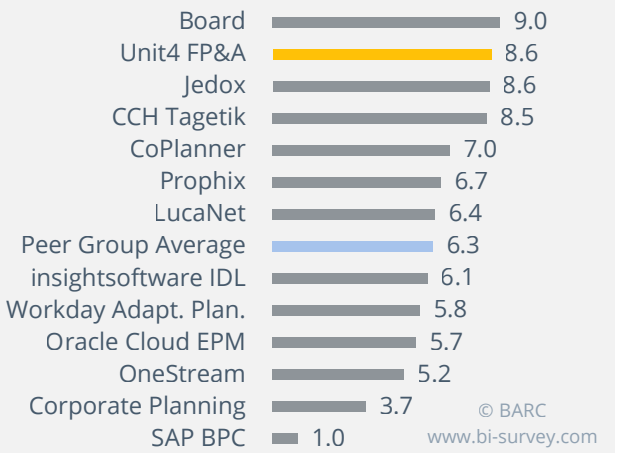
Planning, budgeting and forecasting functionality is at the heart of Unit4 FP&A. The product provides comprehensive capabilities to support top-down, bottom-up and mixed planning processes in a flexible and business-user-oriented manner. Unit4 FP&A allows customers to address various planning topics on one common platform, with different aggregation levels (e.g., strategic as well as operational planning) for an integrated corporate planning approach (including financial planning and, if required, financial consolidation). Indeed, 'good coverage of planning-specific requirements' is the number two reason why companies choose to buy Unit4 FP&A (59 percent). The product is ranked as a leader for *Planning Functionality* in four of its peer groups.

Self-Service

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

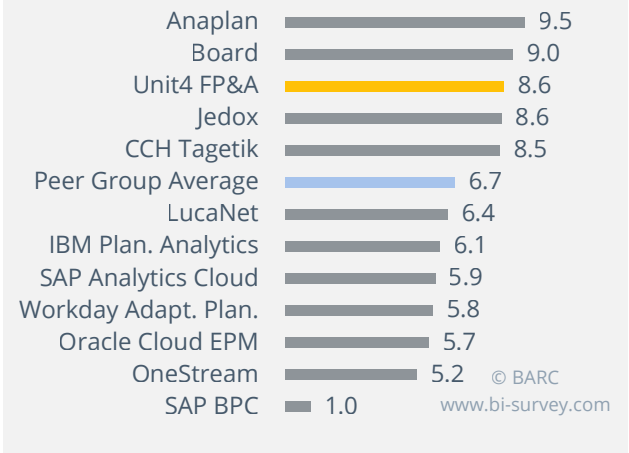
Self-Service – Leader

Peer group: Fin. Plan. & Consolidation-Focused Products



Self-Service – Leader

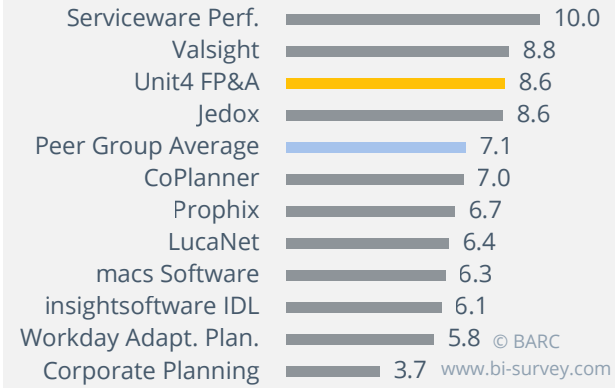
Peer group: Global Vendors



Self-Service

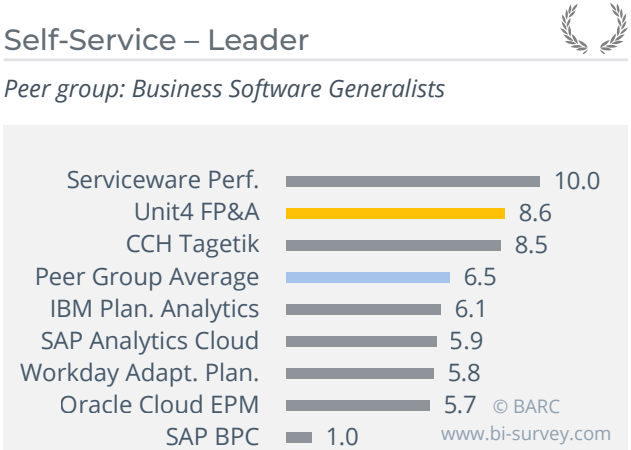
Self-Service – Leader

Peer group: Midsize/Departmental Implementations



Self-Service – Leader

Peer group: Business Software Generalists



BARC Viewpoint

Using planning and CPM products in a self-service manner in business departments has been a rising trend in the last 18-24 months. Many companies recognize that dynamic times require a fast supply of information through more frequent updating of plans and forecasts. Unit4 FP&A's goal is to deliver a business-user-friendly platform for business power users to build planning and CPM applications without the need for programming. The product is designed for self-service use in business departments (typically finance and controlling). This is particularly true when leveraging the product's cloud option, where Unit4 looks after the running and maintenance of the system (software-as-a-service). Unit4 FP&A scores highly for *Self-Service* in four of its peer groups in this year's Planning Survey.

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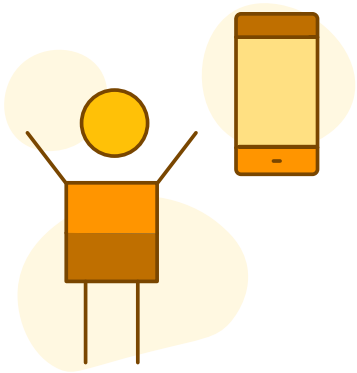
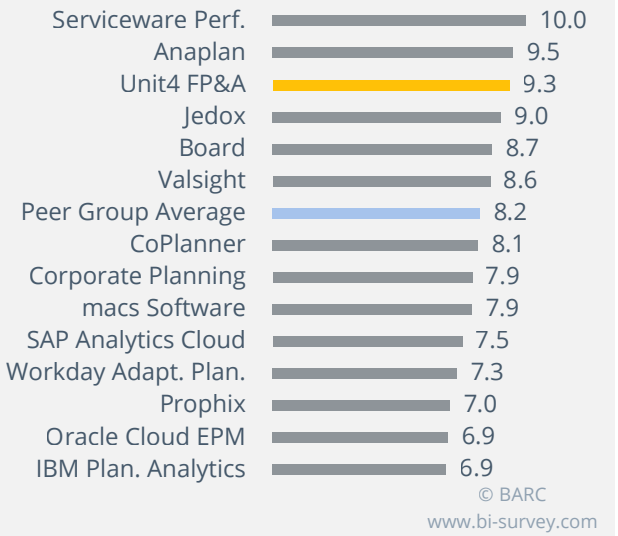
Ease of Use



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

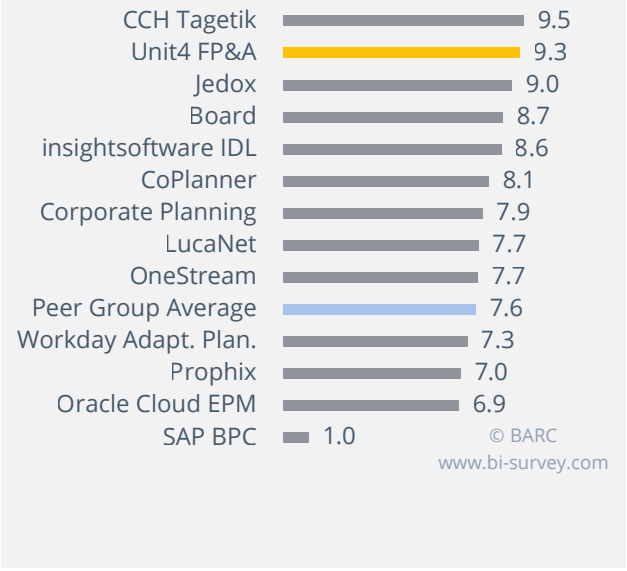
Ease of Use – Leader

Peer group: Operational Planning-Focused Products



Ease of Use – Leader

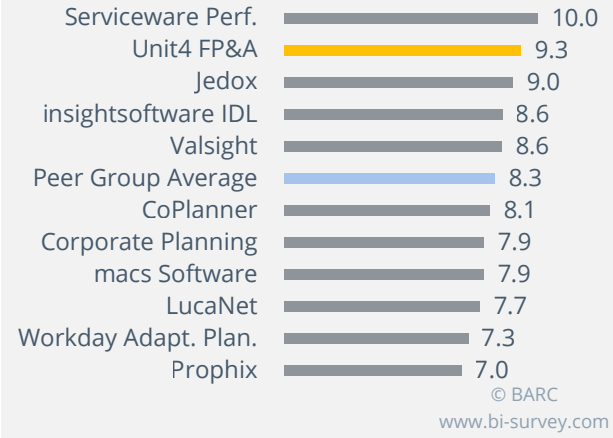
Peer group: Fin. Plan. & Consolidation-Focused Products



Ease of Use

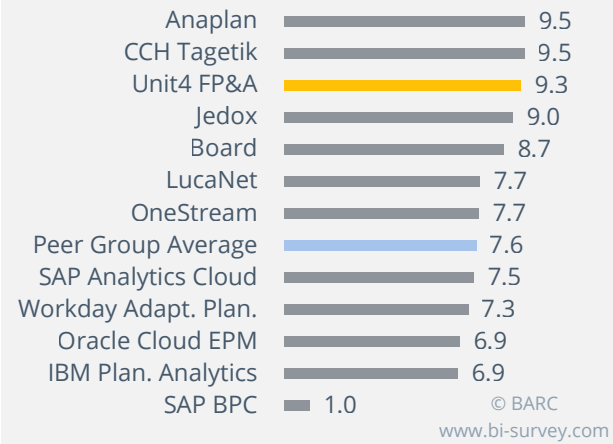
Ease of Use – Leader

Peer group: Midsize/Departmental Implementations



Ease of Use – Leader

Peer group: Global Vendors



BARC Viewpoint

With its Excel-like user interface, many customers consider Unit4 FP&A to be easy to use. The solution gives business users the platform and tools to configure their planning, budgeting & forecasting, analytics, reporting and financial consolidation applications, without needing a technical background. While the initial barrier to working with the product is low, its comprehensive and flexible functionality means that business power users should be well trained before attempting to create tailored applications. Unit4 FP&A is among the leaders for *Ease of Use* in four of its peer groups. Aside from technical tasks such as data transfers from operational source systems and the implementation of the database environment, Unit4 FP&A can be used in a relatively self-service manner by business users (typically finance and controlling). Only 2 percent of Unit4 FP&A users found the software difficult to use.

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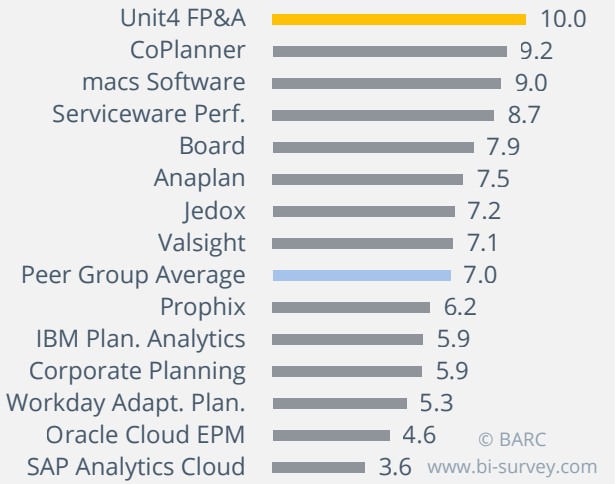
Flexibility

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.

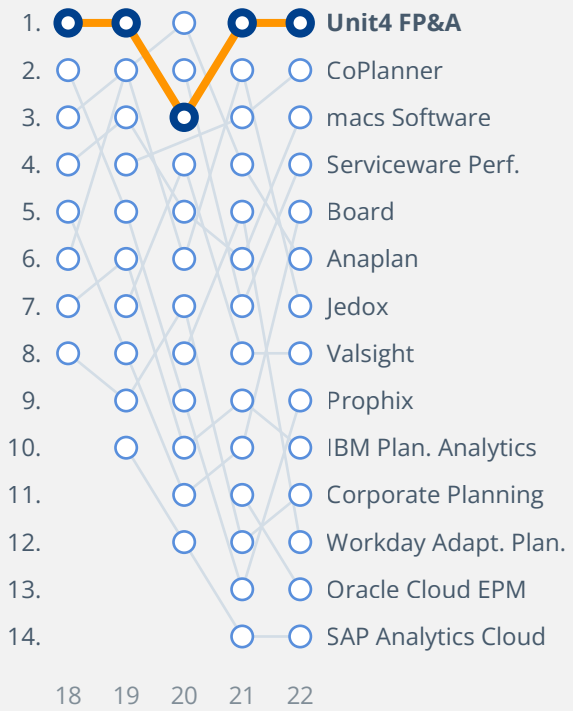
Flexibility – Top-ranked

Peer group: Operational Planning-Focused Products



Consistently outstanding in Flexibility

Peer group: Operational Planning-Focused Products



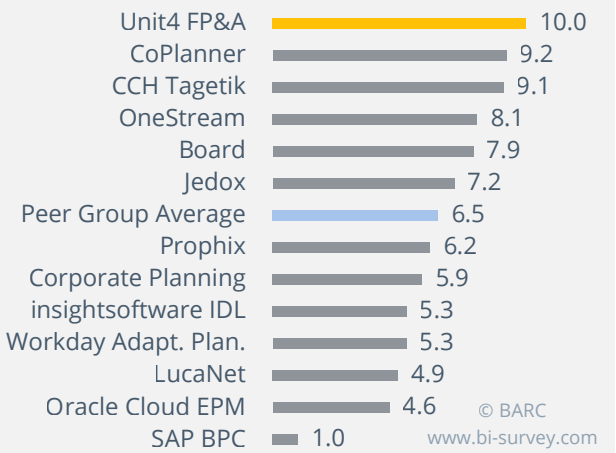
Flexibility

BARC Viewpoint

'Flexibility of the software' has been the number one reason why companies choose to buy planning products since 2017 and is also by far the number one reason why companies decide to buy Unit4 FP&A (77 percent). For several years, the product has achieved top ranks for *Flexibility* in all of its peer groups. At its core, Unit4 FP&A is a flexible but programming-free development environment for business users. This enables customers to address a variety of corporate and financial performance management topics. Besides creating individual planning and forecasting applications for different sub-budgets and planning strategies, users enjoy complementary analytics functionality for reporting, dashboarding, analysis and financial consolidation. The product's flexible development environment is supplemented by prebuilt but adaptable business solutions, which are available for various industries and business departments.

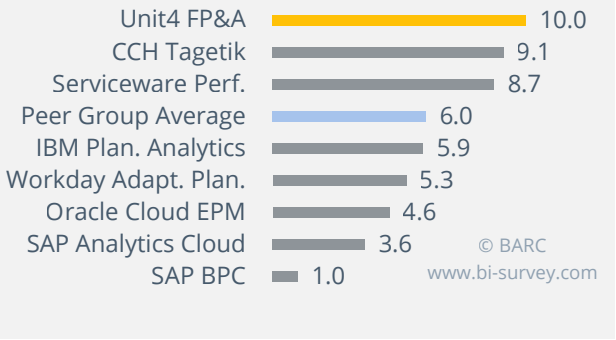
Flexibility – Top-ranked

Peer group: Fin. Plan. & Consolidation-Focused Products



Flexibility – Top-ranked

Peer group: Business Software Generalists

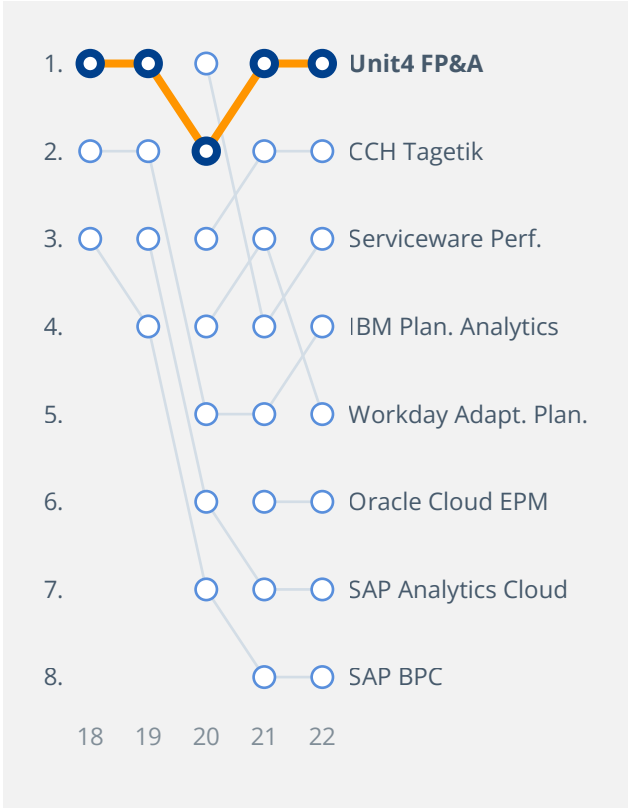


Consistently top-ranked in Flexibility

Peer group: Fin. Plan. & Consolidation-Focused Products

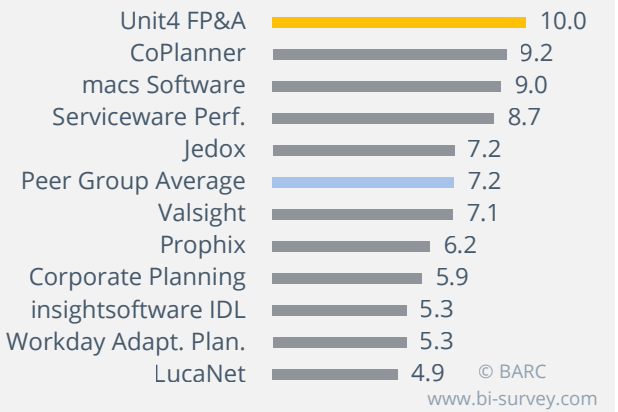
Consistently outstanding in Flexibility

Peer group: Business Software Generalists



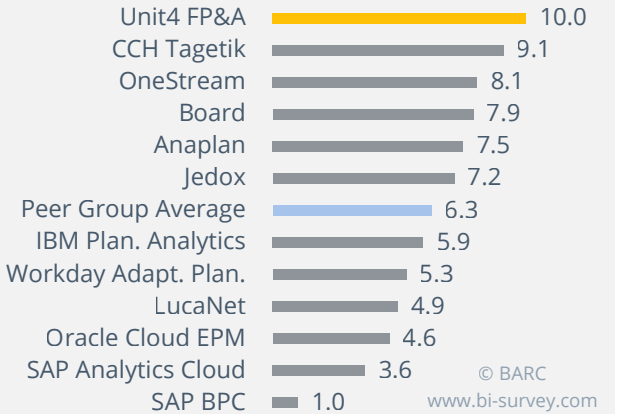
Flexibility – Top-ranked

Peer group: Midsize/Departmental Implementations



Flexibility – Top-ranked

Peer group: Global Vendors

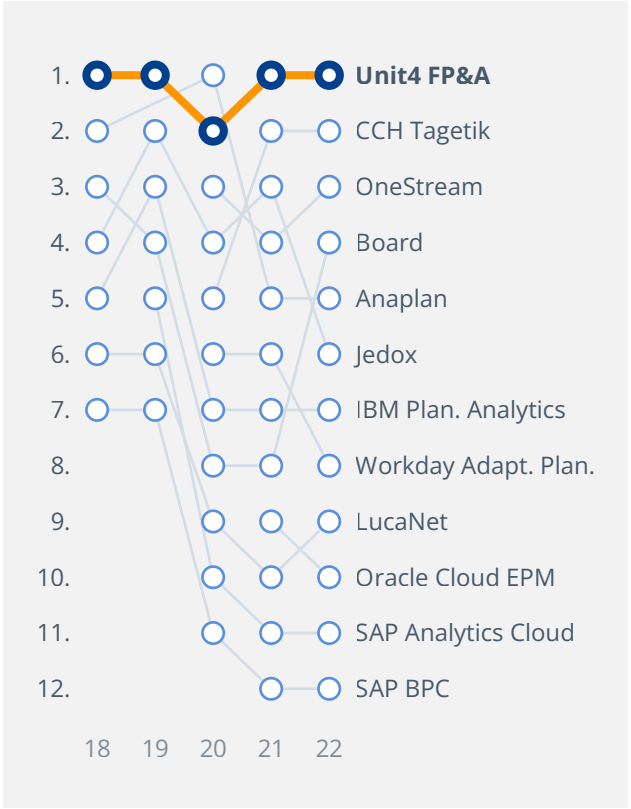


Consistently outstanding in Flexibility

Peer group: Midsize/Departmental Implementations

Consistently outstanding in Flexibility

Peer group: Global Vendors

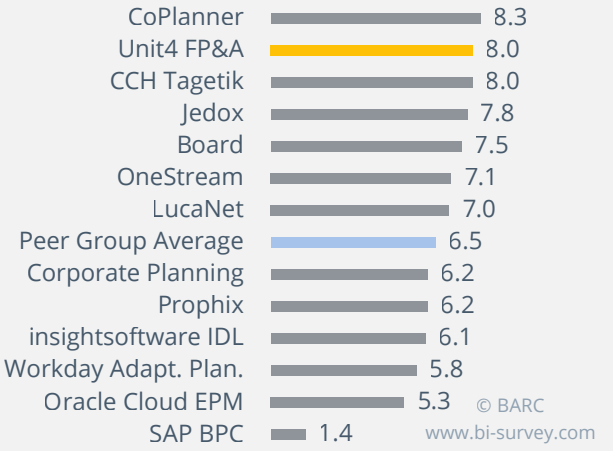


Customer Experience

Combines the *Self-Service*, *Flexibility*, *Ease of Use*, *Sales Experience and Performance Satisfaction* KPIs.

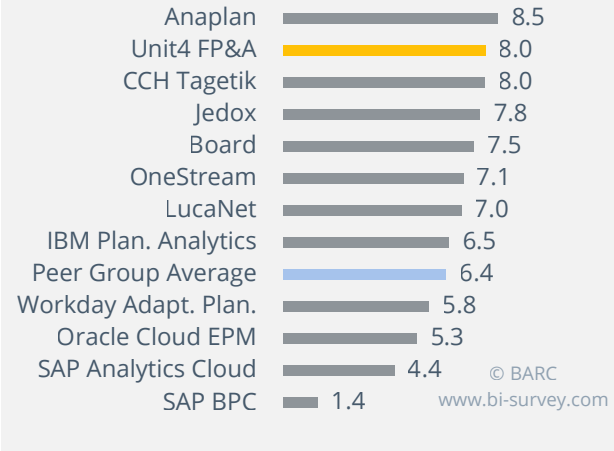
Customer Experience – Leader

Peer group: Fin. Plan. & Consolidation-Focused Products



Customer Experience – Leader

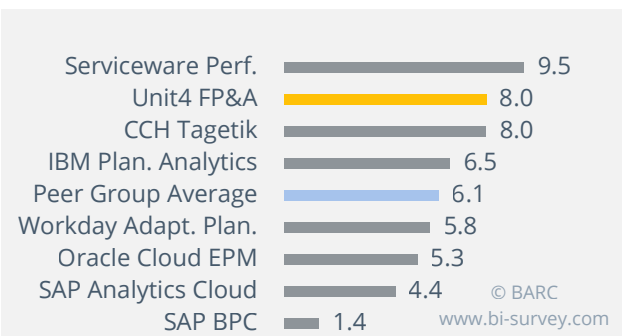
Peer group: Global Vendors



Customer Experience

Customer Experience – Leader

Peer group: Business Software Generalists



BARC Viewpoint

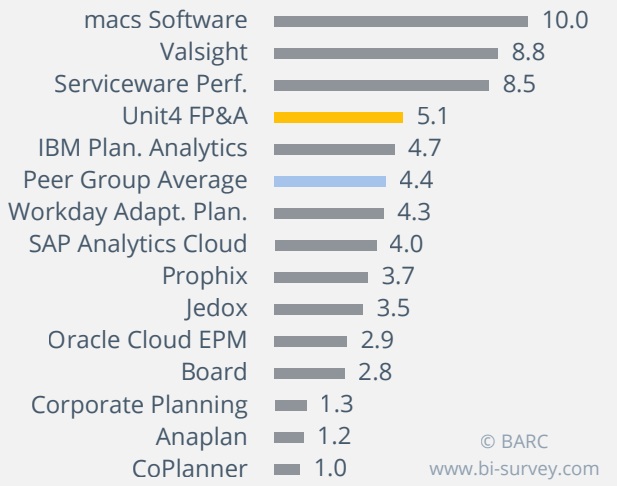
Customer Experience is an aggregated KPI that combines the *Self-Service, Ease of Use, Flexibility, Performance Satisfaction* and *Sales Experience* KPIs. Strong results for Unit4 FP&A in several of these contribute to leading ratings for *Customer Experience* in three of its peer groups. Unit4 FP&A is considered by many to be easy to use and therefore self-service planning appears to be a frequent use case with this business-user-friendly and flexible platform. Its Excel-like user interface requires little technical knowledge to use so the initial barrier to working with it is low. Flexibility is a key strength and provides the option for customers to address various corporate and financial performance management, but also planning, budgeting and forecasting requirements.

Competitive Win Rate

This KPI is based on the percentage of wins in competitive evaluations.

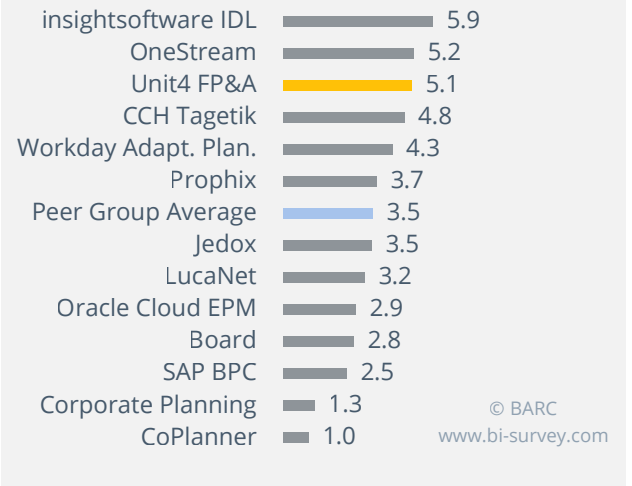
Competitive Win Rate – Leader

Peer group: Operational Planning-Focused Products



Competitive Win Rate – Leader

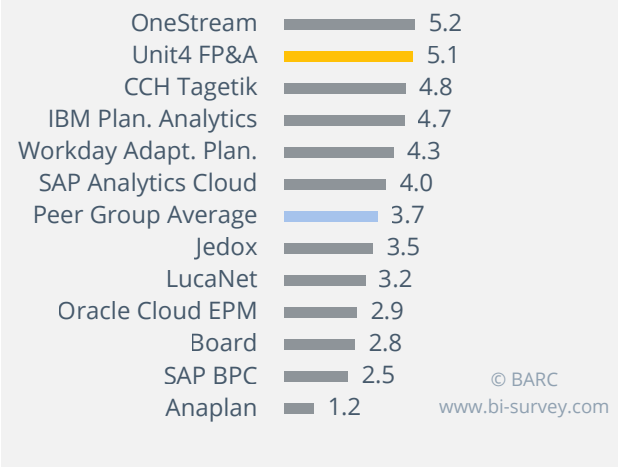
Peer group: Fin. Plan. & Consolidation-Focused Products



Competitive Win Rate

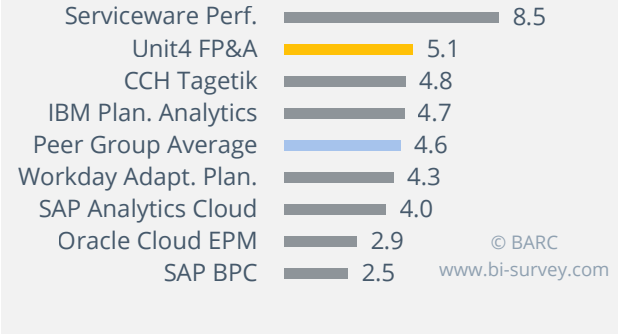
Competitive Win Rate – Leader

Peer group: Global Vendors



Competitive Win Rate – Leader

Peer group: Business Software Generalists



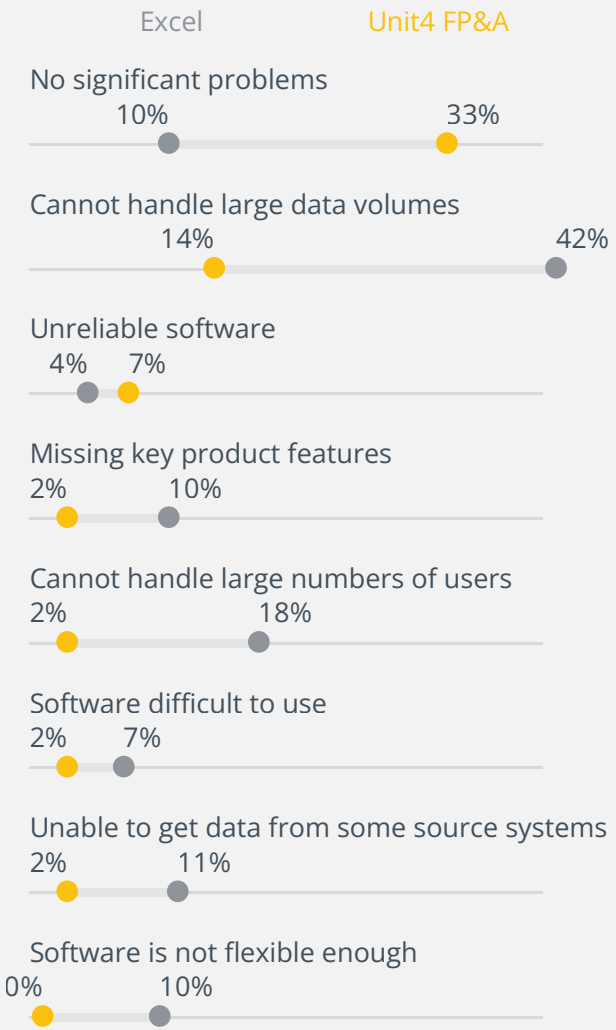
BARC Viewpoint

Unit4 FP&A's competitive win rate in head-on competitions against other vendors is convincing. As a result, the product achieves leading ranks for the *Competitive Win Rate* KPI in four of its peer groups this year. Unit4 FP&A's flexibility and its breadth of functionality to address various corporate and financial performance management use cases – including comprehensive capabilities for planning, budgeting and forecasting – clearly convinces many companies during the software selection process. Furthermore, ease of use and business-user-friendliness are convincing arguments during the software selection process that companies will be able to use the solution in a self-service manner in their finance and controlling departments.

Unit4 FP&A vs. Excel

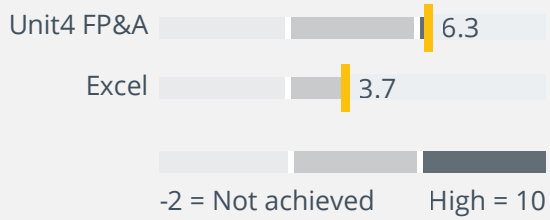
Problems encountered by Unit4 FP&A and Excel users

n=42/136



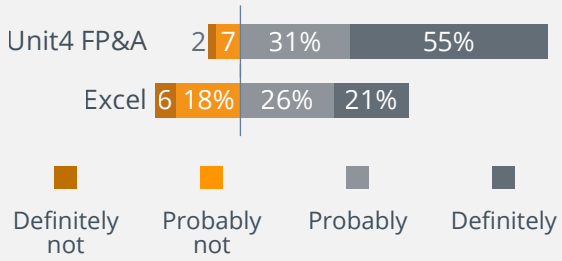
Business Benefits Index*

n=42/140



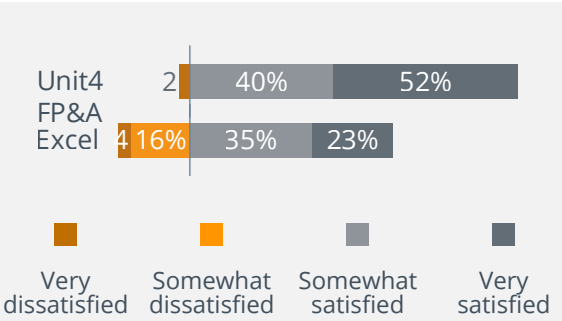
Recommendation**

n=42/140



Satisfaction level**

n=42/141



Unit4 FP&A vs. Excel

BARC Viewpoint

Year after year, BARC's Planning Survey reveals that Excel remains one of the world's most widely used products for planning and analytics. However, many users and companies are dissatisfied with it. Unit4 FP&A users have far fewer complaints than Excel users. Common issues in planning projects such as missing key product features, inflexibility and handling of large numbers of users or data volumes do not seem to be a major problem for Unit4 FP&A customers. 33 percent even report having no significant problems at all with the product. Business benefits regularly achieved with Unit4 FP&A (and achieved more frequently than with Excel) include increased transparency of planning, improved integration of planning with reporting/analysis, better quality of planning results and more precise/detailed planning. 86 percent of Unit4 FP&A users say they would "definitely" or "probably" recommend their planning product to other organizations, while 92 percent of respondents are "somewhat satisfied" or "very satisfied" with Unit4 FP&A.

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

** Neutral category not shown

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BARC (Business Application Research Center) is one of Europe's leading analyst firms for business software, focusing on the areas of data, business intelligence (BI) and analytics, enterprise content management (ECM), customer relationship management (CRM) and enterprise resource planning (ERP).

Our passion is to help organizations become digital companies of tomorrow. We do this by using technology to rethink the world, trusting data-based decisions and optimizing and digitalizing processes. It's about finding the right tools and using them in a way that gives your company the best possible advantage.

This unique blend of knowledge, exchange of information and independence distinguishes our services in the areas of research, events and consulting.

Research

BARC studies are based on internal market research, software tests and analyst comments, giving you the security to make the right decisions. Our independent research brings market developments into clear focus, puts software and vendors through their paces and gives users a place to express their opinions.

Events

Decision-makers and IT industry leaders come together at BARC events. BARC seminars in small groups, online webinars and conferences with more than 1,000 participants annually all offer inspiration and interactivity. Through exchange with peers and an overview of current trends and market developments, you will receive new impetus to drive your business forward.

Consulting

In confidential expert workshops, coaching and in-house consultations, we transform the needs of your company into future-proof decisions. We provide you with successful, holistic concepts that enable you to use the right information correctly. Our project support covers all stages of the successful use of software.

Other Surveys

The BARC Data, BI and Analytics Trend Monitor 2022 reflects on the trends currently driving the BI and data management market from a user perspective. We asked close to 2,400 users, consultants and vendors for their views on the most important BI and analytics trends.

The Future of Planning is a BARC market research study that examines the contribution modern planning and forecasting can make to corporate management. Download here.

The BI & Analytics Survey 22 is the world's largest survey of business intelligence software users. Based on a sample of over 2,400 responses, it offers an unsurpassed level of user feedback on 30 leading products. Find out more at www.bi-survey.com

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