

The Planning Survey 18

The world's largest survey of planning software users

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

Corporate Planning



A CXP GROUP COMPANY



Peer Group
Solution-focused Planning Products

1. Top-ranked in
 Planning functionality
 Ease of use
 Integrated planning
 User experience

Leader in
 Business benefits
 Project success
 Project length
 Business value
 Price-to-value
 Vendor support
 Implementer support
 Product satisfaction
 Customer satisfaction
 Performance satisfaction
 Predefined data connections
 Self-service
 Simulation & scenario analysis
 Considered for purchase

Peer Group
Financial Performance Management Products

1. Top-ranked in
 Business benefits
 Business value
 Planning functionality
 Reporting/analysis functionality
 Self-service
 Integrated planning
 User experience

Leader in
 Project success
 Project length
 Price-to-value
 Product satisfaction
 Ease of use
 Simulation & scenario analysis
 Considered for purchase

Peer Group
European Vendors

1. Top-ranked in
 Planning functionality
 Ease of use
 Integrated planning
 User experience

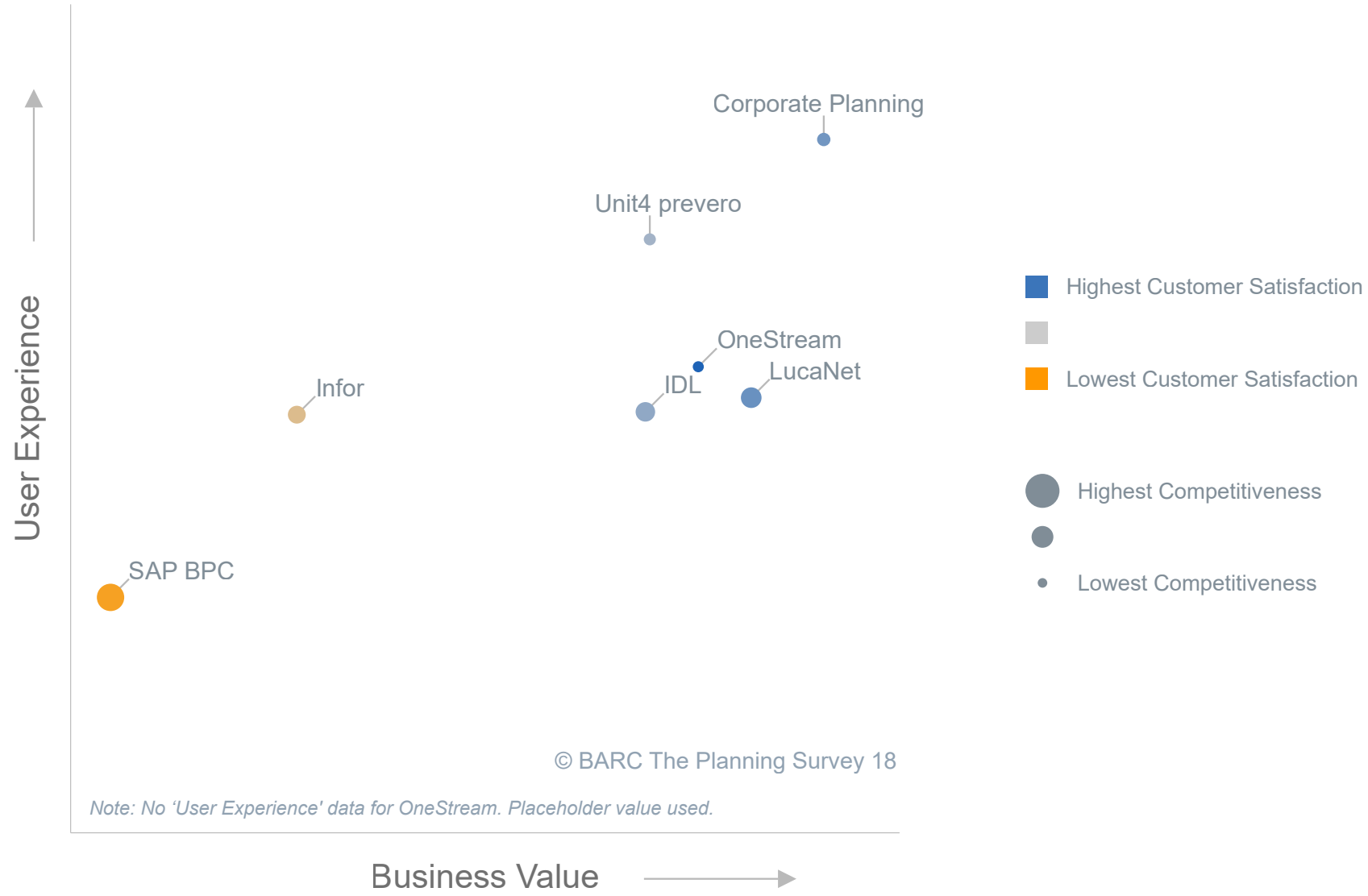
Leader in
 Business benefits
 Project success
 Project length
 Business value
 Vendor support
 Product satisfaction
 Predefined data connections
 Self-service
 Simulation & scenario analysis

Summary

With 15 top ranks and 30 leading ranks, CP achieves a great set of results in this year's Planning Survey. Excellent ratings in numerous important KPIs help to consolidate its position as a leading planning and CPM vendor in the DACH region. Companies can benefit from using CP software in terms of increased planning frequency, more precise/detailed planning, reduced planning complexity, improved integration of planning with reporting/analysis and better quality of planning results. An overwhelming 97 percent of respondents are 'somewhat satisfied' or 'very satisfied' with CP software, a major reason behind its high recommendation rate of 91 percent. With its suite approach, the vendor offers an integrated product portfolio for operational management, integrated financial planning, financial consolidation and strategic management.



The Planning Survey 18 *User Review Matrix* - Peer group: Financial Performance Management Products





The Planning Survey 18 *User Review Matrix* - Peer group: European Vendors



© BARC The Planning Survey 18



The Planning Survey 18 *User Review Matrix* - Peer group: Solution-focused Planning Products





The Planning Survey 18 Corporate Planning top ranks

Top-ranked
in
Planning functionality
*Peer Group
Solution-focused Planning Products*
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Top-ranked
in
Integrated planning
*Peer Group
Solution-focused Planning Products*
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Top-ranked
in
Ease of use
*Peer Group
Solution-focused Planning Products*
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Top-ranked
in
User experience
*Peer Group
Solution-focused Planning Products*
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Top-ranked
in
Business benefits
*Peer Group
Financial Performance Management Products*
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Top-ranked
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Financial Performance Management Products*
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Top-ranked
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| BARC

Top-ranked
in
Reporting/analysis functionality
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Financial Performance Management*
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Top-ranked
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| BARC

Top-ranked
in
Integrated planning
*Peer Group
Financial Performance Management Products*
#PLANNINGSURVEY18
| BARC

Top-ranked
in
Ease of use
*Peer Group
European Vendors*
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| BARC

Top-ranked
in
User experience
*Peer Group
European Vendors*
#PLANNINGSURVEY18
| BARC

Top-ranked
in
Planning functionality
*Peer Group
European Vendors*
#PLANNINGSURVEY18
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“
Umfangreich und flexibel, guter Support durch den Hersteller. Sehr detaillierte Planungen möglich.

BARC PLANNING SURVEY 18

” Person responsible/ Project manager for departmental BI, transportation and logistics, 101-2.500 employees

“
Sehr gut, kompetente Mitarbeiter, Rechnungslegung detailliert und übersichtlich, gute Erreichbarkeit der Mitarbeiter.

BARC PLANNING SURVEY 18

” Head of business department, retail/ wholesale/trade, 101-2.500 employees

“
Unkompliziertes Produkt, Planungs- und Istwerte können einfach und schnell analysiert werden. Planung ist auf verschiedenen Ebenen möglich, d.h. verschiedene Szenarien können durchgespielt werden.

BARC PLANNING SURVEY 18

” Controlling, food production, 101-2.500 employees

“
Überaus flexible Software, die voll und ganz auf die Unternehmensanforderungen angepasst ist.

BARC PLANNING SURVEY 18

” Consulting, > 2.500 employees

“
Für KMUs eine höchst praktikable Lösung - Anpassungen können durch Anwender selbst vorgenommen. Für langfristige integrierte Unternehmensplanung im Einsatz - besonders für langfristige Planungen sehr geeignet.

BARC PLANNING SURVEY 18

” Head of business department, utilities, < 100 employees



Corporate Planning overview

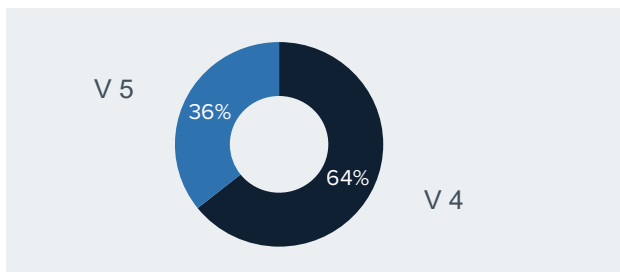
CP Corporate Planning AG (CP) is a software vendor and consultancy based in Hamburg, Germany. The company, which was founded in 1989, currently has approximately 130 employees worldwide. CP has regional and international offices in Germany, Austria, the Netherlands, Switzerland and the UK. The company is one of the largest planning software vendors in the DACH region.

CP offers solutions for operational management, integrated financial planning, financial consolidation and strategic management. Having combined its formerly separate products into the integrated CP-Suite, all modules now have a common user interface and are based on an integrated database in Microsoft SQL Server. 3,900 customers worldwide use various CP-Suite modules.

Corporate Planner, the planning product in CP-Suite, is targeted at business departments. The solution can be deployed both as a single desktop application as well as an enterprise solution for CPM and financial consolidation. Across its entire customer base, Corporate Planner is used by an average of 10+ users

Versions used

n= 28



per installation, yet it also supports installations with significantly larger numbers of users.

Corporate Planner's strengths include its intricate dialog boxes and wizards as well as comprehensive planning functionality and predefined reports and analyses that support business power users in a variety of tasks. The product provides centralized top-down planning, decentralized bottom-up planning as well as a combination of both approaches. The vendor does not focus on any particular planning topics (financials, sales, HR etc.) and can be used in any industry sector. For reporting, Corporate Planner offers various report types with many different possibilities. A comprehensive library of predefined business analyses is also available (e.g., variance, ABC and portfolio analysis), which users can run directly on their data. In the latest version, a new CP-Sales module provides functionality for sales controlling with enhanced flexibility for navigation in data and improved dashboarding capabilities. These new developments are a first step to enhancing CP's BI functionality for dashboarding, ad hoc queries and analysis. However, because, at least in the past, CP hasn't regarded itself as a typical BI product for individual analyses, a so-called BI-Exit is available for accessing CP data with third-party front ends (Connectivity BI and Connectivity Qlik).

Corporate Planning customer responses

This year we had 34 responses from Corporate Planning users. 64 percent of them used Version 4 and 34 percent Version 5.

BARC THE PLANNING SURVEY 18

The Planning Survey 18 is based on findings from the world's largest and most comprehensive survey of planning software users, conducted from November 2017 to February 2018. In total, 1,465 people responded to the survey with 875 answering a series of detailed questions about their usage of a named product. Altogether, 17 products (or groups of products) are analyzed in detail.

The Planning Survey 18 examines user feedback on planning product selection and usage across 24 criteria (KPIs) including business benefits, project success, business value, recommendation, customer satisfaction, user experience, planning functionality and competitiveness.

This document contains just a selection of the headline findings for Corporate Planning. 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](#).



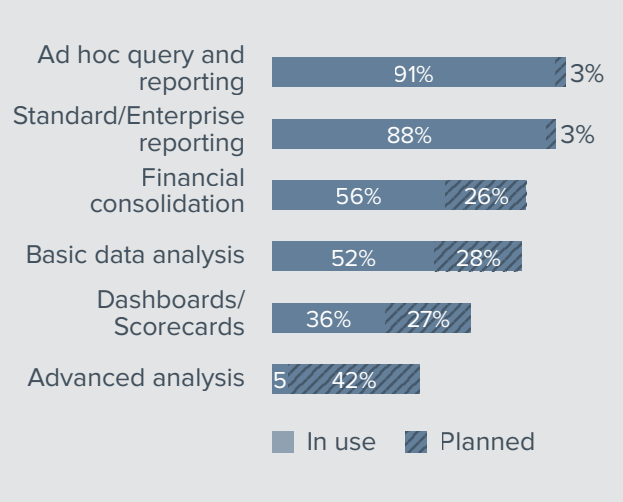
User and Use Case Demographics

BARC Comment

Besides planning, customers mainly use CP for ad hoc query and reporting, standard/enterprise reporting and financial consolidation. 42 percent of respondents plan to use it for advanced analysis in the future. CP targets small and mid-sized companies across all industries. 59 percent of our sample of CP customers come from mid-sized companies (100-2,500 employees) with a median of 8 users (with 5 of them using planning functionality), but the mean of 14 users (10 for planning) indicates there are also some larger implementations. 76 percent of CP users are planning users – comfortably above the survey average of 62 percent – reflecting the fact that CP is essentially a planning tool rather than a BI tool.

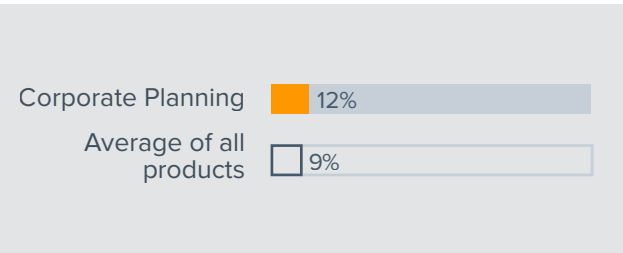
Current vs. planned use (besides planning)

n=34



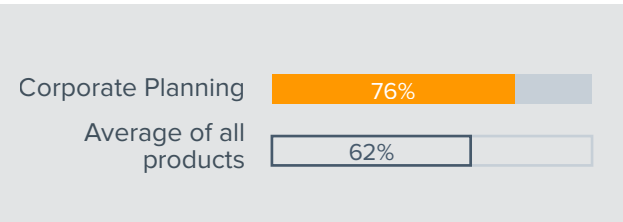
Percentage of employees using Corporate Planning

n=34



Planning users (as a percentage of all users)

n=34



Total number of users per company

n=34



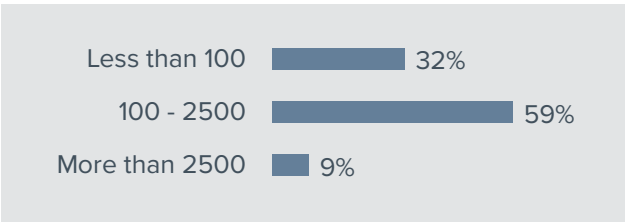
Planning users per company

n=34



Company size (employees)

n=34



Peer Groups and KPIs

The KPIs

The Planning Survey 18 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 20 - 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 following KPI chart titles. 'Top-ranked' indicates first position. 'Leader' usually denotes a position in the top 25-35% of products listed in the chart.

Peer Group Classification

The Planning Survey 18 features a range of different types of planning, budgeting and forecasting products so we use peer groups to help identify competing products. The peer groups have been defined by BARC analysts using their experience and judgment, with segmentation based on the following key factors:

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

Corporate Planning features in the following peer groups:

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

Peer Groups Overview

Flexible Planning Platforms

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

Solution-focused Planning Products

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

Financial Performance Management Products

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

Enterprise Software Vendors

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

Global Vendors

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

European Vendors

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

BI-focused Products

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

Business benefits

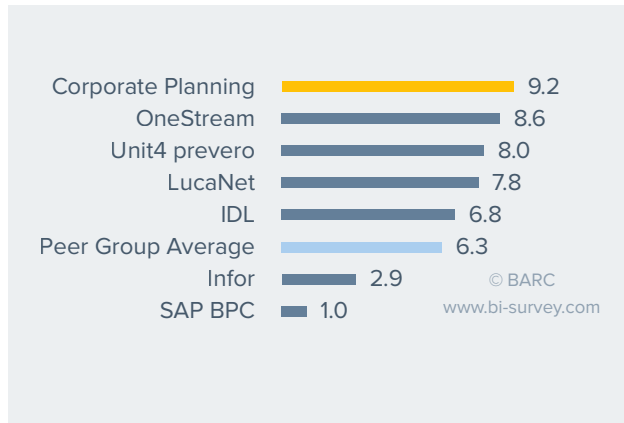


This KPI is based on the achievement level of a variety of business benefits.

Business benefits – Top-ranked



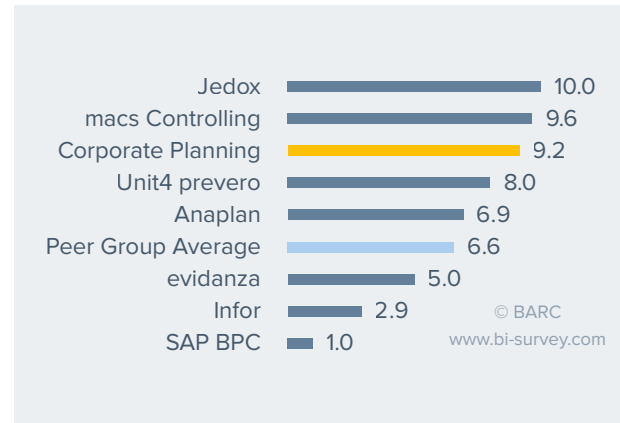
Peer group: Financial Performance Management Products



Business benefits – Leader



Peer Group: Solution-focused Planning Products



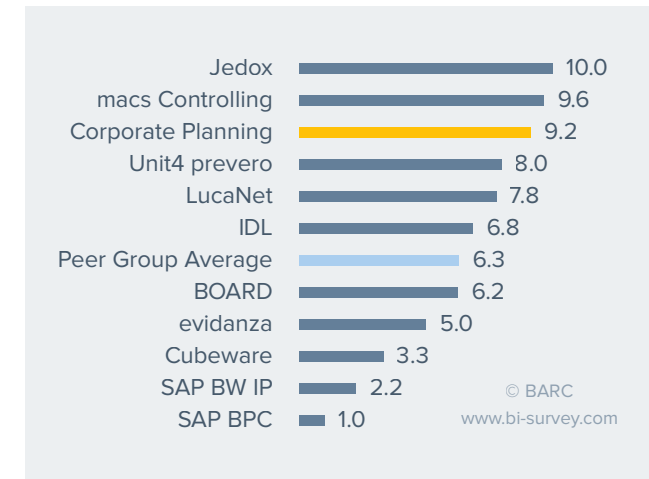
Business benefits



Business benefits – Leader



Peer Group: European Vendors



CP offers a comprehensive suite of products for operational management, integrated financial planning, financial consolidation and strategic management. Many customers benefit from using CP software and therefore feel they can recommend the product to other companies. Business benefits such as increased planning frequency, more precise/detailed planning, reduced planning complexity, improved integration of planning with reporting/analysis and better quality of planning results are achieved by an above-average proportion of CP users compared to other planning products. CP's results in this year's Planning Survey show that the product creates real business value for companies and many customers are satisfied with both the vendor and its product. CP is ranked top for 'Business benefits' in the 'Financial Performance Management Products' peer group.

Project success

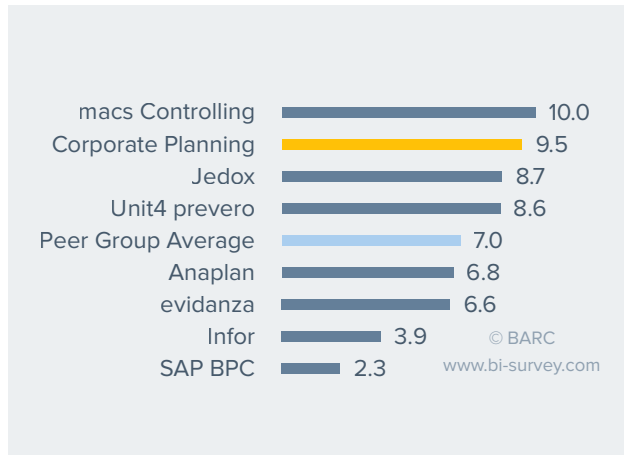


This KPI is based on the implementation satisfaction level and the frequency of projects completed on time and on budget.

Project success – Leader



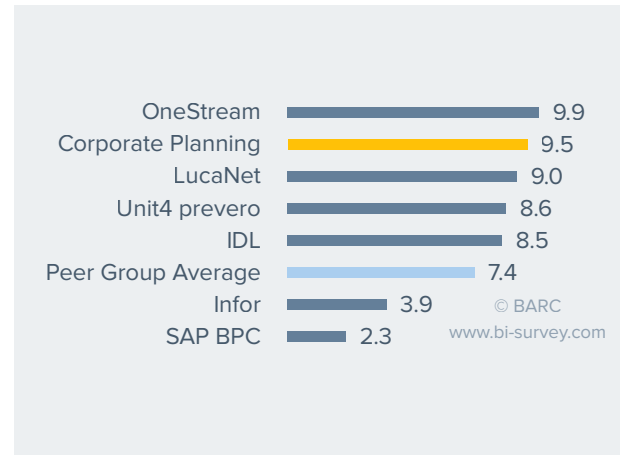
Peer Group: Solution-focused Planning Products



Project success – Leader



Peer Group: Financial Performance Management Products



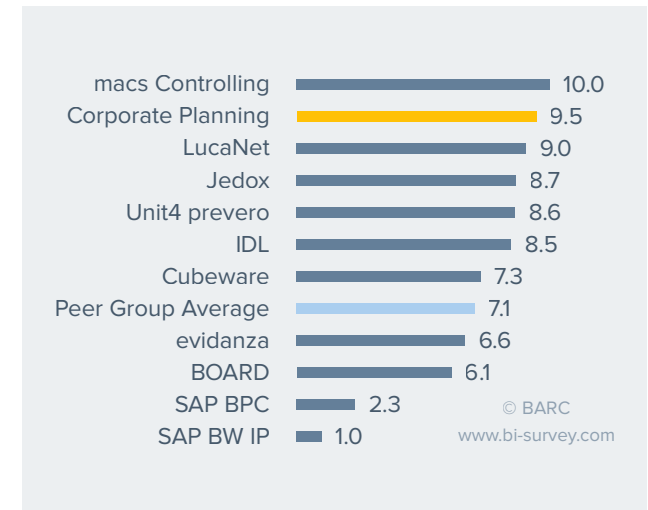
Project success



Project success – Leader



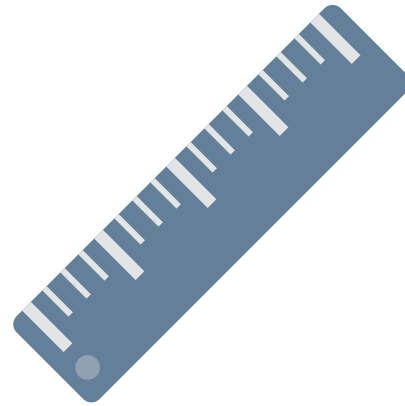
Peer Group: European Vendors



BARC Viewpoint

Customers confirm that CP software projects have a high success rate. The level of implementation satisfaction and the frequency of projects completed on time and on budget are high. Project goals defined at the outset are often reached. Consequently, CP achieves leading ranks for 'Project success' in all of its peer groups, beating many of its local and international rivals. CP's broad and comprehensive suite with modules for operational management, integrated financial planning, financial consolidation and strategic management might also contribute to the success of projects because many different planning and CPM requirements can be addressed with its integrated product portfolio.

Project length

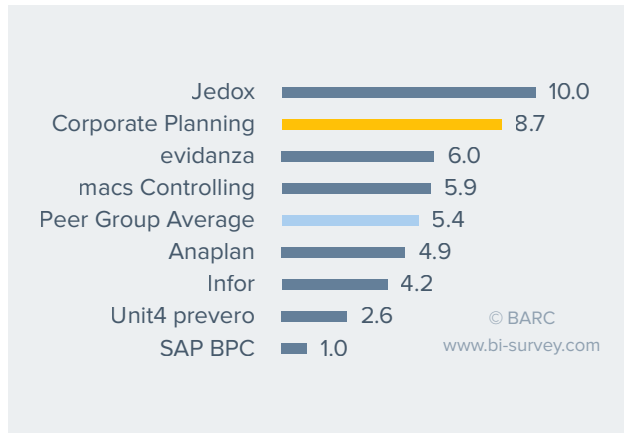


This KPI is based on how quickly the product is implemented.

Project length – Leader



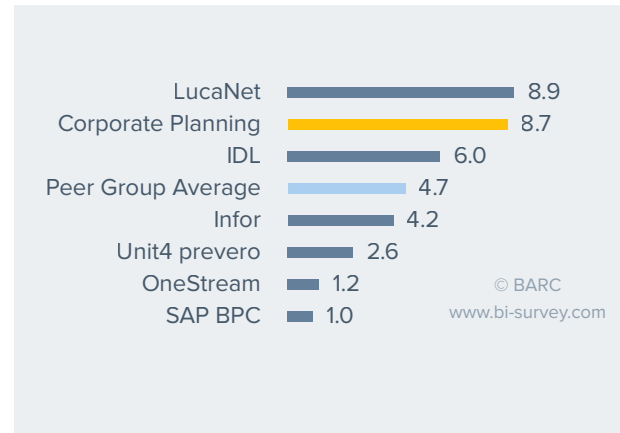
Peer Group: Solution-focused Planning Products



Project length – Leader



Peer Group: Financial Performance Management Products



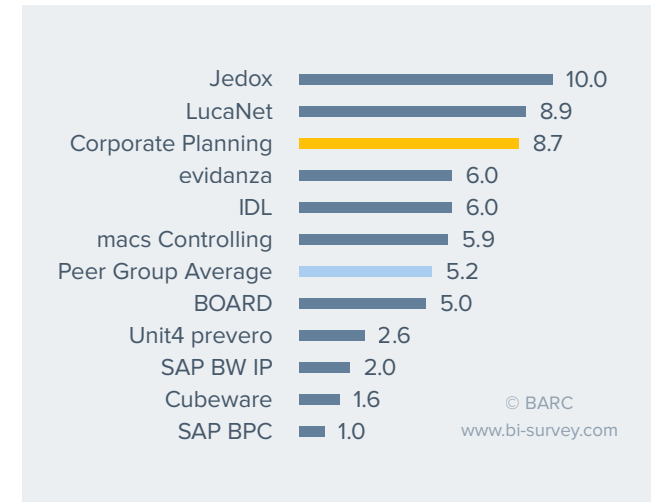
Project length



Project length – Leader



Peer Group: European Vendors



BARC Viewpoint

Customers seem to be quite happy with the amount of time spent on their implementation projects. Projects with CP software are usually quite quick in comparison to many of its local and global competitors. CP's predefined data connections to more than 100 operational source systems as well as its predefined reports and business analyses are particularly helpful for speeding up implementation projects. However, it should be noted that projects with CP software are often small in terms of numbers of users and data volumes involved. Business requirements in small and mid-size companies, CP's primary target group, are often straightforward. CP achieves leading ranks for 'Project length' in all of its peer groups.

Business value

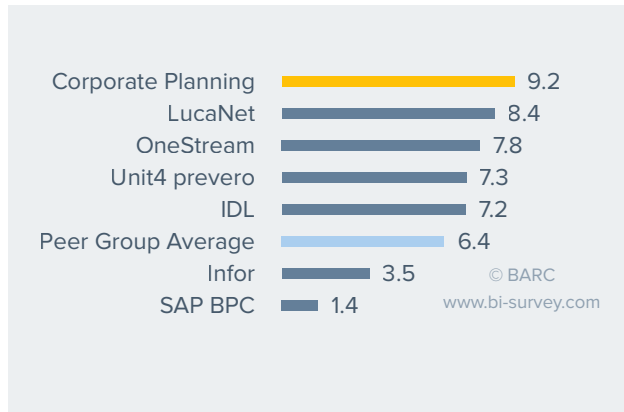


This KPI combines the 'Business benefits', 'Project success' and 'Project length' KPIs.

Business value – Top-ranked



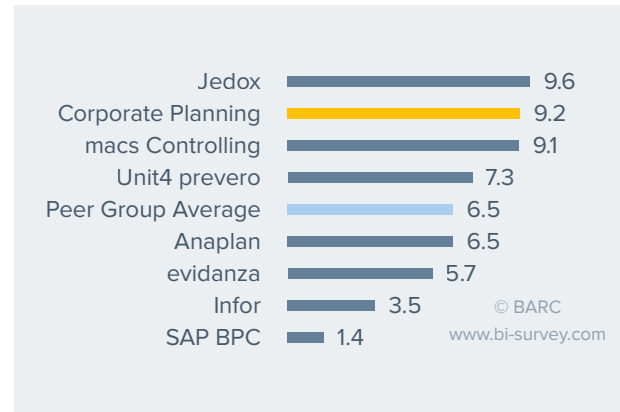
Peer Group: Financial Performance Management Products



Business value – Leader



Peer Group: Solution-focused Planning Products



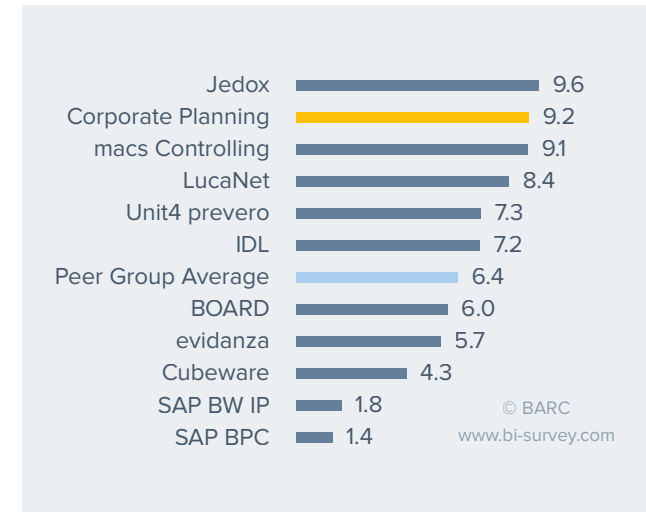
Business value



Business value – Leader

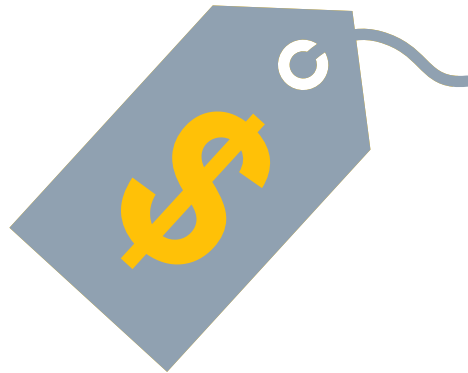


Peer Group: European Vendors



CP's results in this year's Planning Survey show that the product creates real business value for companies and many customers are satisfied with both the vendor and its product. The level of implementation satisfaction and the frequency of projects completed on time and on budget are high. Project goals defined at the outset are often reached. Business benefits such as increased planning frequency, more precise/detailed planning, reduced planning complexity, improved integration of planning with reporting/analysis and better quality of planning results are achieved by an above-average proportion of CP users compared to other planning products. Many customers feel they can recommend using CP as a planning tool. In fact, 91 percent of CP users say they would probably or definitely recommend it to other organizations.

Price-to-value

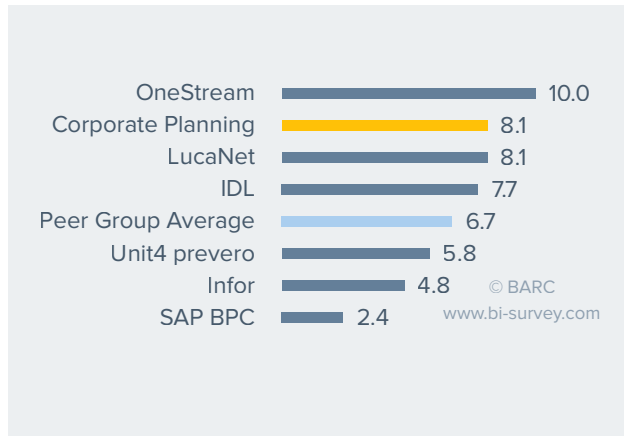


This KPI is based on how users rate their BI tool in terms of price-to-value.

Price-to-value – Leader



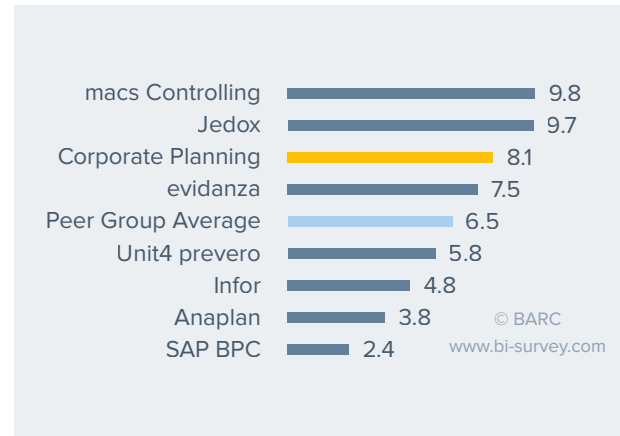
Peer Group: Financial Performance Management Products



Price-to-value – Leader



Peer Group: Solution-focused Planning Products



Price-to-value

Compared to its competitors in the ‘Financial Performance Management Products’ and ‘Solution-focused Planning Products’ peer groups, CP is considered to be attractively priced, offering good value and comprehensive functionality for addressing various planning and CPM use cases. The product’s price-performance ratio is a major reason why many customers choose the product. The product offers high business value for customers at a reasonable price. CP is licensed using a named or concurrent user concept, depending on each customer’s needs. The fee for support and maintenance is set at 21 percent of the license list price per year.

Vendor support

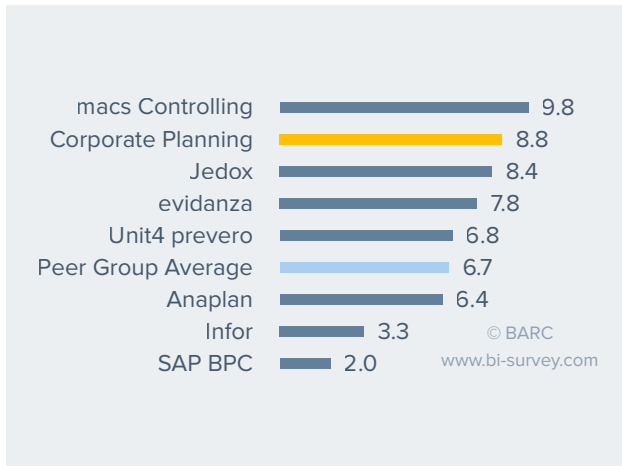


This KPI measures user satisfaction with the level of vendor support provided for the product.

Vendor support – Leader



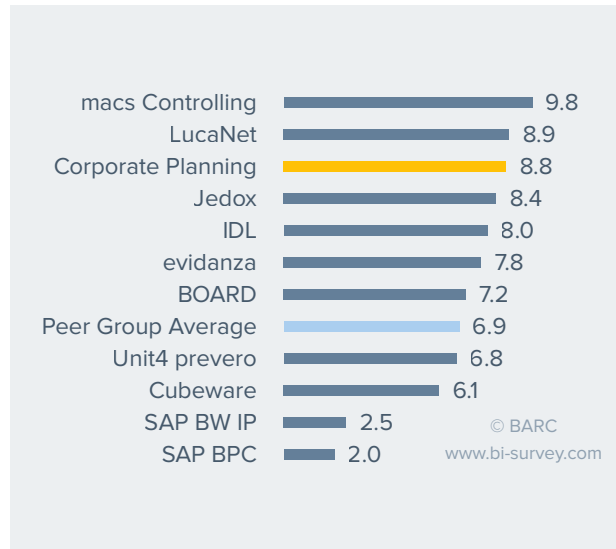
Peer Group: Solution-focused Planning Products



Vendor support – Leader



Peer Group: European Vendors



BARC Viewpoint

In this year's Planning Survey, CP achieves leading ranks for 'Vendor support' in two of its peer groups. Customers seem to be largely satisfied with the vendor's support and benefit from its product knowledge and implementation experience. With 130 employees and 12 offices in Germany (HQ), Austria, Switzerland, the Netherlands and the United Kingdom, CP is able to support many customers at a local level in their native language with highly trained staff. CP offers telephone, email and remote support to its customers as well as a user forum for registered users, an annual customer conference and some local user conferences.

Implementer support & Reporting/analysis functionality



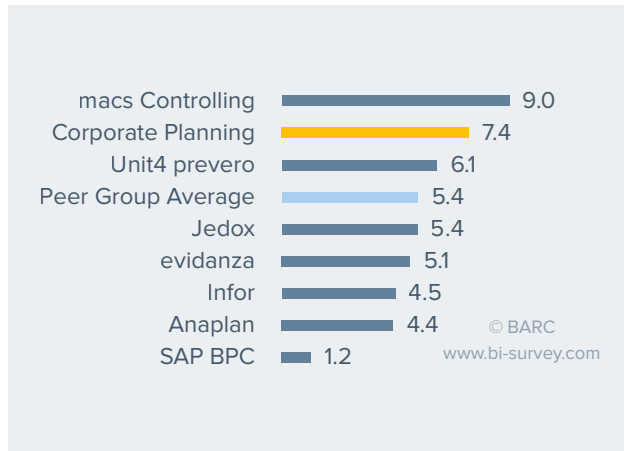
The 'Implementer support' KPI measures user satisfaction with the level of the implementer's support for the product.

The 'Reporting/analysis functionality' KPI measures user satisfaction with the reporting/analysis functionality of the product.

Implementer support – Leader



Peer Group: Solution-focused Planning Products



BARC Viewpoint

Implementer support



CP's partners also seem to do a very good job on their implementation projects. Partners often focus on specific solutions, industries or regions. User satisfaction with the level of implementation partners' support for the product is highly rated and way ahead of its competitors in the 'Solution-focused Planning Products' peer group. Whereas CP itself is strongly focused on the DACH region, Benelux and the UK, elsewhere CP products are mainly sold and implemented by partners. Many of them are also Qlik partners who enhance Qlik's Analytics Platform with planning and CPM functionality from CP using the Connectivity Qlik interface.



Reporting/analysis functionality

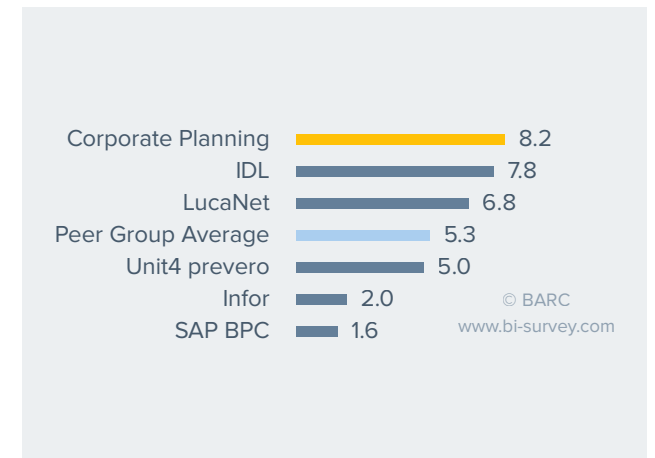
BARC Viewpoint

CP is essentially a planning tool with BI functionality. 'Good coverage of planning specific requirements' and 'Good coverage of reporting/analysis requirements' are the main reasons why companies buy the product. CP's strengths include its intricate dialog boxes and wizards as well as comprehensive planning functionality and predefined reports and analyses that support business power users in a variety of tasks. An impressive library of predefined business analyses is also available (e.g., variance, ABC and portfolio analysis), which users can run directly on their data. In the latest version, a new CP-Sales module provides functionality for sales controlling with enhanced flexibility for navigation in data and improved dashboarding capabilities. These new developments are a first step to enhancing CP's BI functionality for dashboarding, ad hoc queries and analysis.

Reporting/analysis functionality – Top-ranked



Peer Group: Financial Performance Management Products



Product satisfaction

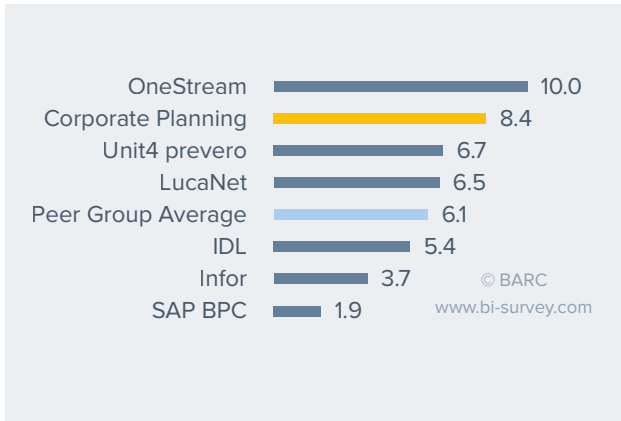


This KPI is based on the frequency of problems encountered with the product.

Product satisfaction – Leader



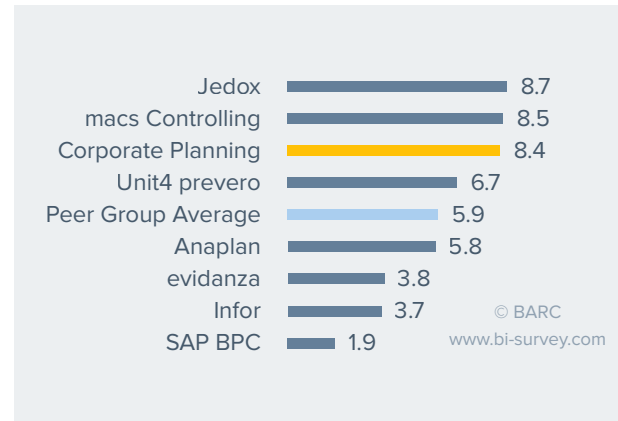
Peer Group: Financial Performance Management Products



Product satisfaction – Leader



Peer Group: Solution-focused Planning Products



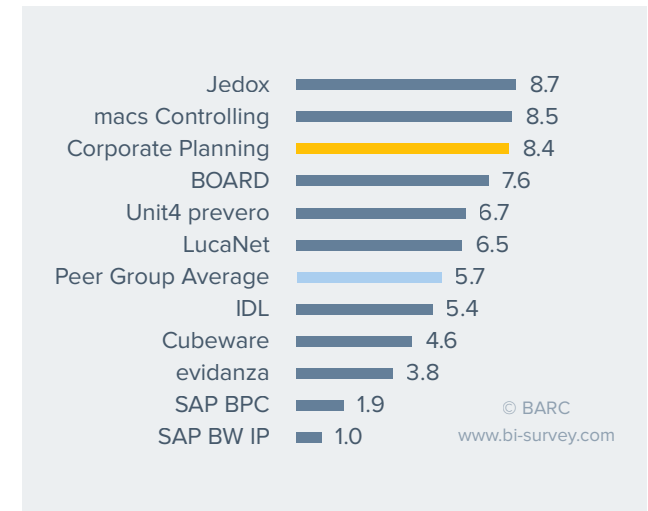
Product satisfaction



Product satisfaction – Leader



Peer Group: European Vendors



CP's comprehensive suite of products for operational management, integrated financial planning, financial consolidation and strategic management seems to hit the spot for many companies. The products are typically deployed in business departments in small and mid-size companies. CP software's strengths include its intricate dialog boxes and wizards as well as comprehensive planning functionality and predefined reports and analyses that support business power users in a variety of tasks. The product provides centralized top-down planning, decentralized bottom-up planning as well as a combination of both approaches. Problems encountered with CP products are quite rare. In fact, 53 percent of customers say they have no significant problems at all with the product. In this year's Planning Survey, CP achieves three leading ranks for 'Product satisfaction' in its peer groups.

Customer satisfaction & Performance satisfaction



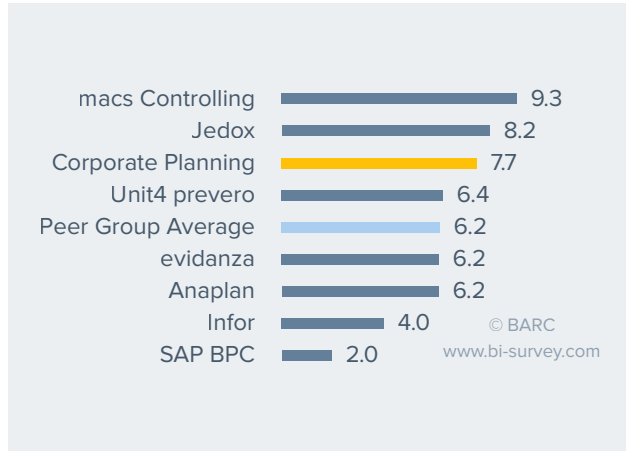
The 'Customer satisfaction' KPI combines the 'Price-to-value', 'Recommendation', 'Vendor support', 'Implementer support' and 'Product satisfaction' KPIs.

The 'Performance satisfaction' KPI measures the frequency of complaints about the system's performance.

Customer satisfaction – Leader



Peer Group: Solution-focused Planning Products



Good results for ‘Vendor support’ and ‘Implementer support’ as well as in the ‘Recommendation’, ‘Price-to-value’ and ‘Product satisfaction’ KPIs place CP well clear of many of its rivals for ‘Customer satisfaction’, particularly in the ‘Solution-focused Planning Products’ peer group. Customers are satisfied with the level of support offered by the vendor and its partners. CP is a German vendor and many of its customers are located in the DACH region. Many customers seem to place a high value on CP’s geographical proximity to their business. Customer satisfaction is crucial to establishing long-lasting relationships.



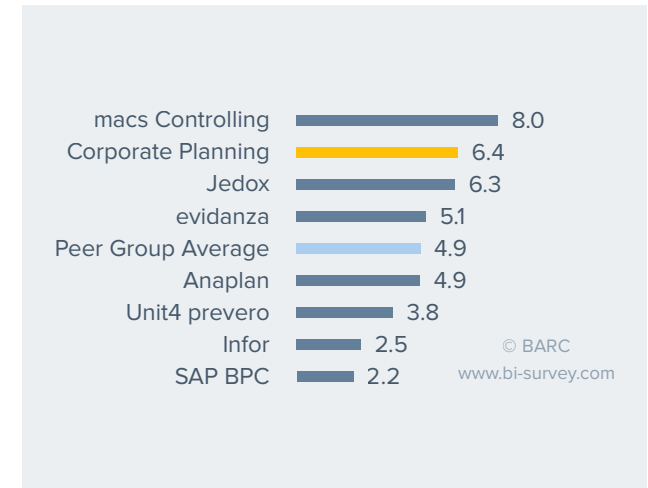
Performance satisfaction

‘Convincing performance’ is also a prominent reason why companies choose CP software. Customers are quite satisfied with the performance the product offers. However, CP is normally used with relatively small data volumes and few concurrent users, where performance is not usually an issue. In any case, CP and its underlying relational data model in Microsoft SQL Server are clearly capable of dealing with the data volumes and user numbers its customers typically work with. All data aggregations as well as the whole calculation logic is done at runtime in CP’s application server memory. The level of complaints about performance issues post implementation is around average.

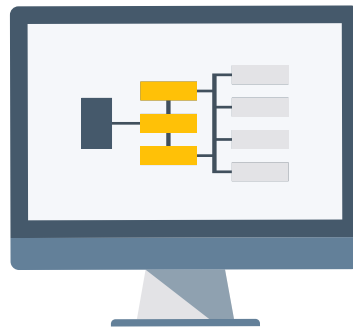
Performance satisfact – Leader



Peer Group: Solution-focused Planning Products



Planning functionality

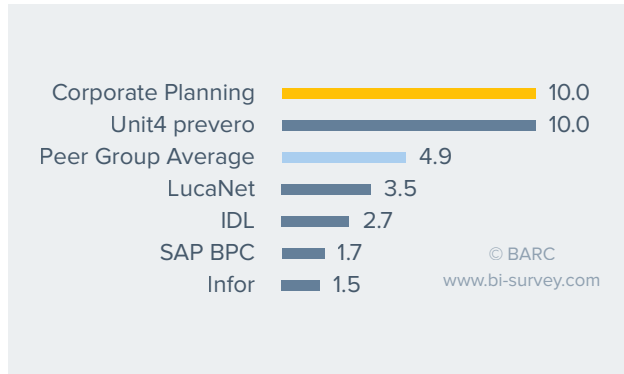


This KPI measures user satisfaction with the planning functionality of the product.

Planning functionality – Top-ranked



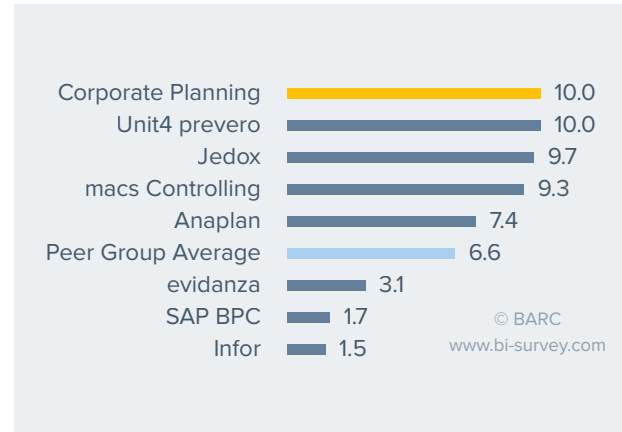
Peer Group: Financial Performance Management Products



Planning functionality – Top-ranked



Peer Group: Solution-focused Planning Products



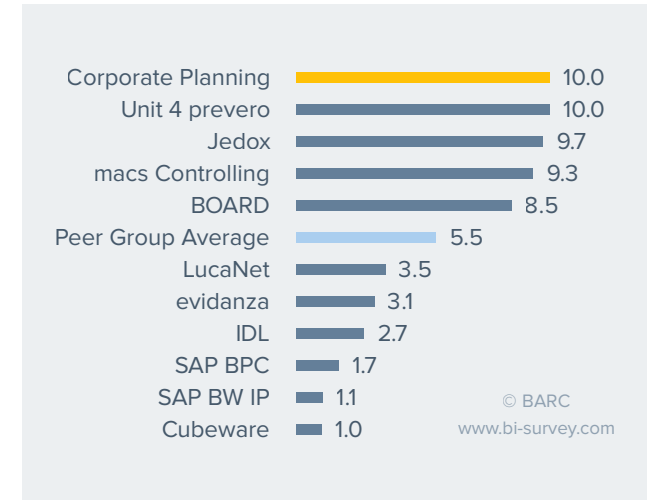
Planning functionality



Planning functionality – Top-ranked

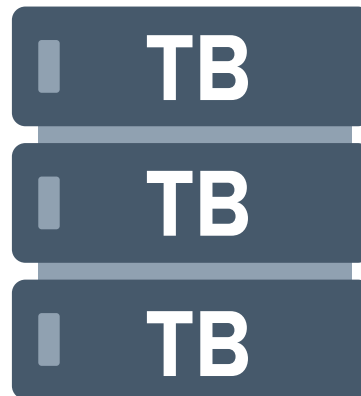


Peer Group: European Vendors



Corporate Planner, the planning product in CP-Suite, is targeted at business departments. Corporate Planner's strengths include its intricate dialog boxes and wizards as well as comprehensive planning functionality and predefined reports and analyses that support business power users in a variety of tasks. The product provides centralized top-down planning, decentralized bottom-up planning as well as a combination of both approaches. The product does not focus on any particular planning topics (financials, sales, HR etc.) and can be used in any industry sector. The solution can be deployed both as a single desktop application as well as an enterprise solution for CPM and financial consolidation. Customers are very satisfied and consider the product to have comprehensive planning functionality. As a result, CP is ranked top for its 'Planning functionality' in all of its peer groups.

Predefined data connections

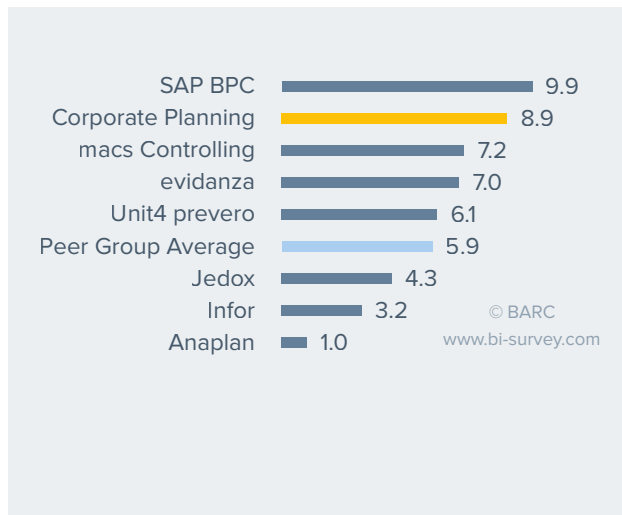


Based on how often the product was chosen for its predefined data connection to systems in use, and on the frequency of complaints about being unable to access data from source systems.

Predefined data connections – Leader



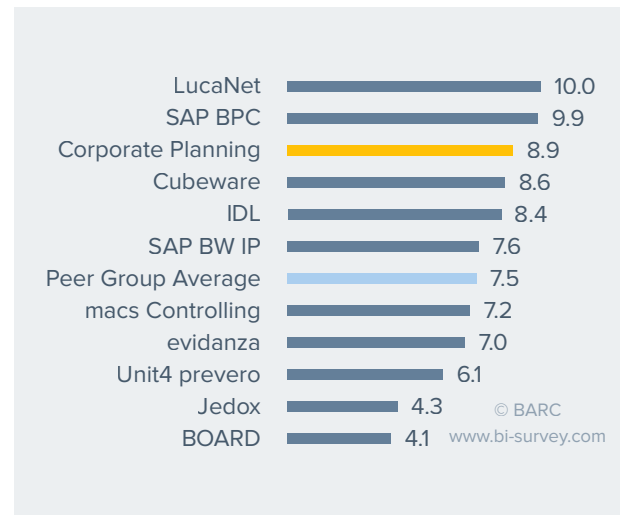
Peer Group: Solution-focused Planning Products



Predefined data connections – Leader



Peer Group: European Vendors



Predefined data connections



‘Predefined data connections’ is another frequently cited reason for choosing CP products. CP ranks highly in all of its peer groups, well above the survey average. The level of complaints about being unable to get data from some source systems is quite low. For data integration purposes, CP has its own ETL functionality to access data sources and transfer data. In addition to its standard interfaces, CP provides more than 100 “integrations”, which are predefined data connections to common ERP and accounting systems. Integrations can significantly speed up data migration projects. However, they have to be separately licensed. Moreover, for individual analyses of CP data with third-party BI products, a so-called BI-Exit is available (Connectivity BI and Connectivity Qlik).

Ease of use

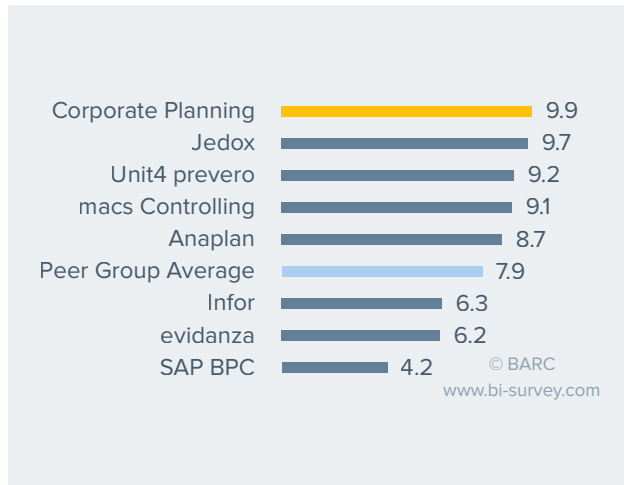


This KPI is based on how often the product was chosen for its ease of use, and on the level of complaints about ease of use post-implementation.

Ease of use – Top-ranked



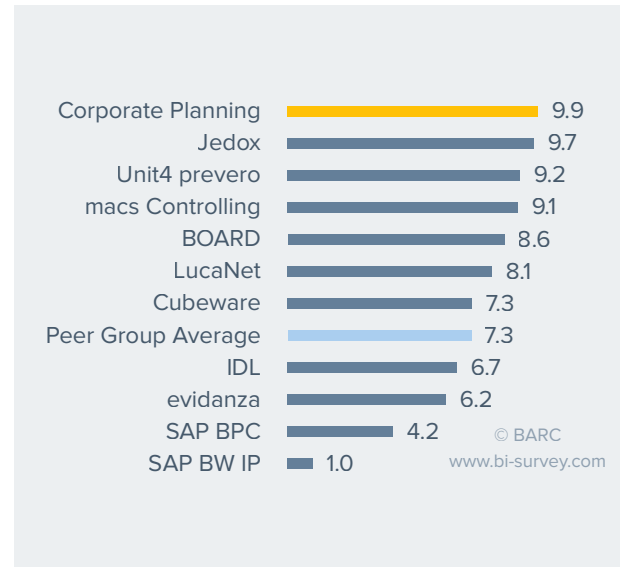
Peer Group: Solution-focused Planning Products



Ease of use – Top-ranked



Peer Group: European Vendors



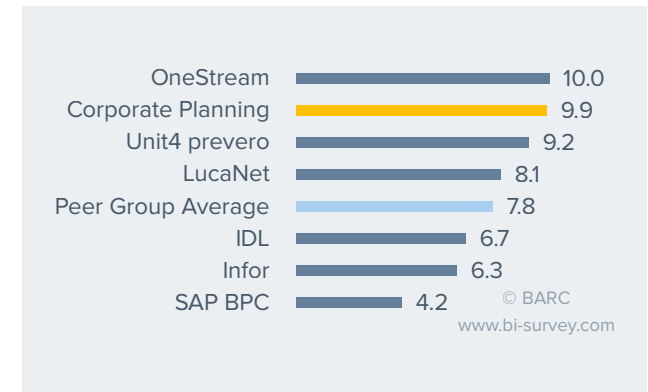
Ease of use



Ease of use – Leader

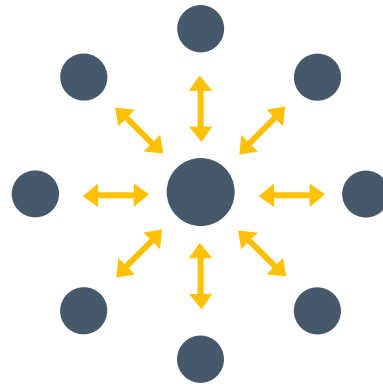


Peer Group: Financial Performance Management Products



Once again this year, our survey results confirm that CP is easy to use. ‘Software difficult to use’ is seldom cited as a problem by CP users. CP is targeted at business departments and requires little technical knowledge except for some aspects of data management (particularly data integration). Administration, modeling and creating planning forms, as well as general planning functionality, are designed for business users. Consequently, many customers use CP for self-service planning in business departments and require only a minimum of IT support to work with the product. CP is ranked top for ‘Ease of use’ in two of its peer groups and achieves a leading position in the other.

Integrated planning

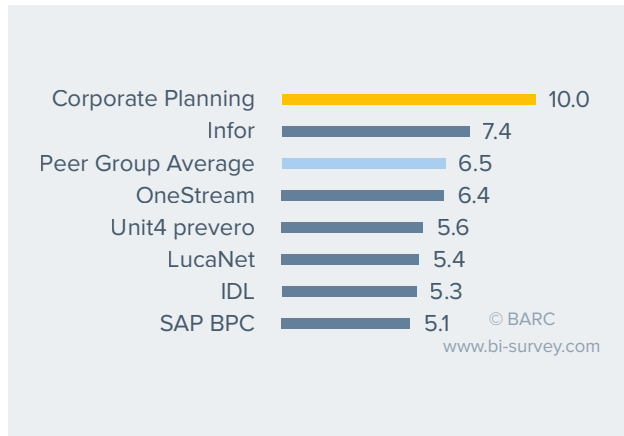


This KPI is based on how many sites currently integrate strategic and operational plans, and how many sites integrate different sub-budgets.

Integrated planning – Top-ranked



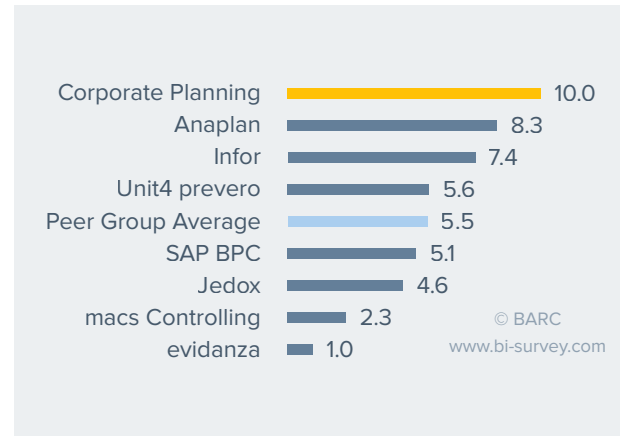
Peer Group: Financial Performance Management Products



Integrated planning – Top-ranked



Peer Group: Solution-focused Planning Products



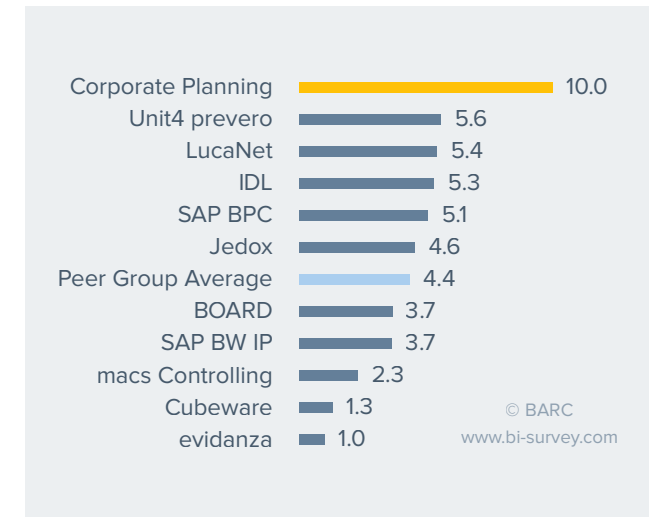
Integrated planning



Integrated planning – Top-ranked



Peer Group: European Vendors



CP provides centralized top-down planning, decentralized bottom-up planning or a combination of both approaches. Customers can address various planning topics on one common platform, with different aggregation levels (e.g., strategic as well as operational planning) for an integrated enterprise planning approach (including financial planning and financial consolidation). CP comes with a predefined model for integrated financial planning (balance sheet, P&L, cash flow) called CP-Finance. Individual operational sub-budgets (e.g., cost, sales, HR) can be transferred to CP-Finance for planning of financial results including the consideration of intercompany allocations. Customers are highly satisfied with CP's support for integrated planning.

Self-service

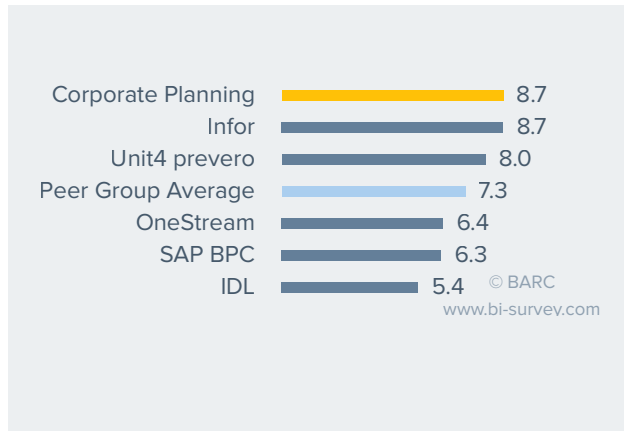


This KPI is based on how many sites currently use self-service features with their planning tool.

Self-service – Top-ranked



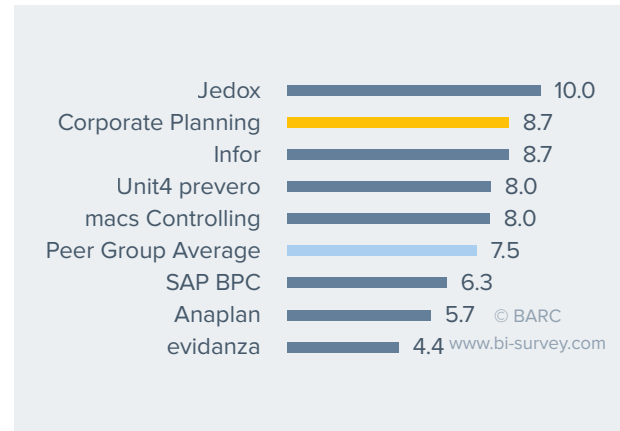
Peer Group: Financial Performance Management Products



Self-service – Leader



Peer Group: Solution-focused Planning Products



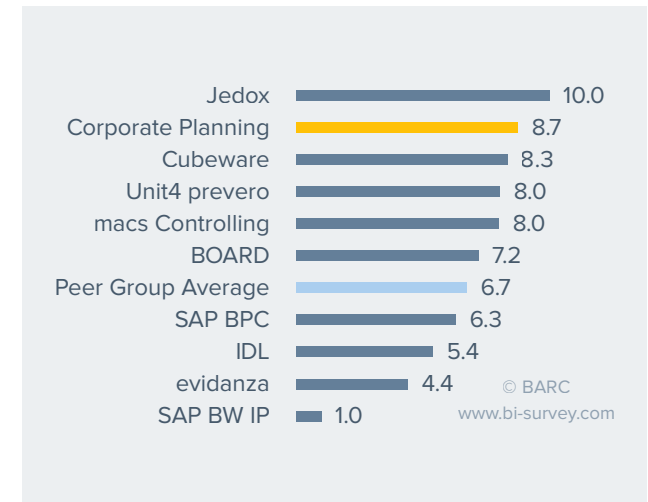
Self-service



Self-service – Leader

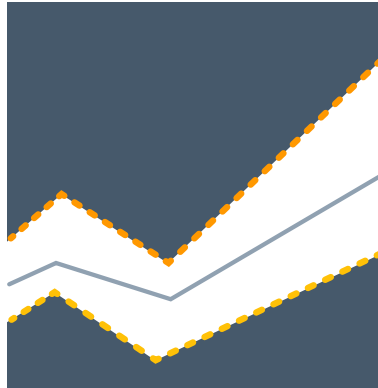


Peer Group: European Vendors



CP software is strongly focused on business departments as its main target group. Many customers clearly appreciate the planning functionality and ease of use of the product and often do self-service planning in business departments with CP. Justifiably, CP is ranked top for 'Self-service Planning' in the 'Financial Performance Management Products' peer group and achieves leading ranks in its other two peer groups. Using the cloud version of CP Suite based on Microsoft Azure, the implementation of self-service planning in business departments is even easier, requiring just a minimum of IT resources to work with the product. However, tasks such as integrating data into CP's data model still may require IT support.

Simulation & scenario analysis

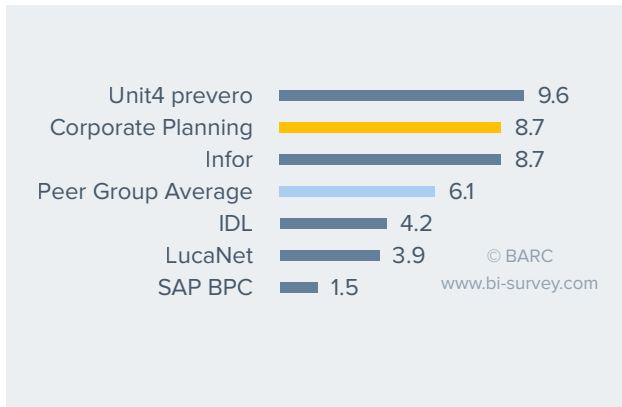


This KPI is based on how many sites currently do simulation and scenario analysis with their planning product.

Simulation & scenario analysis – Leader



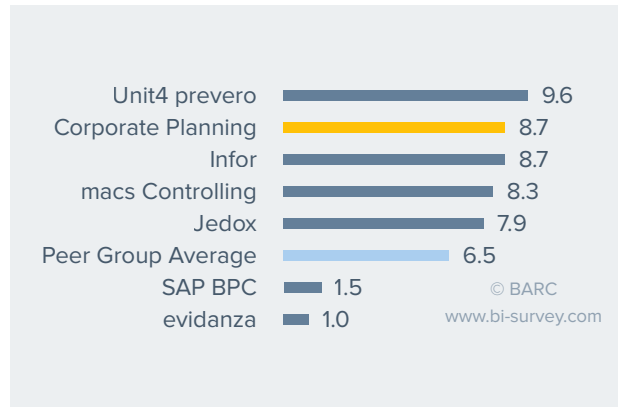
Peer Group: Financial Performance Management Products



Simulation & scenario analysis – Leader



Peer Group: Solution-focused Planning Products



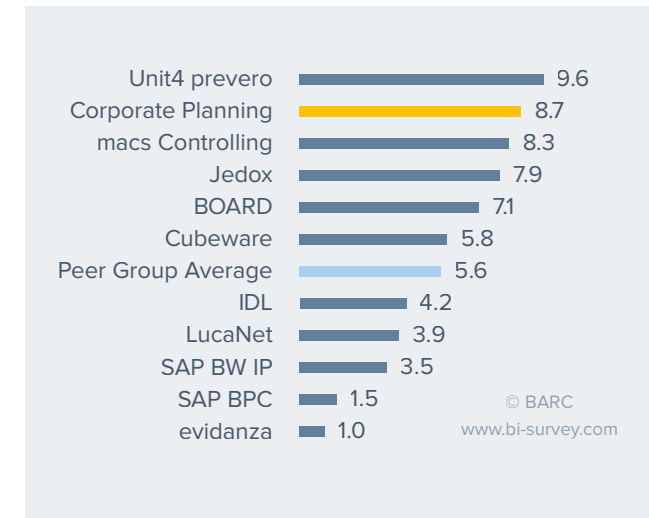
Simulation & scenario analysis



Simulation & scenario analysis – Leader



Peer Group: European Vendors



Leading ranks in all of its peer groups confirm that CP customers seem to be satisfied with the product's simulation and scenario analysis functionality. Simulations can be done for parameters as well as time periods. Wizards for copying simulation scenarios are available with no limit on the number of scenarios. The comparison of different scenarios in planning forms is also possible.

User experience

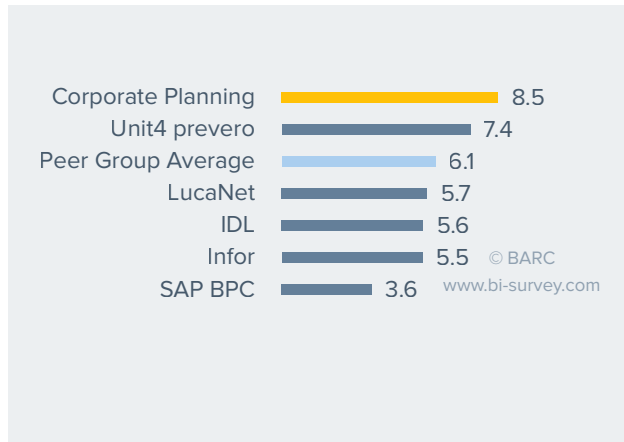


Combines the 'Performance satisfaction', 'Planning functionality', 'Reporting/analysis functionality', 'Predefined data connections', 'Ease of use', 'Flexibility', 'Self-service', 'Integrated planning', 'Simulation & scenario analysis' and 'Driver-based planning' KPIs.

User experience – Top-ranked



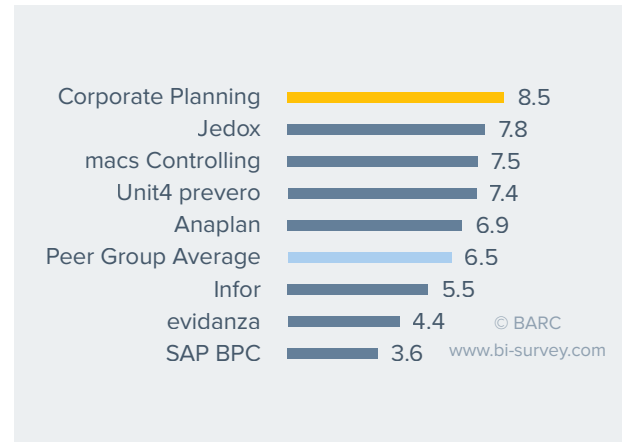
Peer Group: Financial Performance Management Products



User experience – Top-ranked



Peer Group: Solution-focused Planning Products

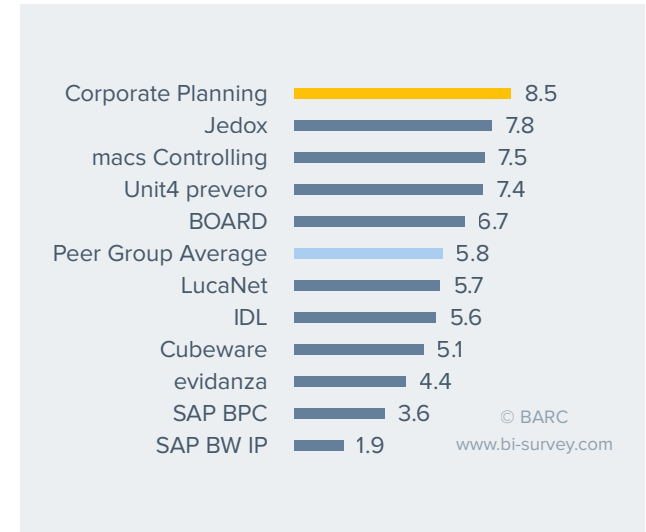


User experience

User experience – Top-ranked



Peer Group: European Vendors



'User experience' combines the 'Performance satisfaction', 'Planning functionality', 'Reporting/analysis functionality', 'Predefined data connections', 'Ease of use', 'Flexibility', 'Self-service', 'Integrated planning', 'Simulation & scenario analysis' and 'Driver-based planning' KPIs. Good results in several of these KPIs elevate CP to first place in all of its peer groups. The results in this year's Planning Survey confirm that CP customers are satisfied with the performance of the product, its planning and BI functionality, as well as its ease of use and predefined data connections. Problems encountered by CP users are fairly rare. Indeed, 53 percent of respondents say they have no significant problems at all when using it.

Considered for purchase

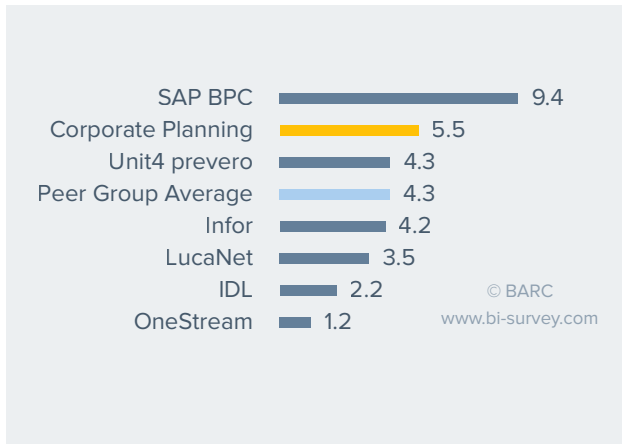


This KPI is based on whether respondents considered purchasing the product.

Considered for purchase – Leader



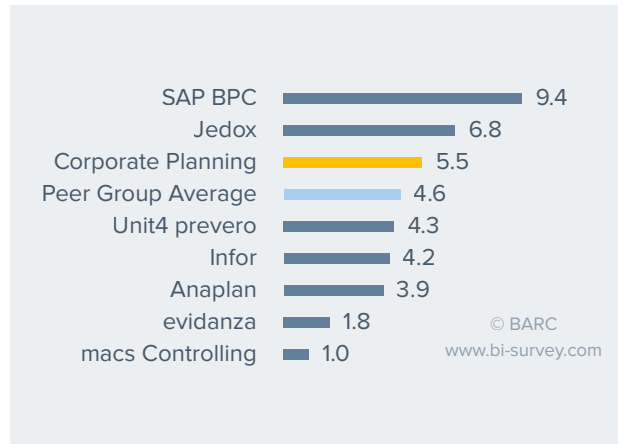
Peer Group: Financial Performance Management Products




Considered for purchase – Leader



Peer Group: Solution-focused Planning Products



Considered for purchase



BARC Viewpoint

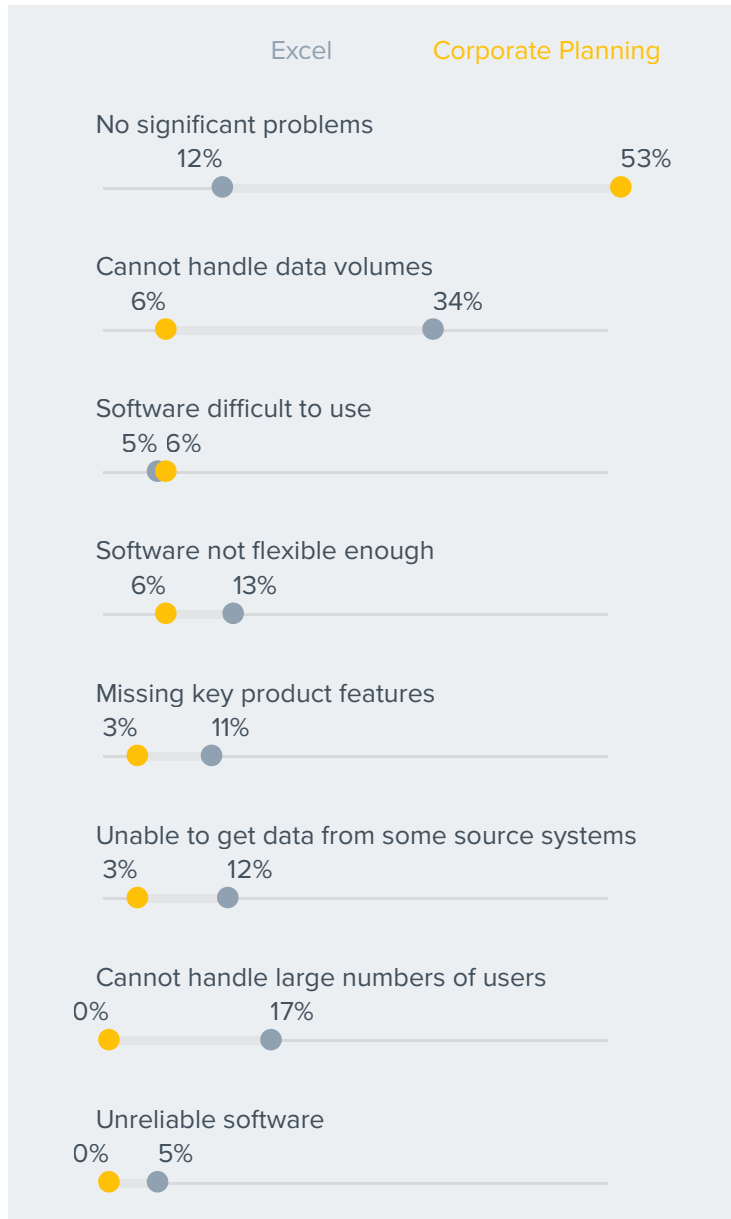
CP is one of the largest local planning and CPM specialists in the DACH region and is widely considered for purchase and shortlisted in software evaluations. It is now firmly established and well-known in the market. One reason for this strong result might be its broad and comprehensive product portfolio with modules for operational management, integrated financial planning, financial consolidation and strategic management. The products can be used for various planning and CPM use cases across all industries. Furthermore, the vendor's widespread marketing activities create good market visibility, which is particularly important given CP's target audience of small and medium-sized companies in the DACH region – a crowded market with lots of competition, especially in the field of planning and CPM.

Corporate Planning vs. Excel



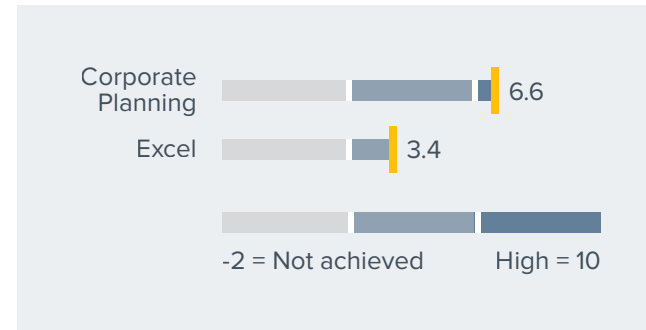
Problems encountered by Corporate Planning and Excel users

n=34/172



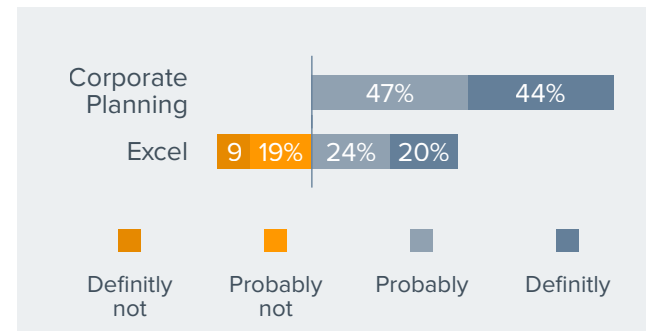
Business Benefits Index*

n= 34/177



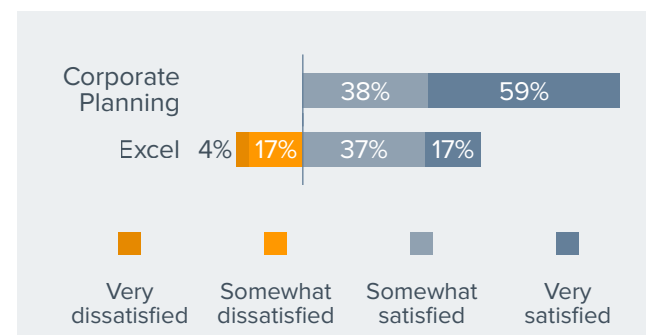
Recommendation**

n= 34/171



Satisfaction level**

n=34/175



Corporate Planning vs. Excel



BARC Viewpoint

Excel remains one of the most widely used planning and BI products in the world. However, many users and companies are dissatisfied with it. CP software users have far fewer complaints than Excel users. Common issues in planning projects such as missing key product features (e.g., for planning), inflexibility and handling of large numbers of users or data volumes do not seem to be a problem for CP software users. 53 percent of customers even report having no significant problems with the product. Business benefits regularly achieved with CP software (and achieved more often than with Excel) include increased planning frequency, more precise/detailed planning, reduced planning complexity, improved integration of planning with reporting/analysis and better quality of planning results. 44 percent of CP software users say they would definitely recommend their planning product to other organizations, while an impressive 97 percent of respondents are 'somewhat satisfied' or 'very satisfied' with CP software.

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

** Neutral category not shown

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

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

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

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

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

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

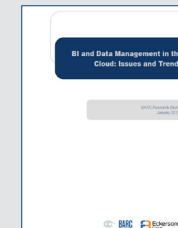
Along with CXP and Pierre Audoin Consultants (PAC), BARC forms part of the CXP Group – the leading European IT research and consulting firm with 155 staff in eight countries including the UK, US, France Germany, Austria and Switzerland. CXP and PAC complement BARC's expertise in software markets with their extensive knowledge of technology for IT Service Management, HR and ERP.

For further information see: www.cxpgroup.com

Other Surveys



The BARC **BI Trend Monitor 2018** reflects on the trends currently driving the BI and data management market from a users' perspective. We asked close to 2,800 users, consultants and vendors for their views on the most important BI trends.



'BI and Data Management in the Cloud': A BARC and Eckerson Group study on current attitudes, issues and trends relating to the use of BI and DM technologies in the cloud. [Download here.](#)



The BI Survey 17 is the world's largest survey of business intelligence software users. Based on a sample of over 3,000 responses, it offers an unsurpassed level of user feedback on 42 leading BI products. Find out more at www.bi-survey.com

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