The Planning Survey 26

The voice of the planning software user community

Sample, Products, Methodology, and KPIs

This document provides background information to help gain a clearer understanding of The Planning Survey 26

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Introduction

The Planning Survey 26 is the largest and most thorough fact-based analysis of the planning, budgeting, and forecasting software market currently available. It is not based on anecdotal accounts or personal opinions – unlike much analyst research – neither is it intended to be a measure of market shares. Instead, it sets out to analyze market trends and produce meaningful comparisons of competing products across a wide range of critical software and vendor-related criteria. The Planning Survey also provides a detailed quantitative analysis of why customers buy planning tools, what they are used for, what problems they experience with the tools and how successful they are.

This is the twelfth edition of The Planning Survey. It employs the same proven methodology as The BI & Analytics Survey, which has been conducted annually since 2000. Based on the real-world experiences of 804 respondents, much of its value lies in the effective analysis of such an impressive, well-distributed sample.

The Planning Survey 26 features 20 planning products from 20 different vendors. It includes not just products from well-known global giants – such as IBM, Oracle, and SAP – but also tools from much smaller vendors that ordinarily don't get much press but which, in many cases, offer outstanding value to customers.

After data cleansing and removing responses from participants unable to answer specific questions about their use of planning products, we were left with a sample of 578 end users, 88 consultants, and 56 vendor and reseller employees. Participants from all over the world took part in The Planning Survey 26.

The findings from The Planning Survey 26 are presented in several documents, each focusing on a specific set of the survey results.

Document	Description
The Planning Survey 26 – The Results	An overview and analysis of the most important product-related findings and topical results from The Planning Survey 26
The Planning Survey 26 – Sample, Products, Methodology, and KPIs	Provides information about the sample and an overview of the survey methodology. It also includes descriptions of the KPIs we use in The Planning Survey 26, as well as details of our calculation methods.
The Planning Survey 26 – Vendor Performance Summaries	A series of executive reports on each product featured in The Planning Survey 26. Each report contains a product overview written by BARC's analyst team plus a summary of the relevant product-related results from the survey.

Data Decisions. Built on BARC.

BARC is the leading analyst firm for data & analytics, AI, corporate performance management (CPM), and ESG with a reputation for unbiased and trusted advice. Our expert analysts deliver a wide range of research, events, and consulting services for the data & analytics community. Our innovative research evaluates software, vendors, and service providers rigorously and highlights market trends, delivering insights that enable our customers to innovate with data, analytics, and AI. BARC's 25 years of experience with data strategy & culture, data architecture, organization, and software selection helps clients transform into truly data-driven organizations.

Research

BARC user surveys, software evaluations, and analyst advisory services along with expert driven content such as research notes, trend analysis, and blogs give organizations the confidence to make the right decisions. Our independent research gets to the heart of market developments; evaluates software, vendors, and service providers thoroughly; and gives valuable ideas on how to turn data, analytics, and AI into added value and successfully transform businesses.

Consulting

The BARC consulting practice is entirely focused on translating companies' requirements into future-proof decisions. The holistic advice we provide helps companies successfully implement their data & analytics strategy and culture as well as their architecture and technology.

BARC's research and experience-founded expert input sets organizations on the road to the successful use of data & analytics, from strategy to optimized data-driven business processes.

Events

At BARC events, leading minds and industry experts come together to share insights and drive innovation. Our conferences, roundtables, and online webinars attract over 10,000 participants annually, offering a unique blend of information, inspiration, and interactivity. These events provide a platform to exchange ideas with peers, explore emerging trends, and gain expert perspectives on market developments.

By engaging with thought leaders and industry practitioners, participants discover actionable strategies to enhance their business and stay ahead in the evolving world of data & analytics.

For further information see:

www.barc.com

The sample

Most surveys are conducted or sponsored by an organization based in, and focused on, one country. However, planning is a worldwide market and we wanted to capture a larger international sample.

The net result was an extraordinarily international panel. Respondents were located in 44 countries. The countries with the most respondents are Germany, the United States, Austria, and the United Kingdom. The regions with the most respondents are Europe, North America, and Asia Pacific.

The online questionnaire was published in three languages: English, German, and French.

Sample size and make-up

Many thousands of people around the world were invited to participate in The Planning Survey 26, using BARC's online research panel and the support of vendors and various websites. As in previous years, the questionnaire offered different sets of questions for vendors and users (or consultants answering on behalf of users).

The results of the online data collected are shown in the following table, with the numbers of responses removed also displayed.

Vendor profile	
Total responses	804
Filtered during data cleansing	-61
Remaining after data cleansing (total answering questions)	**743**
Non-user (did not answer questions about products)	21
Vendor (did not answer questions about using products)	56

Table 1: Responses to the survey

The number of responses is split between users, consultants, vendors, and non-users. Vendors answered a different set of questions to those answered by end users. This document focuses on the analysis of the user results.

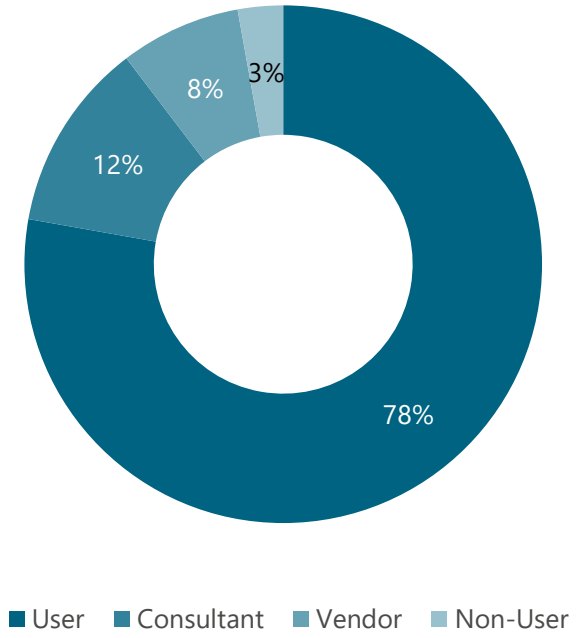

Figure 1: Has your organization purchased, or considered purchasing, any planning / budgeting / forecasting software? (n=743)

Organization sizes by headcount

Specialized planning software is most commonly found in medium and large organizations (see Figure 2). Over half of the responses we received were from users in companies with more than 1,000 employees (see Figure 3).

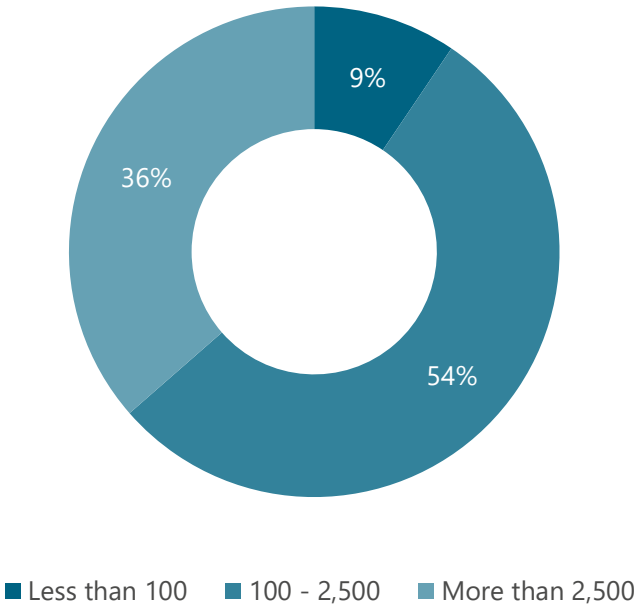

Figure 2: How many employees are there in your entire organization, including all of its branches, divisions, and subsidiaries? (n=656)

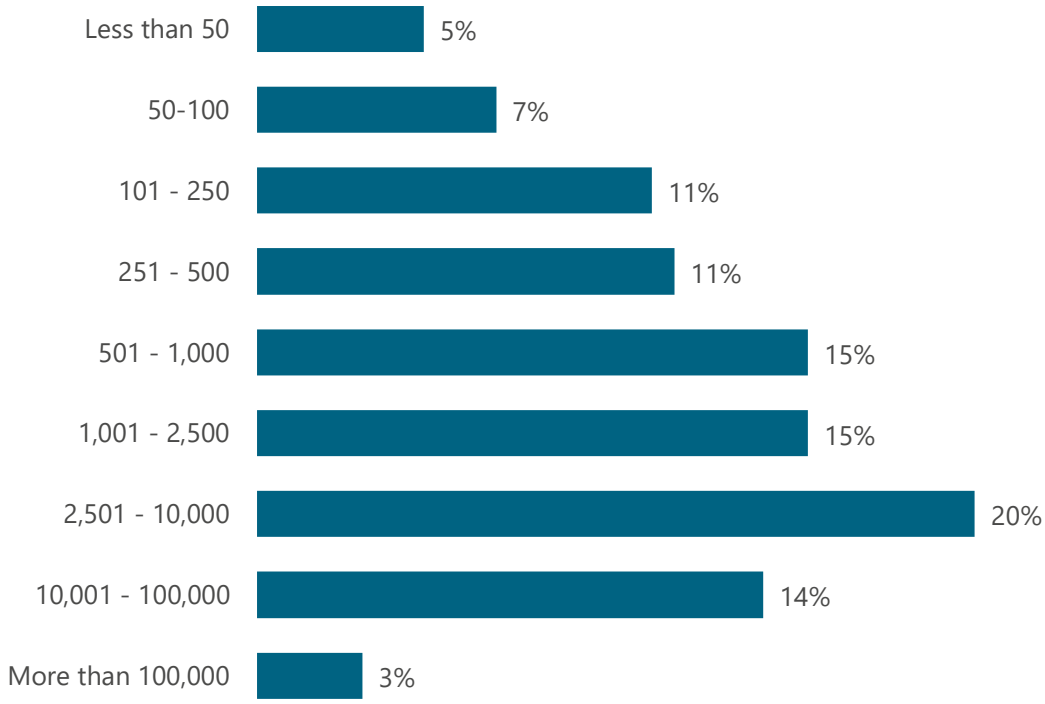

Figure 3: How many employees are there in your entire organization, including all of its branches, divisions, and subsidiaries? (n=656)

Vertical markets

We asked all respondents which industry sector their company operates in. Figure 4 below shows the results of this question. Most respondents have a manufacturing background, followed by services and then retail/wholesale.

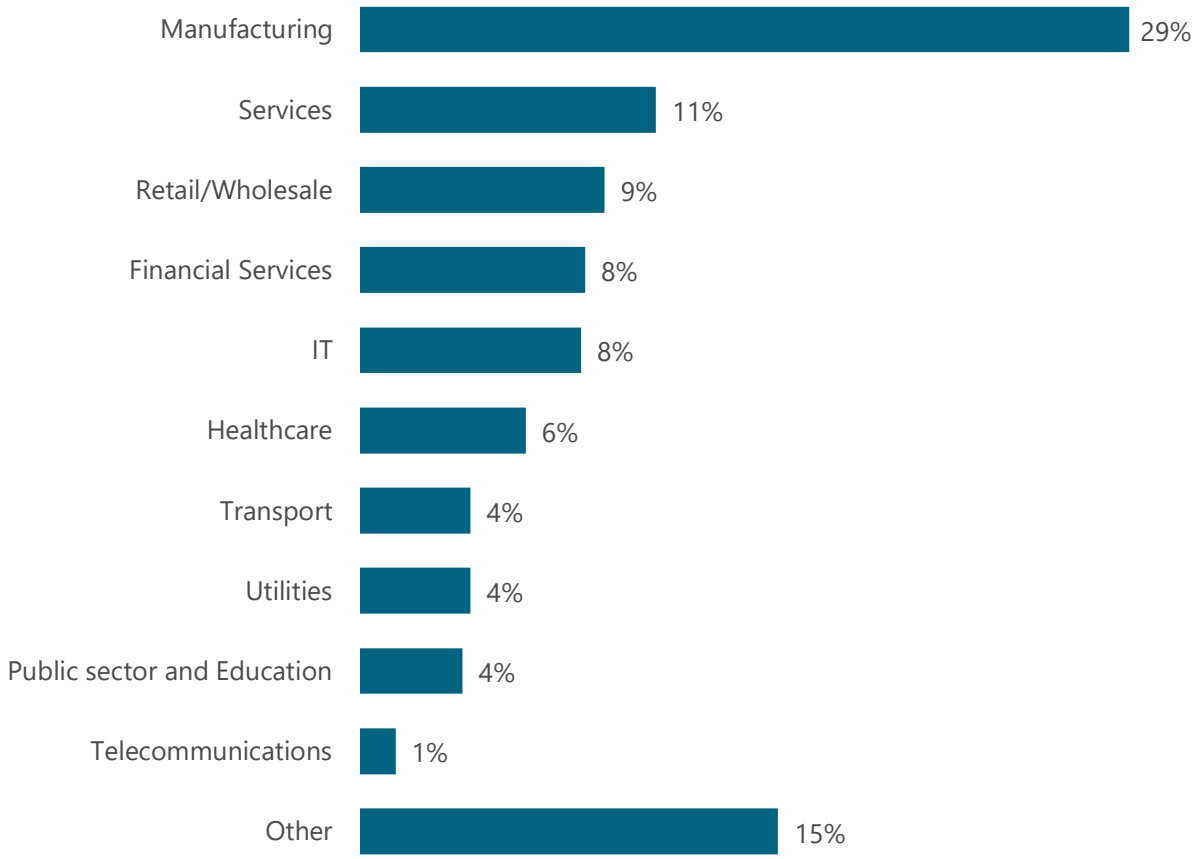

Figure 4: Which of the following best describes your organization's industry sector? (n=684)

Featured products

When grouping and describing the products featured in The Planning Survey, we do not strictly follow the naming conventions the vendors use. Note that the names we use in this document are our own and are not always the official product names used by the vendors.

One of the key reasons for this is that the products we analyze are not necessarily the latest version of the tool. Vendors often change the product name between versions, making it difficult to have a single official name for several versions of the same product. The point is not to challenge the naming conventions of the vendor, but simply to reduce the complexity of the survey findings for the convenience of the reader. In some cases, we also shorten the names of the products to improve the formatting of the charts.

We asked respondents explicitly about their experiences with products from a predefined list, with the option to nominate other products. This list is updated each year and is based on the sample size of the products in the previous year, as well as additional new products on the market. Our predefined list can be found at the end of this document. In cases where respondents said they were using an "other" product, but from the context it was clear that they were actually using one of the listed products, we reclassified their data accordingly.

We solicited responses on all surviving products with more than a minimal response in last year's survey, plus a few others whose numbers have potentially grown to the point where there is enough data to be analyzed.

Table 2 shows the products included in the detailed analysis. A minimum of 20 responses is required for a product to be included in the detailed analysis. The number of responses about "other" products is not included in this table.

Product label	Product name	Respondents
Anaplan	Anaplan	68
Board	Board	27
CCH Tagetik	Wolters Kluwer CCH Tagetik	23
CoPlanner	CoPlanner	35
Corporate Planning	Corporate Planning Corporate Planner	32
evidanza	evidanza	20
IBM Planning Analytics	IBM Planning Analytics	45
Jedox	Jedox	23
Lucanet	Lucanet	29
OneStream	OneStream	22
Oracle Cloud EPM	Oracle Cloud EPM	21
Phocas	Phocas	23
Pigment	Pigment	21
Planful	Planful	20
Prophix	Prophix One	23
SAP Analytics Cloud	SAP Analytics Cloud	36
SWOT	SWOT One	21
Unit4 FP&A	Unit4 FP&A	22
Vena	Vena	20
Workday Adapt. Plan.	Workday Adaptive Planning	20

Table 2: Products included in the sample

The products in the sample vary in their market focus and origin. Most feature in our detailed analysis every year, especially those from the larger players.

Peer groups

The Planning Survey 26 features a wide range of planning tools so we use peer groups to help readers identify and compare competing products. The peer groups are defined using the criteria outlined in Table 3.

The peer groups are designed to help readers compare similar tools in terms of focus (Products for Planning, Budgeting & Forecasting; Integrated Products for Planning & Financial Consolidation; Integrated Products for Planning and BI & Analytics), usage scenario (Midsize/Departmental Implementations, Large/Enterprise-Wide Implementations), and geographical presence (Worldwide Implementations). See Table 4 for an overview of the products in each peer group.

Peer group	Description
Products for Planning, Budgeting & Forecasting	Designed for planning, budgeting, and forecasting, these products cater to various sub-plans (financial, operational, strategic), offering flexibility and predefined planning solutions for specific applications. Since The Planning Survey is focused on exactly this use case, this peer group includes all the products featured in the survey.
Integrated Products for Planning and Financial Consolidation	With a strong emphasis on financial performance management, these products provide built-in financial intelligence and predefined business rules for an integrated approach to (financial) planning and financial consolidation.
Integrated Products for Planning and BI & Analytics	Beyond planning and performance management, these products integrate comprehensive reporting, dashboarding, ad hoc query, and analysis capabilities, expanding their scope beyond pure planning functionality.
Midsize/Departmental Implementations	Products in this peer group are typically (but not exclusively) used in smaller and midsize scenarios and/or departmental implementations with a moderate number of users.
Large/Enterprise-Wide Implementations	Products in this peer group are typically (but not exclusively) used in large scenarios and/or enterprise-wide implementations with many users.
Worldwide Implementations	These vendors have a truly global sales and marketing reach. They are present worldwide, and their products are used all around the world.

Table 3: Peer group descriptions

	Products for Planning, Budgeting & Forecasting	Integrated Products for Planning and Financial Consolida-tion	Integrated Products for Planning and BI & Analytics	Midsize/Depa rtmental Implemen-tations	Large/ Enterprise-Wide Implementati ons	Worldwide Implementati ons
Anaplan	X	X			X	X
Board	X	X	X		X	X
CCH Tagetik	X	X			X	X
CoPlanner	X	X		X		
Corporate Planning	X	X	X	X		
evidanza	X		X	X		
IBM Planning Analytics	X		X		X	X
Jedox	X	X	X		X	X
Lucanet	X	X		X		X
OneStream	X	X			X	X
Oracle Cloud EPM	X	X			X	X
Phocas	X		X	X		
Pigment	X			X		
Planful	X	X		X		
Prophix	X	X		X		X
SAP Analytics Cloud	X		X		X	X
SWOT	X	X		X		
Unit4 FP&A	X	X		X		
Vena	X	X	X	X		
Workday	X	X			X	X

Table 4: Products by peer group matrix

Overview of the key calculations in The Planning Survey 26

Measuring business benefits

Business benefits are the real reason for carrying out any planning or BI project. The BI & Analytics Survey and The Planning Survey have been studying them directly for years. We ask respondents the extent to which they realize a list of benefits.

For each potential benefit, respondents are asked to indicate the level of achievement, if any, with five levels. We use a weighted scoring system, as shown in Table 5 below, to derive a composite score for each of the possible benefits, based on the level of benefit achieved. We call this the BBI (Business Benefits Index).

Level of benefit achievement reported	Weighting
Fully	10
To a large extent	7.5
Somewhat	5
Little	2.5
Not at all	0

Table 5: The Business Benefits Index weighting system

This rating system is the basis of the most important index in The Planning Survey. It is a dimensionless number with an arbitrary value, but as long as the weighting system remains constant, it can be used for comparisons between segments of the sample, such as the sample for individual products or regions, to name just two.

Participants were asked to rate the level to which they had achieved each benefit. Business Benefits are calculated by counting the number of each reported level of benefit and multiplying this number by the corresponding weighting. The results are then divided by the number of responses for each particular benefit to find the average response.

Figure 5 shows that "increased transparency and traceability of planning," "more precise/detailed planning," and "better quality of planning results" are the top three benefits companies achieve through the use of their planning products.

In contrast to the main benefits, "saved headcount," "reduced costs," and "increased competitive advantage" are seen as relatively minor benefits for planners.

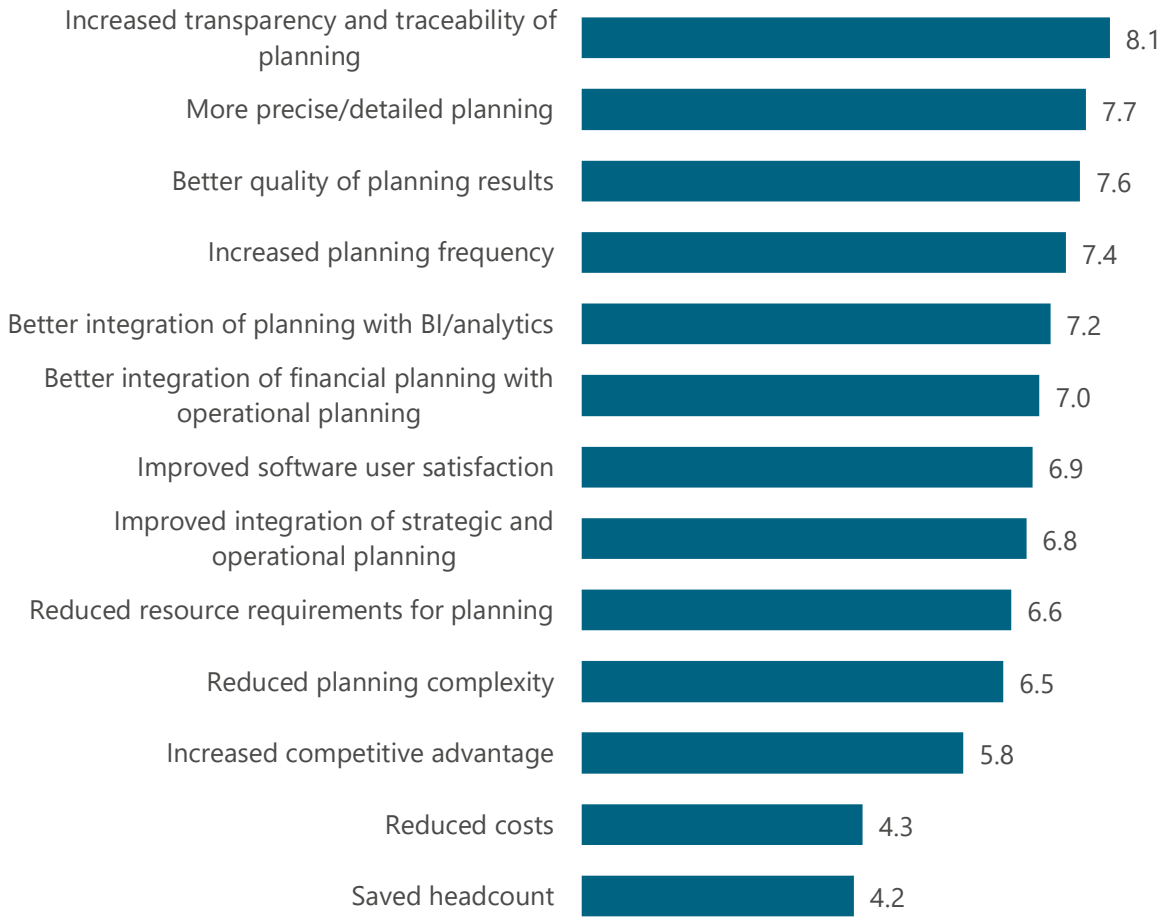

Figure 5: Evaluated business benefits with calculated value (BBI) (n=600)

Project success

The *Project Success* KPI is based on how respondents rate the success of their implementation projects. The weightings of the possible responses are shown in the following table.

Rating of project success reported	Weighting
Very good	**10**
Good	**7.5**
Satisfactory	**5**
Poor	**2.5**
Very poor	**0**

Table 6: Responses and weightings for *Project Success*

Net promoter score

We calculate the net promoter score (NPS) for each product based on the percentage distribution of responses to the question: "Would you recommend your planning product to a similar company?" The following formula is used:

NPS = % Definitely − (% Maybe + % Probably not + % Definitely not)

"Probably" and "Don't know" are excluded from the calculation as neutral. "Definitely" is treated as the promoter equivalent, while "Maybe," "Probably not," and "Definitely not" are grouped together on the detractor side.

How this compares to the standard NPS

The official NPS methodology uses an 11-point scale (0–10): respondents rating 9–10 are promoters, 7–8 are passives, and 0–6 are detractors. The score is then calculated as % Promoters – % Detractors.

Our approach follows the same core principle — subtracting weaker or negative responses from the strongest positive ones, with neutrals excluded — but applies it to a 5-point verbal scale instead of a numeric one. One notable difference is how the middle of the scale is treated. In the standard NPS, mid-range responses (7–8) are passive and excluded, whereas in our version "Maybe" is grouped with the detractor side. This makes our scale somewhat stricter, but the overall logic and direction of the score remain comparable.

In practice, the results are directionally aligned with a standard NPS, though absolute values may differ slightly due to the scale format and the placement of the neutral zone.

Means and medians

The Planning Survey makes frequent references to different forms of averages — means and medians. Just in case your statistical knowledge is a little rusty, here's a quick reminder of the definition of the terms:

The mean is the usual arithmetic average. Its value is affected by every value in the sample, so a single large outlier can materially affect the mean, particularly with small samples.

The median is the value in the middle of the sample; that is, half of the sample is larger than the median, and the other half is smaller. It could be regarded as the "typical value," and is affected by the number, but not the value, of outliers. One or two large or small outliers therefore do not affect the median.

Understanding multiple response questions

Several questions in The Planning Survey 26 allow the user to make multiple responses. For example, we asked users what problems (if any) they encountered in their projects. Because many users had more than one problem, the number of responses is larger than the number of respondents.

This means that there are two ways to calculate the percentage of a given response: based on the total number of responses or based on the total number of respondents. We present The Planning Survey results based on the number of respondents.

Calculating percentages based on the number of respondents tells us how likely a given respondent is to have the problem, but results in percentages higher than 100 percent when all the problems are added together. Conversely, calculating percentages based on the total number of responses would result in a total of 100 percent.

Survey data collection

The Planning Survey 26 was conducted by BARC from November 2025 to February 2026. All data was captured online from a total of 804 respondents.

Respondents were solicited individually via BARC's own research panel and from dozens of vendor and independent lists, as well as websites from many different countries, with invitations being sent to the lists in a staggered fashion.

At our request, most of the vendors notified their customers about The Planning Survey using either their regular newsletters, social media, or websites. We also asked some bloggers to mention it. Each list and website had a different survey URL, though in all cases, the same questionnaire (in English, German, or French) was used.

Understanding the KPIs

The goal of this section is to help the reader spot winners and losers in The Planning Survey 26 using well-designed dashboards packed with concise information. The Planning Survey includes a set of 26 KPIs for each of the 20 products. These include four aggregated KPIs, which aggregate the results of various combinations of "root" KPIs.

This year we have calculated a set of KPIs for each of the six peer groups. Peer groups are used to enable fair and useful comparisons of products that are likely to compete.

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.
- Each KPI is measured on a scale from 0 (lowest value) to 10 (highest value).

KPIs are only calculated if the KPI in question is applicable to a product. Therefore, some products do not have a full set of root KPIs. It is important to exclude KPIs based on small (and therefore not representative) samples to ensure that the graph scales are not distorted by outlier KPIs. In such cases, the product is still shown in the tables, but with a blank KPI value and no bar in the bullet graph or bar chart.

Aggregated KPIs	Root KPIs
Business Value	Business Benefits
	Project Success
	Project Length
Customer Satisfaction	Price to Value
	Recommendation
	Vendor Support
	Implementer Support
	Product Satisfaction
	Sales Experience
Functionality	Predefined Connectors
	Data Integration
	Planning Content
	Planning Functionality
	Workflow
	Forecasting
	Simulation
	Reporting/Analysis
	AI-Powered Planning
User Experience	Self-Service
	Ease of Use
	Flexibility
	Performance Satisfaction

Table 7: Aggregated and root KPIs

Reading the KPI charts

We provide two different types of dashboards for viewing the KPIs:

1. A "KPI Dashboard" displays the KPI values for each product in a peer group using a simple bar chart. The products are sorted by value in descending order.
2. A "Product Dashboard" displays all the KPIs for a single product.

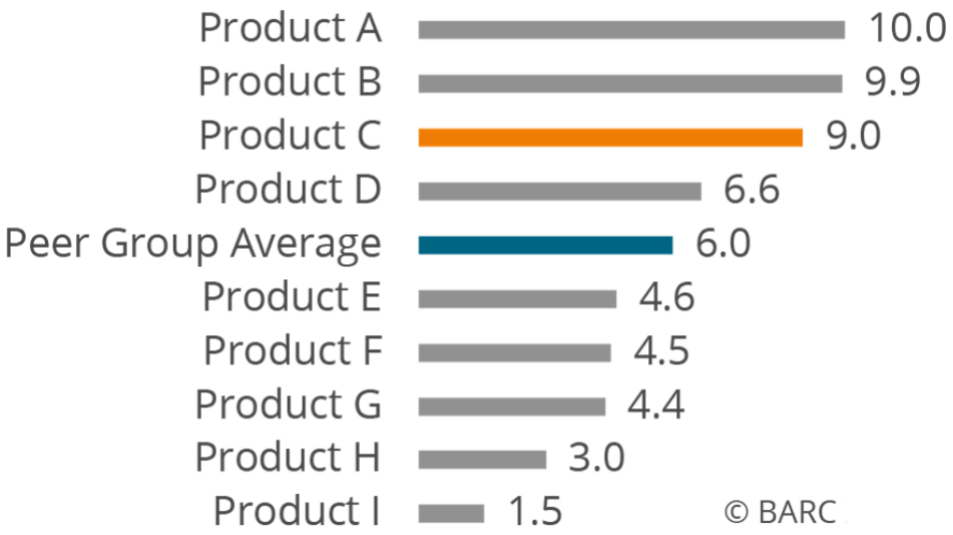

Figure 6: KPI dashboard used for displaying KPIs

In the KPI Dashboards (see Figure 6), the peer group average is indicated by a blue bar.

In the Product Dashboards (see Figure 7), the first column shows the KPI name and the next column indicates the product rank in the specific peer group. As previously mentioned, not every product is represented by the complete set of KPIs. The gray squares show how many products in the peer group have an adequate sample to be classified in each KPI. The next column shows the KPI values for the product in question in each KPI and the blue bars in the final column represent those KPI values against the peer group average, which is indicated by a vertical gray line.

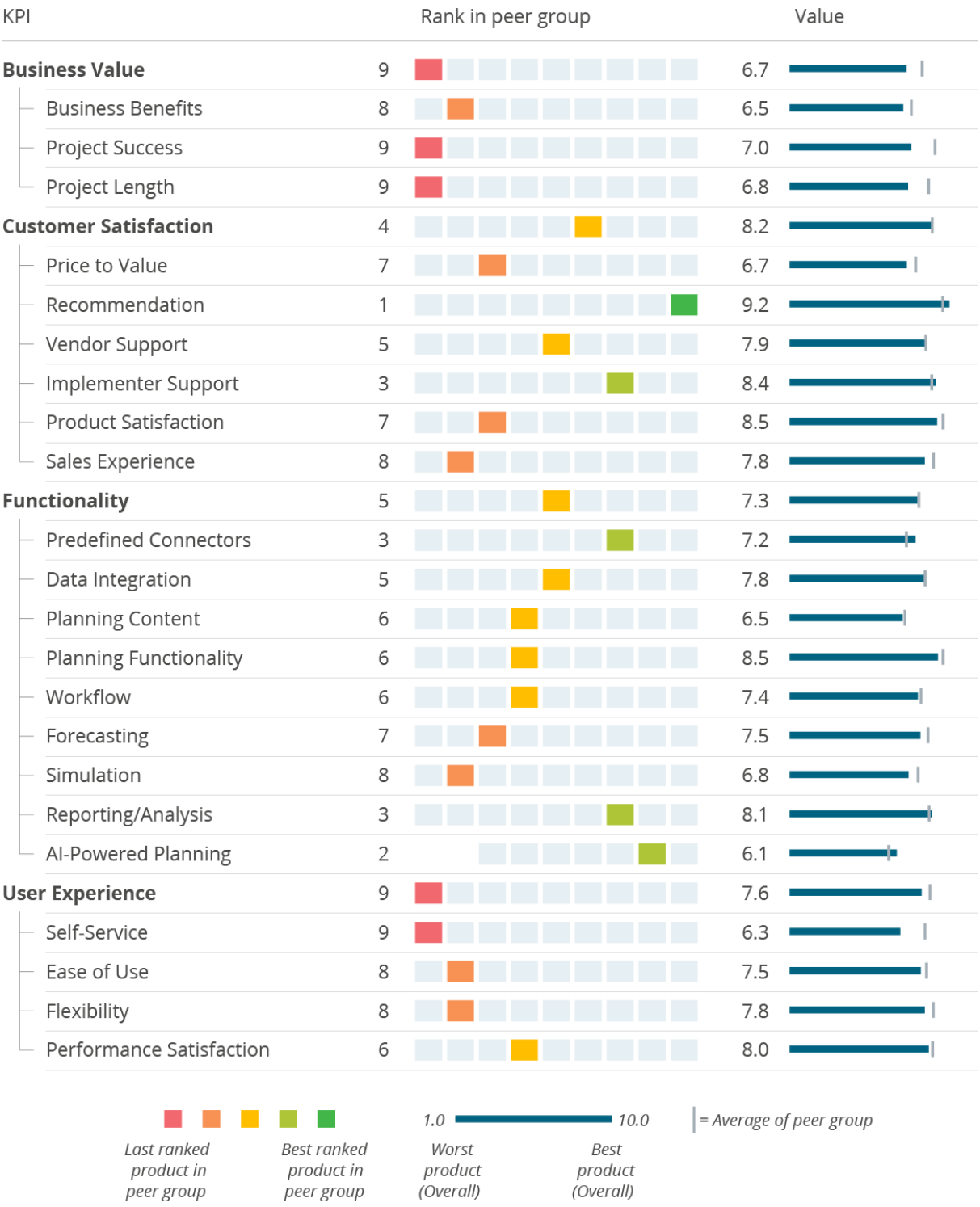

Figure 7: Product dashboard used for displaying KPI results for a single product in a peer group

The KPIs (overview)

The following section provides the entire list of KPIs calculated for The Planning Survey 26, as well as a description of the calculations.

Different readers will have their own views on which of these KPIs are important to them. For example, some people will regard *Predefined Connectors* as vital, while others may consider *Recommendation* or *Self-Service* to be more important.

The KPIs below provide a good selection from which readers can choose the ones that best fit their own organization's requirements.

Business Benefits

What we measure

We measure the real benefit of projects after implementation whereas other surveys limit their questions to technical or organizational issues.

Why it is important

Business Benefits is possibly the most important KPI, focusing on bottom-line benefits of software projects, rather than individual technical aspects.

A software project that does not deliver business benefits is superfluous. Unlike core transaction systems, planning software projects are optional, not mandatory, so they must pay their way in terms of delivering business benefits.

How we measure

We ask users to rate the degree to which they have achieved each project benefit based on a 5-point scale ranging from "fully" to "not at all." Using this information, we weight their responses and calculate the Business Benefits Index (BBI).

See Figure 5 for a list of the benefits evaluated by survey participants.

Project Success

What we measure

This KPI is based on the respondents' level of satisfaction with their implementation projects, taking into account factors such as the implementation of business aspects, the technical implementation, and completion within the timeframe and budget originally set.

Why it is important

The initial success of a planning project can have a great bearing on the business benefits achieved over time. Our surveys in previous years have consistently found that long-running projects are likely to become costlier than first anticipated, deliver fewer business benefits, and often lead to other significant problems. Therefore, the speed with which a product is implemented can be crucial. User and administrator satisfaction are also important indicators that the tool has been adopted as envisaged at the outset of the project.

How we measure

We ask users to rate the success of their implementations on a scale of "very good" to "very poor." The KPI is calculated by averaging the ratings for each product (see Table 6 for details).

Project Length

What we measure

We measure user satisfaction with the time it takes to implement their planning product.

Why it is important

Rapid implementation is a key measure of project success. Our research over the years has shown that projects with short implementation times deliver business benefits faster.

How we measure

We ask participants to rate the time it took to implement their planning product from software purchase to initial rollout. To obtain the final KPI, we calculate an average score per product.

Business Value

Business Value is a combination of the *Business Benefits, Project Success,* and *Project Length* KPIs.

Price to Value

What we measure

We ask participants to judge the price-performance ratio of their chosen product.

Why it is important

Price to value is an important metric in today's cost-conscious age. As many a planning tool user has found, the costs of buying and supporting software quickly add up, especially when attempting to cost-justify adding new users. As more BI/planning capabilities are pushed out to the business, this perception of value becomes even more critical.

How we measure

We ask participants to rate the price-performance ratio of their chosen product. To obtain the final KPI, we calculate an average score per product.

Recommendation

What we measure

We measure whether customers already using a product would recommend that product to others.

Why it is important

No one knows more about how a product performs in the real world than the customers already using it. All too often, they find that products don't live up to expectations, or that the vendor does not support the product properly. Therefore, if existing users say they would recommend the product, we regard this as a positive indicator of its value.

How we measure

Users are asked whether they would recommend their product. This measure is based on the degree and proportion of positive responses.

Vendor Support

What we measure

We measure user satisfaction with the level of support provided for the product by the vendor.

Why it is important

Product support from the vendor is a key determinant for project success. This is an area where there are major differences between vendor ratings.

How we measure

We ask participants to rate the quality of the vendor's support. To arrive at the final KPI, we calculate an average score per product.

Implementer Support

What we measure

We measure user satisfaction with the level of support provided for the product by the implementer.

Why it is important

Product support is a key determinant for project success. As with *Vendor Support*, this is an area where we see major differences between products. The implementer's role can be just as important as the vendor's.

How we measure

We ask participants to rate the support they received from the implementer. To obtain the final KPI, we calculate an average score per product.

Product Satisfaction

What we measure

We measure the level of satisfaction with the product.

Why it is important

If a product proves unreliable at a critical time, the results can be debilitating and can even render an application unusable.

However, not all customers have the same dependency on reliability, as some applications are not mission critical or time critical.

How we measure

We ask participants to rate their satisfaction with the product. We calculate an average score per product to arrive at the final KPI.

Sales Experience

What we measure

We measure how companies rate their sales experience with the vendor.

Why it is important

In a competitive market like the BI and CPM software market, a highly professional sales organization is essential in order to become successful and continue to win new customers. In an increasingly complex, competitive, and digitalized world, vendors that can quickly understand organizations' needs, provide industry-specific knowledge, and offer competitive pricing and contract flexibility are more likely to create a positive sales/purchasing experience for the customer. A positive experience in this regard can be as important to making the right software decision as functional and technical considerations.

How we measure

On a scale of "very good" to "very poor", we ask users to rate the sales and pre-sales activities of their vendor, taking into account factors such as providing timely and comprehensive answers to product-related questions, ability to understand the customer's business needs, flexibility in terms of pricing/contract, the fulfillment of marketing/sales promises, and the vendor's conduct in general.

To obtain the final KPI, we weight each response option and calculate an average score per product.

Customer Satisfaction

We combine the *Price to Value, Recommendation, Vendor Support, Implementer Support*, *Product Satisfaction,* and *Sales Experience* KPIs to calculate this aggregated KPI.

Predefined Connectors

What we measure

This KPI measures user ratings of the product's predefined standard interfaces with data sources and connectors.

Why it is important

Predefined data connections to operational source systems (e.g., ERP, CRM) save time and development effort in projects.

How we measure

We ask participants to rate their tool's standard interfaces to data sources (e.g., ERP, CRM) and connectors. To obtain the final KPI, we calculate an average score per product.

Data Integration

What we measure

This KPI measures user ratings of the product's data integration functionality.

Why it is important

This is about the various aspects of integrated business planning: deriving operational planning from strategic planning, forecasting, linking up the various sub-plans in financial planning, and linking planning with other areas of BI, such as reporting, analysis, and financial consolidation. Integrated

business planning is a planning approach which, if properly implemented and organized, promises a significant improvement in planning quality.

How we measure

We ask participants to rate their tool's data integration from source systems (e.g., ETL functionality). To obtain the final KPI, we calculate an average score per product.

Planning Content

What we measure

This KPI measures user ratings of the predefined planning content available with the product.

Why it is important

Particularly in the early stages of projects, customers can benefit from predefined planning content, which can be helpful for speeding up implementation. Predefined planning content can be available from the vendor itself or from partners and is typically industry-specific and/or focused on particular planning topics such as different sub-plans (e.g., sales planning, financial planning, etc.). Often this content can be used as a starting point in implementation projects and can be adapted to a customer's needs.

How we measure

We ask participants to rate the predefined planning solutions provided with their tool. To obtain the final KPI, we calculate an average score per product.

Planning Functionality

What we measure

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

Why it is important

Planning tools provide specialized functions (e.g., planning or simulation scenarios) based on a consistent database. Depending on the planning scenario (top-down, bottom-up, centralized, decentralized, etc.), some functions may be more or less important. Buyers should evaluate a product's functionality and decide whether it matches their present requirements as well as those in the foreseeable future.

How we measure

We ask participants to rate their product's coverage of – and support for – the functional requirements for planning, budgeting, and forecasting. To obtain the final KPI, we calculate an average score per product.

Workflow

What we measure

This KPI measures user ratings of the product's workflow functionality.

Why it is important

To manage decentralized bottom-up planning processes with lots of planners involved, workflow functionality can be helpful when coordinating the consecutive planning steps. Workflow management

environments in planning products often include task assignment to planners, deadlines / time limits for task completion, email notifications, approval processes / release of plan data, and locking/unlocking plan data that has been entered by planners.

How we measure

We ask participants to rate their product's workflow functionality for managing and controlling the planning process. To obtain the final KPI, we calculate an average score per product.

Forecasting

What we measure

This KPI measures user ratings of the product's forecasting functionality.

Why it is important

Based on plan values already entered for certain planning periods and their comparison with realized actuals from operational source systems, planning tools support the creation of forecasts of future corporate development. Forecasts are often used to update the plan or budget data and are done on a monthly or quarterly basis. Forecasts are either focused on certain periods (e.g., end of the fiscal year) or done on a rolling basis (e.g., for the next 12 months).

How we measure

We ask participants to rate their tool's forecasting functionality. To obtain the final KPI, we calculate an average score per product.

Simulation

What we measure

This KPI measures user ratings of the product's simulation functionality.

Why it is important

Today, companies spend a lot of time creating their plans. Often, there is very limited time available for dealing with the plan data produced (e.g., using simulations and scenario analysis). Simulations can help companies to play through different possible scenarios (e.g., best case, worst case) to derive actions for each scenario and to prepare for the future. There are two main types of simulation: those in which structures used in planning are changed (e.g., organizational structures) and parameter simulations. The depiction of different scenarios can help to make planning results plausible and comprehensible if parameters change. Driver-based planning models are particularly suitable for simulation approaches with parameters and scenario considerations.

How we measure

We ask participants to rate their tool's simulation and scenario planning functionality. To obtain the final KPI, we calculate an average score per product.

Reporting/Analysis

What we measure

This KPI measures user ratings of the product's coverage of reporting and analysis requirements.

Why it is important

Without appropriate options for reporting and analysis, planning is not possible. Functions for reporting results, intermediate results, or the analysis of deviations between actual and budget figures are essential in planning processes. In addition, functions for displaying aggregate performance indicators are often required in management cockpits and dashboards. For many customers, the integration of reporting and analysis in their planning solution is very important, making this a key criterion.

How we measure

We ask participants to rate their tool's coverage of additional reporting and analytics requirements. To obtain the final KPI, we calculate an average score per product.

AI-Powered Planning

What we measure

This KPI measures user ratings of the AI support for planning and forecasting offered by their tool.

Why it is important

AI offers great potential to take business planning to the next level. The use of machine learning, generative AI, and agentic AI in the context of planning and forecasting is a prioritized future goal for many organizations now. AI can help to automate planning processes and to relieve planners of routine tasks.

How we measure

We ask participants to rate their tool's AI support for planning and forecasting. This can include features such as automated predictions, anomaly detection, AI-powered insights, natural language interaction, and support by AI agents. To obtain the final KPI, we calculate an average score per product.

Functionality

We combine the *Predefined Connectors, Data Integration, Planning Content, Planning Functionality, Workflow, Forecasting, Simulation, Reporting/Analysis,* and *AI-Powered Planning* KPIs to calculate this aggregated KPI.

Self-Service

What we measure

We measure how users rate the self-service use of their planning product.

Why it is important

Self-service can speed up processes and eliminate the middleman. Independence from IT processes is a commonly cited requirement in software projects.

How we measure

We ask participants to rate the product for its ability to be used self-sufficiently in business departments without strong IT involvement. To obtain the final KPI, we calculate an average score per product.

Ease of Use

What we measure

We measure the degree to which respondents consider their planning software to be easy to use.

Why it is important

Ease of use is often considered the holy grail of software. It is an important consideration for any vendor seeking to expand its footprint within enterprise sites. Business decision-makers don't want to have to spend a lot of time in training or learning new interfaces.

How we measure

We ask participants to rate ease of use for developers of planning applications as well as the ease of use of their tool for planners. To obtain the final KPI, we calculate an average score per product.

Flexibility

What we measure

We measure the degree to which respondents consider their planning software to be flexible.

Why it is important

With the current vogue for agility and self-service capabilities and the increasing need for users to be able to access a variety of planning use cases (top-down, bottom-up, centralized, decentralized, strategic, operational, etc.), flexibility is an important consideration for many organizations.

How we measure

We ask participants to rate the flexibility of their product to implement a range of planning use cases, approaches, and topics. To obtain the final KPI, we calculate an average score per product.

Performance Satisfaction

What we measure

We measure the level of satisfaction with the product's performance.

Why it is important

Performance satisfaction is crucial in planning projects and often affects project outcomes. In some ways, complaints about performance are more important than performance measured in seconds, because acceptable delays can vary depending upon how the system is used.

How we measure

We ask participants to rate their satisfaction with the product's performance, for example, in terms of data load performance, data processing performance (e.g., scenario calculations), and write-back performance. We calculate an average score per product to arrive at the final KPI.

User Experience

The *User Experience* aggregated KPI is based on a combination of the *Self-Service, Ease of Use, Flexibility,* and *Performance Satisfaction* KPIs.

Product picklist used in The Planning Survey 26

Abacum

Acterys

Anaplan

Bissantz DeltaMaster

Board

Centage

CoPlanner

Corporate Planning Corporate Planner

Datarails

deFacto Planning

evidanza

Farseer

Hypergene

IBM Planning Analytics

Infor EPM

Inforiver by Lumel

insightsoftware IDL

insightsoftware Longview

insightsoftware Power ON

Jedox

Jirav

K4 Analytics

Kepion

Lucanet

macs Software

OneStream

Oracle Cloud EPM (Oracle Planning and Budgeting Cloud Service)

Oracle Hyperion Planning

Phocas

Pigment

Planful

Prophix

SAP Analytics Cloud

SAP Business Planning and Consolidation (BPC)

Serviceware Performance

Software4You

Solver

SWOT

Talentia CPM

Thinking Networks QVANTUM

Unit4 FP&A

Valsight

Vena Solutions

Wolters Kluwer CCH Tagetik

Workday Adaptive Planning

Other planning product, please specify:

Don't know

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