The Planning Survey **19**

The world's largest survey of planning software users

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

Prophix

BARC

KPI results

23 top-rankings

and

27 leading positions

in 3 different peer groups.

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Recommendation

94%

of surveyed users say they would **recommend*** Prophix.*

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

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Satisfaction

94%

of surveyed users are **satisfied** with Prophix.*

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

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Users

79%

of Prophix users in a company **use** it for **planning and budgeting**.*

** Compared to **63%** for the average planning tool*

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Vendor support

97%

of surveyed users rate Prophix's **vendor support** as **excellent**, **good** or **satisfactory**.*

** Compared to **72%** for the average planning tool*

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Project length

50%

of surveyed users had Prophix **implemented in less than 3 months**.*

** Compared to **29%** for the average planning tool*

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Peer Group
Flexible Planning Platforms

1. Top-ranked in

Business benefits
Project length
Price-to-value
Recommendation
Planning functionality
Workflow
Reporting/analysis
Ease of use
Flexibility
Self-service
User experience

Leader in

Project success
Business value
Vendor support
Product satisfaction
Customer satisfaction
Planning content
Forecasting
Functionality
Competitive win rate

Peer Group
BI-focused Products

1. Top-ranked in

Project length
Price-to-value
Vendor support
Product satisfaction
Customer satisfaction
Planning functionality
Ease of use
User experience

Leader in

Business benefits
Business value
Recommendation
Planning content
Workflow
Simulation
Performance satisfaction
Self-service
Competitive win rate

Peer Group
North American Vendors

1. Top-ranked in

Business benefits
Project length
Business value
User experience

Leader in

Price-to-value
Vendor support
Product satisfaction
Customer satisfaction
Planning functionality
Reporting/analysis
Functionality
Ease of use
Flexibility

BARC Summary

With 23 top ranks and 27 leading ranks in three different peer groups, Prophix once again achieves an excellent set of results in this year's Planning Survey. Convincing ratings in numerous important KPIs help to consolidate its position as an effective CPM vendor that delivers considerable benefits to its customers. Companies can benefit from using Prophix in terms of reduced planning complexity, improved employee satisfaction and more precise/detailed planning. An impressive 94 percent of respondents are 'somewhat satisfied' or 'very satisfied' with Prophix, a major reason behind its high recommendation rate of 94 percent. Prophix offers a comprehensive CPM solution focused on budgeting, forecasting, reporting, analysis and financial consolidation, which customers appear to be very satisfied with.

User Experience

Prophix

Valsight

IBM Plan Analytics

BOARD

Cubeware

Oracle Hyp Plan

SAP BW IP

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Note: No 'Competitiveness' data for BOARD. Placeholder value used.

Business Value

Highest Competitiveness

Highest Customer Satisfaction

Lowest Competitiveness

Lowest Customer Satisfaction

User Experience

Longview Plan (On-Premises)

Jedox

Prophix

IBM Plan Analytics

evidanza

BOARD

SAP Analytics Cloud

Unit4 Prevero

Infor

Cubeware

IDL

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Note: No 'Competitiveness' data for BOARD. Placeholder value used.

Business Value

Highest Competitiveness

Highest Customer Satisfaction

Lowest Competitiveness

Lowest Customer Satisfaction

Longview Plan (On-Premises)   Prophix

OneStream

Longview Plan (Tidemark)

IBM Plan Analytics

Infor

User Experience

Oracle Hyp Plan

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Note: No 'Competitiveness' data for Longview Plan (Tidemark). Placeholder value used.

Business Value

○ Highest Competitiveness   ■ Highest Customer Satisfaction

●   ▫

• Lowest Competitiveness   ■ Lowest Customer Satisfaction

The Planning Survey 19 Prophix top ranks

Top-ranked in
Business benefits
Peer Group
Flexible Planning Platforms
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Top-ranked in
Business benefits
Peer Group
North american vendors
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Top-ranked in
Business value
Peer Group
North american vendors
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Top-ranked in
Customer satisfaction
Peer Group
BI-Focused Products
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Top-ranked in
Ease of use
Peer Group
BI-Focused Products
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Top-ranked in
Ease of use
Peer Group
Flexible Planning Platforms
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Top-ranked in
Flexibility
Peer Group
Flexible Planning Platforms
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Top-ranked in
Planning functionality
Peer Group
BI-Focused Products
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Top-ranked in
Planning functionality
Peer Group
Flexible Planning Platforms
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Top-ranked in
Price-to-value
Peer Group
BI-Focused Products
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Top-ranked in
Price-to-value
Peer Group
Flexible Planning Platforms
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Top-ranked in
Product satisfaction
Peer Group
BI-Focused Products
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Top-ranked in
Project length
Peer Group
BI-Focused Products
THE PLANNING SURVEY 19
BARC

Top-ranked in
Project length
Peer Group
Flexible Planning Platforms
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Top-ranked in
Project length
Peer Group
North american vendors
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The Planning Survey 19 Prophix top ranks

Top-ranked in **Reporting/analysis**
Peer Group
Flexible Planning Platforms
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Top-ranked in **Self-service**
Peer Group
Flexible Planning Platforms
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Top-ranked in **User experience**
Peer Group
BI-Focused Products
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Top-ranked in **User experience**
Peer Group
Flexible Planning Platforms
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Top-ranked in **Recommendation**
Peer Group
Flexible Planning Platforms
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Top-ranked in **User experience**
Peer Group
North american vendors
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Top-ranked in **Vendor support**
Peer Group
BI-Focused Products
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Top-ranked in **Workflow**
Peer Group
Flexible Planning Platforms
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" Great application. Has streamlined the budgeting and forecasting processes. Has also improved our reporting substantially.

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Head of business department, manufacturing, 101-2,500 employees

" Very favorable. It is a flexible, robust and cost effective application that doesn't require dedicated IT resources. Our finance team administers the application.

BARC THE PLANNING SURVEY 19

Line of business employee, marketing, 101-2,500 employees

" Amazing tool, great value for the price, and the company really takes the user's requests into consideration when updating their product. I have never seen a software so focused on the user experience, and that makes for a great tool.

BARC THE PLANNING SURVEY 19

Head of business department, manufacturing, 101-2,500 employees

" Great flexible tool at a reasonable price. Definitely get the value from this product.

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Line of business employee, manufacturing, 101-2,500 employees

" Prophix is a great tool for consolidations, especially for balance sheet and income statements. It is currently being managed by finance employees with little to no support from IT.

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

Prophix overview

Founded in Canada in 1987, Prophix began as a software distributor implementing financial applications. In the year 2000, the organization released its own performance management software, also called Prophix, recognizing the market's need for innovative planning and reporting systems. Today, Prophix has more than 230 employees worldwide and over 3,000 customers in more than 100 countries, covering all company sizes and industries. Prophix customers mainly come from North America, while approximately 350 are located in Europe.

Prophix is a unified corporate performance management solution that delivers insight into finance, operations and business performance with a focus on business user experience and ease of use to streamline model and process management. The product is focused on budgeting, forecasting, reporting and analysis, operational planning, personnel planning, revenue planning, project planning and financial consolidations. Reports, plans, budgets and forecasts can also be pushed to PowerPoint, Word or PDF through a scheduled process or on demand.

Data and metadata in Prophix is stored in Microsoft SQL Server as well as the database's multidimensional

Versions used

n= 33

V11
8%

92%

V12

component Analysis Services.

The vendor has a strong focus on business departments in mid-size companies with typically 50-100 users per implementation. However, there are much larger implementations as well. Prophix is available on-premises as well as in the cloud leveraging AWS.

Prophix does not confine itself to any one single planning topic (financials, sales, HR etc.). The product can be used to create individual planning applications with capabilities for top-down and bottom-up planning including workflow functions to control planning processes. It contains little predefined business content (e.g., for financial planning). However, some partners do offer predefined content for specific topics and industries. Planning forms, like reports, are created in an Excel-like environment in Prophix. An installed Windows client, an HTML5 web client and an Excel add-in are available as front ends to enter plan data or to work with reports, analyses and dashboards.

Besides planning, Prophix also provides comprehensive capabilities for BI and analytics. Standard reporting in a formatted and (if required) print-oriented way is supported, as are ad hoc queries based on OLAP methodologies (drill functionality, slice and dice, pivoting etc.). For visualizing data (e.g., in management cockpits or dashboards), standard business graphics as well as more advanced chart types are available.

Prophix customer responses

This year we had 33 responses from Prophix users. At the time of the survey, 92 percent of them were using version 12 and 8 percent were still running version 11.

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The Planning Survey 19 is based on findings from the world's largest and most comprehensive survey of planning software users, conducted from November 2018 to February 2019. In total, 1,367 people responded to the survey with 1,195 answering a series of detailed questions about their use of a named product. Altogether, 22 products (or groups of products) are analyzed in detail.

The Planning Survey 19 examines user feedback on planning product selection and usage across 28 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 Prophix. It does not show all the KPI results and focuses mainly on the positive findings.
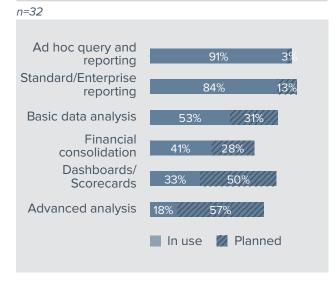
For more information on the survey, visit The BI Survey website.

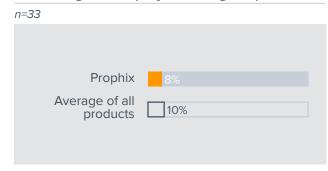# User and Use Case Demographics

BARC Comment

Besides planning, customers mainly use Prophix for ad hoc query and reporting (91 percent), standard/enterprise reporting (84 percent) and basic data analysis (53 percent). 57 percent of respondents plan to use it for advanced analysis and 50 percent for dashboards/scorecards in the future. Prophix targets mid-sized companies across all industries. 79 percent of our sample of Prophix customers come from mid-sized companies (100-2,500 employees) with a median of 30 users (with 25 of them using planning functionality), but the mean of 58 users (45 for planning) indicates there are also some larger implementations. 79 percent of Prophix users are planning users – well above the survey average of 63 percent – reflecting the fact that Prophix is essentially a planning tool rather than a BI tool.

Current vs. planned use (besides planning)

n=32

	In use	Planned
Ad hoc query and reporting	91%	3%
Standard/Enterprise reporting	84%	13%
Basic data analysis	53%	31%
Financial consolidation	41%	28%
Dashboards/Scorecards	33%	50%
Advanced analysis	18%	57%
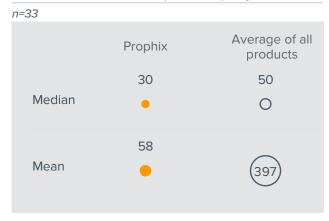
Percentage of employees using Prophix

n=33

Prophix	8%
Average of all products	10%

Planning users (as a percentage of all users)

n=33

Prophix	79%
Average of all products	63%

Total number of users per company

n=33

	Prophix	Average of all products
Median	30	50
Mean	58	397
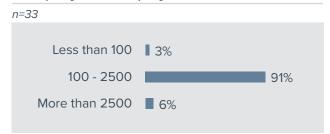
Planning users per company

n=33

	Prophix	Average of all products
Median	25	20
Mean	45	116

Company size (employees)

n=33

Less than 100	3%
100 - 2500	91%
More than 2500	6%

The KPIs

The Planning Survey 19 provides the reader with well-designed KPI dashboards packed with concise information, which can be absorbed at a glance. The KPIs all follow these simple rules:

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

The terms 'top-ranked' and 'leader' are used in the 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 19 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?

Prophix features in the following peer groups:

- Flexible Planning Platforms
- BI-focused Products
- North American 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.

North American Vendors: North American vendors are headquartered in North America and do the majority of their business there.

Business benefits

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

Business benefits – Top-ranked

Peer Group: Flexible Planning Platforms

Prophix	8.1
BOARD	7.7
Valsight	7.4
Peer Group Average	4.9
IBM Plan Analytics	4.8
Oracle Hyp Plan	2.8
Cubeware	2.0
SAP BW IP	1.5

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Business benefits – Top-ranked

Peer group: North American Vendors

Prophix	8.1
Longview Pl. (Tidem.)	8.0
OneStream	7.5
Peer Group Average	5.8
Longview Pl. (On-Pr.)	5.4
IBM Plan Analytics	4.8
Infor	4.2
Oracle Hyp Plan	2.8

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Business benefits
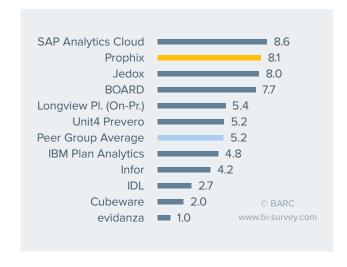
Business benefits – Leader

Peer Group: BI-focused Products

SAP Analytics Cloud	8.6
Prophix	8.1
Jedox	8.0
BOARD	7.7
Longview Pl. (On-Pr.)	5.4
Unit4 Prevero	5.2
Peer Group Average	5.2
IBM Plan Analytics	4.8
Infor	4.2
IDL	2.7
Cubeware	2.0
evidanza	1.0

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BARC Viewpoint
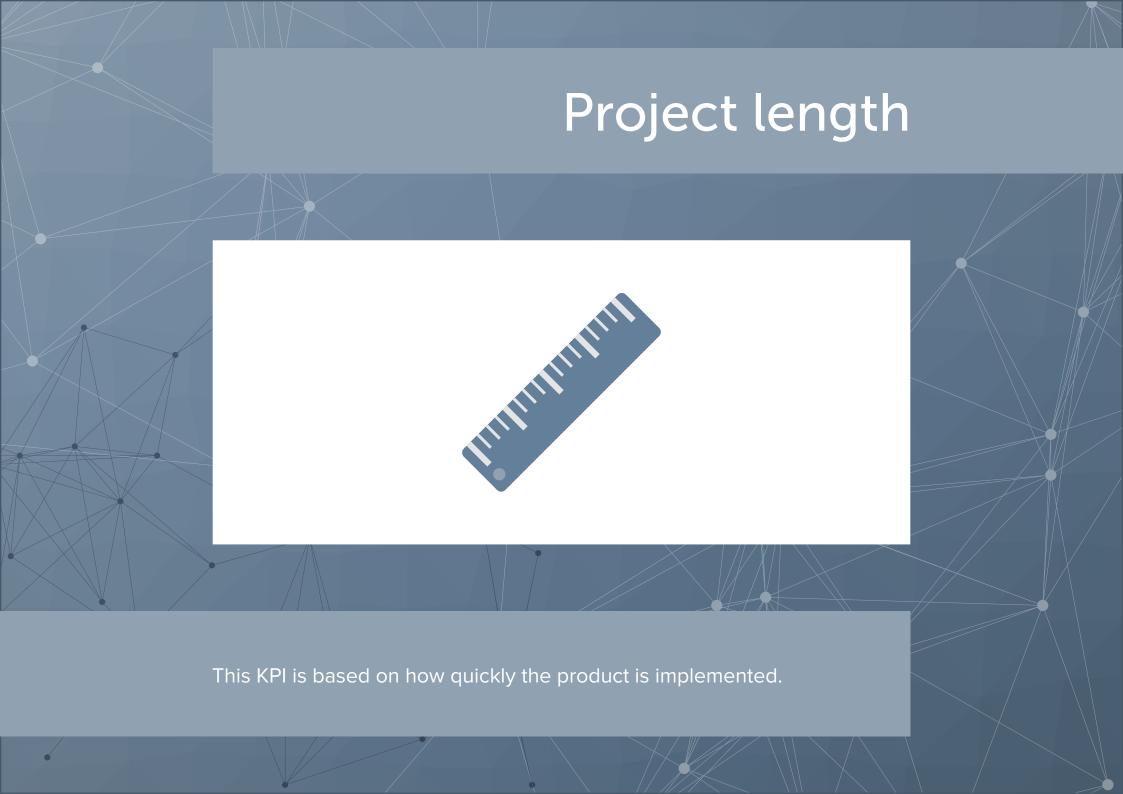
Prophix customers can achieve clear benefits from using the unified corporate performance management solution. Business benefits such as reduced planning complexity and more precise/detailed planning are achieved by an above-average proportion of Prophix users compared to other planning products. For many customers, these benefits lead to improved employee satisfaction and reduced resource requirements for planning. Business departments in mid-sized companies are the most likely to benefit from the insights into data it can provide. Prophix is ranked top for 'Business benefits' in two of its peer groups and achieves a leading rank in its third peer group.
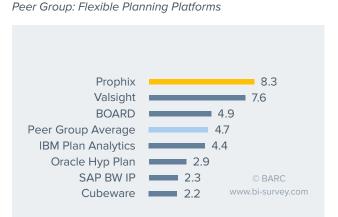
Project length

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

Project length – Top-ranked

Peer Group: Flexible Planning Platforms

Prophix	8.3
Valsight	7.6
BOARD	4.9
Peer Group Average	4.7
IBM Plan Analytics	4.4
Oracle Hyp Plan	2.9
SAP BW IP	2.3
Cubeware	2.2

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Project length – Top-ranked

Peer group: North American Vendors

Prophix	8.3
IBM Plan Analytics	4.4
Longview Pl. (On-Pr.)	3.8
Peer Group Average	3.8
Infor	3.0
Oracle Hyp Plan	2.9
OneStream	2.0
Longview Pl. (Tidem.)	1.9

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Project length – Top-ranked

Peer Group: BI-focused Products

Prophix	8.3
Jedox	8.1
SAP Analytics Cloud	6.7
IDL	6.2
BOARD	4.9
Peer Group Average	4.7
IBM Plan Analytics	4.4
Longview Pl. (On-Pr.)	3.8
Infor	3.0
evidanza	2.4
Cubeware	2.2
Unit4 Prevero	2.1

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BARC Viewpoint

Customers are very happy with the amount of time spent on their implementation projects. Projects with Prophix are usually quick in comparison to many of its local and global competitors. Consequently, Prophix is the top-ranked planning product for 'Project length' in all of its peer groups. However, it should be noted that projects with Prophix are rather small in terms of the numbers of users and data volumes involved compared to the survey average. Nonetheless, customers are satisfied with their implementation projects, which are often successful. Many customers clearly benefit from using this unified corporate performance management solution that delivers insight into finance, operations and business performance.
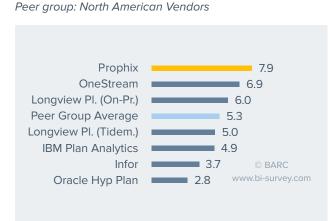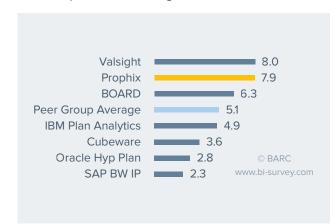
Business value

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

Business value – Top-ranked

Peer group: North American Vendors

Prophix	7.9
OneStream	6.9
Longview Pl. (On-Pr.)	6.0
Peer Group Average	5.3
Longview Pl. (Tidem.)	5.0
IBM Plan Analytics	4.9
Infor	3.7
Oracle Hyp Plan	2.8

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Business value – Leader

Peer Group: Flexible Planning Platforms

Valsight	8.0
Prophix	7.9
BOARD	6.3
Peer Group Average	5.1
IBM Plan Analytics	4.9
Cubeware	3.6
Oracle Hyp Plan	2.8
SAP BW IP	2.3

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Business value – Leader

Peer Group: BI-focused Products

Jedox	8.4
Prophix	7.9
SAP Analytics Cloud	7.2
IDL	6.8
BOARD	6.3
Longview Pl. (On-Pr.)	6.0
Peer Group Average	5.8
IBM Plan Analytics	4.9
Unit4 Prevero	4.3
evidanza	4.2
Infor	3.7
Cubeware	3.6

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BARC Viewpoint

Many companies say they benefit from using Prophix. The product offers unified corporate performance management functionality for budgeting, forecasting, reporting, analysis and financial consolidation. Business benefits such as reduced planning complexity and more precise/detailed planning are achieved by an above-average proportion of Prophix users compared to other planning products. For many customers, these benefits lead to improved employee satisfaction and reduced resource requirements for planning. Furthermore, 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. Customers are very happy with the amount of time spent on their implementation projects. Projects with Prophix software are usually quick in comparison to many of its local and global competitors. Prophix is the highest ranked product for 'Business value' in the 'North American Vendors' peer group.
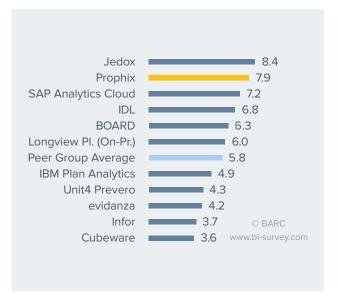
Price-to-value
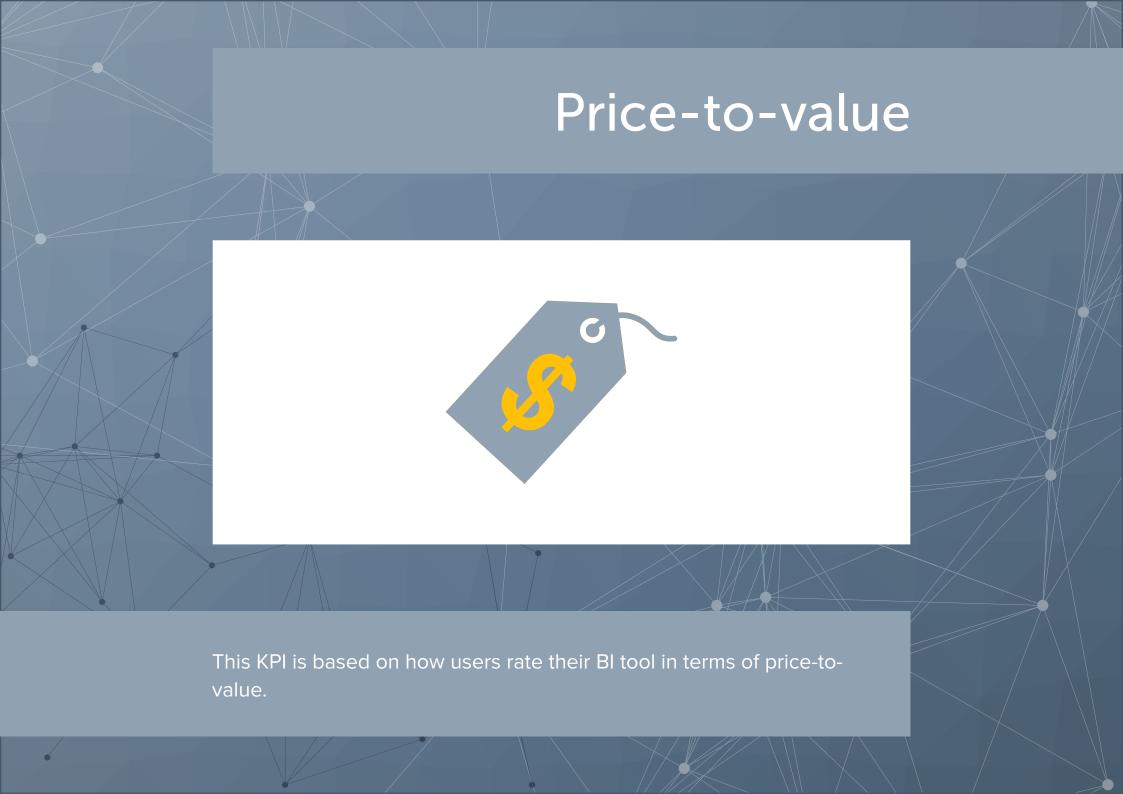

This KPI is based on how users rate their BI tool in terms of price-to-value.

Price-to-value — Top-ranked

Peer Group: BI-focused Products

Prophix	9.1
Jedox	8.3
IDL	7.6
SAP Analytics Cloud	7.4
Peer Group Average	6.7
Longview Pl. (On-Pr.)	6.7
Cubeware	6.7
Unit4 Prevero	6.2
evidanza	6.2
BOARD	5.5
Infor	5.3
IBM Plan Analytics	4.4

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Price-to-value — Top-ranked

Peer Group: Flexible Planning Platforms

Prophix	9.1
Valsight	8.5
Cubeware	6.7
Peer Group Average	5.9
BOARD	5.5
IBM Plan Analytics	4.4
Oracle Hyp Plan	4.3
SAP BW IP	2.9

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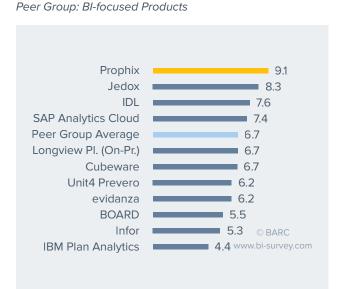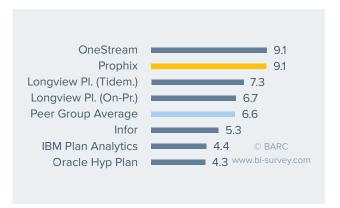
Price-to-value

Price-to-value — Leader

Peer group: North American Vendors

OneStream	9.1
Prophix	9.1
Longview Pl. (Tidem.)	7.3
Longview Pl. (On-Pr.)	6.7
Peer Group Average	6.6
Infor	5.3
IBM Plan Analytics	4.4
Oracle Hyp Plan	4.3

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BARC Viewpoint

Prophix is a unified corporate performance management solution focused on budgeting, forecasting, reporting, analysis and financial consolidations. Many customers highlight the product's price-performance ratio, which is also a prominent reason for buying Prophix. Consequently, Prophix ranks top in two of its peer groups for 'Price-to-value'. Prophix is considered to be attractively priced, offering good value and comprehensive functionality to address a variety of CPM use cases. The product offers high business value for customers at a reasonable price. Prophix is licensed using a named user concept, depending on the edition of the software, and is either available on-premises or in the cloud. The fee for support and maintenance is set at 20 percent of the license list price per year.

Recommendation

This KPI is based on the proportion of users that say they would recommend the product to others.

Recommendation – Top-ranked

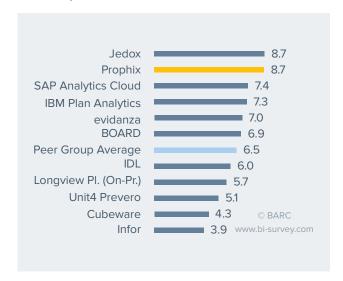*Peer Group: Flexible Planning Platforms*

Prophix	8.7
Valsight	7.4
IBM Plan Analytics	7.3
BOARD	6.9
Peer Group Average	5.7
Cubeware	4.3
Oracle Hyp Plan	4.1
SAP BW IP	1.0

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Recommendation – Leader

Peer Group: BI-focused Products

Jedox	8.7
Prophix	8.7
SAP Analytics Cloud	7.4
IBM Plan Analytics	7.3
evidanza	7.0
BOARD	6.9
Peer Group Average	6.5
IDL	6.0
Longview Pl. (On-Pr.)	5.7
Unit4 Prevero	5.1
Cubeware	4.3
Infor	3.9

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BARC Viewpoint

61 percent of Prophix users say they would definitely recommend their planning product to other organizations. This result is a great indicator of customer satisfaction with the vendor and its product. An impressive 94 percent of respondents are 'somewhat satisfied' or 'very satisfied' with Prophix, a major reason behind its high recommendation rate. Recommendation and success stories are tremendously important for vendors to gain visibility and to be considered for purchase in software selection processes more often. The results of this year's Planning Survey clearly show that customers are largely satisfied with Prophix as their planning tool and the vendor therefore ranks top for 'Recommendation' in the 'Flexible Planning Platforms' peer group.

Vendor support

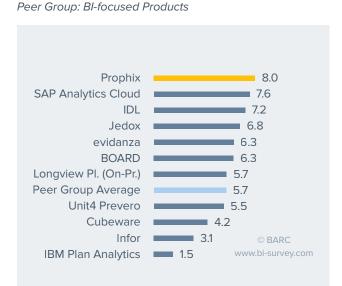This KPI measures user satisfaction with the level of vendor support provided for the product.

Vendor support – Top-ranked

Peer Group: BI-focused Products

Prophix	8.0
SAP Analytics Cloud	7.6
IDL	7.2
Jedox	6.8
evidanza	6.3
BOARD	6.3
Longview Pl. (On-Pr.)	5.7
Peer Group Average	5.7
Unit4 Prevero	5.5
Cubeware	4.2
Infor	3.1
IBM Plan Analytics	1.5

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Vendor support – Leader

Peer Group: Flexible Planning Platforms

Valsight	9.7
Prophix	8.0
BOARD	6.3
Peer Group Average	4.5
Cubeware	4.2
IBM Plan Analytics	1.5
SAP BW IP	1.1
Oracle Hyp Plan	1.0

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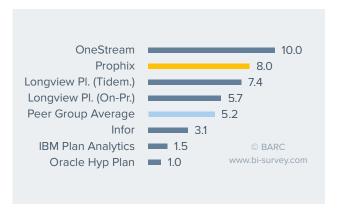
Vendor support

Vendor support – Leader

Peer group: North American Vendors

OneStream	10.0
Prophix	8.0
Longview Pl. (Tidem.)	7.4
Longview Pl. (On-Pr.)	5.7
Peer Group Average	5.2
Infor	3.1
IBM Plan Analytics	1.5
Oracle Hyp Plan	1.0

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BARC Viewpoint
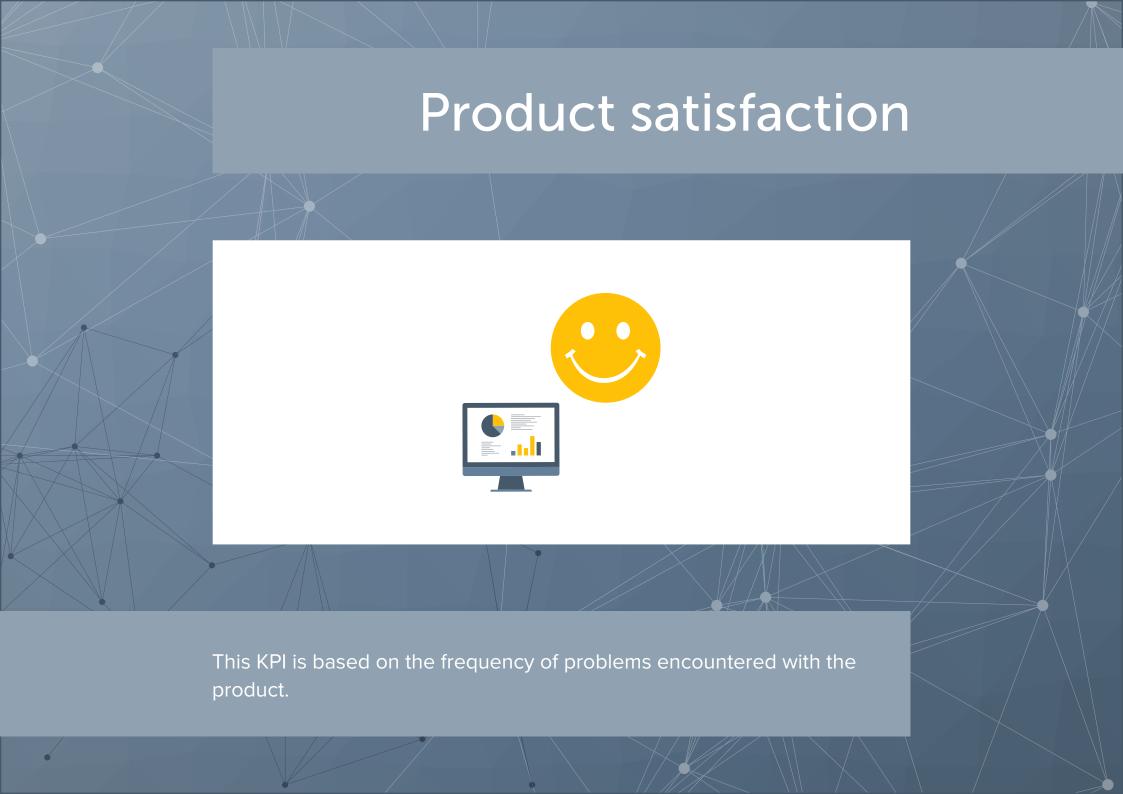
Prophix customers are highly satisfied with the support services they receive from the vendor. Consequently, Prophix ranks top for 'Vendor support' in the 'BI-focused Products' peer group and achieves leading ranks in its other two peer groups. Prophix offers support through its worldwide headquarters in Toronto and its European headquarters in Copenhagen, providing 17 hours of dedicated support. Prophix offers direct support or support through implementation partners. Standard Support is focused on technical issues, but may also support business issues, depending on the contract. Additionally, Prophix has its own user forum in which Prophix users can make their own contributions / functional suggestions. An annual meeting of customers takes place in North America and Europe. Prophix listens very carefully to customers' needs and requirements, constantly improving its software with this information.
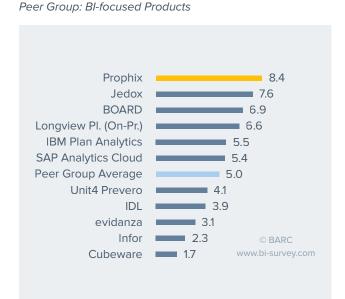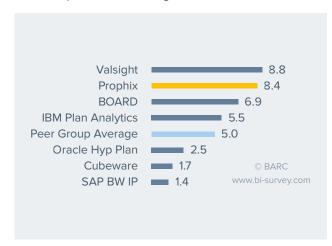
Product satisfaction

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

Product satisfaction – Top-ranked

Peer Group: BI-focused Products

Prophix	8.4
Jedox	7.6
BOARD	6.9
Longview Pl. (On-Pr.)	6.6
IBM Plan Analytics	5.5
SAP Analytics Cloud	5.4
Peer Group Average	5.0
Unit4 Prevero	4.1
IDL	3.9
evidanza	3.1
Infor	2.3
Cubeware	1.7

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Product satisfaction – Leader

Peer Group: Flexible Planning Platforms

Valsight	8.8
Prophix	8.4
BOARD	6.9
IBM Plan Analytics	5.5
Peer Group Average	5.0
Oracle Hyp Plan	2.5
Cubeware	1.7
SAP BW IP	1.4

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Product satisfaction

Product satisfaction – Leader

Peer group: North American Vendors

OneStream	10.0
Prophix	8.4
Longview Pl. (Tidem.)	6.8
Longview Pl. (On-Pr.)	6.6
Peer Group Average	6.0
IBM Plan Analytics	5.5
Oracle Hyp Plan	2.5
Infor	2.3

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BARC Viewpoint
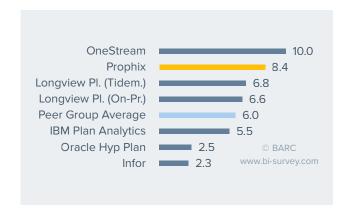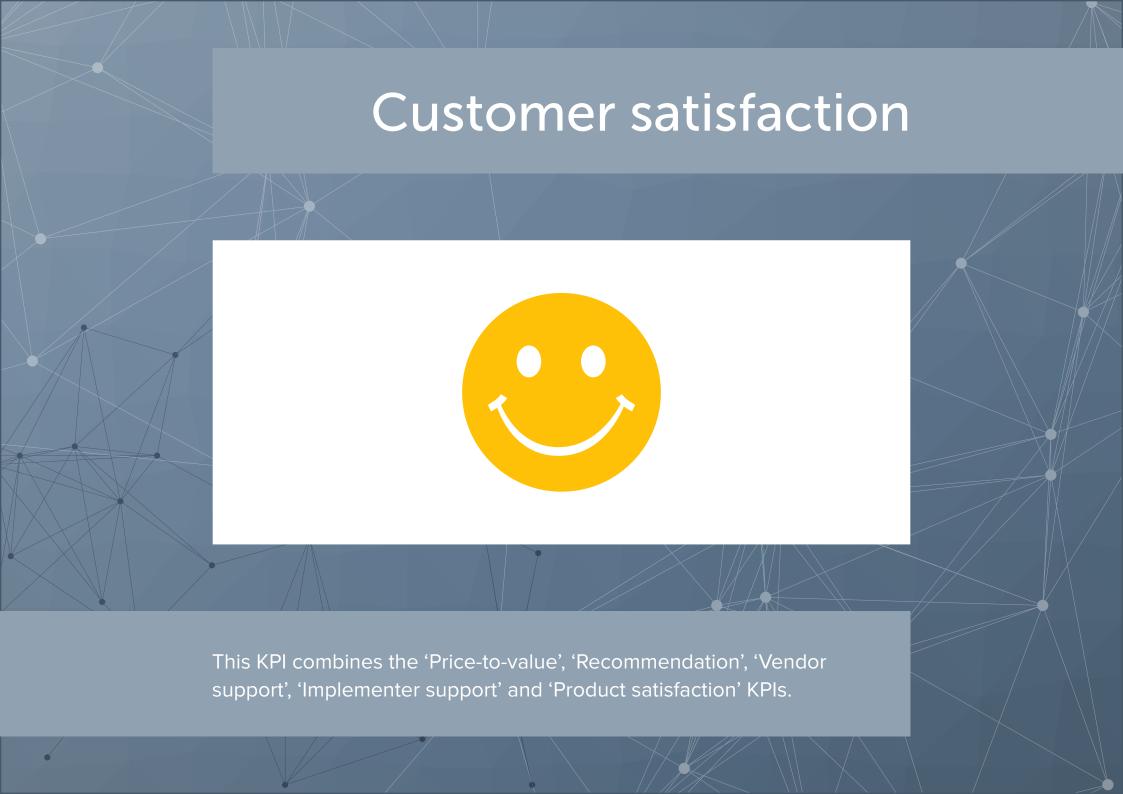
Prophix is a unified corporate performance management solution that delivers insight into finance, operations and business performance with a focus on business user experience and ease of use. Prophix does not confine itself to any one single planning topic (financials, sales, HR etc.). The product can be used to create individual planning applications with capabilities for top-down and bottom-up planning including workflow functions to control planning processes. It contains little predefined business content (e.g., for financial planning). The vendor's product and go-to-market approach clearly convince customers, who report satisfaction with the vendor and particularly its product. Deservedly, Prophix ranks top in the 'BI-focused Products' peer group for 'Product satisfaction' in this year's Planning Survey.

Customer satisfaction

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

Customer satisfaction – Top-ranked

Peer Group: BI-focused Products

Prophix	6.7
Jedox	6.5
SAP Analytics Cloud	5.7
Longview Pl. (On-Pr.)	5.3
IDL	5.3
BOARD	5.2
Peer Group Average	5.0
evidanza	4.7
Unit4 Prevero	4.4
IBM Plan Analytics	4.1
Cubeware	3.4
Infor	3.1

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Customer satisfaction – Leader

Peer Group: Flexible Planning Platforms

Valsight	7.1
Prophix	6.7
BOARD	5.2
Peer Group Average	4.4
IBM Plan Analytics	4.1
Cubeware	3.4
Oracle Hyp Plan	2.7
SAP BW IP	1.3

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Customer satisfaction

Customer satisfaction – Leader

Peer group: North American Vendors

OneStream	8.1
Prophix	6.7
Longview Pl. (Tidem.)	6.4
Longview Pl. (On-Pr.)	5.3
Peer Group Average	5.2
IBM Plan Analytics	4.1
Infor	3.1
Oracle Hyp Plan	2.7

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BARC Viewpoint

48 percent of Prophix customers state that they have no significant problems at all when using the software, which is a strong indicator of customer satisfaction with the product. Customer satisfaction is crucial to establishing long-lasting relationships with customers. A good proportion of customers confirm that they are satisfied with both the vendor and its planning product. The product's price-performance ratio, vendor support and product satisfaction are especially highly valued. Consequently, the product comes highly recommended by its customers. In fact, 61 percent of surveyed users say they would definitely recommend using Prophix for planning to other companies. In this year's Planning Survey Prophix ranks top for 'Customer satisfaction' in the 'BI-focused Products' peer group.
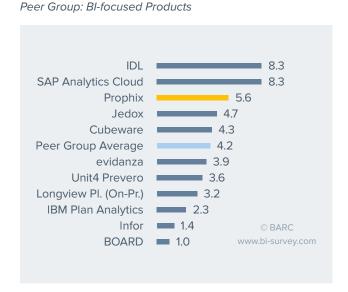
Planning content

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

Planning content – Leader

Peer Group: BI-focused Products

Product	Score
IDL	8.3
SAP Analytics Cloud	8.3
Prophix	5.6
Jedox	4.7
Cubeware	4.3
Peer Group Average	4.2
evidanza	3.9
Unit4 Prevero	3.6
Longview Pl. (On-Pr.)	3.2
IBM Plan Analytics	2.3
Infor	1.4
BOARD	1.0

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Planning content – Leader

Peer Group: Flexible Planning Platforms

Product	Score
Valsight	8.0
Prophix	5.6
Oracle Hyp Plan	4.8
Cubeware	4.3
Peer Group Average	4.0
IBM Plan Analytics	2.3
SAP BW IP	1.7
BOARD	1.0

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BARC Viewpoint

Prophix does not confine itself to any one single planning topic (financials, sales, HR etc.). It can be used to create individual planning applications through the Prophix Model Wizard as part of implementation projects. In general, Prophix contains little predefined business content (e.g. for financial planning). Instead, Prophix submits offers on predefined templates or standard planning models to its partners, who have predefined business models and logics in their portfolio (e.g., models for „Professional Services" or for the public sector). In any case, Prophix's customers are happy with its partners' predefined planning content and the product achieves two leading rankings for 'Planning content'.

Planning functionality

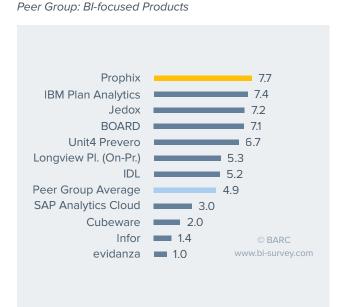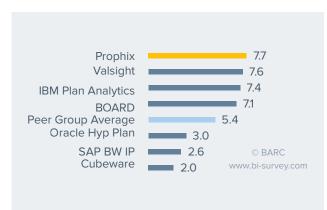This KPI measures user ratings of the product's coverage of planning specific requirements.

Planning functionality – Top-ranked

Peer Group: BI-focused Products

1.

Prophix	7.7
IBM Plan Analytics	7.4
Jedox	7.2
BOARD	7.1
Unit4 Prevero	6.7
Longview Pl. (On-Pr.)	5.3
IDL	5.2
Peer Group Average	4.9
SAP Analytics Cloud	3.0
Cubeware	2.0
Infor	1.4
evidanza	1.0

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Planning functionality – Top-ranked

Peer Group: Flexible Planning Platforms

1.

Prophix	7.7
Valsight	7.6
IBM Plan Analytics	7.4
BOARD	7.1
Peer Group Average	5.4
Oracle Hyp Plan	3.0
SAP BW IP	2.6
Cubeware	2.0

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Planning functionality – Leader

Peer group: North American Vendors

OneStream	8.6
Prophix	7.7
IBM Plan Analytics	7.4
Longview Pl. (Tidem.)	6.6
Peer Group Average	5.7
Longview Pl. (On-Pr.)	5.3
Oracle Hyp Plan	3.0
Infor	1.4

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BARC Viewpoint

The Planning Survey results clearly indicate that Prophix is a comprehensive planning tool. It is focused on budgeting, forecasting, operational planning, personnel planning, revenue planning and project planning. 'Good coverage of planning specific requirements' (53 percent) is the second most frequently cited reason why companies choose to buy Prophix. The product can be used to create individual planning and forecasting applications with capabilities for top-down and bottom-up planning including workflow functions to control planning processes. Consequently, Prophix is top ranked for its planning functionality in the 'BI-focused Products' and 'Flexible Planning Platforms' peer groups.

Workflow

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

Workflow – Top-ranked

Peer Group: Flexible Planning Platforms

Prophix	6.5
Valsight	4.9
BOARD	4.8
IBM Plan Analytics	4.2
Peer Group Average	4.1
Cubeware	3.8
Oracle Hyp Plan	3.3
SAP BW IP	1.0

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Workflow – Leader

Peer Group: BI-focused Products

Longview Pl. (On-Pr.)	7.3
Prophix	6.5
IDL	5.6
SAP Analytics Cloud	5.6
Jedox	5.4
Peer Group Average	5.0
BOARD	4.8
evidanza	4.5
IBM Plan Analytics	4.2
Infor	4.2
Cubeware	3.8
Unit4 Prevero	3.6

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BARC Viewpoint

Prophix can be used to create individual planning applications with capabilities for top-down and bottom-up planning including workflow functions to control planning processes. The product's workflow functionality also includes time management and commentary functions. In addition to approval processes, notification functions and tasks are also available. The latter can be assigned. Comprehensive status monitoring is available for tracking the progress of the planning process for planning officers. Overall, customers are satisfied with the product's workflow capabilities, rating them the best in the 'Flexible Planning Platforms' peer group.

Forecasting & Project success

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

The 'Project success' KPI is based on the implementation satisfaction level and the frequency of projects completed on time and on budget.

Forecasting – Leader

Peer Group: Flexible Planning Platforms

Valsight	10.0
Prophix	7.7
Cubeware	6.8
IBM Plan Analytics	6.8
BOARD	6.7
Peer Group Average	6.3
Oracle Hyp Plan	5.5
SAP BW IP	1.0

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BARC Viewpoint — Forecasting

Prophix provides its own forecasting functionality. When creating a forecast, users can individually define the split of actuals and plan data. As an example, for a year-end-forecast, the first six months can be filled with actuals from source systems while the next six months can be planned to create the forecast. Forecasts can also be implemented on a rolling basis. Rolling forecasts allow companies to work with constantly updated data to reflect on-going changes in a business or market. Forecasts can be created based on cash flow, production, sales and finances, using different timelines. Prophix is a leader for its forecasting functionality in the 'Flexible Planning Platforms' peer group.

Project success — BARC Viewpoint
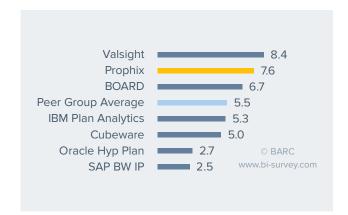
Prophix achieves a leading rank for 'Project success' in the 'Flexible Planning Platforms' peer group. The results show that the level of implementation satisfaction and the frequency of projects completed on time and on budget are high. Project goals defined at the outset are often reached. Prophix projects are either implemented by the vendor itself or by experienced partners. Prophix and its partners support customers by advising them how best to implement the software according to their particular business needs. Successfully implemented projects are a prerequisite for high customer satisfaction and the business value a product can create.

Project success – Leader

Peer Group: Flexible Planning Platforms

Valsight	8.4
Prophix	7.6
BOARD	6.7
Peer Group Average	5.5
IBM Plan Analytics	5.3
Cubeware	5.0
Oracle Hyp Plan	2.7
SAP BW IP	2.5

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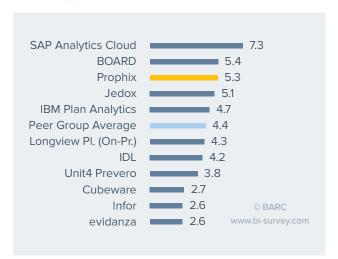
Simulation & Performance satisfaction

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

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

Simulation – Leader

Peer Group: BI-focused Products

SAP Analytics Cloud	7.3
BOARD	5.4
Prophix	5.3
Jedox	5.1
IBM Plan Analytics	4.7
Peer Group Average	4.4
Longview Pl. (On-Pr.)	4.3
IDL	4.2
Unit4 Prevero	3.8
Cubeware	2.7
Infor	2.6
evidanza	2.6

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BARC Viewpoint — Simulation

Future corporate development can be simulated in Prophix using different scenarios. In scenarios, either parameter simulations or structural simulations can be done. There is no limitation to the number of scenarios in Prophix. As is typical for multidimensional planning solutions, simulations and versions can be managed using a separate (scenario) dimension in the planning model. In the 'BI-focused Products' peer group, Prophix is considered to be a leader for its simulation capabilities.

Performance satisfaction — BARC Viewpoint

'Performance too slow' is cited as a problem by a below-average proportion of Prophix users. Customers are quite satisfied with the performance the product offers and 'Convincing performance' (34 percent) is a prominent reason why companies choose to buy the product. However, compared to the survey average it is normally used with relatively small data volumes and few concurrent users, where performance is not usually an issue. The vendor has a strong focus on business departments in mid-size companies with typically 50-100 users per implementation. However, there are much larger implementations as well. In any case, Prophix and its underlying relational and multidimensional data model in Microsoft SQL Server are clearly capable of dealing with the data volumes and user numbers its customers typically work with.
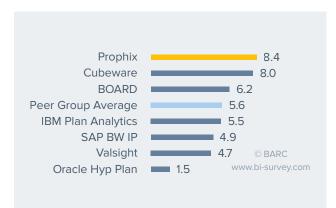
Performance satisfaction – Leader
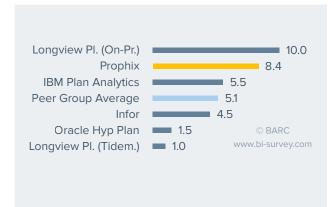
Peer Group: BI-focused Products

IBM Plan Analytics	9.0
evidanza	8.0
Prophix	7.2
BOARD	6.5
Longview Pl. (On-Pr.)	6.4
Jedox	6.3
Peer Group Average	6.2
Cubeware	6.1
SAP Analytics Cloud	5.4
IDL	4.8
Infor	4.7
Unit4 Prevero	3.9

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Reporting/analysis

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

Reporting/analysis – Top-ranked

Peer Group: Flexible Planning Platforms

Prophix	8.4
Cubeware	8.0
BOARD	6.2
Peer Group Average	5.6
IBM Plan Analytics	5.5
SAP BW IP	4.9
Valsight	4.7
Oracle Hyp Plan	1.5

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Reporting/analysis – Leader

Peer group: North American Vendors

Longview Pl. (On-Pr.)	10.0
Prophix	8.4
IBM Plan Analytics	5.5
Peer Group Average	5.1
Infor	4.5
Oracle Hyp Plan	1.5
Longview Pl. (Tidem.)	1.0

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BARC Viewpoint

Besides planning, Prophix also provides comprehensive capabilities for BI and analytics. Standard reporting in a formatted and (if required) print-oriented way is supported, as are ad hoc queries based on OLAP methodologies (drill functionality, slice and dice, pivoting etc.). For visualizing data (e.g., in management cockpits or dashboards), standard business graphics and more advanced chart types are available. The Planning Survey results clearly show that Prophix not only benefits its users but also offers comprehensive functionality for reporting and analysis. 'Good coverage of reporting/analysis requirements' (47 percent) is also a prominent reason why companies choose to buy Prophix. As a result, Prophix ranks top for 'Reporting/analysis' in the 'Flexible Planning Platforms' peer group.

Functionality

This KPI combines the 'Predefined data connectivity', 'Data integration', 'Planning content', 'Planning functionality', 'Workflow', 'Forecasting', 'Simulation', 'Driver-based planning' and 'Reporting/analysis' KPIs.
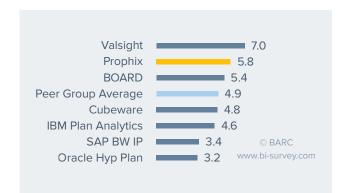
Functionality — Leader

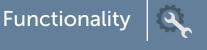*Peer group: North American Vendors*

Vendor	Score
OneStream	7.4
Prophix	5.8
Longview Pl. (On-Pr.)	5.7
Longview Pl. (Tidem.)	5.3
Peer Group Average	5.1
IBM Plan Analytics	4.6
Infor	3.4
Oracle Hyp Plan	3.2

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Functionality — Leader

Peer Group: Flexible Planning Platforms

Vendor	Score
Valsight	7.0
Prophix	5.8
BOARD	5.4
Peer Group Average	4.9
Cubeware	4.8
IBM Plan Analytics	4.6
SAP BW IP	3.4
Oracle Hyp Plan	3.2

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BARC Viewpoint

'Functionality' is an aggregated KPI which combines the 'Predefined data connectivity', 'Data integration', 'Planning content', 'Planning functionality', 'Workflow', 'Forecasting', 'Simulation', 'Driver-based planning' and 'Reporting/analysis' KPIs. In achieving good customer feedback for many of these KPIs, particularly in the 'North American Vendors' and 'Flexible Planning Platforms' peer groups, Prophix emerges as a leader in this category. The product's comprehensive planning and reporting/analysis functionality is a key factor in convincing and satisfying customers. Prophix 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).

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.
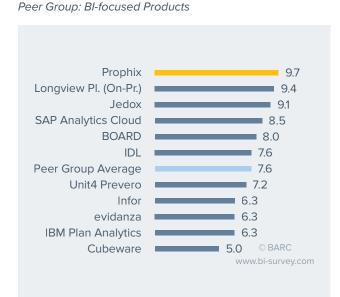
Ease of use – Top-ranked

Peer Group: BI-focused Products

Prophix	9.7
Longview Pl. (On-Pr.)	9.4
Jedox	9.1
SAP Analytics Cloud	8.5
BOARD	8.0
IDL	7.6
Peer Group Average	7.6
Unit4 Prevero	7.2
Infor	6.3
evidanza	6.3
IBM Plan Analytics	6.3
Cubeware	5.0

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Ease of use – Top-ranked

Peer Group: Flexible Planning Platforms

Prophix	9.7
Valsight	9.5
BOARD	8.0
Peer Group Average	6.3
IBM Plan Analytics	6.3
Cubeware	5.0
Oracle Hyp Plan	4.7
SAP BW IP	1.0

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Ease of use
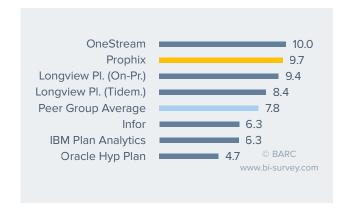
Ease of use – Leader

Peer group: North American Vendors

OneStream	10.0
Prophix	9.7
Longview Pl. (On-Pr.)	9.4
Longview Pl. (Tidem.)	8.4
Peer Group Average	7.8
Infor	6.3
IBM Plan Analytics	6.3
Oracle Hyp Plan	4.7

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BARC Viewpoint

'Ease of use for planners' is among the main reasons why companies choose Prophix. Not one of the Prophix customers surveyed had any complaints about ease of use. The vendor has a strong focus on business departments in mid-size companies and has worked hard to make its product easy to use and user-friendly for business departments. Business power users in particular can create individual applications without needing any programming skills. Consequently, many customers feel they can roll out Prophix for self-service planning in business departments. This year, Prophix is the highest ranked planning product for 'Ease of use' in the 'BI-focused Products' and 'Flexible Planning Platforms' peer groups.
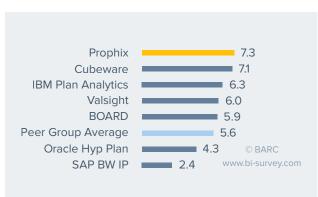
Flexibility

This KPI is based on how often the product was chosen for its flexibility, and on the frequency of complaints about user flexibility post-implementation.

Flexibility – Top-ranked

Peer Group: Flexible Planning Platforms

Prophix	7.3
Cubeware	7.1
IBM Plan Analytics	6.3
Valsight	6.0
BOARD	5.9
Peer Group Average	5.6
Oracle Hyp Plan	4.3
SAP BW IP	2.4

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Flexibility – Leader

Peer group: North American Vendors

Longview Pl. (On-Pr.)	7.7
Prophix	7.3
IBM Plan Analytics	6.3
Infor	6.3
Peer Group Average	6.2
Longview Pl. (Tidem.)	5.0
Oracle Hyp Plan	4.3

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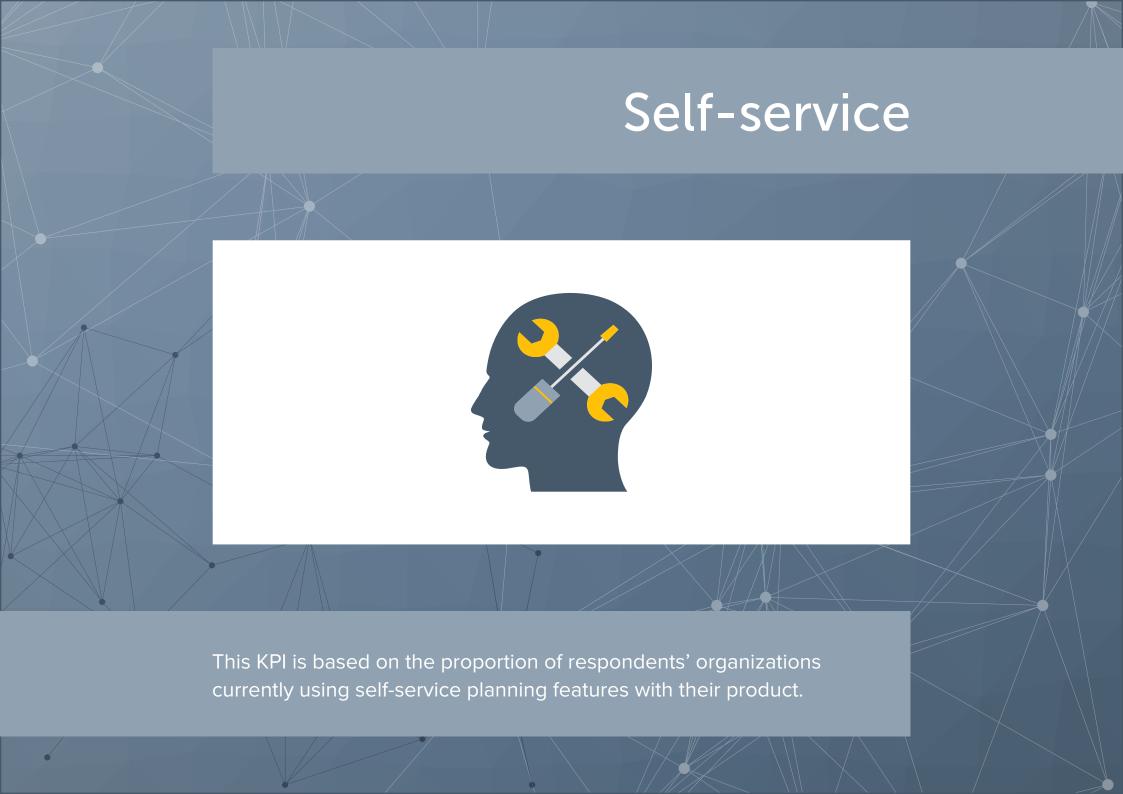
BARC Viewpoint

'Flexibility of the software' is again the number one reason why companies choose Prophix. The product can be used to address a variety of use cases with capabilities for top-down and bottom-up planning including workflow functions to control planning processes. Complaints about inflexibility are very rare (6 percent). Prophix provides a flexible environment for building individual planning and CPM applications, extended with functionality for reporting, analysis and dashboarding. It contains little predefined business content and can be used for a variety of planning topics (e.g., financials, sales, HR, etc.) in any industry sector. Prophix ranks top for 'Flexibility' in the 'Flexible Planning Platforms' peer group.
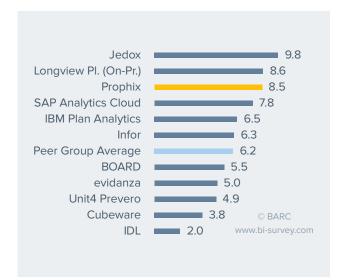
Self-service

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

Self-service – Top-ranked

Peer Group: Flexible Planning Platforms

Prophix	8.5
IBM Plan Analytics	6.5
BOARD	5.5
Peer Group Average	4.3
Cubeware	3.8
Valsight	3.2
Oracle Hyp Plan	1.3
SAP BW IP	1.0

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Self-service – Leader

Peer Group: BI-focused Products

Jedox	9.8
Longview Pl. (On-Pr.)	8.6
Prophix	8.5
SAP Analytics Cloud	7.8
IBM Plan Analytics	6.5
Infor	6.3
Peer Group Average	6.2
BOARD	5.5
evidanza	5.0
Unit4 Prevero	4.9
Cubeware	3.8
IDL	2.0

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BARC Viewpoint

Prophix targets business departments in mid-size companies across all industries. Many of its mid-size customers use the product in a self-service approach in business departments (typically the finance and controlling departments). Business power users generally use it to create wizard-based individual planning applications requiring only minimal IT support (e.g., for data integration tasks). None of the Prophix users surveyed cited 'Software difficult to use' as an issue for them. Using the cloud version of the product also shifts the responsibility for server management and operation to Prophix so users can work even more independently from IT departments. This year, Prophix ranks number one for 'Self-service' in the 'Flexible Planning Platforms' peer group.
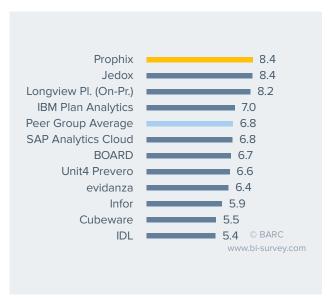
User experience

Combines the 'Performance satisfaction', 'Ease of use', 'Flexibility' and 'Self-service' KPIs.

User experience – Top-ranked

Peer Group: Flexible Planning Platforms

Prophix	8.4
Valsight	7.2
IBM Plan Analytics	7.0
BOARD	6.7
Peer Group Average	5.7
Cubeware	5.5
Oracle Hyp Plan	4.0
SAP BW IP	1.3

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User experience – Top-ranked

Peer group: North American Vendors

Prophix	8.4
OneStream	8.3
Longview Pl. (On-Pr.)	8.2
Longview Pl. (Tidem.)	7.2
Peer Group Average	7.0
IBM Plan Analytics	7.0
Infor	5.9
Oracle Hyp Plan	4.0

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User experience

User experience – Top-ranked

Peer Group: BI-focused Products

Prophix	8.4
Jedox	8.4
Longview Pl. (On-Pr.)	8.2
IBM Plan Analytics	7.0
Peer Group Average	6.8
SAP Analytics Cloud	6.8
BOARD	6.7
Unit4 Prevero	6.6
evidanza	6.4
Infor	5.9
Cubeware	5.5
IDL	5.4

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BARC Viewpoint

User experience' is an aggregated KPI which combines the 'Performance satisfaction', 'Ease of use', 'Flexibility' and 'Self-service' KPIs. Good results in all of these KPIs place Prophix top in all three of its peer groups. The results of this year's Planning Survey confirm that Prophix customers are satisfied with the performance of the product, its flexibility and ease of use. Many customers feel they can roll out the product for self-service planning in business departments. Problems encountered by Prophix users are rare. Indeed, 48 percent of respondents say they have no significant problems at all when using it.
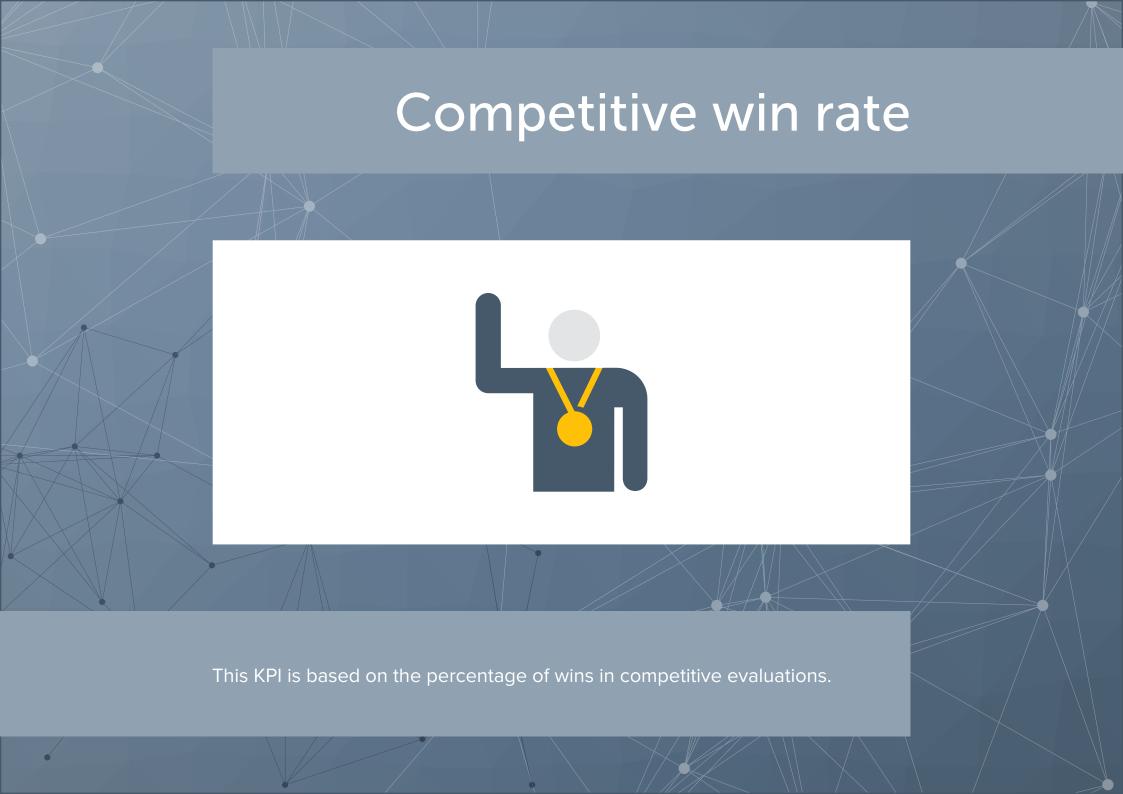
Competitive win rate

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

Competitive win rate – Leader

Peer Group: BI-focused Products

Longview Pl. (On-Pr.)	7.5
IDL	7.1
Prophix	7.1
evidanza	6.5
Jedox	6.3
Peer Group Average	5.2
Infor	4.4
IBM Plan Analytics	4.1
SAP Analytics Cloud	3.9
Unit4 Prevero	3.5
Cubeware	1.8

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Competitive win rate – Leader

Peer Group: Flexible Planning Platforms

Valsight	10.0
Prophix	7.1
Peer Group Average	4.7
IBM Plan Analytics	4.1
SAP BW IP	3.4
Cubeware	1.8
Oracle Hyp Plan	1.8

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BARC Viewpoint

When Prophix is considered for purchase, its percentage of wins in competitive evaluations is very high. While its competitive win rate – based on the percentage of deals won in competitive evaluations against other vendors – is quite good, the vendor does not have the market presence to be widely considered for purchase. In any case, the survey results clearly indicate that Prophix is a unified corporate performance management solution focused on budgeting, forecasting, reporting, analysis and financial consolidations and that companies can benefit greatly from using it. Business departments in mid-sized companies are the most likely to benefit from the insights into data it can provide. The vendor's 94 percent recommendation rate speaks for itself.
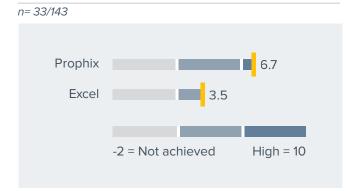
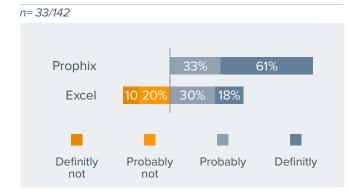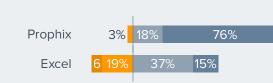## Problems encountered by Prophix and Excel users

n=33/153

Excel   **Prophix**
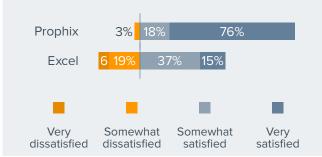
No significant problems
8%   48%

Performance too slow
18%   28%

Unable to get data from some source systems
12% 14%

Unreliable software
3%   12%

Missing key product features
6%   9%

Cannot handle large numbers of users
6%   14%

Software is not flexible enough
6%   15%

Cannot handle our data volumes
0%   40%

Software difficult to use
0% 3%

Business Benefits Index*

n= 33/143

Prophix ──────────── 6.7

Excel ──────── 3.5

-2 = Not achieved   High = 10

Recommendation**

n= 33/142

Prophix   33%   61%

Excel   10 20%   30%   18%

Definitly not   Probably not   Probably   Definitly

Satisfaction level**

n=33/145

Prophix   3% 18%   76%

Excel   6 19%   37%   15%

Very dissatisfied   Somewhat dissatisfied   Somewhat satisfied   Very satisfied

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. Prophix 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 Prophix users. 48 percent of customers even report having no significant problems at all with the product. Business benefits regularly achieved with Prophix (and achieved more often than with Excel) include reduced planning complexity, improved employee satisfaction and more precise/detailed planning. 61 percent of Prophix users say they would definitely recommend their planning product to other organizations, while an impressive 94 percent of respondents are 'somewhat satisfied' or 'very satisfied' with Prophix.

* 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 — Business Application Research Center

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.

For further information see:
www.barc-research.com

Other Surveys

The BARC **BI Trend Monitor 2019** reflects on the trends currently driving the BI and data management market from a user perspective. We asked close to 2,700 users, consultants and vendors for their views on the most important BI trends.

BARC Score: Enterprise BI and Analytics Platforms is BARC's concise overview of the global BI and analytics tools market. It features profiles of the twenty leading vendors and BARC's rating of each provider based on a wide range of criteria related to their portfolio capabilities and market execution.

The BI Survey 18 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 36 leading BI products. Find out more at **www.bi-survey.com**

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