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CONSULTING SOLUTIONS



Clash of the Titans 2019

An Independent Comparison of SAP,
Oracle, Microsoft Dynamics and Infor

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INTRODUCTION

Panorama Consulting Solutions developed its annual Clash of the Titans analysis to compare the “titans” of the enterprise software industry: SAP, Oracle, Microsoft Dynamics and Infor.

Clash of the Titans 2019 analyzes responses collected from Panorama’s ERP Benchmark Survey between September 2018 and October 2018. The dataset includes 263 respondents who have selected or implemented SAP, Oracle, Microsoft Dynamics or Infor ERP solutions. The analysis is based on all solutions offered by the four vendors across all industries.

Panorama is in no way affiliated with SAP, Oracle, Microsoft Dynamics, Infor or any other software vendor or reseller.

VENDOR SELECTION

The battle between SAP, Oracle, Microsoft Dynamics and Infor isn't likely to be settled anytime soon. The following page reveals respondents' choice of vendor.

SAP maintains a foothold in the Fortune 500 market by primarily building its products from the ground up rather than through acquisition.



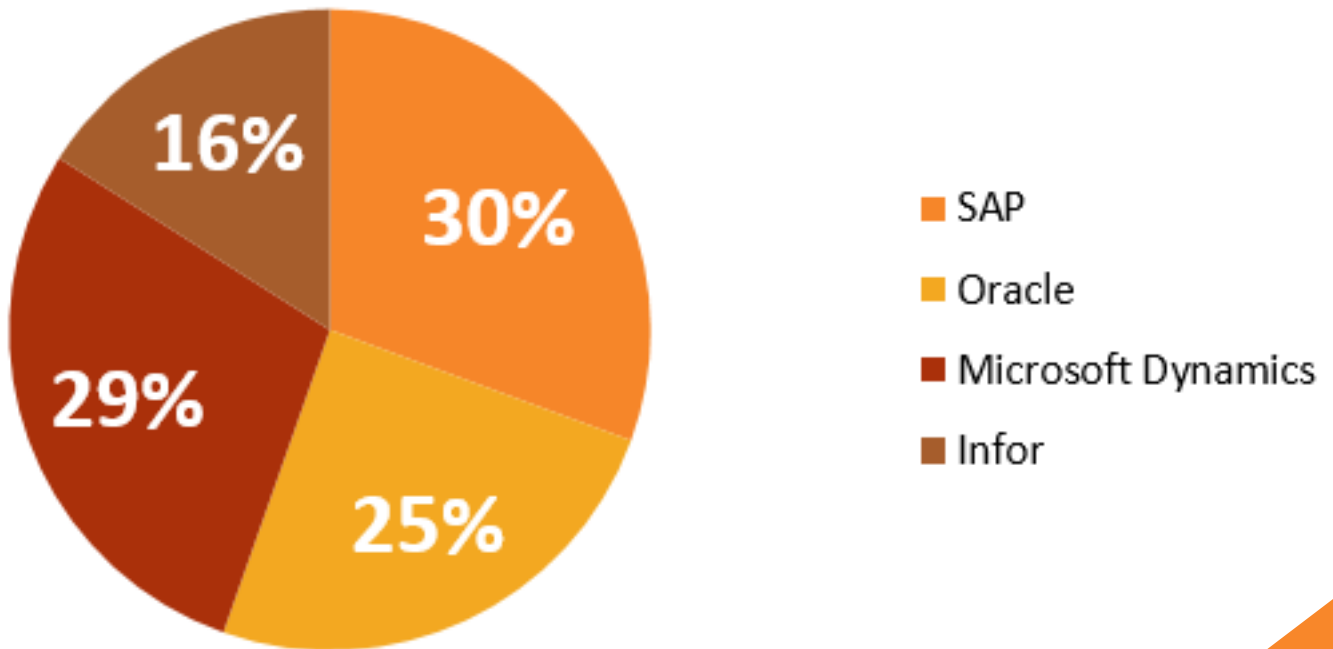
Oracle's primary strength is developing and acquiring robust product lines that can provide flexible functionality to a variety of industry niches.

Microsoft is continuing to expand its appeal among organizations of all sizes looking for a less complex alternative to SAP.



Infor has always aimed to develop innovative products and plans to continue this trajectory with its recent funding from Koch Equity.

Vendor Selected



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When evaluating ERP vendors, organizations should consider software functionality, deployment options and vendor and product viability. An informed decision also requires business process mapping and requirements definition.



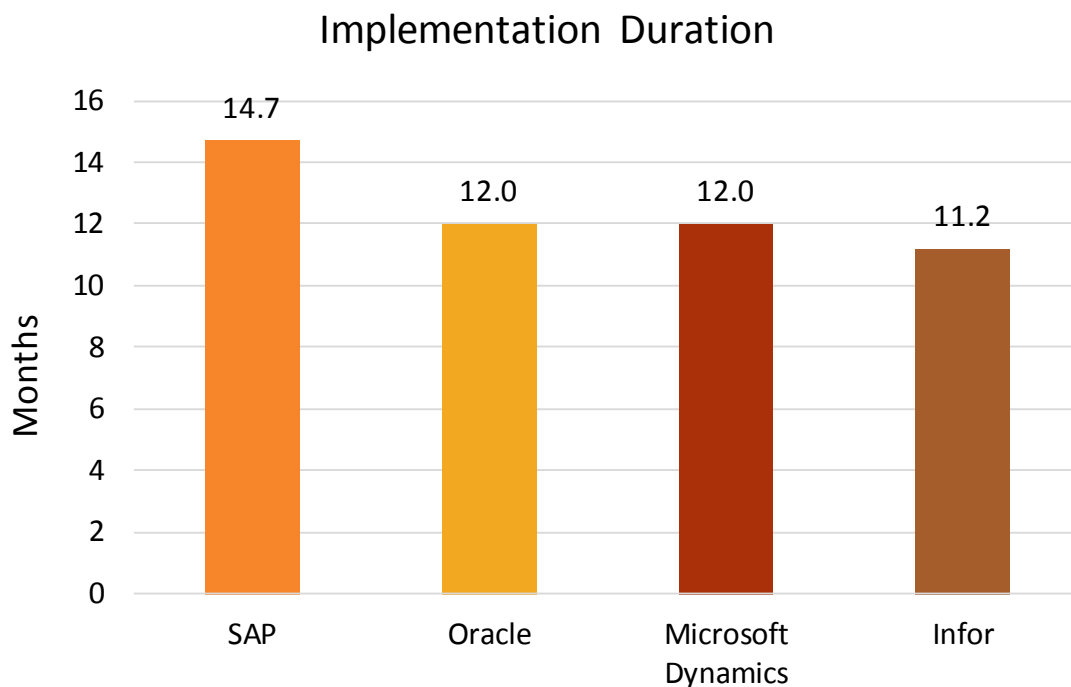
IMPLEMENTATION DURATION

SAP has the longest implementations.

SAP clients are typically global and complex organizations. These organizations choose SAP because of its scalability and robust functionality. Global implementations naturally require a longer time commitment due to the number of locations.

Infor has the shortest implementations.

Infor encourages organizations to minimize software customization and use more out-of-the-box pre-configurations. When organizations spend less time on customization and configuration, this can shorten their implementation timeline.



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OPERATIONAL DISRUPTION

ERP implementations can cause operational disruptions, such as the inability to manufacture or ship products.

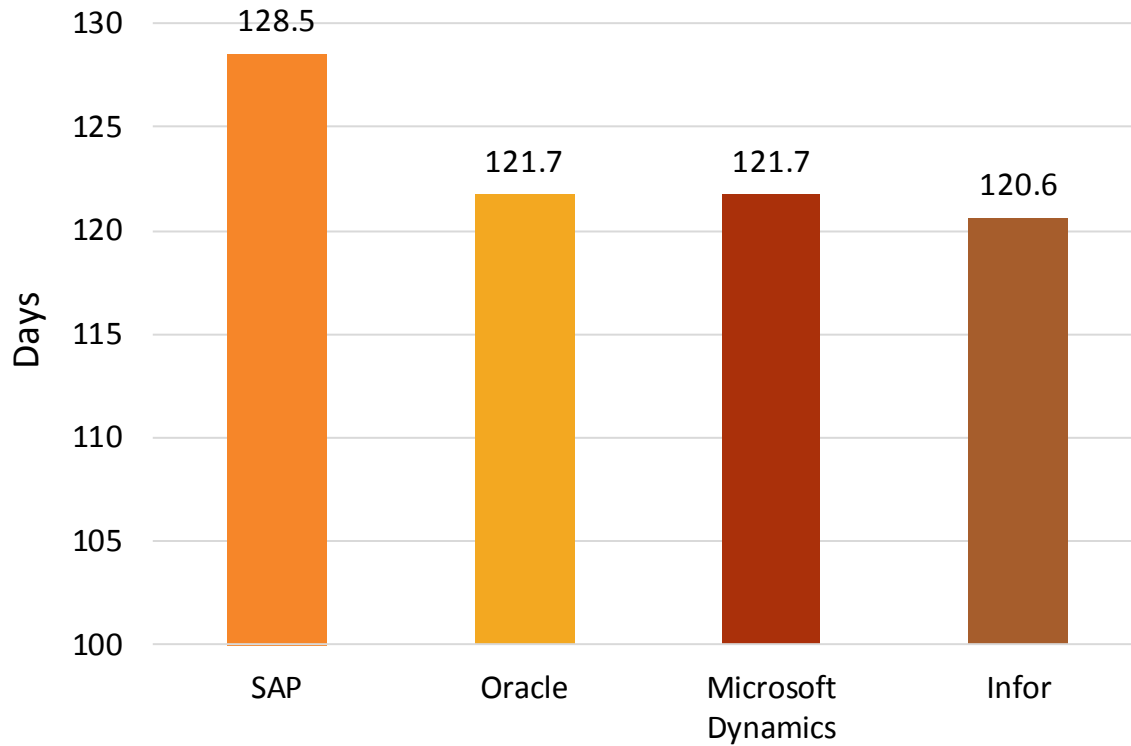
SAP has the longest operational disruptions.

As mentioned earlier, SAP works with large organizations that have complex, global operations. An operational disruption at a large organization can affect multiple locations, which can take more time and effort to resolve.

Infor has the shortest operational disruptions.

Since Infor encourages the use of out-of-the-box functionality, its clients are assuming less risk. Customization can have unforeseen effects on software functionality due to interdependencies. Infor clients are minimizing customization and finding that software functionality is much more predictable.

Length of Disruption



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To reduce the risk of operational disruption, organizations should take a phased implementation approach. It's also wise to conduct multiple conference room pilots before go-live.



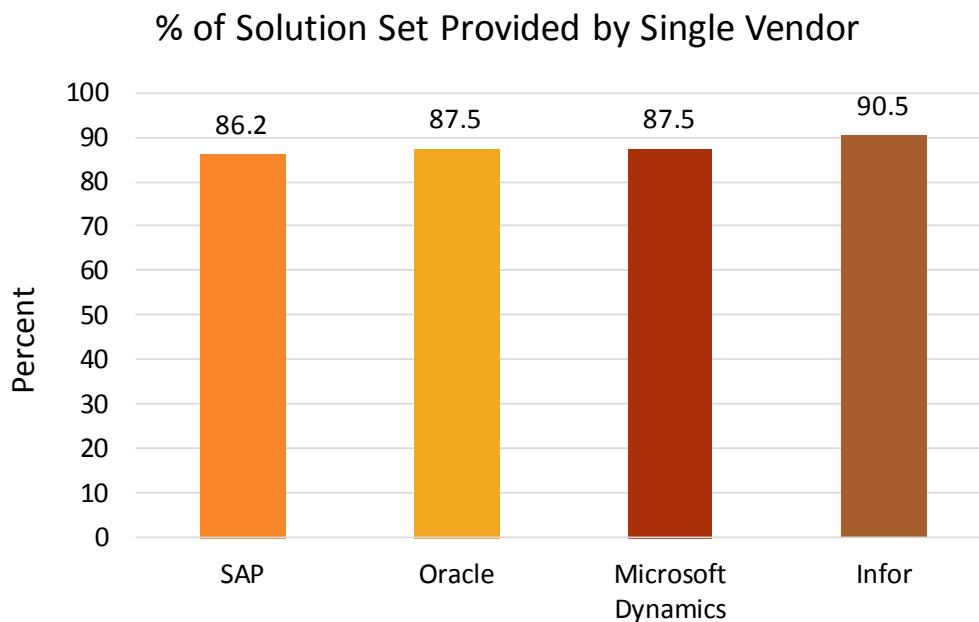
SINGLE ERP SYSTEM VS. BEST-OF-BREED

Organizations implementing Infor prefer single ERP systems.

Organizations implement Infor for industry-specific functionality as well as secondary functionality, such as enterprise asset management and product lifecycle management. The implementation of industry-specific functionality tends to be quick enough to allow time for implementing secondary functionality. As mentioned earlier, Infor customers tend to be smaller and less complex than SAP customers, resulting in faster implementations.

Organizations implementing SAP still prefer single ERP systems, but sometimes opt for best-of-breed.

SAP also provides a full-suite of solutions. However, SAP implementations tend to be longer, causing many organizations to forgo secondary functionality in order to reduce implementation time. Eventually, they seek secondary functionality from less complex ERP systems outside of the SAP solution set.



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INTERNAL VS. EXTERNAL RESOURCES

While vendors typically recommend a team of at least 8-12 full-time internal resources, this isn't feasible for most organizations.

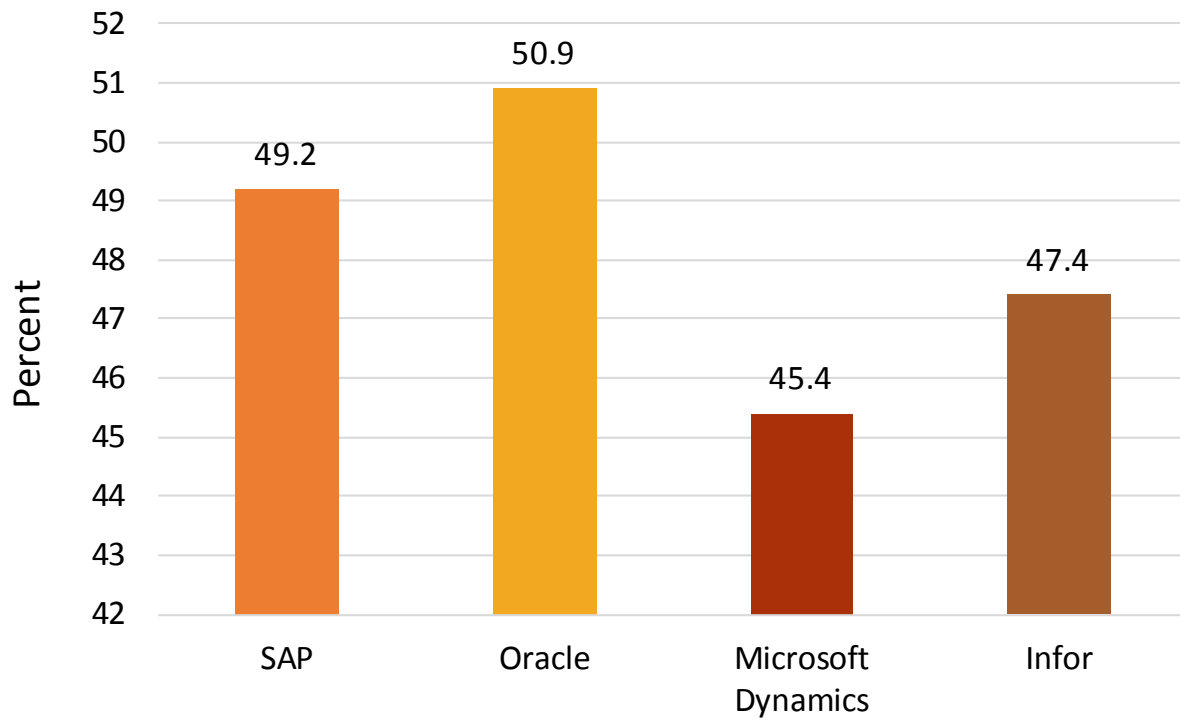
Organizations implementing Oracle use the most internal resources.

Oracle is a flexible solution that typically requires simple customization and configuration that can be done in-house. Complex customization is a major reason why organizations rely on external resources.

Organizations implementing Microsoft Dynamics use the most external resources.

Microsoft Dynamics is also a flexible solution. However, Microsoft uses channel partners to provide preconfigured industry functionality. While this doesn't necessarily decrease an organization's ability to use internal resources, it certainly creates more reasons to use external resources.

% of Resources That are Internal



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Resource allocation is one of the most common struggles for organizations implementing ERP software. Many organizations heavily rely on external resources from the vendor and systems integrator. Unfortunately, this increases implementation costs.



ROLE OF ERP SOFTWARE IN DIGITAL STRATEGY

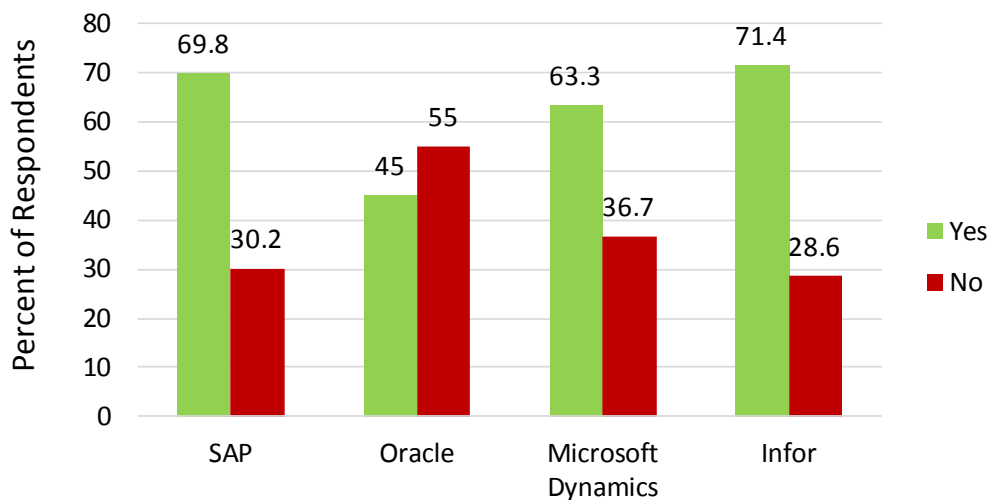
Many Infor customers reported that ERP software played a significant role in their digital strategy.

Infor positions itself as an innovative, visionary technology provider. This attracts innovative organizations that view technology as an enabler of business transformation. These organizations are more likely to include technology as part of their overall digital strategy, instead of adding it as an afterthought.

Few Oracle customers reported that ERP software played a significant role in their digital strategy.

Oracle's marketing strategy is slightly different than Infor's. Oracle seems to focus more on promoting specific functionality, such as finance. This might attract more organizations looking to automate particular processes or functional areas and fewer organizations looking to transform their entire operating model.

Did the ERP project play a significant role in your digital strategy?



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BUSINESS INITIATIVES INCLUDED IN DIGITAL STRATEGY

The most common business initiative organizations included in their digital strategy was an ERP implementation (HCM implementation, EAM implementation, etc.). Few organizations included strategy development as part of their digital strategy.

Infor had the most organizations reporting a focus on supply chain management (SCM) functionality.

Infor recently acquired GT Nexus, which is a leading SCM application.

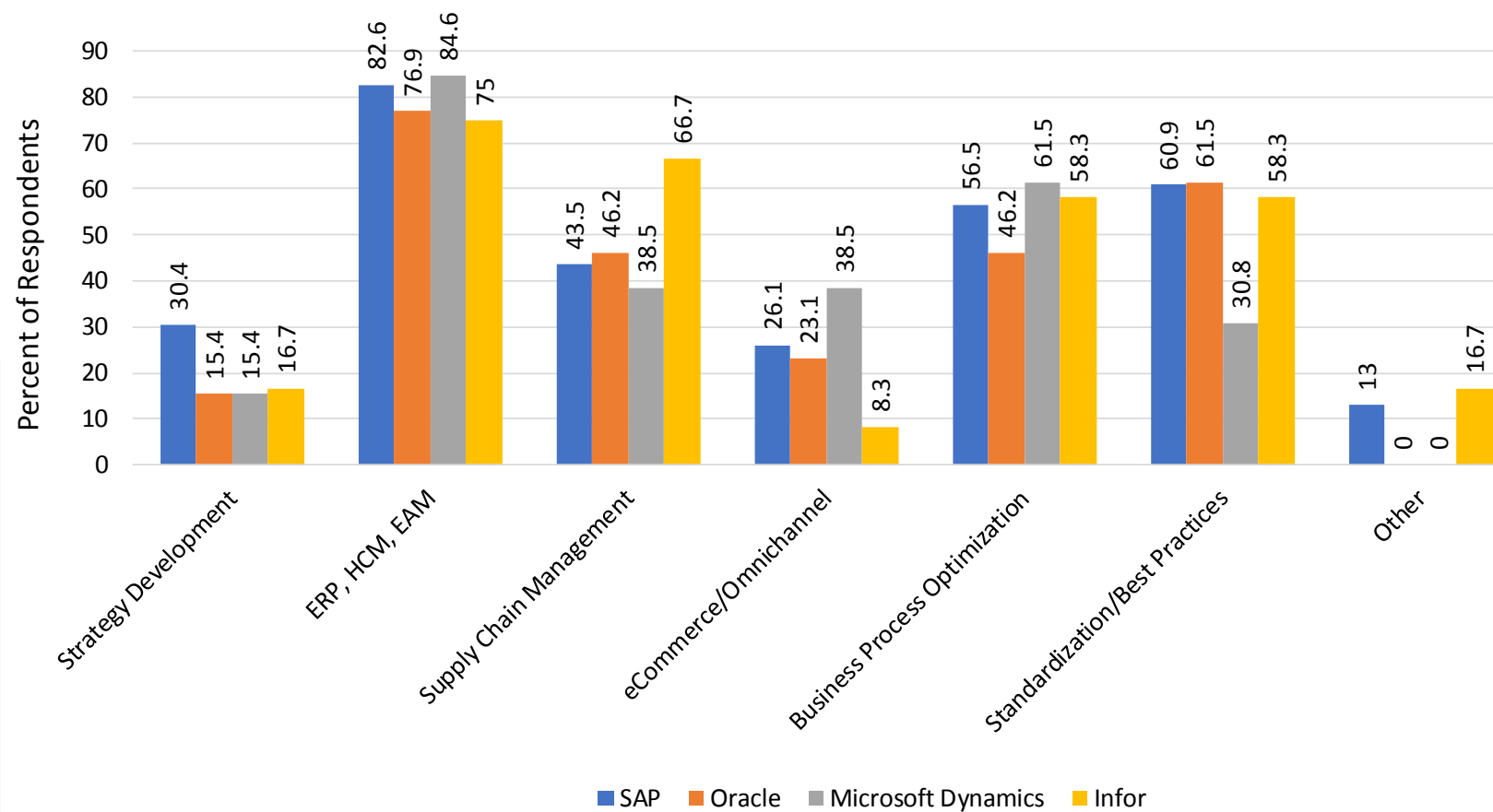
Microsoft Dynamics had the most organizations reporting a focus on business process optimization.

Microsoft Dynamics value-added resellers (VARs) encourage the use of out-of-the-box functionality. This requires organizations to standardize, and often optimize, their processes.

Infor had the least organizations reporting a focus on eCommerce or omnichannel functionality.

Infor is in the process of improving its eCommerce functionality. Infor has purchased retail and eCommerce applications, which are still being integrated into Infor's end-to-end solution.

Business Initiatives Included in Digital Strategy



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The key to a successful ERP selection is developing a digital strategy with a five to seven year outlook. However, many organizations begin executing a strategy without taking the time to develop it and ensure alignment.

CONCLUSION

Your organization's digital strategy should guide your selection and implementation of ERP software. However, only 60% of respondents reported that their ERP implementations played a significant role in their digital strategies. While ERP vendors have different marketing strategies, all ERP systems are meant to help you achieve your strategic vision. Instead, many organizations use ERP software solely for the purpose of addressing technical pain points or improving transactional processes.

SAP, Oracle, Microsoft Dynamics and Infor each provide robust ERP systems that can transform your organization. The data points in this report do not prove one vendor is better than other, but rather highlight common challenges that implementing organizations may face when working with each of these vendors. Diving deeper into these challenges, it's apparent that they're not caused by technical shortcomings. Each of these vendors can provide value to the organization that anticipates challenges and understands how ERP software aligns with their organizational goals.

ABOUT PANORAMA CONSULTING SOLUTIONS

Panorama Consulting Solutions is an independent, niche consulting firm specializing in digital transformation and ERP systems expertise for mid- to large-sized private- and public-sector organizations worldwide. One-hundred percent technology agnostic and independent of vendor affiliation, Panorama offers a phased and integrated top-down strategic alignment approach and/or a bottom-up tactical execution, enabling each client to achieve its own, unique business transformation objectives by transforming their people, processes and technology challenges to successfully implement change. Panorama's services include: Digital Strategy, Technology Assessment, ERP Selection, ERP Implementation, Change Management, Human Capital Management, IT Staffing, Business Process Management, Business Process Reengineering, Value Stream Mapping, M&A Integration, Project Auditing, Project Recovery and Software Expert Witness Testimony.

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