

A BPM Partners Research Note

Vendor Landscape Matrix
For Business Performance Management

October 2008

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Executive Summary

The Business Performance Management (BPM) vendor landscape continues to evolve at a rapid pace. After the major mergers of the past year the vendors are now sorting out their combined product sets and laying out their product roadmaps for the next several years. The vendors that were not involved in the merger and acquisition activity have continued to advance their own product sets by releasing new versions with new capabilities that they hope will keep them competitive. In addition to all of that, several vendors new to the U.S. BPM market have launched recently as well.

With all of this activity it is difficult for the analysts, let alone the average end user, to stay current with the multitude of BPM product offerings available in the market. The goal of the BPM Partners Vendor Landscape Matrix is to provide a quick snapshot of all the key players, their status in the market, and the focus of their offerings. This is accomplished with a high-level quick view objective grid, along with vendor by vendor commentary, attribute checkmarks, and customer satisfaction ratings collected as part of the annual BPM Pulse Survey. This document will be updated periodically to reflect the most current information available. We believe that this information should enable organizations to focus their vendor selection activities around those vendors most likely to meet their needs, saving time and money in the process. This information is not intended to replace the thorough due diligence, analysis, and detailed evaluations and comparisons that we recommend be conducted as part of any BPM vendor selection process.

All of the data contained in this document has been independently researched and compiled by BPM Partners, Inc.

The BPM Vendor Landscape Matrix Explained

This grid is only for Business Performance Management Vendors. It is therefore important to understand how we define BPM:

- ❖ BPM is a set of integrated, closed-loop management and analytic processes, supported by technology, that address financial as well as operational activities.
- ❖ BPM is an enabler for businesses in defining strategic goals, and then measuring and managing performance against those goals.
- ❖ Core BPM processes include financial and operational planning, consolidation and reporting, modeling, analysis, and monitoring of key performance indicators (KPIs) linked to organizational strategy.
- ❖ Operational Analytics focus on the performance of key business areas including Sales, Marketing, Customer Service, Manufacturing, R&D, IT, and HR.
- ❖ BPM 2.0 Technologies enhance ease of use and distribution and include: data visualization, SaaS, SOA, open source, 64-bit support, mobile access, and search.
- ❖ BPM 2.0 Applications enable deeper analysis including risk, provide more forward-looking results and include: predictive analytics, profitability analysis/activity-based costing, external benchmarking

We currently track over 100 vendors that provide software to address one or more aspects of business performance management and business intelligence. The majority of these vendors are not included in this matrix. Inclusion in the Vendor Landscape Matrix is based solely on BPM Partners' evaluation of vendor activity in the field as it relates to performance management. Only those vendors actively competing for and successfully delivering BPM solutions in the U.S. market are included in this grid.



often, but not always, provide integration with their ERP transactional offerings. Although there are many large vendors in this row there are also some smaller ones. Placement in this row is not a measure of company size, but breadth of product offering.

The BPM Partners Vendor Landscape is intended to provide objective, informative placement of the various vendors. One of the key design elements in this approach is that there is no 'good' or 'bad' place to be on the grid. Which group of vendors is the best fit for any given company is a function of that company's specific requirements. For example, if an organization is focused on one particular aspect of BPM a specialized vendor that provides a focused, deep solution in that area might be the best choice. On the other hand, if a company is looking to eventually implement all aspects of BPM then a comprehensive solution might be in order. Lastly, those companies who already have addressed their business intelligence (BI) needs or are simply not interested in BI right now may choose to look at the financial performance application vendors.

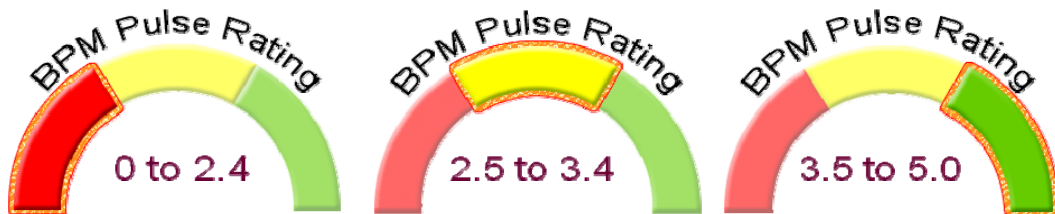
An important note regarding the developing vs. established vendors: while the established vendors offer proven solutions with theoretically less risk, the developing vendors tend to be more innovative, more cost-effective, and more likely to offer personalized service and a chance to directly influence product direction. Which type of vendor to go with then becomes a matter of company needs and corporate culture.

Vendor Details

For each vendor included in the matrix we have included brief comments, usually highlighting what's new or unique about the vendor. Where available we have also included customer satisfaction ratings for 11 key attributes as well as an overall score. This data comes directly from the BPM Pulse Survey 2008 which had responses from over 750 companies. When rating vendors/products respondents self-identified themselves as owners of the vendors/products being rated. They were asked to rate their vendor and product satisfaction on a 5 point scale with 1 being the lowest and 5 being the highest. The attributes being rated (and their grid codes) were:

- Overall satisfaction
- Sales process (Sales)
- Price/value (Price)
- Product functionality (Func)
- Ease of use (Use)
- Ease of implementation (Impl)
- Product performance (Speed)
- Product quality (Quality)
- Product documentation (Doc)
- Customer support/hotline (Supp)
- Vendor-run training (Train)
- Vendor-run consulting (Const)

Our interpretation of these ratings is represented as follows:



Vendors that did not get assessed in the 2008 BPM Pulse Survey, or did not have sufficient data to provide an accurate rating are noted with "data not available".

In addition, we have included a set of vendor checkboxes to highlight specific product and vendor capabilities. The key to the current set of checkboxes follows:

Key to Vendor Checkboxes

Core Capabilities				BPM 2.0 Capabilities			Vendor Profile		
Bud	Dash	Con	BI	T2.0	A2.0	OA	Vert	Global	Refs
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Core Capabilities

Budgeting (Bud): The product offers top-down and bottom-up budgeting, as well as planning and forecasting.

Dashboard (Dash): The vendor provides a graphical interface that can display a collection of key performance indicators (a scorecard) with gauges, stoplights, and charts. Dashboards may be graphical display tools or prebuilt applications.

Consolidation (Con): The software sums data from multiple ledgers, incorporating currency conversion and intercompany eliminations as needed.

BI for BPM (BI): The vendor develops and sells stand-alone tools that aid in the development of BPM applications. The tools may include extract, transform and load (ETL); reporting tools; metadata management; and other BI.

BPM 2.0 Ready Capabilities

BPM 2.0 Technology (T2.0) : The product utilizes any of the technologies that facilitate the wider distribution or deeper analysis that BPM 2.0 delivers. These technologies may include data visualization, hosting, open source, 64-bit support, mobile access, hardware appliances and service-oriented architecture (SOA).

BPM 2.0 Applications (A2.0): The vendor provides any of the following: predictive analytics, external benchmarking, activity-based costing and/or profitability analysis.

Operational Analytics (OA): The vendor offers a platform for operational analytics and/or delivers packaged applications focused on selected operational areas.

Vendor Profile

Vertical Solutions (Vert): The vendor offers industry-specific capabilities or content integrated in a software application. This functionality can be the vendor's sole focus, or it can be in addition to more generic offerings.

Global Support (Global): The vendor has a presence, direct or indirect, in most major business centers around the world.

Large Reference Base (Refs): More than 100 clients are successfully using this vendor's BPM products.



The Comprehensive Vendors

Vendor 1

This paragraph provides a description of vendor 1's offerings, unique elements, recent releases, plans, merger and acquisition activities, specific strengths.

Capabilities

Bud	Dash	Con	BI	T2.0	A2.0	OA	Vert	Global	Refs
✓	✓	✓				✓			✓

Customer Satisfaction

Overall: 3.77

Sales	Price	Func	Use	Impl	Speed	Quality	Doc	Supp	Train	Const
3.87	3.63	3.98	3.82	3.44	3.43	3.77	3.68	3.64	3.61	3.70



The Financial Performance Management Vendors

The Specialized Vendors

About BPM Partners

BPM Partners is the leading independent authority on business performance management (BPM) solutions and a founding member of the BPM Standards Group. BPM Partners' vendor-neutral consultants guide companies through their BPM initiatives from start to finish, helping companies attain the maximum value from their business performance management initiatives. This is done through hands-on services that provide insight on how to collect and analyze the right information to address specific business goals. BPM Partners leads clients through project definition and justification, technology evaluation and selection, and deployment strategies and management. These services are available for budgeting and planning, consolidation and reporting, modeling, operational analytics, and scorecards/dashboards. For further information visit: <http://www.bpmpartners.com/> or call (203) 359-5677.