



THIRD STAGE
CONSULTING GROUP

The Software
Selection Guide

A BUYER'S GUIDE TO SELECTING BUSINESS SOFTWARE



Outline

Introduction	3
What Is Software Selection and Why Is It Important?	4
What Happens If You Select the Wrong Software?	6
What To Do Before You Look For Software	8
Keep an Eye Out for These Potential Pitfalls	10
Software Selection Vetting Process	12
How To Build A Strong Short-List	14
Negotiating With Vendors	16
Overall Best ERP System	18
Top ERP Systems For Small Businesses	22
Best For Large Businesses	26
Best For Manufacturing	28
Best For Government	32
Best For CRM	36
Supply Chain Management	40
Top 10 Marketing Automation Software Platforms	45
Top Business Intelligence	48

INTRODUCTION

Our team at Third Stage Consulting has been conducting yearly research on various software, including ERP, HCM, CRM, supply chain management and a bevy of other software options for small, medium and large business. These reports provide benchmarks and insights into industry trends surrounding digital transformation. Our goal is to help businesses make informed decisions when it comes to implementing new technology for their digital transformations.

The constant introduction of new technologies can often overshadow the importance of people and processes. While advancements in AI, robotics, and other fields may be exciting, they must be integrated with a strong focus on how they can benefit and enhance human work and decision-making. The integration of technology should not solely drive progress, but instead enhance and support the people and processes already in place.

This report aims to provide companies with a roadmap for choosing and implementing a software solution for their digital transformation journey. It includes tips on evaluating potential options and steps to take before making a decision.

WHAT IS SOFTWARE SELECTION AND WHY IS IT IMPORTANT?



Software selection is the process of choosing the right software for your organization. This involves a careful evaluation of different software solutions to determine which one is best suited to meet your business needs.

Looking for the right software can be a daunting task, especially if you are looking for a solution that can meet the unique needs of your organization. With so many complex requirements and changing business conditions, it is important to find a solution that is flexible and adaptable enough to keep up with your evolving needs.

To help you make the best selection for your organization, this guide offers practical tips and strategies for selecting performance management software. Whether you are looking for an all-in-one solution or a suite of tools that can be customized to fit your specific needs, these tips will help you find the right software that meets your business goals and ensures your success. So put these tips to work and find the performance management software that is right for you.

There is no one-size-fits-all approach to selecting software. Instead, each business must tailor its strategy to its unique needs, which requires a customized approach to implementation. As you evaluate different solutions, it is important to keep this focus on your specific needs and requirements, rather than being swayed by marketing hype or the opinions of others. Ultimately, the key to successful strategy execution lies in choosing a solution that meets your specific needs and requirements, rather than simply following the crowd or going with the status quo.

When choosing a solution for your business, it is important to consider more than just its functional

capabilities. In addition to being able to meet your requirements, you should also look at the flexibility and usability of the solution, as these factors can have a significant impact on the overall cost and ease of implementation.

A solution that is easy to manage and maintain will offer a more predictable timeline for implementation, as well as lower long-term costs associated with its continued use. By prioritizing these factors, you can ensure that you are getting the most value from your solution in the long run.

When evaluating software solutions, it is important to consider not just the basic features and functions of a product, but also how well it will meet your specific business needs. This requires going beyond generic demos and presentations, and diving deeper into the evaluation process to fully understand how the solution will function in your organization. Ultimately, the key to success lies in paying attention to the details and being aware of any potential pitfalls or drawbacks. By doing so, you can be confident that your selection will meet your needs and help your organization achieve its goals.

What software is NOT!

One of the main misconceptions we see is that software is the solution. This is not the case. In fact, the software is often a band-aid to a much deeper issue. Stakeholders without understanding how their business works will often look to software as the solution to all of their problems. The reality is that software can only automate what already exists.

This is a dangerous mindset because it completely takes the focus away from solving the real issues at hand. It's important to understand that software is a tool and not a cure-all. In many cases, it can actually make things worse.

The Bigger Issue

Extracting the root cause of the problem within the business is essential for long-term success. One of the main reasons businesses fail is because they don't have a clear understanding of their value proposition or issues within a broken process or toxic culture.

The software can only automate and improve what already exists. It cannot fix these deeper issues. In order for businesses to be successful, they need to focus on solving the bigger issue at hand.

Many times, we see businesses that are trying to solve dysfunction with a new technology tool. The new tool may work for a little while, but eventually, the same issues will come back. This is because the software cannot fix what's broken within the business.

The only way to really solve these issues is to get to the root of the problem and make changes from there. Only then can businesses see real, long-term success.

If you're a business owner or stakeholder, and you're thinking about implementing new software, ask yourself this first: Is the software really the solution, or is it just a band aid? If it's the latter, you may want to think twice before moving forward.

WHAT HAPPENS IF YOU SELECT THE WRONG SOFTWARE?

US Air Force Digital Transformation Failure

The US Air Force recently experienced one of the biggest and most expensive ERP failures of all time. This government and military organization is now attempting to recover the implementation – but is this disaster salvageable?

Overview of the US Air Force Oracle ERP Failure

After spending 8 years and over \$5B on its Oracle ERP software implementation (internally referred to as the Expeditionary Combat Support System), the project was eventually canceled in 2012. In late 2020, [Accenture was hired to resume the botched ERP implementation](#) over 5 years for a mere \$90 million. However, this implementation is unlikely to be remediated without some fundamental adjustments to the organization's overall strategy and approach.

A few years after the project was canceled, a US Senate subcommittee led by the late Senator John McCain performed a postmortem analysis of the root causes of failure. The outcome of the analysis was a 44-page report, which provides a fascinating look into the inner-workings of this ERP failure (you can [read the complete report here](#)). There are some interesting lessons to be learned here.

Below are a few themes that emerged in my review of this implementation, which will undoubtedly go down as one of the [biggest ERP failures of all time](#).

The US Air Force was an “organizational disaster”

Two of the most powerful words in the US Senate's report was its reference to the “organizational disaster” that resulted in the failure. It noted a number of cultural, political, and overarching organizational change management issues that contributed to the Oracle implementation challenges.

Of particular note was that the US Department of Defense struggled with many of the same implementation issues and pitfalls when it had

also tried to implement a new ERP system within the US Navy. The report is highly critical of the organizational issues that plagued the ERP failure from the start. It also suggests that the core reasons for failure were largely organizational, cultural, and change management in nature – more so than problems with the technology itself.

Disregard of ERP software acquisition and project management best practices

In reading the Senate's report, it is clear that the implementation suffered from poor software acquisition processes and project management. Here are just a few of the things that the implementation project team did wrong – and undermined the organization's odds of success:

- The project management and leadership team failed to properly identify and mitigate the [ERP project risks](#).
- The team did not accurately estimate the amount of time, money, and resources required for the project.
- Although the intent of the project was to implement a single ERP system, the team ultimately veered off track to pursue multiple systems. This added to the complexity, cost, and risk of the project.
- There was a lack of testing of the new software and corresponding business processes.
- Organizational changes were poorly managed, which resulted in an overwhelming resistance to change (more on this to follow).
- There were improper project governance and controls in place.

Another of the biggest flaws was that the team pursued a high degree of customization of the Oracle software, which escalated the project risks and costs. The willingness to customize – even where the team perhaps didn't need to – is also likely a symptom of the fact that there was so much resistance to change.

Long story short, the project was poorly executed and managed, which contributed to the project's failure.

Cultural resistance to change

Even if the project would have had the benefit of better project governance and execution, the project was destined to fail. While **project management** and execution issues can be solved relatively easily, it is much harder to change underlying cultural and change management issues. The Air Force project team suffered from all of the above.

Many within the Air Force viewed the organization as “too big to change.” As the project team continued through the implementation journey, key stakeholders and employees strongly resisted changes to future business processes and the capabilities of the Oracle ERP technology. The team clearly struggled to overcome the highly tenured employees, bureaucracy, and inflexible operations and failed to implement many of the changes as a result.

Refusal to change business processes

The organization's cultural problems and resistance to change culminated in an overall refusal to change and improve its business processes. This problem began from the start when the project team failed

to define its future state business requirements, needs, and wants. Instead of articulating clear future state business processes, the team paid its system integrator (CSC) \$85 million to address “new” requirements that were never addressed from the start.

This video outlines how the US Air Force and other organizations should address business process management during an ERP implementation:

In addition to its failure to define its future state business processes, the project also failed to understand the current process and systems landscape that it was aiming to replace. As a result, the team appeared to be flying blind without an understanding of what the actual changes are, how people would be impacted, and how to transition away from the old processes and systems.

Even after 8 years of the project, the team still did not have an understanding of the complete inventory of systems and processes that they were trying to replace. This is comparable to planning a car trip to another city without knowing what city you are in – you have a map and know where you need to go, but you have no idea where you are starting from. This is a recipe for disaster.

Lack of leadership and executive alignment

The Air Force's lack of leadership – especially at the executive level – was perhaps the biggest problem with this implementation. There was no clear executive sponsor and the organization's leaders delegated most major project decisions to the project team without providing adequate strategic direction. This led to poor decisions such as using an ineffective implementation methodology,

commissioning too much customization, and other problems.

Turnover on the project team was another symptom of poor leadership and direction. The project team experienced a high degree of attrition, which led to lost tribal knowledge and a lack of continuity throughout the implementation. It also created unnecessary chaos and subpar morale among the project team members.

It is quite likely that this lack of leadership contributed to and caused many of the other problems outlined above. In other words, poor leadership was likely a root cause that created other symptoms throughout the implementation.

Lessons learned and takeaways

The benefit of large ERP implementations like this one is that there are a number of lessons that can help you be more successful in your transformation. Here are a few lessons and takeaways from the Oracle ERP failure at the US Air Force – as well as best practices to help you succeed

- Taking the time for business process management is important, especially early in the project.
- Organizational change management will make or break your implementation.
- Executives need to be aligned and provide strong strategic leadership in order for implementation or digital transformation to be successful.
- Strategic program and project management is essential to success.
- Be sure to understand your current state before rushing to define your future state.

WHAT TO DO BEFORE YOU LOOK FOR SOFTWARE



Selecting the right software for your organization is pivotal to maximizing the business value of your new systems and reducing the risk of failure, or expensive restoration project.

We call it “Phase-0” or the pre-work to software selection. Many organizations prematurely jump into a full-on selection without understanding exactly what the business needs or the overall readiness current culture. This can lead to a failed software project or, even worse, the culture never really adapting to change.

Here are three areas that we always recommend our clients focus on before they start their software selection:

1. Define your business requirements

Before you even start looking at software, you need to take the time to define your business requirements.

- **What are the specific needs of your organization?**
- **What processes do you need the software to support?**
- **What are your performance goals?**

Answering these questions will help you narrow down your options and choose the right software for your business.

Remember a digital transformation is NOT just an IT project, it's an organizational journey that will impact all parts of the business. As such, you must involve stakeholders from across the organization in this process to get a complete understanding of the requirements.

The system requirements must align with the core goals and strategies of the full enterprise for the software to create real value.

2. Secure executive alignment and commitment

As with any business initiative, you need to ensure that there is executive alignment and commitment to the project.

The software selection process can be lengthy and expensive, so you must have the full support of your organization's leadership team. This will help ensure that the project stays on track and that you have the resources you need to be successful.

To achieve ongoing alignment, an organization must first have the trust of the greater organizational community. Once that exists, it's possible to develop a governance model with the right level of control and flexibility to make decisions that reflect the conditions of the moment while remaining true to the organization's goals.

Surveys and readiness assessments will help the project and executive team understand the organization's trust in the leadership's ability to execute any new technology project of process implementation.

3. Assess your organizational readiness

Selecting new software is a major undertaking, and it's important to make sure that your organization is ready for the change.

You need to assess your current culture and readiness for change, as well as the skills and capabilities of your workforce. Do you have the right mix of people with the right skills to support a new system?

You also need to consider your organizational structure and how it will need to change to support the new software. Will you need to create new roles or redesign existing ones?

Keep in mind that a successful software implementation requires more than just the right technology. You also need the right people and processes in place to make it work.

Organizational readiness assessments help identify where the gaps are in an organization's ability to support change. This information is critical in making decisions about how to proceed with a software implementation.

Phase-0 is an important part of the software selection process, but it's often overlooked. By taking the time to focus on these three areas, you can increase your chances of success and ensure that you select the right software for your business.

When it comes to software, one size does NOT fit all. The right software for your business depends on several factors, including your industry, business model, and organizational culture.

Don't make the mistake of thinking that you can simply choose any software and it will work for your organization. It's important to take the time to understand your specific needs and choose software that will fit those needs.

KEEP AN EYE OUT FOR THESE POTENTIAL PITFALLS



Lack of Overall Digital Roadmap

Before jumping into an ERP software assessment, be sure you know and have outlined exactly what you are looking for. Most companies have a spread of disparate systems, some integrated, some not, and in many cases departments have just purchased a stand-alone system because they “need” some new functionality. Before long, you find your organization has overlapping functionality and a range of systems, data issues and redundant costs.

Before evaluating ERP, CRM, HCM or any of the top ERP systems, take a holistic look at your entire platform of systems currently in place and define what the future systems infrastructure should look like. Based on current technology trends, it is likely that you will consider an ERP best of breed strategy, so it is important to consider all your options. Without this, you may find yourself back in the same mess you are now.

Relying on Software “Best Practices”

Anyone who has ever talked to a software provider has been pitched the idea of incorporating “best-practices” as part of their technology implementation. How is it that every software package on the market has your company’s best practices already programmed in their system? Essentially, any out-of-box software has some general functionality that fits common practices for a particular industry or functional area. This is why it is important to correctly answer to the question: **when should business process management should occur in your ERP implementation?**

The answer is that there are multiple “best-practices” for any industry or functional process,

and it is up to you to determine which will best fit your business model. Functionality that a software vendor states as “best practice” may not, in fact, be best practice for your industry or sub-vertical, much less your individual company; it is simply the best practice for what that particular software offers. If your determination is to simply adopt to the “best-practices” provided by your new software, you are placing your company at risk.

Lack of a business case and benefits realization plan

You may simply “need” a new ERP and know that your business will not survive on the current platform. This is great to know, but it is not a business case. With the variety of software functionality and emerging technologies, it is imperative to know 1) that you are getting what you need and 2) that you can justify the cost with benefit potential. If you try to select technology without measuring and defining how a new system will improve your business, it is similar to launching a new business without a business plan.

Another way to look at this is to consider how “cool” technology has become. It is no longer a simple business support function- technology is a business differentiator. Automation, mobility, big data, virtualization, **internet of things**, robotics, etc., sounds awesome when discussing with the SAP salesman (or any software), but watch out. You don’t want to go without what you need, and you certainly don’t want to end up with what your stakeholders don’t want or can’t afford. Say that 3 times fast!

Not Understanding Total Cost of Ownership (TCO)

Tying to the above point, it’s common knowledge that **ERP software total cost of ownership**

extends far beyond than just the software itself. Implementation services, maintenance, integration costs, data management, hardware and infrastructure upgrades (servers, PCs, database, scan guns, printers, etc.), business processes reengineering, organizational change management, program and project management, consultant or project team travel and contingency, etc. really add up. Tie that to the excessive functionality a multiple EDI partners you have agreed to and you may be in for a shock.


You may assume that any additional “work” will be handled internally, but then backfilling and internal costs and capabilities will need to be evaluated. Make sure you have documented a TCO analysis before purchasing new technology.

Bottom line: ERP software selection is the first step to a successful digital transformation

An effective ERP software selection process won't guarantee success, but it at least gives you a chance to succeed. It's an important prerequisite to a successful implementation, so be sure to watch for these common pitfalls along the way. And don't be afraid to reach out to independent ERP consultants such as our team at Third Stage for help along the way!

In the meantime, this video outlines some additional things to consider during your ERP software selection process.

SOFTWARE SELECTION VETTING PROCESS



Before the implementation process for a digital transformation begins and before a decision is to be made about the software you will leverage for that transformation, it would be in our best recommendation that you spend some time asking some important, qualifying questions about your upcoming change. When it comes to software selection specifically, we recommend vetting potential vendors.

1. Measure twice, cut once

- Allow your team the time to do real due diligence upfront. Red flags are ignored many times when the company is hurtling toward a fast decision. A proper selection process can take anywhere from 6-18 months depending on the size and scope. Allow them time and resources.

2. Get references

- Ask to speak to references who are on the same version you are planning to deploy and if it's on-prem or **cloud**. Preferably in your industry, size, and with some of the same nuances or challenges you are solving for.

3. Probe beyond the surface

- Ask them to further demonstrate areas where they say “yes, we can do that” This may require mini demonstrations of said functionality and the vendor should be willing and able to accommodate.

4. What you see is not always what you get.

- Ask if that functionality they are selling or showcasing (whether it be early in the sales cycle, during demonstrations, etc.) is “out of the box” or requires customization. Ask

as many times as you need through various stages until your team feels comfortable that the functionality is or will be there. In addition, ask for details about the time and cost tied to building out the customizations. As well as any recurring fees to maintain the integrations that are built to accommodate those customizations.

5. Remember that vendors are selling

- There may be claims made in the sales process that simply can't be fulfilled by the professional services team. There have been many companies who have fallen subject to the professional services team being blindsided by a request, and they can only say that that functionality was not included or that it is the customer's responsibility. Assume positive intent with your sales representative, but verify everything. Once you sign the contract, there's no going back.

6. Understand the product road map

- Ask to have someone walk you through their product roadmap. Understand if what they are selling/showing is what will be deployed on your go-live date. Vendors will have their demo environments, websites, and web videos set up to show all the bells and whistles functioning at a high level. Again, they are selling. Remember that most **ERP software** does not come out of the box looking/operating like that. Dig deep into their product roadmap and the stability of the product over the next several years.

7. Do your due diligence

- Check the forums and real user feedback about how good their technical support and service teams are. SLAs, response times on

service tickets, etc. There are many resources out there. Consider looking at places like [Gartner](#) and [Software Advice](#).

8. Adding on too early in the process.

- Be wary of doing customizations or buying additional modules too early in the process. Learn what is core functionality first and work with the system for a while before spending more time or money on additional bells and whistles you may not need right now. Have someone keep track throughout so that you have an idea of additional time and cost that may not be in the initial quote. The 20% contingency budget built into these projects should not be spent on things that could have been accounted for ahead of time.

9. Request sales back-up.

- Ask the vendor to include a solution architect and professional services/delivery team resource in the demonstration if possible. This will keep the sales team honest in terms of what they are promising as well as have expertise in the meeting. They will be more accustomed to speaking to the more nuanced functionality questions and providing at least general cost, time, and complexity estimates.

10. NEGOTIATE!

- There is almost always room to negotiate on price. There are a couple of vendors who are notorious for not negotiating, which I will not name here. But, we've seen most of the Tier 1 and Tier 2 ERP vendors come down by over 30% on the list price for larger projects.
- Know when fiscal year-end is for your vendors, and try to time negotiations/close around that time when they are most incentivized to offer discounts.

- » Oracle: May 31. Microsoft: June 30. Infor: April 30.
- » The end of the quarter can also be a good time for that as well.
- A few other ways we've seen customers reduce spending include caps on maintenance fee increases, extended maintenance and support time, future options on additional software purchases, and reduced hourly rates on professional services.

HOW TO BUILD A STRONG SHORT-LIST

The software selection process can be daunting when you realize just how many solutions there are on the market. When evaluating software for a digital transformation, it's important to analyze the strategy required more so than the ins and outs of the products themselves. That will come later once we know the strategic direction the client chooses, which is dictated, in part, by how the shortlist contenders are structured. The software selection should also be made with an eye on the future, as the software will ideally outlast the digital transformation it was chosen to support.

Table of Contents

Let's take a hypothetical case study of a **digital transformation**.

- » Company Profile
- » Where does the software selection process begin?
- » Alignment in Corporate and Digital Strategy



Let's take a hypothetical case study of a digital transformation

Company Profile

Take, for instance, Great & Co., a consumer products/apparel company. They rake in roughly \$1B in annual revenue, they have multiple locations across the world and their primary growth strategy has been to acquire smaller companies. As a result, they have a lot of movement and a ton of “edge systems” that don't function synergistically.

As a result, their operations are full of silos. The independent, best-of-breed systems have been bubble gum and bandaged together, and are unintentionally creating more manual work, confusion, lost orders, inaccurate product data, financials, etc. To make matters worse, this landscape was built upon MS Great Plains an ERP solution that is approaching sunset.

Understanding Great & Co's best fit software comes with understanding their overall technology stack, otherwise known as their system architecture. No matter which road they take, it will always lead back to technical disruption due to how their system infrastructure is set up. The fact of the matter is, if you're going to update an **MES**, CRM, HCM, or any

other system when operations are at this capacity, one must consider a full-scope ERP system to do the job. Sure, it may be more painful and expensive to rip and replace the current technological landscape of the company in an effort to do it “right” now, but it will likely be better in the long run.

Where does the software selection process begin?

Great & Co. is an example of an organization that has ample work to do in order to prepare for a digital transformation. They would need to focus on things like reworking processes, trimming the fat, and reducing internal product development to be able to streamline, have a repeatable process across all operations, etc.

Once they are able to clean up and prepare for a transformation, they need to revisit their overall corporate strategy to dial in on a successful digital strategy. This will help to better understand how software can play a role in achieving their goals.



Alignment in Corporate and Digital Strategy

For Great & Co., their objectives were to gain stability in their systems and enable further scalability. These objectives have been ironed out

amongst executives, enabling everyone to be on the same page. It's only with this clear and distinct goal that we can truly dial in on the best fit software. Without it, the ample options of software solutions on the market would pose a different allure, pulling the organization away from the target operating model they need in order to reach their future state vision.

Great & Co's variable and unique operational factors brought us to the following ERP solutions on their shortlist:

- Infor
- MS Dynamics
- IFS

Before jumping into product demonstrations, we will first analyze each software to see which one will be better in the long run.

A software's ability to provide a return on investment (ROI) is essential in any software decision and should be considered when evaluating software solutions. Its ability to provide an ROI lies in the 3 pillars of digital strategy: people, processes, and technology.

1. People need to adopt the software with ease.
2. Processes need to be streamlined by the people through the technology.
3. Technology needs to be a good fit for IT capabilities and system infrastructure.

All three of these pillars need to be analyzed to understand the current state, visualized to understand the future state, and blueprinted to understand how to build the bridge between the two. This is true through the software selection process, and really through any other phase

throughout the digital transformation journey. Other factors such as company size, industry, business model, processes, etc. also come into play to help make a final decision.

The software is just one piece of the puzzle. A company also needs to c

NEGOTIATING WITH VENDORS



Once you sign on the dotted line, you're committed. It's true with any contract, but the stakes are often higher when you're talking about investments ranging in the thousands, if not millions of dollars for new enterprise software.

If done correctly, **software** negotiations can help you with more than just landing favorable terms. It can actually help lay the groundwork for effective project management too. Fundamentally, you want to approach the contract negotiation process as a means of being able to manage your relationship with that vendor during and beyond the duration of the digital transformation. It's an opportunity that businesses need to take advantage of rather than walk into a deal blindly to accept whatever terms the vendor sets in front of you.

It goes beyond the legal implications of a contract. A strong contract will act as the guardrails to the ongoing relationship with the software vendor or system integrator. However, when preparing for the acquisition of new software, many clients tell us how their heads are spinning as they go through the negotiation process. Given the weight of this part of the **software selection process**, we thought it'd be helpful to ask a lawyer. Here's what they said.

Tips from a Lawyer on Negotiating with Software Vendors

Expand your focus in negotiations

Look beyond the pricing structure and the discounts. You want to use the contract as a tool to put into place tactics and workflows for managing your relationship with your vendor. For example, what will it look like if the vendor doesn't hold up their end of the deal? What is the process when

your team is delayed in deliverables needed in order to move forward?

Having things like dispute resolution mapped out on the front end will enable a smoother vendor relationship from start to finish. Of course, things like abstract legal concepts such as infringement, service warranties with respect to performance, etc. are all key areas to negotiate, but you mustn't overlook the practical elements of the digital transformation.

Negotiating with cloud-based ERP vendors vs. On-premise ERP vendors

At the core, almost all cloud vendors have a subscription-based pricing model. **Cloud** vendors, essentially, are hoping to hook you onto their system and make it a challenge for you to get out. Be aware of that intention as you walk into the contract negotiation process with cloud-based vendors.

When you're entering into a subscription-based contract with a cloud vendor, try to incorporate clauses in the contract that outline termination and what it would look like if your organization chose to go a different direction within a few years of **implementing the software**. How can you get out of the contract?

With that said, realize that the discount you're being offered is often tied to how long you agree to leverage the technology. The goals in this situation vary depending on which side you are on: You want flexibility and a low price, and the vendor wants you to commit long term at the highest price possible. The question then becomes, how can you negotiate terms that appease both parties?

On-premise solutions are a bit different. In the scenario that you host an on-premise solution, your IT team is going to need to spearhead the functionality and security of the systems. With cloud solutions, you're leaning on the software vendor to provide security and data management. These pieces all need to be considered in the contract negotiation process as far as responsibility and ownership as well.

It's important for you to understand what you're committing to - from pricing to obligations. It's critical to negotiate proper discounts, timeline commitments, and exit clauses. The bottom line is that you want to be able to manage your organization the way you want to manage it without being tied to software vendor commitments.

Negotiating with System Integrators

When you're negotiating with a software vendor, the negotiations are fundamentally different. If you are using a **system integrator** (SI), there are often salespeople that minimize the problems and exaggerate the functionalities that have an allure to your organization. Many times, you will be promised the A team and left with the D team when it comes time for implementation.

Be cognizant that promises are empty until confirmed in a contract. The scenario I just mentioned above happens on a regular basis. The good news is that you can put language in the contract that keeps SIs from overpromising and underdelivering. With the right clauses, whatever the SI commits to in the sales process is what they will be obligated to fulfill. And if does happen? You have a process in place to address the issue.

By doing incorporating these elements into your negotiations, you are mitigating conflict on the backend. You'll also minimize the risk of ERP failure and the need for an expensive lawyer to help you recoup what has been lost.

Differences in negotiations with small vs. large vendors

When dealing with a smaller firm, you want language in the contract that specifically touches on the people assigned to your project for the full duration of the project. There should also be language that helps outline the resources they will bring to the table since these resources are often more sparse than when you work with larger vendors.

When you're dealing with the Accentures of the world, or other large organizations, you have to come at it with a different perspective. All of these large organizations are going to give you concessions, but it's typically one-sided. The reality is, these larger firms will use your project in one of two ways.

1. They see it as a cash cow with minimal scope.
2. They use your project for unqualified or incompetent consultants.

They'll want to pump billable hours through the project. Knowing that, you need to be sure that there are tools in place to manage the scope of work and ensure time is spent most effectively throughout the duration of the digital transformation project. It all comes back to project ownership.

As you negotiate your contract, be mindful of who truly owns the project. An assumptions section of an SOW will often say the vendor or integrator is working for you and taking direction from you.

However, the lifecycle of one of these projects is 15 or so years. These vendors know the level of experience of the people on your team when it comes to implementing new software, or lack thereof, and they will capitalize on that.

It's imperative for you as the customer to bring in a third-party consultant who understands the ins and outs of a digital transformation. Getting the right kinds of consultants on board will decrease the likelihood of failure. In fact, the cost that will be spent on a third-party consultant will be minimal in comparison to bringing lawyers on to address a failed ERP implementation.

If you have questions about how to best negotiate with your software vendor or system integrator, we invite you to reach out to us directly. We are here as an informal sounding board to help you ensure you're on the right path in your digital transformation journey.

Software Guide By Size or Industry

1. Overall best
2. Best for small businesses
3. Best for large businesses
4. Best For manufacturing
5. Best for Government
6. Best CRM
7. Best Supply Chain Management
8. Marketing Automation
9. Business Intelligence
10. Warehouse

OVERALL BEST ERP SYSTEM



10 Acumatica

Coming in at number 10 is Acumatica. Acumatica is a software vendor that was not in our top 10 list last year but is a new entry into our top 10 list this year and the reason Acumatica has emerged as an upcoming player is largely because they've defined a very clear niche in the marketplace. They tend to focus on manufacturing distribution organizations. The product has a very clear user interface and the pricing model is very conducive to the small and mid market, especially if you're a low volume high margin type of manufacturing or distribution company, it can be a very cost effective solution with a very high ROI and the reason for that is because they have a very unique pricing model where they price based on transaction volumes so if you have a lot of high volume low margin types of products it may not be a good fit but if you have a moderate to low volume but higher margin types of products it can actually be very cost effective for organizations. In addition to the extensive user interface, there's also R&D dollars that are being pumped into the product via private equity firm that just bought the firm not too long ago and that's always a good sign of a product that's up and coming when there's private equity money behind it so you combine all these things together and that's a reason to put Acumatica number 10 on our list.

9 salesforce

Coming in at number nine is Salesforce and FinancialForce. Now this is a product that's actually dropped a couple notches in our ranking from last year not so much because the product itself has changed or gotten less desirable but because there's other

vendors that have made bigger strides and bigger advancements and we've seen greater success with than Salesforce but having said that it's important to note that many people view Salesforce as purely a CRM system but really Salesforce and FinancialForce and Force.com platform that all has become somewhat of an ERP platform for general ERP capabilities even outside of CRM so I mentioned FinancialForce on the financial side you have extensions like Rootstock which is a vendor that's built on Salesforce that provides manufacturing ERP capabilities just to name two examples of products that provide ERP-like capabilities now Salesforce is a good fit for organizations that might be looking for more of a best of breed and a flexible type of solution where they can bolt on different types of systems different modules to meet different needs as the organization grows but along with that comes a dark side which is that a lot of organizations find that that flexibility can create a lot more complexity in terms of integration and cost it also puts more pressure on your IT department to maintain that system so those are some things to think about but in general that's enough to land Salesforce and FinancialForce at number nine on our list.

8 odoo

Coming in number eight on our list is Odoo and Odoo is an open source ERP system it's new to our top 10 list although you may recall seeing it on our top 10 list of ERP systems for small business this year it made the general top 10 list largely because we've seen a scale for some mid-size organizations as well and for the general functionality and capabilities that the product has expanded to in recent years so just to hone in on this open source concept open source can

be a good thing in terms of a price tag for the software licenses but the downside is that as you start to add on different modules and different capabilities that number can actually go up that price tag can actually increase the other downside of odoo is that it can be complex to maintain so if you don't have a fairly sophisticated and mature it department that can maintain the complexities of an open source system that just requires more i.t sophistication that could be a downside as well it can also be a downside when it comes to scaling for large organizations but for small and mid-market organizations odoo can be very good fit especially if you're looking for something with maximum flexibility and maximum modularity to be able to tie together different modules within the organization so with all that being said that's enough to land due at number eight on our list coming in at number seven is sage x3 which is a product that fell a couple notches from last year's ranking again not so much because sage x3 is less desirable than it was before but because other vendors have made further advancements in their product but sage x3 in general is a great product it's a core financial system it's great for manufacturing and distribution types of organizations as well as organizations that aren't in manufacturing distribution it's a good tier two alternative to some of the bigger erp vendors in the marketplace and some of the downside risks of the product include a couple things one is that we find it's not as scalable for really large and complex organizations as some of the other products in our top 10 list so if you're a larger more sophisticated global organization it may test the boundaries of your organization and the second thing is the user interface isn't quite as clean or user-friendly as some of the other systems in the marketplace but with all that being said that's enough to land sage x3 and number seven on our list

6 InforCloud Suite

coming in number six on our list is infor cloud suite this is a product that's actually moved up in our ranking this year and one caveat i have to throw out there though is that the infor cloud suite umbrella is very broad and maybe a bit misleading because there's actually multiple systems within the infor cloud suite umbrella they're trying to brand or rebrand the product as cloud suite but you still have the segments of different products that they work with now m3 is a product that we often see in manufacturing situations we also see enforced sightline as one of the solutions that we see in manufacturing types of environments and then there's also infor nexus which is a supply chain management solution and actually one of our top 10 supply chain management systems in the market and the reason i bring up these three different solutions is because infor cloud suite involves a lot of different systems and the system within the cloud suite umbrella that's best for you is going to depend on your needs but in general when we look at the infor cloud suite umbrella we find that it has a great robust and wide variety of business processes and capabilities that fit a lot of different situations especially organizations that are in manufacturing and distribution but we also see infor being used by a lot of non-manufacturing organizations as well they also have a lot of r d dollars as a result of koch industries putting in a lot of money into the acquisition of the company and now the downside of infor though just like every product in our top 10 list they have a downside as well the downside with infor is largely the product roadmap just understanding which of these systems to piece together to give you the solution you need

that can be very confusing it can be very daunting and it's important to really make sure you're honing in on the right solution whether it's m3 or sideline or nexus or some of the other solutions that they offer so that's one thing the other thing is the cost of the solution tends to be a bit higher than some of the others that we've covered so far in our top 10 list but having said that those cost differences can oftentimes be negotiated away but with all that being said that's enough to land in for cloud suite and number six on our list

5 IFS

coming in at number five on our list is ifs and ifs was in our top five last year it actually dropped just one slot to number five this year it's great product strong enough to finish in our top five and the reason it is in our top five is because it is a very focused solution it's not trying to be everything to everyone and it tends to focus on industrial manufacturing and distribution types of companies so if you're a company that has a lot of project management or asset management or maintenance repair types of functions ifs is a very good fit now the reason it fell from number four to number five is largely because it's such a narrow focus which isn't necessarily a bad thing but when we're looking at a broad general ranking like this one there's other solutions that can provide broader capabilities to meet a number of different clients needs but if you're one of the organizations that fit within that sweet spot of ifs you might actually put ifs at number one on your list so it's a matter of understanding what those strengths of the product are relative to your needs and it has a good user interface there's a lot of r d dollars being spent on the product itself and the organization is also focusing on expanding

its value-added reseller network its network of implementation partners if you will so those are some up and coming aspects of ifs that i think will prove that it has a very bright future now the downside of the product is that it could be a little more expensive than some of the solutions in the marketplace we find that dollar for dollar you're going to spend a bit more on ifs but you may be getting better capabilities if it's the right fit for you and then the other big downside of ifs is largely perception based which is that a lot of organizations haven't heard of ifs they're a european-based company they have a good presence in europe and they're still expanding and still trying to increase their market share in other parts of the world so as far as reference ability and having peers they use the product you're not going to have as many peers using ifs as maybe some of the other products in our top 10 list but that's not necessarily a terrible thing either so all that being said is enough to land ifs at number five on our list



coming in at number four on our list is sap s4 hana it's actually moved up a couple slots from last year largely because they're starting to get some traction and momentum on building that maturity that they've struggled with for the last few years since hana was released several years ago now s4hana is very strong in financials inventory management sort of your vanilla basic erp functionality so it's really one of the best when it comes to financial flexibility and financial capabilities gl capabilities product costing all that stuff now where s4hana tends to struggle is once you get outside the core and you start to look at other advanced capabilities like manufacturing or advanced planning product

life cycle management even some of the crm capabilities are lacking so it's still not as mature of a product as it could be and will be someday and certainly not as mature of a product as the old ecc product was or even r3 which are the old legacy sap products so that's probably the biggest thing holding back the product now on the flip side there are some maturity issues with some of the expanded capabilities but what sap has done to partially address that is to go acquire other companies so they've acquired products like ariba on the procurement side of things success factors on human capital management concur as it relates to time and expense so they've become somewhat of a best of breed provider but with that comes a dark side which is now you have multiple systems that you need to tie together so the sap roadmap is still a bit clujie it's a bit hard to navigate in terms of understanding what products might be the right fit for you within the sap umbrella but having said all that just based on history and based on sap's track record especially with the larger more complex organizations i'm fairly confident that sap will get there and s4hana will get there soon enough and we actually have seen a significant amount of progress here in the last couple years as it relates to that so having said all that that's enough to land sap s4han at number four on our list



coming in number three on our list is oracle erp cloud which along with sap is one of the gold standards for larger fortune 1000 types of organizations and when we compare oracle to sap cloud and really just to explain why oracle is ahead of sap it's largely because oracle's a more flexible product it's something that can be tailored more

easily than s4hana can be in general it struggles with a lot of the same things that sap struggles with with s4hana in that oracle erp cloud is still a work in progress there's still a lot of advanced manufacturing capabilities that aren't baked into the system yet and there's still a lot of missing components of oracle erp cloud but having said all that oracle erp cloud is a very broad and robust product that can meet a lot of different industry needs especially if you're a diversified larger more complex organization and if you value flexibility and ease of integration oracle can be a great fit so with all that in mind that's enough to land oracle erp cloud at number three on our list



coming in at number two is last year's number one solution which is oracle netsuite and still a very solid respectable ranking and number two in our top ten list but it did drop and the reason for that is largely because we're seeing some concerning trends with netsuite but let me start with the positive things the positive aspects of oracle netsuite are first of all that it's one of the pioneer software as a service types of solutions so it's been in the cloud for 20 years well before all the other vendors try to play catch-up so they have a very mature solution that's been in the cloud the entire time it's been around it was built for the cloud it has an architecture built for the cloud as well it also focuses on small and mid market companies so if you're a fairly vanilla small mid-market company and you're looking to upgrade from quickbooks or your basic accounting system netsuite can be a logical next step in your evolution through the digital transformation now the downside of oracle netsuite is first of all the pricing is fairly high especially for a small and mid-

sized organization it can actually be pretty costly in the long term because you have a recurring subscription model with a lot of hidden costs that can actually escalate over time the other downside that really held it back from being in the number one slot is that we're starting to see more issues with implementations with oracle netsuite and this is just strictly a hypothesis but my theory is that oracle since they acquired netsuite has gotten so aggressive with pushing further into the small and mid market but also pushing upstream to larger organizations it seems as though they may be getting over their heads in some cases with where they're selling oracle netsuite so that's something to keep in mind as well is making sure that you understand whether or not oracle netsuite really can meet your needs and that you're getting an agnostic view of that evaluation and then the final thing that really holds back oracle netsuite is the fact that it does have a lack of flexibility when compared to other systems in the marketplace so if you don't like the way netsuite was built it's very hard to change when you compare it to say a microsoft e365 or an oracle erp cloud or even some of the other systems in the marketplace so that lack of flexibility relative to the other systems is partially what holds it back but again very solid respectable number two on our top ten ranking for this year.

1 Microsoft 365

coming in at number one is a new number one very different from last year which is last year's number two system and that is microsoft d365 the primary reason why d365 is number one is partially because there's two different solutions that d365 offers there's business central

which is built for small and mid-market companies those with more vanilla or straightforward requirements and then there's finance and operations which is for larger more complex

Organizations so you have two distinctly different systems meeting distinct needs of different types of organizations but on top of that you also have the flexibility and the user interface of microsoft a lot of organizations are comfortable with that user interface a lot of organizations value the flexibility the d365 provides especially when you compare it to say an oracle netsuite or an sap s4hana microsoft d365 can be a lot more flexible now the dark side to this though is that just because you can change the d365 system doesn't mean you should and a lot of organizations get tripped up during the implementation because they try to over customize or over change the system the way it was meant to be used the other appealing factor of microsoft

dynamics is the fact that it's so easy to integrate with other systems and that it has that microsoft look and feel those are some of the common reasons why many of our clients opt to go with d365 now one last dark side that i'll throw in here even though they're number one on our list the biggest dark side of using d365 is their value-added reseller network it is a complete mess there are just way too many providers out there that are selling d365 they're implementing d365 but they may or may not be qualified to do so i'd say of all the vendors in our top ten list microsoft probably has the least amount of control in oversight of their reseller network and that's a big problem when it comes to implementation so if you do choose microsoft dynamics

365 just know that the product itself may be ranked number one on our list but when you choose the implementation partner you want to make sure you look carefully at the options you have because that whole ecosystem has a high degree of variability in the competencies in terms of the implementation providers so all that being said is enough to land microsoft d365 and number one on our list

TOP ERP SYSTEMS FOR SMALL BUSINESSES

10 deacom®

coming in at number 10 is a ERP system called deacom now deacom is a very simple to use ERP system used quite a bit by the small and mid-sized market also used by some larger global organizations as well but we find that its ease of use and ease of implementation to be a good fit for a lot of smaller organizations this is especially true for organizations that have either manufacturing capabilities distribution supply chain intensive types of needs those types of organizations often find the deacom can be a great fit for these organizations so although the software can scale for larger organizations many of our small and mid market companies that are manufacturing distribution supply chain related organizations find the deacom can be a great fit for their organizations

9 salesforce

coming at number nine is Salesforce now many of you may think of Salesforce as a CRM only system customer relationship management which is true Salesforce it does do customer relationship management and it's relatively easy to implement for organizations that are looking to automate some of their sales and customer service types of processes but in addition to providing CRM capabilities Salesforce also has an ecosystem of third-party applications that can fill out the breadth of requirements for an ERP type of capability so for example financial force is a system that handles financials ties into Salesforce on the CRM side of things and allows you to combine your financials your customer relationship as an example but there's also other third-party applications that are

available as well now Salesforce is a fairly flexible type of software that can integrate well with other applications the downside of it though is that there can be some complexity and implementing and maintaining that software just because of the flexibility and the ability to integrate with other systems requires a certain amount of technical sophistication and maturity within your own organization to manage that going forward so you really have to look at do I have the internal IT capabilities to support something like that but if you do and you're a sales driven organization and CRM in particular is very important in addition to some of the other ERP capabilities and Salesforce can be a great fit for you

8 EPICOR.

now another system we commonly see in the mid market especially in manufacturing or distribution or retail types of organizations is epic or up of course a system that's been around for a long time they've focused in a number of different industry verticals like manufacturing distribution retail like I just mentioned but they've also provided a number of other capabilities that can be suitable for organizations now while Epicor is commonly used in the small in mid market there's a pretty good adoption rate in the mid market there's some uncertainty around the viability of the company in general and the product in general there's been no announced plans for the company to retrench for many of its product offerings that the company's been around for a long time but when compared to some of the other vendors in the marketplace there's questions about what the long-term viability and roadmap might look like at

least in our opinion observing the market for the last twenty years or so but regardless of that epicor can be a great fit for your organization especially if you're a retail shop if you're a manufacturing shop distribution and EPCOR also has a number of different products that can fill different needs for different types of organizations so all those things considered are enough to land epic or number eight on our list

7 **intuit quickbooks**

coming into number seven is QuickBooks Enterprise that may sound unusual for some of you some of you may be watching this video to try and find a replacement for your QuickBooks Enterprise but the reality is that a lot of startups a lot of smaller organizations use QuickBooks and the reason for that is it's become kind of a de-facto accounting and financial software package for small and mid-sized companies it's also further increased the adoption of QuickBooks has been the add-ons and some of the third-party systems that extend the functionality and capabilities QuickBooks for example there's a product out there called fishbowl inventory management ties into QuickBooks and allows companies to add some more advanced inventory management capabilities to their QuickBooks Enterprise capabilities now even though QuickBooks is widely used by small and mid market companies and we've seen the product scale up to I believe 200 million in revenues are the largest client that we've seen use QuickBooks we find that many organizations will at some point outgrow QuickBooks and so if you're extremely high-growth organization or you have ambitious plans for growth or if you've been established for a while and you're looking for longer term growth you

may want to consider other options in the top ten because we spend a lot more time helping clients replace QuickBooks than we do helping them to upgrade or to improve the capabilities they have with QuickBooks now with all that in mind that's enough tool and QuickBooks Enterprise at number seven on our list

6

coming in number six on our list is sa P Business one this is a product that's been around for quite some time sa P actually acquired the product about 20 years ago and has really used this as its penetration of the small admit market s ap has s for Hana which tends to focus on the upper mid market larger organizations business Wan is designed more for small in mid-market companies now the good news with s AP Business one is a lot of small and mid-sized companies use it especially in parts of Europe in Asia Asia Pacific Latin America it's widely used not quite as much in North America but it is worldwide commonly used by many small and mid-sized companies the thing that's holding Business one back from being higher on our list is that there's some questions about the long-term viability of the product with s AP focusing so much of its time in R&D dollars and resources and marketing and sales on s4 Hana I have some questions around whether or not business a1 will be around for the long term and we found through past experience that a lot of software vendors can only support so many products and especially ones that are going after big enterprise customers and the fact that s AP is so entrenched in trying to secure its footprint with larger enterprises leads me to question whether or not it will invest appropriately in business one for the small and mid market but despite all

that enough companies out there use it it's suitable enough for small and mid markets companies that that's enough to land sa P business one at number six on our list coming in at

5

number five on our list is a product called priority software and it's probably one of the lesser-known ERP systems on our list but it's something that's very well suited for small at mid market companies now the company itself was founded in Israel and is quickly expanding its footprints from outside Middle East in Europe to North America and other parts of the world and it's a product that's very easy to use very intuitive relatively easy to implement has a great user interface there's a lot of good strengths that come along with this product it's also strong in areas such as manufacturing distribution complex supply chains those are some of the differentiators for priority software now one of the other things that's strong about the product is that it has a pretty cool mobile development app that allows you to without actually coding anything create mobile apps based on the software and the data that you have in the actual priority database or the priority software so that's a unique differentiator for companies they have mobile workforces or have mobile capabilities that they want to embed within their organizations now the biggest thing holding back priority software a couple things one is it's not very well known secondly they're still expanding their implementation footprints and building out an ecosystem of partners that can support the product so there's not a lot of resources out there that can support the product but if you're a small midsize company you'll probably get more attention from a company like priority and there's other upsides

that could outweigh some of those downsides that I mentioned with all that I'm in mind that's enough to land priority software at number five on our list

4 sage

coming into number four on our list is sage software this is a company that's been around for a long time and is focused almost exclusively on the small in mid market space ERP systems for the small Indian market space and they have a couple different products they have sage 100 cloud Sage 300 cloud sage x3 which x3 is more for some larger more complex organizations but the reason I bring this up is they have three primary offerings that can help midsize and smaller organizations navigate whatever capabilities they're looking for and so the product tends to be strong in financials inventory distribution HCM CRM that sort of thing so it really is a complete product pretty well-established pretty mature product and we find a lot of companies that are in manufacturing distribution inventory management intensive types of organizations tend to do pretty well and find a good fit with Sage so if you're one of those types of organizations Sage would be a good product to at least consider on your short list with all of that in mind that's enough to land Sage at number four on our list

3 odoo

now coming in at number three on our list is odoo software it's another product that you may or may not have heard of and it used to be called open ERP it's one of the leading if not the leading open source ERP systems and in fact the only open source ERP system to make our top ten list and it's highly

adopted by small and mid-market companies across the world very easy to use very straightforward system has very straightforward pricing which a lot of small amid market companies appreciate it also allows you to do a lot with it there's a lot of flexibility you know do in terms of integration and adding applications and working your way and growing your way into the full capabilities of the software a lot of the other systems in our top 10 list require you to implement a broad cross-section of functionality in order for the whole thing to work whereas I do is built more modular to where you can implement module by module as your company grows and expands now the downside of odoo is that it requires a certain amount of focus and attention it's an open source system which is good news that provides a lot of flexibility but it requires a very much of a hands-on implementation approach to figuring out how you want this all to work for your organization there's a little bit more legwork from the caught the end user perspective or the functional implementation perspective so that's one thing to keep in mind if you're an organization that's growing very quickly and you don't have a lot of IT staff and you don't have a lot of bandwidth to be messing around with software or trying to figure out how to implement it and manage it day to day they can be a little bit much for some organizations and the other part of it is that it doesn't have as much predefined business processes and workflows as you might find with some of the other vendors in the top 10 list so those are some things to think about or some trade-offs that come along with it but given the fact that so many organizations use it and it is flexible easy to use focused on the small to mid market that's enough to land do at number three on our list

2 Microsoft Dynamics® 365

coming at number two on our list is Microsoft Dynamics 365 business central now Microsoft D 365 has two versions or two primary versions of the product one is called FN o or finance and operations which is for larger organizations than you have business central which is more for small and mid market companies business central is a little bit more focused a little bit more simple a little bit more vanilla and it could be more suitable for an organization that isn't overly complex now one of the benefits of Microsoft Dynamics is that the product itself is fairly flexible when compared to some of the other larger vendors in our top 10 it's easy to integrate relatively speaking and it's also something that is used by a lot of organizations and it's commonly compared to other short list options for for small and mid market companies now the downside of business central is its flexibility can sometimes be a liability just because you can change the software more easily doesn't mean you should and that's one of the challenges that a lot of small and mid market companies have with implementing a product like microsoft d 365 the other downside and probably the biggest downside risk of implementing microsoft e 365 is the value-added reseller ecosystem of partners that can help implement the product is very much fragmented very inconsistent there's not much control over it so you really have to vet those partners very carefully because there's a lot of poor quality implementers out there there's some good ones but you have to wade through a lot of the poor ones to get there so all those pros and cons being considered is enough to land Microsoft e 365 business central and number two on our list

1 ORACLE NETSUITE

coming in at number one on our list is NetSuite product owned by Oracle and supported by Oracle and NetSuite is a SAS multi tenant software as a service product so it's in the cloud it's multi tenant meaning lots of different companies use the same instance of the software you obviously get your own ability to configure and tailor the software for your own individual needs but it's a pretty but it's more of a vanilla standard type of ERP system now that could be your good or bad thing depending on what type of organization you have if you have one that is a bit of fairly vanilla organization in terms of its back-office operations and you're ok with it just adapting to the way the software works then it's not a problem but if you have a complex organization or you really value flexibility or you have things that are super unique to you as a small business and that's we can be somewhat constraining or limiting the other downside of NetSuite is it can be expensive when compared to some of the other products we talked about in the top ten NetSuite is one of the higher cost ones we found in terms of software licensees and ongoing subscription fees that is something that can be negotiated independent third parties like third stage can help you negotiate that but in general we find that the cost is higher oftentimes for NetSuite but all of that in mind and all those things considered is enough to land NetSuite at number one on our list so those are the top ten systems in the market but how do we pick the best one well first of all it's important to recognize that that top 10 list I just went through is the top 10 for small businesses of all different types different geographies different industries different cultures and your unique culture and focus and strategic goals and objectives will lead

to a different list in different sets of strengths of weaknesses based on what we just went through so it's really important to look at what type of company you're trying to be are you a high-growth company that's looking to scale quickly that might lead you to a different set of shortlist options than if you're a more of a steady Eddy steady growth type of organization or a lifestyle business or one that intends to remain smaller than others that's going to lead you to a different answer so it's really important to take all this with a grain of salt and have an objective view of what it is you're trying to accomplish to define the needs that are unit to you to help you land at the ideal shortlist and I encourage you to check out a lot of the resources I provided below in some links on our website in in the description below that'll help you navigate some of the decisions that you have to make if you like to talk more about it or just brainstorm ideas of what might be the best fit for you feel free to reach out to me I'm included my contact information below I also encourage you to provide comments below if you've worked with any of you systems or have comments or questions please comment in the fields below please subscribe to the channel and hope you found this information useful we'll chat soon

BEST FOR LARGE BUSINESSES



5 workday.

coming in at number five is workday now a lot of people think of a workday as an HCM only solution and it certainly is focused on human capital management automating HR processes around benefits administration talent management learning and development things of that nature but over the years workday has also expanded into financials and they've provided a fair amount of robustness and capability in the financial space so a lot of larger organizations are finding that the financial capabilities of workday combined with its HCM or human capital management capabilities makes it a viable ERP solution now the other strengths of workday is not only its market share and its position in the market but also the fact that it's a native cloud solution so ever since the product came out way back when it has been a native cloud solution so while a lot of ERP systems now are playing catch-up and trying to migrate from on-premise to the cloud workday is already establishing in the cloud which gives it a leg up in terms of level of maturity and just overall capability for the system now probably the biggest weakness of workday is going to be if you're a complex manufacturing organization or complex services organization there's probably going to be capabilities that are missing in terms of a complete ERP solution so you're probably gonna be looking at more of a Best of Breed type scenario where you would have workday for your human capital management your financials kind of your core back office but then you would need other systems to address other capabilities to address manufacturing or warehouse management or different aspects of your business depending on what industry you're in but either

way all of those things considered is enough to put workday at number five on our list

4 Deltek.

coming in at number four is a company called Dell tech a lot of you may have heard of the product a lot of you may be using it especially if you're in government contracting or a project management intensive type of organization in aerospace and defense etc and deltek isn't appropriate for all industries but there are a lot of larger organizations that benefit from the capabilities of Deltek so companies that focused on as I mentioned project management have a need to cost projects and track labor and cost to specific projects those are some of the capabilities they're fairly unique for Dell tech that they do better than other ERP solutions the other thing we see is that a lot of larger organizations use deltek and while a lot of companies we help migrate from dell tech to other solutions over time we still find the Dell tech is a very viable solution for some of these larger organizations particularly for those organizations as I mentioned that are in government contracting even government types of entities themselves aerospace and defense other types of organizations they have more of a focus on project management and a need to attract resources and cost to projects so with all that being considered that's enough to put deltek at number four on our list today

3 SAP S/4 HANA

coming in number three is si ps4 Hana and in the past si ps4 Hana would probably be number one or at the very lowest number two on our list this year

it's coming in at number three primarily because while it is still a product that is appropriate for larger organizations there's a certain amount of maturity that's lacking that the older legacy si P products had so for example with r3 and ECC on the SA P side some of the legacy products those products were a lot more mature and more established and had more robust capability than s for Hana and that's just part of the migration that the company is making from on-premise to cloud-based offerings so on the flipside si P has the strengths and the competencies and the scalability to support larger organizations they also have the breadth of capability the breadth of functionality to meet the needs of diverse organizations and diverse product lines and customer bases also the global reach of the product is another aspect that is strong with Si P so s ap was built for larger organizations their client base has traditionally been the fortune 500 fortune 1000 types of organizations so by nature si P is going to be a good fit for a lot of larger organizations and based on where they are today we put AZ for hana at number three on our list

2 Microsoft 365

coming in at number two is Microsoft Dynamics 365 now Microsoft is the product that's probably made the most headway over the years in meeting the needs of larger more complex global organizations ten years ago Microsoft didn't really have a good offering for larger organizations but with ax and division in previous years and now at D 365 they've really focused on building out a breadth of capability a certain amount of flexibility and scalability that has allowed the software to support the needs of complex organizations now probably the biggest strength of d 365 is going to be its flexibility so if

we look at the ability to change the software to manage workflows and change workflows and to build custom reports and things of that nature without necessarily changing the code behind the software that's where D 365 excels especially when we compare it to an s4 HANA or some of the other products that were lower in our top 5 list and some of the products that didn't make it in our top 5 list as well so Microsoft has a nice combination of scalability and standard types of workflows and functionality but balancing that with the flexibility that a lot of organizations need especially for global diversified decentralized organizations where you're gonna have a diverse set of business processes that's where Microsoft e 365 tends to excel and so that's enough to put Microsoft Dynamics 365 at number 2 on our lists

1 ORACLE CLOUD ERP

coming in at number one in our top 5 list of ERP systems for larger organizations is Oracle ERP cloud now Oracle has traditionally been like si P another vendor that has focused on primarily larger organizations global organizations more complex scalable types of organizations and where Oracle is really excelling now against other competitors especially in the larger upper space of the enterprise's that are buying ERP systems is in the flexibility of its capabilities so it's in some ways like Microsoft e 365 but just a more powerful and more scalable version of Microsoft e 365 and that is a gross oversimplification but if you were to compare Oracle to both s AP and Microsoft D 365 I see it oftentimes is more like a D 365 in that regard as far as the flexibility that it provides at the same time it provides a certain amount of standard workflows standard capabilities and functionality that a lot

of larger organizations need to drive efficiency and drive harmonization and standardization throughout their enterprises another area where Oracle ERP cloud has really made some headway relative to competitors is in the manufacturing and distribution space especially manufacturing if we look at more complex manufacturing more complex supply chains global supply chains that's an area where Oracle ERP cloud really excels especially against some of the other competitors here in the top five so with all of those things consider that's enough to land Oracle ERP cloud number one on our list of ERP systems for 2024 the larger enterprises so that concludes our top five list of ERP systems for larger enterprises.

BEST FOR MANUFACTURING



coming in at number 10 is e2 shop system and e2 is a standalone shop floor manufacturing execution system and the reason i point this out is because some of the other systems in our top 10 list are systems that do other things in addition to mes but e2 focuses exclusively on shop floor automation now some of the advantages of e2 include the fact that it can handle make to order complex manufacturing environments so if you're an organization that isn't selling vanilla high volume types of products but instead you're selling custom lower volume types of products e2 can be a great fit for you in addition the product is relatively simple to use when we compare to other systems in the marketplace and e2 given that it's a smaller software vendor tends to have better customer service and it tends to give their customers a little bit more attention than what we see with some of the other bigger vendors in our top 10 list now just like every other system we're going to talk about here in the top 10 list e2 also has weaknesses in addition to strengths first and foremost it's a product that can be expensive over time the cost of the product can be a bit higher than some of the others in our top 10 list the reporting isn't as strong as some of the other systems in our top 10 list and the general breadth of capability isn't as strong as some of the others in our top 10 list but if you're a make to order or engineer order manufacturer e2 might be a good solution to consider



coming in at number nine is sap me me stands for manufacturing execution and sap is a broader enterprise-wide technology so sap me is one module or one system within the sap suite of products so if you're a manufacturer that's looking not only to manufacturing but also looking at other parts of your operations like warehouse management financial management inventory management crm etc sap me might be a good one to consider now some of the strengths of me include the fact that it can support highly scalable environments so larger more complex manufacturing environments it also is very good at providing detailed production visibility into operations as well as reporting and analytics those are some of the strengths of the sap me system now some of the downside weaknesses of the product include the fact that there can be a steep learning curve for learning the product it's not as easy to use and not as easy to learn as some of the other products in the marketplace now to be fair that's because it is a very powerful tool which comes along with a certain amount of complexity in a certain learning curve the data archiving and data management can be more complex and difficult but again it's because it requires so much in the form of data in order to handle the complex capabilities that it offers and finally it's a product that's not ideal for smaller mid-size businesses it's generally going to fit better for larger more complex organizations if you're a smaller mid-size organization or if you just don't have that complex of a manufacturing environment sap me may be overkill for you and may actually end up costing you a lot more than it does deliver business benefits but having said all that that's enough to land sap and me at number nine on our list

8 FISHBOWL

coming in number eight is fishbowl manufacturing and fishbowl is a product that specializes more for small and mid-sized manufacturing shops so if you're a smaller manufacturer you don't have super complex needs you don't need all the complexities and all the robust capabilities of say an sap which we just talked about then fishbowl might be a good option for you now the biggest upside for fishbowl are going to be its ease of use it's not as complex it's not as hard to learn as some of the other systems in the marketplace and as i mentioned before it's also tailored and targeted to small and mid-sized manufacturers so if you fit that profile fishbowl can be a great fit for you now some of the downside risk of fishbowl include the fact that it's not built for larger organizations so if you are a larger organization or more complex manufacturer you're probably going to outgrow the needs of fishbowl pretty quickly some of the reporting and analytics are weak compared to other reporting and analytic capabilities of some of the other systems in the marketplace and finally the product is not an all-inclusive system so if you are looking for a system that can do more than just the shop floor management in the manufacturing execution then you may want to look to one of the other systems in our top 10 list that are more broader enterprise-wide technologies that can also integrate to financials and other parts of your business but having said all that that's enough to land fishbowl number eight on our list

7 Microsoft Dynamics® 365

coming in at number seven is manufacturing d365 which is often used by manufacturers to automate their shop floors now some of the benefits or the strengths of d365 include the fact that it's a microsoft product so it has that microsoft look and feel that many of us are used to and that can make learning and adoption a bit easier in many cases it's also a pretty robust product so it's a good balance between some of the smaller vendors in our top 10 list that cater to small and mid-size organizations which microsoft d365 can do but it also is scalable so it's something that can grow with your organization and if you are a larger more complex manufacturer d365 can typically scale for that size and complexity and then finally the other big strength of microsoft dynamics 365 is the fact that it's easy to configure customize and integrate it's a pretty open platform it has that microsoft flexibility that a lot of us are used to and so that can be a strength of the products as well especially if you have unique needs and you know you're going to need to tailor the software to fit your needs now the downside risk of d365 is because it is a broad big system that does more than just manufacturing execution it creates a lot of complexities it can take time to implement the setup and the learning curve can be a bit difficult at least just in terms of establishing and implementing the software and finally the cost can be a bit higher than some of the other products that we considered in our top 10 list so all of these things considered are enough to land microsoft dynamics 365 and number seven on our list

6 ORACLE NETSUITE

coming in at number six is oracle netsuite and oracle netsuite isn't well known in the manufacturing space and it's not considered a really strong manufacturing system but for more vanilla higher volume lower complexities sorts of manufacturing environments netsuite can be a great option especially if you're a small to mid-size organization that's looking to implement an enterprise-wide technology netsuite can be a great option because it does everything that an enterprise needs from financials to inventory management to warehouse management to other functions including manufacturing now some of the benefits of netsuite include the fact that it's a sas or a cloud-based system that allows you to deploy the technology a bit faster although learning the technology and actually deploying it into your business takes a bit longer but the technical implementation and setup itself can be a bit faster than some of the other systems in our top 10 list it's also a product that integrates with other systems fairly easily so if you do need to tie into any legacy or regulatory based systems netsweep can be a good option now the downside of netsuite is that it can include some costs that creep up on you over time so the recurring subscription costs and all the escalators and kickers that kick in over time as the company grows and as you increase transaction volumes that can actually increase and escalate fairly quickly or more quickly than you might be comfortable with so that's something to fully understand is what is your total cost of ownership in the long term for using a product like netsuite another downside is that netsuite is known and notorious for difficult implementations in that they typically don't provide very hands-on or robust implementation

capabilities from netsuite themselves now having said that there are third-party partners out there that specialize in netsuite and there's an increasing number of them that can help mitigate that risk and then finally probably the biggest risk of netsuite or the biggest weakness is that if you are a complex manufacturer or if you anticipate growing and scaling to become a more complex manufacturer netsuite's a system that you're more likely to outgrow than some of the other systems in our top 10 list but having said all of this and especially if we factor in the adoption rate of netsuite which is very high for small and mid-sized organizations this is enough for netsuite to land number six on our list

5 aptean

coming in at number five on our list is aptean and aptean is a software vendor that's actually grown up through the acquisition of several different manufacturing based erp systems and manufacturing is their core area of focus they don't do a whole lot outside of manufacturing one of the strongest areas of their focus is food and beverage manufacturing so if you're a food and beverage manufacturer aptean might actually be higher on your list but in general if you're any sort of manufacturer aptean might be one you consider now part of the strength or one of the strengths of the product is that you have an exclusive focus on manufacturing so the software is built for manufacturers it's also user friendly and highly customizable compared to other systems in our top 10 list and finally it's a full-blown erp system so aptean doesn't just do manufacturing execution it also does financials inventory management supply chain warehouse management etc so if you're looking for a more complete solution that does

not just manufacturing but also integrates to other sorts of business processes aptean might be worth considering so along with the strengths come a couple of weaknesses of aptean and one is that the product is harder to configure and set up when compared to other systems in the marketplace that's the feedback we get from some of our clients and when compared to other software vendors and the frequency of updates to the software aptean intends to be a little slower than some of the other products when it comes to r d and getting upgrades and updates out to their customers so that's something to consider as well especially if you're the type of organization that wants to be on the latest and greatest in terms of advancements and r d dollars being invested in new technologies but having said all of that that's enough to land aptean in number five on our list

4 infor

coming in at number four is infor and if you haven't heard of infor they're actually one of the largest software vendors in the world i believe they're number one behind sap oracle and microsoft and infor also tends to focus on manufacturing which is why they've rated so highly in our top 10 list now some of the benefits of infor's mes capabilities include the fact that it's relatively easy to learn has a relatively easy user interface to learn and understand it's fairly customizable more customizable than many of the systems in our top 10 list and there's constant improvements and updates to the technologies so it's a vendor that tends to push out improvements and updates and invest very heavily in manufacturing r d which can be a benefit to you if you're one of their customers and finally infor is a full-blown

erp system so if you're looking for capabilities outside of manufacturing infor might be a good consideration now some of the weaknesses of the product include the fact that if you have multiple locations and multiple shop floors and manufacturing facilities it can be somewhat limited in its ability to handle a breadth of different processes and functions so it's not exactly suitable for multiple locations or as suitable as some of the other systems in our top 10 list the yearly licensing is known to be somewhat cumbersome and costly although that pricing model is evolving as they migrate more to infor cloud suite which is more of a cloud-based subscription-based model but the pricing is a bit confusing to some of our customers and finally the overall cost of infor can be a bit higher than some of the other systems in our top 10 list but having said all of that is enough to land infor at number four on our list

3 EPICOR

coming in at number three is epicore advanced mes and if you haven't heard of epicore epicore is another software vendor that focuses very heavily on the manufacturing space so mes is one of the capabilities that they've really doubled down on over the years now some of the benefits of using epicore in addition to the fact that it's focused on manufacturing is first of all it's a product that's relatively easy to use the user interface is easy to learn and pick up when you compare it to other systems in our list the product is also highly customizable and there's a lot of add-ons available to give you the capabilities you might need that aren't necessarily inherent in the core product and finally they give you more deployment options than a lot of other software vendors in our top 10 list

so in other words you can deploy the software on premise or in the cloud which a lot of organizations like to have that choice or that flexibility or at the very least to know that they can switch back and forth depending on what their needs are in the future now some of the downside weaknesses of epicore include first of all the fact that it can be hard to find some of the more advanced features so while on one hand it is a system that's easier to use and learn some of the more advanced capabilities are a bit harder to figure out so really making sure that you train your people and that they fully understand the capabilities of the Software is even more important for epicore than other types of systems in addition the reporting tends to take some time to set up and the system itself tends to be a bit slower in terms of performance than other systems in the marketplace so all that being said that's enough to land epicore advanced mes and number three on her list

2 IQMS

coming in at number two is iqms and iqms is a software vendor that has a very large manufacturing install base in fact most of our clients that choose iqms are in the manufacturing space so some of the unique strengths of the product include the fact that it is very scalable so if you're a high-growth smaller or mid-sized manufacturer and you anticipate being a large one in the future or you at least anticipate some high levels of growth iqms can be a good one that can be simple enough to start out when you're smaller but can also scale up for as you grow and as you become more complex and your needs evolve over time the product also has very robust real-time monitoring features so it provides better visibility into real-time data which

not all the systems can do as well as iqms and then of course the third strength that i'll point out is the fact that it does focus on manufacturing so it is a product that's largely built for manufacturing whereas some of the other systems in our top ten list yes they can do manufacturing but they're also trying to be everything to everyone else at the same time so it's in many cases a strength to know that you've got a vendor that's focused on your vertical now some of the downside risk of iqms include the fact that the cost can be a bit higher than some of the other software vendors in our list the reporting can be somewhat cumbersome and complicated so it's not as intuitive not as easy to set up as some of the other reporting capabilities of some of the other systems in our list and it's been known within the community that some customers have trouble with upgrades and updates to the software so they're frequent and sometimes that can cause disruptions to the operations and that's something we hear a bit more often in this software vendor vertical than in other software vendors in our top 10 list but having said all that that's enough to land iqms at number two on our list

1 PLEX

coming in at number one is plex systems and plex is a product that is built for manufacturing and one of the unique aspects of plex is the fact that it was built in the cloud about 20 years ago so while many software vendors and mes providers are just now trying to migrate their old on-premise systems to the cloud plex has been in the cloud for quite some time so they have a head start on that whole cloud migration so it's a cloud-based solution it's focused on manufacturing those are two of the biggest strengths of the product and

some of the other strengths include the fact that it's easy to use it has a very slick user interface and it's easy for employees to learn and plex also has a lower cost than many of the software vendors in our list which means you can get a better roi and better value for that investment in their technology now even though it's number one plex also does have its downside weaknesses which are worth noting first is that even though it's easy to use and it's got a slick interface sometimes there are parts of the workflows that aren't as intuitive as others and so it's a bit inconsistent in its usability and its overall aesthetic appeal of the user interface it's also been known to be prone to bugs because perhaps they're a smaller vendor they're not one of the biggest vendors in our list there's just not as much support in r d dollars going into fixing those bugs and making sure that the bugs are worked out before it's released but having said that we haven't seen any situations where organizations have been completely shut down or materially disrupted as a result of some of those bugs and then finally some of the implementation partner capabilities are a bit limited with plex when you compare it to some of the other systems in our top 10 list so if you're looking for third party providers or vars that can help you implement the solution your options are a bit more limited so if you do choose blacks you want to make sure you really think through and understand what your options are make sure you have a clear plan and a clear roadmap for how you're going to deploy the technology but having said all that that's enough to land plex at number one on our list

BEST FOR GOVERNMENT



10 ORACLE NETSUITE

coming in at number 10 is netsuite and this is a product owned by oracle it's one of the pioneer sas or software as a service cloud-based products that's been around for a long time and it's always been in the cloud and it's a product that has some fairly well established and mature business processes and capabilities particularly when you look at financials and some of the other aspects of what it takes to run a government or public sector organization now the thing holding back netsuite from being higher on our list is that there are some capabilities that aren't as robust as some of the other systems in our top 10 list so things unique to public sector organizations like grant management fund management fund accounting is not as robust within netsuite but a lot of smaller public sector organizations find that it works just fine so that's one thing to consider the other thing to consider is that if you run into any limitations of the software it can be a little bit more complex a little bit more difficult and limiting to be able to change the software so those are a couple things holding netsuite back from being higher on the list but with all those things considered that's enough to land netsuite at number 10 on our list

9 sage Intacct

coming in at number nine on our list is sage intact an accounting system that works very well in non-profits public sector organizations has a lot of the accounting nuances required for non-profits and and government entities and it's a product that's been around for quite some time and it has a fairly narrow focused particularly within public sector

hospitality some other non-public sector types of industries as well but it has a robust enough capability to support much of the public sector now some things to consider with sage intact is one is it's not quite as scalable and robust as some of the other systems in the marketplace so if you're a large state entity or a large city or a federal entity it may not be enough for you it may not be scalable enough in terms of functionality the other thing to consider is there's not as many resources out there that know sage and can help implement sage compared to some of the other products in the marketplace but with all that stuff in mind and all those pros and cons considered that's enough to land sage intact at number nine on our list

8 Microsoft Dynamics 365

coming in at number eight on our list is microsoft dynamics 365. in particular the finance and operations segment of d365 you have the business central which focuses on smaller organizations and then you have fno which focus on the larger organization so for the public sector we find that fno within d365 can be a good fit for a lot of organizations now some of the strengths of d365 and some of the differentiators are that it's a fairly flexible product so where you run into things that you want to change or need to change d365 can be a little bit easier to handle it has that microsoft look and feel and can integrate well with other microsoft products like office 365 and sharepoint and things of that nature so those are a few of the strengths that differentiate d365 and it's also scalable more so than some of the other systems in our top ten list so larger public sector organizations are able to to scale to that level now the thing that's most likely holding back microsoft e365 in our list is the

fact that the implementation ecosystem is a bit of a mess there's not a lot of great implementation partners out there there's a fair amount of pretty poor implementation partners and a lot of mediocre ones as well so really navigating that environment to find the best implementation partner one that understands the public sector one that understands the software well and can do all the things required to make the project successful is going to be extremely important but with all those pros and cons considered that's enough to land microsoft dynamics number eight on our list

7 **ORACLE** **PEOPLESFT**

coming in at number seven on our list is oracle peoplesoft it's a product that a lot of public sector organizations especially larger ones have used over the years it's a product that's been highly successful in the space highly focused and penetrated well within the space and it has a lot of capabilities that a public sector and government non-profit organization might require now some of the things to consider when you're looking at peoplesoft is one is it has a high market adoption extremely high market adoption within the public sector but the downside is that there's questions about the long-term viability of peoplesoft and long-term roadmap as oracle migrates to the oracle erp cloud and oracle hcm cloud that can be a consideration that needs to be taken into account but with all that in mind peoplesoft has the financial capabilities hcm inventory management supply chain some of the basic things that a public sector organization might need so it's still something worth considering looking at and enough for peoplesoft to land number seven on our list

6 **workday**

coming in number six on our list is workday workday is an hcm or human capital management system not necessarily a full-blown erp system but within its hcm capabilities it has a lot of functionality that is unique to government public sector entities some of the employee and regulatory types of things related to what you would need within your hr department workday can handle more so than a lot of hcm capabilities in other erp systems but in addition to providing that core hcm capability it also provides other erp and financial type of capabilities through its financials that it's starting to expand into and it's also adding third-party partners and systems to its ecosystem so that you can add additional capabilities to the workday platform much like salesforce does on the crm side if you're familiar with that they've developed an ecosystem of third-party bolt-ons basically that can help you tie it all together and broaden the reach outside of hcm so it's more of a best-of-breed approach to erp so that's one thing to keep in mind is that the downside is that now you might have multiple systems to maintain even though they're all on the same platform you're using the same architecture tying the systems together but that requires a certain amount of maintenance and technical integration and technical capability the other thing to consider is that we're seeing an increasing number of Workday failures in the marketplace for whatever reason there it seems that the company has grown very quickly and that its implementation capabilities have not kept up as well with the Software itself so be really careful when implementing the product make sure you've got the right implementation approach and strategy because we are seeing a lot

of troubled workday implementations out there side note that doesn't have a whole lot to do with the software necessarily has more to do with how the software is being deployed that is something to be aware of a warning sign that you should look for but having said all of that and considering all the pros and cons that's enough to land workday number six on our list

5 **Deltek**

coming in at number five on our list is deltek deltek is a company that has largely focused on the non-profit and government government contracting space for a long time there's a higher market adoption rate within that space especially for government contractors companies that sell to government entities but also to maybe to a lesser degree government entities non-profit entities also use dell tech largely because the financials are capable of handling the unique aspects of accounting within government nonprofit but also because of the project-based capabilities so if you're managing projects in project costing and budgeting and tracking and labor allocations and things of that nature is important to you then delta can be a great fit and that's probably its biggest differentiator that we see in the market is its ability to handle that project management within the government public sector government contracting non-profit space so the one downside or probably the biggest downside that we see is that a lot of customers that are using dell tech and customers that we're helping replace and upgrade to a different system comment that dell tech has somewhat of a clunky user interface a little bit outdated look and feel how big of a deal that is to your organization just depends on the strengths of the product and whether or not that's

enough to outweigh it but with all those pros and cons in mind that's enough to land dell tech at number five on our list

4 infor

coming in number four on our list is infor lawson and lawson is another one of those legacy older products call it that is on our list along with peoplesoft and dell tech and some of these systems that have been around in the public sector for a long time and lawson was acquired by infor a while back it has a lot of the unique capabilities for accounting and financials human capital management some of the things that are specific to public sector organizations that can be quite a strength and a lot of organizations in the public sector still use lawson now the downside risk or the thing to think about is that there's questions around the long-term viability of lawson we question how long infor will be supporting the project especially as it moves to cloud suite and sightline some of the other flagship products that the company is really focused in on now and in addition to that infor as a company tends to focus on a broad cross-section of industries and capabilities so my question for someone considering lawson would be what does that long-term road map look like are you comfortable with that and are there enough strengths with lawson to outweigh the fact that there might be some doubt or uncertainty around the road map of lawson but with all that in mind that's still enough to land in fort lawson at number four on our list

3 SAP S/4 HANA

coming in at number three on our list is sap s4 hana especially when combined with the reba which is a procurement system success factors which is their hcm system you combine all that into one complete erp solution that oftentimes provides some extreme robust capabilities and scalability for larger non-profit and public sector and government entities so we see a lot of organizations in the space that are moving test 4hana and they're leveraging some of the capabilities and robust breadth of capabilities to fit the needs of more a more complex public sector type of organization now the downside risks of s4hana are twofold one is that the product itself is still largely migrating to the cloud and still largely immature compared to some other products in our top ten list so in other words organizations and nonprofits and public sector organizations that have used ecc or r3 from sap in the past find that s4hana isn't quite there yet in terms of capabilities and functionality that they might have been used to so that's more of a warning sign if you are a legacy sap customer be sure you really understand what you're really getting now with s4hana versus promises for what might happen in the future the other thing to keep in mind is that s 4hana can be overly complex expensive and rigid for some government and public sector organizations so if you're a very diverse organization or you have or if you value flexibility that can be a strike against s4hana but when you look at the bigger state and federal governments out there some of the national governments internationally there's a lot of those types of entities that are migrating to s4hana and you can't overlook that so it is scalable it's it can provide standardization and scale for public sector

organizations that are looking to automate a large cross-section of functionality so with all that in mind that's enough to land s400 number three on our list

2 ORACLE CLOUD ERP

coming in at number two is oracle erp cloud it is the rival to s4hana which we just talked about and owned by oracle it's their flagship big enterprise big organization type product it is a cross-section of capability that can handle financials accounting hcm inventory management all sorts of different types of capabilities that are required by government public sector organizations the thing that puts oracle a bit higher than sap and others on the list are first and foremost it's flexibility it is largely more flexible than s4hana when it comes to how well you can change or how easily you can change the software integration to third parties tends to be a bit easier and just in general the total cost of ownership and risk profile is more favorable to public sector organizations we find and although oracle much like sap is still in the process of migrating its on-premise legacy solutions to the cloud it seems to be further along in the journey than sap at least at the time i'm recording this video at some point that may change but at this point we find that there's more maturity and more progress being made from that migration to the cloud now probably the biggest downside with oracle erp cloud is that it provides a certain amount of flexibility that can be a liability so it's a strength on one hand because it provides that flexibility to adapt to whatever processes you want but it can also provide cover or an excuse for not wanting to change so a lot of times organizations will dig in their heels not want to change and they'll just change the software instead because they can and that's not necessarily a good reason to do it

so it's not necessarily a flaw with the software but it is a flaw with what we see with a lot of oracle implementations in the public sector with all that in mind though that's enough to land oracle erp cloud at number two on our list

1 UNIT4

coming in at number one on our list is unit four it's a software system that's a cloud-based system that's been around for a long time very specialized and focused primarily on the public sector government nonprofit entities we find that a lot of global nonprofits and public sector companies do very well with this product and a big part of what the appeal is is the functionality that's tailored to the industry so while a lot of the other systems we've talked about so far in this top 10 have government non-profit capabilities they're in some ways trying to be too much to everyone at times and whereas unit 4 is more specialized and more focused on this vertical now there are other verticals that unifor can handle don't get me wrong but they're not trying to be everything to everyone at the same time the product can scale it's used by some larger non-profit and public sector organizations there's a fair number or moderate number of implementation resources out there in the marketplace but the valued reseller network and The the network of implementation partners is not as robust as sap or oracle or microsoft or some of the other vendors that we've talked about in the marketplace but when you balance all those things out and you look at all the comparisons across the board that's enough to land uniform number one on our list so that's a quick rundown of the 10 leading systems among public sector and government organizations but what's the best one for us how do we pick

the right short list for our organization well as i mentioned this top 10 list is a general top 10 list for government organizations of all sizes geographies scope level of complexity all that stuff so when you look at your organization you have to figure out what is it that we need how complex are we how much do we value flexibility how risk adverse are we or are we not there's a lot of different variables you need to consider that will ultimately help you narrow that list of 10 down to a short list and what i just mentioned to be this top 10 list in general may or may not be the same top 10 list that you will find you may find that there's different systems at the top of the list for you based on what your organizations are

BEST FOR CRM



10 HubSpot

coming in at number 10 is a product called hub spot and hub spot is a system that's better known for its marketing automation capabilities but it also has CRM capabilities it allows you to track your sales pipeline your opportunities assign probabilities track tasks that sort of thing and the beauty of hub spot is even though it's not a super robust or super complex CRM system it's something that HubSpot offers for free to users and it's a way to hook you into the hub spot platform so that eventually you might use the marketing automation system which you pay for now some of the strengths of the HubSpot CRM system in addition to being free in addition to being simple is that it can be great for small businesses because if you're looking for basic CRM capabilities or you just want to try out a CRM system HubSpot can be a great place to start and the other advantage is that it ties into marketing automation so if you have email marketing campaigns social media campaigns blog posts to your website landing pages all that stuff it will allow you to take those marketing automation processes and the leads that come in through marketing automation and go straight into your pipeline so that's one of the other benefits of the product now the downside is if you're a complex organization or you have a large sales team or you're a high-growth organization HubSpot can be pretty limiting and you're you're getting a no frills CRM solution a pretty vanilla solution but for a lot of small and mid-sized companies that aren't large and their sales teams HubSpot can be a great place to start so with all that being said that's enough to land HubSpot at number 10 on our list

9 odoo

another good product for small and mid-sized companies is odoo CRM and you may actually know or do better as an ERP solution they provide broad capabilities that span inventory management financials manufacturing supply chain etc they also have a fairly strong CRM module as well now I do is also an open source ERP system meaning that generally it's going to be less expensive and generally it's going to be more open so you can do more with it you can change the code you can change the product and there's a whole third-party ecosystem of apps that tie into odoo so those are some of the benefits of being on the odó platform in general but if we look at the CRM module in particular not only is it suited for small and midsize companies but it's very user friendly that's one of the products biggest strengths is its ease of use it does all the basic things that you need for a CRM system and it's also a very modular product so it ties together with other modules outside of CRM as well so if you're a small company or a growing company you can start off with CRM and know that you can add modules of other capabilities that extend beyond CRM to build or grow into a broader ERP solution now the downside of odoo is it can be somewhat limiting in its capabilities so if you're a midsize organization a larger organization or a more complex sales organization mode is probably going to be a bit limited for its capabilities and some of the other products in our top ten list can do more and they have more power if you're a larger organization but with all that being considered that's enough to land it number 9 on our list

8 sage CRM

now another ERP provider that has strong CRM capabilities is a product called Sage CRM Sage is an ERP system that's used by a lot of mid-sized organizations and some smaller organizations as well the CRM system is a bit more robust than some of the others we've talked about so far it can do a bit more in terms of forecasting and planning it can do some marketing automation and can also do customer service so if you're a customer intensive organization or you have a high-touch customer service function Sage CRM can be a really good spot to not only sell and provide the initial sales automation but also to provide ongoing support and customer service now Sage also allows you to handle quotes proposals and orders it allows integration to other third-party systems as well so even if you're not using Sage ERP and you have a different back office ERP system or you might have a back office ERP system at some point in the future sage CRM has pretty open integration capabilities with those third-party systems and then the final thing worth noting about Sage is that you can deploy it on premise or in the cloud so it's one of the few vendors that are still giving you the option of deploying on-premise if that's what you prefer and you want that flexibility and you want to be able to customize or change the software however you want or if you want a cloud version you can opt for that as well now the one downside of Sage is that if you're a larger organization and you require more robust capabilities Sage may not be the best fit but for most midsize organizations it's enough to land stage and number eight on our list

7 sugarcrm

sugarcrm is a product that's been around for a long time very specialized in CRM capabilities and it can handle a lot of robust needs and a lot of complex capabilities that sales organizations may have it's a product that's used heavily by financial services firms companies that do wealth management and also staffing and recruiting those are some of the industries that find the most benefit from Sugar CRM and one of the unique aspects of sugar is that it has specific capability to some of those industries I just mentioned for example staffing and recruiting it allows you to not only track your sales opportunities and potential clients that you might be pursuing but it also allows you to track candidates that you may be interviewing and having in your your candidate pipeline so that's sort of a unique functionality for a specific industry that sugar has honed in on they also have similar capabilities and specific industry processes that they support within financial services and a few other different industries as well so if you're looking for a very targeted sort of solution that can do things that are specific to your industry Sugar CRM is one that's worth checking out and they're another product much like Sage that can be deployed either on-premise or in the cloud one of the strengths will point out with with Sugar here today is that it can also handle customer service so if you're looking for more of a customer experience type of capability beyond the initial sale and you want to track customer service longer term and ongoing Sugar CRM has some great capabilities there so with all that being said that's enough to land sugar at number seven on our list

6 SAP CRM

coming in at number six is si P CRM and this is the first entry into our top ten list that really focuses on CRM capabilities for larger organizations and larger sales teams so if you're an organization that has a big or a complex sales cycle this product could be great for managing territories and commissions and sales plans it also has capabilities that will track marketing and customer service as well as contracts and billing so it's a fully integrated suite of capabilities that again focus is not just on managing the sales in the pipeline but also on managing the sales force the sales team and all the capabilities that go along with that as well as customer service and marketing more of a true customer experience type of product versus a pure CRM type of solution and by the way that's one thing to note is that many of these systems are migrating from a salesautomation tool to more of an overall customer experience type of tool and that's what you see and that's what you get with s ap CRM now the downside of s ap CRM is it can be overkill for a lot of organizations unless you're a big organization with a complex and big global sales team ASAP CRM is probably going to be overkill for you so in those cases you may want to look at some of the other options in our top ten list that are more focused for the small to mid market but for those larger global organizations with big global sales teams s AP CRM can be a great option all those things being considered are enough to land sa P at number six on our list

5

ORACLE
CRM

coming in at number five is Oracle CRM an Oracle CRM is part of Oracle's overall customer experience module or capability and they're one of the vendors much like SA P that is really investing in the overall customer experience I'm looking at how their product can enhance and optimize all the different touch points that a customer may have with your organization from the time they first reach out to you until they sign up with you to become a customer through the time that they're an actual customer and getting serviced by your organization now much like s ap Oracle CRM can also handle territories Commission sales plan and forecast those sorts of sales management capabilities one of the things that's unique to Oracle and one thing that Oracle CRM is very strong in is something called configure price quote or cpq capability so if you're an engineering type of organization or let's say you manufacture products that are make to order they're complex engineer to order and make to order products the CPQ module will allow you to feed your sales staff with availability of different parts and products that might go into an solution it'll allow them to create a quote based on a configured solution and allow them to price out the solution based on the different components or the different choices that your customers may have so if that's the type of organization you are where you have a complex make to order type of product that's custom to your each individual customer Oracle CRM can be a great fit another cool thing that Oracle CRM does is it looks for signals in your pipeline it looks for behavioral signals of what your prospects are doing that might trigger and need to reach out to them and they use artificial intelligence

and machine learning to identify patterns or signals that might trigger some sort of outreach from your sales staff so that's an example of a vendor being on the forefront of technology as it relates to CRM to use the technology not just to track things that used to track on paper or in your head but also to anticipate what buyers might be doing and when the right times might be to reach out to them now Oracle is a flexible product but the downside of being flexible is that if you're looking for standardization and you really want to tighten up your sales operations and go for something a little bit more common or standardized a product like saP is probably going to be stronger and some of the other products in our top 10 list might be stronger in terms of enforcing standardization but if you're looking for something as flexible can tie into a broader ERP system that Oracle also provides and you're looking for a breadth of CRM and customer experience capabilities Oracle CRM is one you might consider and that's enough to land Oracle at number five on our list

4

ORACLE
NETSUITE CRM

coming in number four is NetSuite CRM you may know NetSuite which is also provided by Oracle as a small and mid-sized market ERP system but they also have a very strong CRM module within that ERP capability and it's something you can purchase on its own as a standalone product now the benefit of NetSuite CRM the reason it rates so high and our ranking is because a lot of small and mid-sized companies find that the CRM capabilities are very strong because they also have a RP capabilities the CRM product ties in well with e-commerce ties in well with forecasting and planning and integration to other capabilities within your operations so that

makes for a pretty strong CRM capability another unique aspect of NetSuite CRM products is if you're the type of organization that not only sells to customers but perhaps you forge partnerships with other firms that might be referring you business or that you might be partnering in to sell and deliver your product or service it has a specialized functionality that allows you to track those sorts of partnerships and the partner management function so that's something that's being unique to NetSuite and something that's worth considering so especially if you're a small or mid market company you'll want to consider this product and even if you're a larger organization and perhaps your sales staff and your sales needs aren't that complex next we can be a great option for you and that's enough tool and NetSuite at number four on our list

3

salesforce

coming in at number three is Salesforce in Salesforce has been around for about 20 years they're one of those first Best of Breed systems that went after the vulnerabilities of ERP systems and one of those vulnerabilities historically was CRM and when Salesforce started they weren't trying to be everything to everyone they were just trying to build CRM capabilities better than the leading air P vendors could and since then ERP vendors and other CRM upstarts have sort of caught up and created capabilities that are on par with Salesforce but Salesforce still has a head start they're the first native cloud CRM solution out there other than NetSuite which is also a native cloud solution on both the ERP and CRM side so this cloud solution combined with its depth of capability within the sales automation side of things is given Salesforce a really strong foundation to build on now over time

Salesforce has also created a third-party ecosystem of bolt-ons and applications that can extend and enhance the functionality of Salesforce and that's a big part of the appeal of Salesforce is you're not just getting the product itself that Salesforce sells but you're also having the option to add on third party applications that can address gaps or industry specific needs that you might have Salesforce is a pretty complex product you can do a lot of different things a lot of the things I've mentioned throughout this video that other CRM systems can do and more it's somewhat difficult to maintain and somewhat difficult to integrate all these different moving parts especially if you start getting third party applications so one word of warning about Salesforce is you probably want to make sure you have a fairly robust internal IT capability to be able to manage that software and to be able to manage the capabilities longer-term but if you're a larger organization or even a midsize organization that does have those capabilities Salesforce can be a great option if you're a smaller organization there's probably better options out there that are a little bit more right sized for your needs because like I said Salesforce can be a bit complex for the simpler sales organizations but with all that in mind that's enough to land Salesforce of number 3 on our list



coming in at number two is a product called Zoho and if you follow the ERP industry or maybe even the crm industry you may not have heard of Zoho but it's actually a very widely used system a lot of small to mid-size organizations use it and it has a lot of unique capabilities that are very specialized within CRM so in addition to doing all

the typical CRM type stuff like pipeline management and lead scoring and things of that nature it can also do pretty cool things with artificial intelligence and predictive analytics for example there are predictive sales capabilities within Zoho so it looks at the behaviors and the activities within your pipeline to identify where the priority should be and what the highest priority leads might be and in addition it also has some pretty neat integrated social media capabilities so you can really tie together the Zoho CRM capabilities can tie to your marketing activities your social media posts your social media engagement as well as more traditional communication methods like phone and email so it really supports that whole army channel sales and customers experience approach and another strength of Zoho is it has extremely high NPS and overall analyst ratings and that combined with its ease of use is enough to Land's Ojo at number two on our list



so coming in at number one is Microsoft Dynamics CRM Microsoft Dynamics is another ERP provider but the CRM capabilities are particularly strong and the thing that lands Microsoft at number one on our list is they have the right balance in our opinion of being able to cater to smaller organizations as well as large multinational organizations they have a good balance and a good mix of clients and in both sides of the spectrum and the capabilities they provide range from simple pipeline management and forecasting and managing leads and lead flow and that sort of thing all the way on up to customer service as well as artificial intelligence to flag next steps or leads or prospects that need some sort of follow-up as well as recommended next steps with

those leads and prospects and because Microsoft now owns LinkedIn LinkedIn ties in very well and pretty seamlessly with Microsoft Dynamics CRM so if you're an organization that's selling to other businesses b2b type of organization especially if you're selling complex products to businesses with multiple decision-makers that LinkedIn integration can be a great way to mine information about your prospects to stay connected to engage with them via social media and tracking all that in your back-office CRM system the other benefit of Microsoft CRM is that it has that Microsoft look and feel and a lot of our client users really like that look and feel they're very comfortable with it they're used to it it integrates well with office 365 and SharePoint and other Microsoft products so if you're a Microsoft shop already Microsoft Dynamics CRM can be a great fit for you in another unique aspect of Microsoft Dynamics CRM is that they have the app source third-party ecosystem much like Salesforce they also have third-party applications that are being built that can extend the functionality of Microsoft CRM and fill in some of the gaps or industry specific needs of the product and of course because Microsoft also provides Dynamics 365 is the back-office ERP system if you were to ever opt to go to their ear piece system it's a great starting point to begin with the CRM solution now the downside of Microsoft are probably its biggest downside is it does have great deal flexibility but that has a dark side as well so that can create some complexities and difficulties for organizations that don't have a clear vision of what they want and how they want their business processes to look it can be difficult to configure the product and to make all those decisions around what the product needs to look like but with all that being said that's still enough to land Microsoft you're number one on our list

SUPPLY CHAIN MANAGEMENT



Most important functions that business can have today in today's global environments and supply chain management technology can be a great way to enable supply chain management capabilities and functionality and today I'm going to talk about the top 10 supply chain systems available to you in the marketplace my name is Eric Kimberling, I'm the CEO and founder of third stage consulting or an independent consulting firm that helps clients through their digital and supply chain transformations and in today's world in the 2020s the world has changed quite a bit in supply chain management has more than ever become a very important competency and capability companies that can manage their supply chains well and manage their suppliers and their costs and their overall distribution and throughput are going to do a lot better and be a lot more successful in today's day and age and technology and other types of transformation around your supply chain can be a great way to enable those types of enhancements and today I'm going to talk about what are those top

10 systems in the marketplace

so in determining our top 10 list for this year there's a number of capabilities and functions that we considered there's general supply chain management functionality that we evaluated for each of these technologies things like supplier collaboration quality management a procurement transportation management logistics fleet management all those things that go into an entire supply chain those are the things we evaluated in addition to overall functionality we looked at the flexibility of the software the value the costs the benefits of the software and we looked at a number of quantitative and qualitative factors in evaluating the different systems and probably most

importantly third stage is completely independent technology agnostic so the vendors had no influence over this top 10 list this is completely unbiased and free from vendor influence and it's strictly based on our experience our research our experience evaluating and implementing these systems as well as some of the other factors that I mentioned earlier so without further ado let's go ahead and get started

10 ORACLE NETSUITE

coming in at number ten is Oracle NetSuite NetSuite is a very common ERP or enterprise technology that happens to contain some supply chain management functionality and a lot of small and mid-sized companies use the product now there are several reasons why or illness we made the top 10 list first of all it has pretty simple functionality it's easy to use it's something that doesn't require a lot of complexity so if you have a fairly standard or fairly vanilla supply chain or if you're a small or midsize organization Oracle Nets we can be a great option for you it's very commonly used in the marketplace it also does be on supply chain management it will do more ERP types of functionality like warehouse management financials HCM and other types of functions so it's not just a supply chain solution but it can also provide other technologies on top of that and like I said if you're a small or midsize company with fairly vanilla and basic supply chain needs Oracle next we can be a great option for you two other quick things to note about Oracle NetSuite one is that it is a fully mature cloud solution a lot of the systems that we'll get to here in the top 10 are maybe cloud based but they started off on premise and they're still finishing their migration to the cloud whereas Oracle NetSuite has always been

a multi-tenant cloud ERP system the other thing to keep in mind is that the product is backed by Oracle which is a huge company lots of R&D dollars pretty clear roadmap and a good future for the product now the downside of Oracle NetSuite are some things that may prevent you from considering it are that if you have complex needs or if you're a larger organization or if you are looking for something more robust and something that requires more flexibility or coolness we is probably not going to be the best bet for you but if that isn't the case then it may be what you may want to consider



coming at number nine is Microsoft Dynamics 365 like NetSuite Microsoft Dynamics is also a full-blown ERP enterprise-wide type of solution in addition to supply chain management but Microsoft Dynamics can handle supply chain management some of the basic functionality and things that you're gonna need for your supply chain and some of the reasons why Microsoft Dynamics excels in the space or a few things one is it's Microsoft so it has that Microsoft look and feel that a lot of organizations and employees and end-users are used to another thing that companies seem to like about Microsoft Dynamics is that it's very flexible so as compared to other systems in the top 10 list and others that didn't make the top 10 list it can provide a lot more flexibility and ability to integrate with other systems so those things combined make it a good candidate for companies looking for supply chain management solutions now d 365 tends to be better for midsize organizations so companies that aren't super large or super complex can generally handle this type of software companies that are smaller on the small side of the

scale may find that d 365 is overkill or too much functionality complexity for them but if you're in the mid market and you have some fairly standard supply chain needs microsoft d 365 can be a great option now one thing to keep in mind with d 365 there's probably its biggest shortcoming is that the partner ecosystem is very fragmented there's a lot of companies out there that sell and implement D 365 and they're not all that great there's some good ones out there there's some terrible ones out there and there's a lot of in between so if you do go with the product you want to make sure you focus just as much time on finding the right implementation partner because that can make or break your overall implementation



coming at number eight is a company called Plex systems you may or may not have heard of the solution but it's a company that's been around for quite a while it's a software that was built in the cloud it was built as a SAS type of solution that can support cloud implementations and it's a product that has historically been very common in the automotive industry aerospace and defense you're starting to see more companies in food and beverage and pharmaceutical use this product and the thing with plex systems is much like NetSuite and Microsoft e 365 it does more than just supply chain it also handles manufacturing shop floor automation and basic financials warehouse management some of the other capabilities that a broader ERP system would typically provide it's also pretty common in retail and distribution it's a product that you'll see more and more companies that are on the distribution side of things using to manage their supply chain facing the customer just

as is the case with NetSuite it's been built in the cloud which allows it to have more mature capability and they're not in the midst of a transition to the cloud like a lot of the others in the top 10 are probably the biggest downside for Plex systems is there aren't a lot of partners out there that are supporting the products so in other words it's harder to find resources that know the product well most companies end up using Plex and their consultants directly to handle the implementation there are some partners that can support the implementation but there's not as many of them as you might find with some of the others in the top ten so that's one of the things to be aware of is making sure you understand that there's not a lot of partners out there in the install base isn't quite as big as some of the other systems in the marketplace but having said all that has enough strengths and capabilities to come in at



coming in number seven is si P as for Hana an S for Hana is a very common solution if you're a fortune 500 fortune 1000 organization or for your a large public sector organization s for Hana tends to be on most people short lists that are in one of those larger organizations and if you're a large organization with a complex global big supply chain as for Hana can be a great solution for you so think of s for Hana is that big robust global but also complex solutions so if you fit that profile si PS for honor can be a great fit now if you don't fit that profile S for Hana is probably gonna be a bit of overkill it's probably gonna be too expensive it's probably gonna be too risky for your organization but if you don't fall into that category it may be something worth considering now a couple of the things to note about us for Hana they recently acquired Arriba which is a procurement platform

and your procurement technology that integrates now with us for Hana so companies that require more depth in the procurement functionality and the procurement processes have Arriba to draw from as well si P is also built on the Hana platform so when it comes to volumes of transactions and real-time access to data real-time analytics and reporting the Hana platform provides a good way to provide that insights and visibility into what's happening in your supply chain through that on a platform now probably the biggest downside or a couple of the biggest downsides for us for Hana is one I already mentioned the breadth and complexity of the software can lead to cost and risk in and potential failure and just too much complexity but the other part of it is that s for Hana at the time I'm recording this is still not as mature as some of the other products they're one of those systems they're still making that transition from the on-premise legacy solutions to cloud solutions so not all the functionality that s ap has built over the years in supply chain management is available in s for Hana at least not yet having said that sa P is a very big company they're investing a lot in R&D and they're making fast advancements in improving the capabilities but for a lot of organization it's somewhat of a leap of faith right now in deploying s for Hana to a global supply chain having said all of that that's what lands s a ps4 Hana at number seven on our list

6 IFS

coming in at number six on our list is a company called ifs that you may or may not have heard of they're a European based organization a lot of installs in Europe but if you're outside of Europe you may not have heard of the company but they're an ERP company that provides enterprise

wide software capabilities including supply chain and they're they're very good at supply chain in fact most of their companies are manufacturing and distribution types of organizations with fairly complex manufacturing and distribution and supply chain related needs the thing that makes AFS unique is that in addition to being able to handle normal supply chain types of processes it's also very good at companies that have supply chains that need to be managed in the field so companies with field services or crews or employees that are very mobile and dispersed geographically and situations where you're trying to track inventory and procurement and movement of goods and materials and work in progress across different sites or different field crews or whatever the case may be IFS has a particular strengths there the other thing that's good about ifs is they have multiple deployment options so a lot of these systems in our top 10 list or cloud only which may be perfect for many of you but some of you may still be interested in options in terms of either on-premise cloud or some sort of hybrid of both ifs at the time I'm recording this still supports multiple deployment options which can be very appealing to a lot of organizations now the biggest downsides of ifs are primarily that there isn't a big ecosystem supporting the product yet it's mostly ifs direct resources there aren't a lot of partners and implementers and resellers out there so it's a bit more difficult to find qualified ifs resources to support your implementation and then the other thing to consider is that ifs does not have as large of an install base or as many customers as some of the other organizations your options in the top 10 so that may not be a deal-breaker for you but something to be aware of as well so with those strengths and weaknesses in mind ifs lands at number six on our list

5 HighJump

coming at number five on our list is a company called high jump they're a supply chain management system and product that offers not just basic supply chain but they're very strong and warehouse management so companies that have complex warehouse management needs such as wave picking and advanced labor tracking and things of that nature we'll find that high jump could be a good option the other interesting thing about high jump is they were recently acquired by a company called Korver Korver's a company that specializes in supply chain and distribution types of software and they also provide some capabilities and functionality through that parent company around freight and logistics and shipping and some other very specialized needs so companies that have complex global supply chain and logistics and freight and shipping types of needs may find that high jump along with its parent company's product offering could be a great fit we typically see high jump being used by smaller to mid-size organizations we don't see a lot of big global complex supply chain types of organizations using high jump but companies that have fairly basic distribution and overall supply chain needs tend to do pretty well with with high jump the other downside of high jump is that we've had a lot of clients comment that the software seems expensive relative to its overall capabilities and certainly we've seen through our negotiation process that that can be true however having said that every vendor can be negotiated with and many of these costs can be brought down but with all these things in mind that's enough to land high jump at number five on our list

4 BlueYonder

coming into number four on our list is blue yonder which used to be called JTA and this is a product that's been around for a long time very specialized niche focus solution but with a big install base a lot of supply chains globally are using JTA or blue yonder some of the things that make blue yonder unique are that in addition to having basic and kind of your normal supply chain type of functionality it's also very strong at sales and operations planning so companies that are sales driven and need that back-office and supply chain visibility through their sales staff as part of the Sales and Operations planning process will find that blue yonder can be a great solution so that's one of the things that's pretty unique about the product and if you're in a situation where that's a value you may want to actually bump up blue yonder on your on your short list blue yonder is very common in retail so we tend to see companies that are in retail or companies that are distributing to retail organizations tend to find value in the product it also handles workforce management very well so that's something that not all of the other products in the top 10 list do well so if you have a large workforce and scheduling is a big challenge for you as far as either in the warehouse or other parts of your supply chain functions workforce management can be an important parts and an important value of what the product brings it also does manufacturing a shop floor planning so while it is specialized in supply chain management there's not that sort of disparate handoff to the shop floor like many of the other products in our top ten may have so it handles integrated within the product the shop floor and manufacturing aspect of your business and obviously if you are a

manufacturer that could be a value to you as well blue yonder tends to have a larger ecosystem than some of the other products in our top ten list so there are more consultants more resources more implementers out there it's a more common skill set so it's a little bit easier to find people that know the product and there's a large install base to a lot of big companies are using the product and it's and it's very commonly used so that all combined can make it very appealing to organizations that are considering supply chain management software probably the biggest downside for bigger companies that might be considering blue yonder is that while it does a lot of things that the other supply chain management systems don't do it still isn't a full ERP system in terms of having financials and full-blown inventory management and CRM capabilities and things of that nature it still is fairly focused on supply chain management with some South floor and manufacturing automation as well but it typically requires some sort of back-end or back-office type of system to handle things like CRM and financials and HCM and things of that nature but having said all that that's enough tool and blue yonder number four on our list

3 ORACLE CLOUD ERP

coming in number three on our list is Oracle ERP cloud or Oracle supply chain management cloud like some of the other products in the top ten lists Oracle provides a full-blown ERP solution but it tends to be very strong in supply chain and its supply chain modules within the technology are very strong and very mature probably Oracle's biggest advantage especially if you're a larger organization that values flexibility is it Oracle tends to be a more flexible product than a lot of the other systems in

our top 10 list particularly if you're looking at s AP or NetSuite or some other products that are harder to change to fit what your needs are what your business our Oracle tends to be the more flexible of those larger types of solutions and it provides the full-blown breadth of capability that you might need outside of your supply chain as well so things like HCM and financials and customer relationship management and other types of functions outside of supply chain another strength of Oracle ERP cloud is the analytical capabilities so anything to do with business intelligence or reporting or getting data out of the system or just having visibility into your supply chain that tends to be a big strength of Oracle products in general and their supply chain management and ERP solution is no different so if you're looking for a product that not only handles your supply chain management needs and gives you the flexibility to to modify and pivot and change your supply chain as you need to but also address some of the other needs within your business Oracle ERP cloud can be a great solution for you

2 nexuS

coming in at number two on our list is in for cloud suite along with Nexus two products from the same company tightly integrated for all intents and purposes could call it the same software but the reason we call it out is because they provide a breadth of capabilities to support some more complex in broader supply chain needs now like Oracle and SAP and some of the more ERP types of systems in our top ten list infor provides a complete ERP solution that provides everything from not just supply chain but financials and CRM and human capital management and other types of functionality but as it relates to supply chain in particular it's very

strong most companies that we see implementing in for cloud Suite happen to be manufacturing and distribution in global supply chain types of organizations so it's a product that can scale up to the largest organizations but it's commonly used by mid-market companies as well if you're a smaller organization it may be a bit complex and overkill for your needs but if you're in the mid market and a bigger organization in for cloud Suite along with Nexus can be a great option now one of the really unique factors of the infor offering and supply chain management is Nexus and they have this control center they uses predictive analytics and business intelligence and just overall data analysis to try and pick up on signals in your supply chain so that you can address and pivot on those signals so that's something that's pretty unique in terms of not just being able to track what's going on in your supply chain real time right now and not just being able to look in the past of what's happening also being able to look at and anticipate potential problems or bottlenecks in your supply chain so you can improve throughput or optimize your procurement cost or optimize your cycle times or whatever the case may be that whole Nexus platform is a pretty unique and in a pretty cool way that we've seen organizations optimize their supply chains for the future another example of a difference with the infor supply chain management solution is the ability to really manage working capital to allow you more from a financial perspective to look at your supply chain and be able to maximum as your cash flow or optimize how you're paying suppliers when you're paying suppliers and that sort of thing so it gets back to not only providing a broader ERP system that provides financial capability but it provides financial capabilities specific to supply chain management needs and supply chain optimization so for all those

reasons that's enough to land in for cloud suite and Nexus and number two honors



coming in number one on our list is Manhattan Associates a company that's been around for a long time providing supply chain management solutions to organizations they're big in retail grocery distribution pretty large organizations with a lot of different locations of global supply chains lots of different suppliers spread out throughout the world that's the type of organization that tends to benefit from and to value the software of Manhattan associates it's also very strong in logistics and transportation so when you look at how you get your products from point A to point B or from the port to your warehouse to the stores that you might be selling to or whatever the case may be Manhattan Associates is very good at tracking the entire supply chain and helping you optimize the entire supply chain it's also a company and a product that's very well known for for innovation there's a lot of innovative stuff that they're doing as an organization and with the product as it relates to artificial intelligence and Internet of Things and overall machine learning things of that nature so there's a lot happening there with the products and part of that is because they are such a specialized company and they tend to deal with the most complex global supply chains so those two things combined allow them to really focus their R&D efforts on those types of innovations that can help improve your supply chain in the longer term the other thing that our clients tend to like about the product is that it's dotnet based which may not mean a lot to you if you're not an IT person but

what that means it's an open flexible solution so you can integrate it easier with other systems it has predefined integration with s AP for example in Microsoft Dynamics for example if you need another system to support your back-office ERP and financial system it can integrate very well with those other systems they also provide multiple deployment options so they have a lot of companies believe it or not that are still on premise some of them are still using IBM iSeries some of them are moving to the clouds so they have multiple deployment options of ways that you can consume their software depending on who you are and what you're trying to accomplish now the biggest weaknesses of the product are things that should be considered as well first of all it's not a full-blown ERP system like I said so if you're a big company big global supply chain might be a great fit for you but you're also gonna have to look At what is our back-office erp system going to need to be to support that how are we gonna integrate that how/s the data going to flow and that can I add a layer of complexity to the implementation that you should be aware of the other thing to be aware of are that most of the implementations are handled directly through Manhattan associates so there's not a lot of partners out there they're also supporting the product so it sort of creates this single point of failure or potential failure and that you have to use for the most part use their resources and their people for the implementation so those are a couple of downside risk to be aware of having said all of that that's enough to land Manhattan associates in number one on our list

TOP 10 MARKETING AUTOMATION SOFTWARE PLATFORMS



10 engagebay

Coming in at number 10 is a product called EngageBay. EngageBay is in our top 10 list because it's a platform that provides a robust marketing automation tool set including a robust social media marketing tool compared to other systems in the market and also has a high lead conversion rate for landing pages. EngageBay can be purchased piece by piece, which allows a company to grow into the product as your needs evolve.

The downside of EngageBay and some of the things that are holding it back from being higher in our top 10 list include fewer templates to be able to drag and drop and create out-of-the-box capabilities compared to other systems. It also has limited troubleshooting documentation as well as limited analytics and again this is all relative to other systems out there in the marketplace.

9 sendinblue

Coming in at number nine is a product called Sendinblue. Sendinblue has a number of advantages including the fact that it has a free trial version that you can try and that free trial version is actually a lot more robust than some of the other systems in the marketplace. Sendinblue is effective for both small and large businesses and it has a number of drag and drop, out of the box templates, that can be used to automate your marketing. Finally it has pretty robust segmentation and is effective in the filtering of your contacts in your contact list so you can really target your markets in a very surgical and focused way.

The main disadvantages of Sendinblue are the fact that it has fairly limited CRM capabilities. Even though we're talking about Marketing Automation in this top 10 list, many of the other systems we talk about in the top 10 list also include CRM functions. Sendinblue does not have a very robust CRM or sales automation capabilities, so, if that's important to you, it may not be the best fit for your business. Finally, Sendinblue, when compared to other bigger software vendors in our top 10 list, doesn't have the same level of customer support that a lot of those that are higher in our list do, so, take this in to account when considering this platform.

8 ActiveCampaign >

Coming in at number eight is ActiveCampaign. ActiveCampaign is on our list largely because it's a cost-effective solution. It's something that can be deployed at a lower cost than many of the others in our top 10 list. ActiveCampaign also has a large number of active users and partners as well, meaning that there's more support and more resources available that integrate with the solution. Furthermore, ActiveCampaign offers free migration, help services and it also leverages machine learning to make better use of and provide better data insights.

The downside of the product include things like slow loading times and slower response times compared to other systems in our list. The free plan is fairly limited when you compare it to other trial versions that other systems provide and it's been known to have a steeper learning curve than other systems in our top 10 list.

7 monday.com

Coming in at number seven is monday.com. Monday.com is not only a marketing automation tool but it's actually more commonly known as a project management <https://www.thirdstageconsulting.com/top-10-crm-systems/> tool, so it's good at managing workflows and Integrations across workflows. This makes Monday.com very beneficial to your marketing efforts. Monday.com is one of the bigger vendors in the top 10 list so there's a number of more robust functions that are available within the product. Features like pre-defined templates, predefined workflows and other features that might benefit your organization.

The downside risk of Monday.com is twofold. First and foremost, as we mentioned before, it's known as more of a project management tool so you're getting a lot of functionality and capability that you may not need if you're only using it for marketing automation. That can create a certain level of complexity and that leads to the second point which is the steep learning curve. Monday.com has a steeper learning curve than some of the other systems in the marketplace, especially if you're not used to using project management software.

6 salesforce

Coming in at number six on our list is Salesforce. Salesforce is a widely used and adopted CRM management software that also contains marketing automation capabilities. Salesforce is largely used by larger organizations, so if you're a large marketing department that wants to integrate with the sales pipeline management that Salesforce and

other CRM systems can provide, then Salesforce marketing automation could be a great option for your business. Salesforce has the advantage of having a plethora of third-party bolt-ons and add-ons to the software because it allows third-party developers to develop third-party apps within their platform. Salesforce has a lot of capabilities that are supported by a pretty robust ecosystem and again if you have larger, more robust marketing automation needs, Salesforce and its related sister products can be a great solution for your company.

Some of the downside risk of Salesforce includes the fact that it's very robust and very complex and it might be Overkill. It also may be too costly for a smaller or mid-size organization. Salesforce is also known to have more limited reporting when it comes to marketing automation when you compare it to other marketing automation systems in our top 10 list. Last, the Outlook plugin that people will commonly use to plug Salesforce into their Outlook email, is oftentimes glitchy and known to be glitchy in the marketplace.

5 ORACLE | eloqua.

Coming in at number five is Oracle Eloqua. Oracle Eloqua is another solution just like Salesforce that's commonly used by larger organizations. More specifically, it's commonly used by larger organizations that are also using one of Oracle's other products like Oracle ERP Cloud or Oracle Supply Chain. Regardless of whether or not you're using other Oracle systems, Oracle Eloqua can be a great tool for marketing automation. The main advantages of Oracle Eloqua include the fact that it has a huge amount of robust workflows and capabilities and processes that can be

great especially for a larger organization. Eloqua integrates well with other tools including ERP and other back office systems. Oracle Eloqua's pricing is not based on the database or contact size, which most systems in our top 10 list are, so, in other words, you can grow your contact list as large as you would like and you're not going to continuously pay more for increasing that database.

The main downside of Oracle Eloqua is that because it is a robust and complex system, it can be harder to learn and the learning curve is a bit steeper. The Oracle Eloqua user interface isn't as user friendly as some of the other systems in our top 10 list and some of the reporting capabilities are a bit limited when you compare them to the other marketing focused systems in our top 10 list.

4 Constant Contact

Coming in at number four is Constant Contact. Constant Contact is actually a great entry level marketing automation tool that's used by a lot of small businesses. The price is right, it gets the job done and it allows you to interact with your customers, create landing pages and send marketing emails. Constant Contact provides all the basic marketing automations that most small businesses need and Constant Contact comes in at a lower cost than some of the other systems in our top 10 list. As inexpensive as Constant Contact is, it is surprisingly flexible, easy to use and provides a fairly robust set of capabilities.

The main downside of Constant Contact is that it lacks some of the robust capabilities of other systems in the marketplace, so, as your organization grows you may find that you quickly

outgrow the capabilities of Constant Contact. If you're just starting out or if you have fairly vanilla marketing automation needs Constant Contact can be a great fit.

3 Pardo

Coming at number three is Pardo. Pardo is something that's commonly used for marketing in the B2B space and not as much with B2C. Pardo is known to have excellent lead engagement and follow-up via email features. Pardo also has a fairly robust visual workflow editor that allows you to modify workflows to fit your specific needs.

The downside risks of Pardo include the fact that there's only a limited number of third-party bolt-ons. Pardo has relatively limited reporting when you compare it to other systems in the marketplace and the the product has a way of adding additional cost to your subscription as you add on additional features within the product Suite.

2 Marketo

Coming in at number two is Marketo. Marketo is a solution focused on smaller marketing needs that are not quite as robust as some of the systems that we've discussed, so it's a good balance for organizations that are in the mid-Market. Marketo's strengths include the fact that it can enable robust behavior tracking for your contacts within your marketing database, there's a lot of web connections for social, email and other communication methods. Lastly, it's easy to integrate with other systems in the marketplace.

Marketo does have some downsides that include the fact that it's not as good at managing or processing larger marketing lists, the analytics and reporting is not as robust as other systems in the marketplace and it requires a fair amount of training when compared to some of the other more simplistic marketing automation systems in our top 10 list.

1 HubSpot

Coming in at number one is HubSpot. Hubspot is actually the system that we use for marketing automation here at Third Stage Consulting, which is part of why we rank it at number one. There's a number of reasons that Hubspot comes in at the first spot on our list. First of all the ease of use is pretty unparalleled, it's really easy to use, it's easy to set up marketing campaigns and workflows. Hubspot has a CRM module that's pretty simplistic but it gets the job done and it might be enough for your CRM and pipeline management needs. Additionally Hubspot allows you to test their CRM system for free so you can actually go to HubSpot and use the CRM tool for free to see if it fits your needs. If you like the CRM system you can then pay to use the marketing automation as well so it's a great way to try the product first and in addition it has highly customizable workflows and integrates well with other systems like CRM systems and even ERP systems.

The downside of HubSpot is the fact that it can be costly. It can cost much more than many of the other systems in the marketplace, especially if you don't need all the capabilities that it provides and some of the customer service has been known

to be challenging or not as strong as some of the other systems in the marketplace but having said all that that's why HubSpot is number one in our top 10 list of marketing automation software.

TOP BUSINESS INTELLIGENCE



10 **MicroStrategy**

coming in number 10 is microstrategy a system that's been around for a long time it's a great business intelligence tool that many organizations use and the reason it comes in at number 10 is for a few reasons first of all it provides very strong dashboards so it's easy to provide summarize dashboard capability that you might be looking for and it also allows you to do so in a way that's very centralized you can consolidate data across your enterprise especially if you're a multinational and you have different business units different locations it allows you to have visibility in a centralized sort of way it also provides real-time data analytics so as data is accumulating and as performance is changing and happening you can actually have real-time data visibility into what's happening in your operations and you'll have that sort of transparency it's also highly customizable so it's a product that can be molded to fit your specific needs but at the same time it's also easy to use out of the box if you decide not to customize it so you sort of get the best of both worlds there you can either use it as it was built or if you have more complex needs or more unique needs it's relatively easy to customize and then finally the mobile app is very user friendly compared to some of the other systems in our top 10 list so that if you're looking for mobile capabilities that can be a very strong feature for the product now just as is the case with all of the systems in our top 10 list there are some downsides to this product as well first of all the administration of the product is not as intuitive and user-friendly as some of the other systems in our top 10 list second of all the licensing cost is relatively expensive when you compare it to other options in the market so

it is going to be the more expensive or one of the more expensive options there's incompatibilities between versions so if you're using different versions in different parts of your organizations or if you upgrade to a newer version it can be difficult to learn and it can be difficult to deploy throughout your organization and finally the development support provided by the vendor is not as strong as some of the Other systems in the marketplace but all that being said is enough to land microstrategy at number 10 on our list

9 **SAP Business Objects**

coming in number nine on our list is sap business objects business objects is a product that sap bought a few years ago and it can be used by sap customers and even if you're not an sap customer it can still be deployed by your organization one thing i'll note just as a caveat is that even if you're using sap s 4hana business objects is not the only business intelligence product that you can use but it's commonly sold along with s4hana now some of the reasons why business objects comes in number nine on our list is partially because it provides a full breadth of business intelligence capabilities so there's a lot of robust breadth to what sorts of analytics and predictive analytics business intelligence that you can do with business objects it also has a very strong user interface or graphical user interface it's easy to share information via microsoft office so it integrates pretty well with microsoft office if you're an office 365 shop it also provides self-service tools so if you're looking for people outside of your it department to be able to create dashboards and reports and business intelligence capabilities this is a product that's very strong in that area and if you're an sap s4hana

user it integrates very well with s4hana although like i said before you don't have to be an sap customer or an s4hana erp user to be able to get the full capabilities of the product it provides a high number of data source integrations so all types of systems especially if you have legacy systems or other systems outside of your core enterprise technologies it can provide from a multitude of different sources to help integrate and tie together and consolidate all that data and finally it has a fair amount of flexibility when compared to other systems in the marketplace so it's another one that can be tailored to fit the needs of your organization now what about the downside risks or the things that don't work as well with business objects first of all it's a more expensive option it's going to be a higher cost option in the marketplace much like many of sap products are but again if you're looking for broader and more robust capability it might be worth it it might be more business value there but the cost is higher and that's something to be aware of there have been complaints among our client base that the customer support isn't strong and that there's something lacking in the level of customer support provided by business objects when compared to other products in the market and finally there have been some performance issues so larger transaction loads can slow the software down the reporting performance and quality has been questionable at times with some of our clients so those are some of the things to consider as you also look at the strengths of the product but overall that's enough to land business objects at number nine on our list



coming in number eight on our list is ibm cognos another common business intelligence tool in the marketplace some of the strengths of this product include the ability to have multiple queries in a single report there's an ability to create shortcuts with the product so if you want shortcuts for reusable or repeated reports that you run on a recurring basis that can be a strong capability there's customizable dashboards so if you're looking for specific visual representations or dashboards for specific sets of data it can be very strong in that area in addition reporting and formats of the reporting can be visualized and presented in different ways and it also provides a separate test sandbox too so separate tests and production sandboxes so you can really test out some of the business intelligence capabilities before you roll it out to larger populations now as far as the downside risks of the product or the weaknesses of the product there's a few of them first of all if you're looking for auto modeling if you're looking to auto model data sets and those sorts of reports that's a weakness of the product that other products might provide better the customization is relatively difficult and expensive so it's going to be a little bit more complex to maintain and can create some complexities and cost issues for some organizations the enterprise price points are relatively high as well so buying the product and deploying the product is more costly than some of the other bi tools in the marketplace and finally the learning curve is relatively steep so it's not as easy to learn it's not as easy to maintain as some of the other bi tools in the market and that's enough to land ibm cognos at number eight on our list



coming in number seven on our list is a product called tibco tibco is another commonly used bi tool even if you haven't heard of it and some of the strengths of the product include the fact that it's highly customizable it's easy to use it's robust there's a lot of broad capabilities that the product provides it's easy to map data so as you look to multiple sources and as you look at how you're going to tie data together across multiple sources it's very strong in that area and finally the tibco vendor also provides excellent customer service we found compared to other systems in the marketplace so if those things are important to you then tibco could be something you consider now as far as the downside risk there's a few of them first the cloud offering is relatively immature compared to some of the other on-premise and more established types of systems out there in the bi space so that's something to consider there's also an issue of synchronization and relatively slow synchronization from multiple data sources so if you find that it's important to your organization to have real-time data analysis it's going to be a bit of a lag if you have multiple data sources or can be a bit of a lag compared to other systems in the market and there have also been issues with bugs and errors with the product as well and part of that is because of the complexity that the product requires but having said all that that's enough to land tibco at number seven on our list

6

ORACLE®
ENTERPRISE PERFORMANCE
MANAGEMENT

coming in at number six is oracle epm or enterprise performance management and oracle has always been pretty strong in the business intelligence space back to the days of when they had acquired hyperion that was a common system that was used for business intelligence purposes and ever since then they've been very strong in the space and now with enterprise performance management they're still just as strong as ever and this is a product that's used often by larger enterprises some of the strengths of the product include a few things compared to some of the more scalable and robust systems in the market it's relatively easy to set up and configure there's a relative ease of use that can make it easier to use especially outside of it support if that's important to you compared to other systems in the market there's relatively low downtime the reports are highly customizable so there's a lot of flexibility in the ways you can create the reports and it's a complete business intelligence solution so especially when you combine it with the core oracle cloud erp solution or other oracle products like crm and supply chain management it ties and integrates really well with those systems as well as even non-oracle products but overall the oracle epm solution provides very broad bi tools and capabilities even if you're not an existing oracle customer now there's a few downside risks as well one of them is cost it is one of the more costly one of the more expensive bi tools in the marketplace you can only deploy epm via the cloud now whereas in the past you used to be able to deploy on-premise if that was important to you so if you have a lot of on-premise solutions that you're trying to tie together with data from the cloud that can be a

challenge as well although it can be done and finally the user interface isn't as strong and intuitive as some of the other systems in the marketplace but all this being said is enough to land oracle epm and number six on our list

5

**Information
Builders**

coming in number five on our list is a product called information builders and information builders is one of the more easier to use products in the marketplace it's highly configurable and easy to use compared to other bi tools the reporting is highly customizable too so if you need more than simple configuration you can actually customize and do more extensive changes to the bi tools to fit your needs it's also easy to integrate with other platforms too via web focus so those are some of the strengths of the product now as far as the weaknesses there's a few of them first of all the newer versions of the product restrict some of the coding abilities and capabilities that you have available to you second of all it's difficult to export files in different formats it also has a bit of an outdated user interface so it's not as intuitive as some of the other systems in the marketplace and finally we found that the customer support isn't as strong as some of the other bi vendors in the marketplace but all that being said that's enough to land information builders at number five on our list coming in number four on our list is a product called sisense and this is another product that has a lot of larger organizations that are deploying the product as well as mid-size organizations as well now some of the strengths of the product include the fact that it's highly customizable so it's another product that can be tailored to fit the needs of your bi requirements it's also a highly innovative vendor

so sci-sense invests a lot in r d and innovation so it's considered one of the more innovative products in the bi space it has a very solid architecture too so if you're looking to integrate with other solutions and tie together multiple data sources across multiple platforms that's something that's very strong and very capable of doing and finally they're known for their customer support at sisense so that's another consideration as you think about what your needs are for your bi tool now as far as the downside there's a few of them as well first is that there's a steep learning curve which is the case with the more robust and the more complex bi tools out there but that's the price you pay for having that level of robustness and complexity to go along with that the product also requires you to be running on a windows server so you must be running the products on a windows server in order to support the product so that may or may not be a problem depending on what your it shop looks like or what your back office infrastructure looks like and then finally the out of the box reporting and visualizations is a bit basic so it's going to require you to do more of the manipulation and more of the creation of what you want those reports to be and some of the other systems or the other bi tools in the market have stronger capabilities when it comes to Out-of-the-box reports and bi tools that you can just use off the shelf so all those things being considered are enough to land sisense in number four on our list

3

 **tableau®**

coming in number three on our list is a product called tableau one of the more commonly known bi tools in the marketplace it's used by thousands of organizations throughout the world and part of the reason why tableau rates so high on our top

10 list is partially because the visualization is so strong there's so many different things you can do with the data visualization which is important to a lot of organizations there's also a simplicity and ease of use that makes it adoptable and highly leveraged by organizations they use this product as its bi tool it allows you to leverage multiple data sources so if you've got multiple systems or a plethora of systems you're trying to tie together for multiple data sources tableau can be a great tool for that the mobile aspect of tableau is very strong as well so if you're trying to look at mobile devices or use mobile devices to access these reports and visualizations tableau is very strong at that and then finally there's a very strong community a strong ecosystem that supports tableau so if you're looking for support or peers or consultants whatever you may need that can support the product tableau is very strong so those are some of the strengths of the product now as far as the weaknesses there's a few of them as well first of all the cost structure is relatively high it's going to cost you more than some of the other systems in the marketplace the cost is relatively inflexible too so in terms of what types of licensing we can negotiate for our clients we found that tableau is actually more difficult to negotiate and less likely to provide price breaks and more reasonable pricing and then finally probably the biggest liability of using tableau is just the complexity and the support required from your it department or from some sort of i.t resource to help support and maintain the system longer term so it's something that just requires a certain degree of sophistication and maturity within your organization within your i.t function to make sure you can support it so if you're a smaller organization that might be a big deal or a deal breaker but if you're a larger organization with a fairly robust or sophisticated i.t staff that may not be as much of an

issue but certainly something you want to consider as you consider the product so all that being said that's enough to land tableau at number three on our list



coming at number two on our list is another well-known bi provider and that is sas an sas is a product that is relatively easy to use and relatively intuitive compared to some of the other bi tools in our ranking and that's not just in terms of creating the visualizations and the reports that you might be looking for but also when it comes to debugging it's relatively easy to work your way through some of the technical complexities and technical issues that you might run into when deploying the product data security is also very strong with the product as well so if you're looking to really lock down data and make sure you manage and control how data is deployed and who can see what that's something that sas is very good at and there's also a plethora of tested algorithms too so if you're looking for predictive analytics for example there's algorithms built within the product that can help you deploy those sorts of analytics so those are some of the strengths of the products but let's talk about some of the weaknesses as well like some of the other more robust systems in the marketplace this is one of the more high cost solutions so sas is generally going to cost you more than some of the other systems in the marketplace if you're looking for text to mining that's something else that can be difficult if you're looking to grab qualitative text and translate that into some sort of visualization or some sort of report or analytic that's something that's fairly limited with sas and then finally if you're looking for graphic representation and creating those

really visually appealing dashboards that's not sas's strength at least relative to other systems in our top 10 list but all that being said that's enough to land sas at number two on our list of top 10 bi tools



coming in at number one on our list is microsoft power bi and the biggest reason why power bi is number one on our list is simply the adoption rate of the product that along with the fact that it integrates so well with microsoft products and so many organizations out there use microsoft products so those two things alone are enough to propel it up toward the top of the list but there's also other strengths as well that are worth considering for example it's also more cost effective than many of the providers in the marketplace so compared to some of the other bi tools we've talked about so far in this top 10 list it is relatively cost effective the product itself is very easy to use much like many of microsoft products and it's also a familiar look and feel too just because it's something that people tend to intuitively pick up because it is a microsoft product and it tends to have more of that microsoft look and feel which a lot of people feel very comfortable with and in addition to integrating with microsoft products it can integrate with hundreds of different data sources even if they're non microsoft data sources so that's another strength of the product and finally some of the custom visualizations that we've seen our clients do with power bi is extremely powerful so that's something worth considering as well now even though it's number one on our list microsoft power bi also has its weaknesses as well things that may or may not make a difference in your evaluation of potential bi tools first of all the user interface is a

bit bulky even though there is a familiarity to it it's relatively easy to use some of it is not as intuitive as you might expect from a microsoft product so that's one consideration the other big consideration is that data handling capacity for the free version is relatively limited so if you're looking for more complex types of capabilities within that area that's something that's relatively limited if you're using the free version but if you're working outside of the free version the data visualization capabilities are just as strong if not stronger than some of the other systems in our top ten list so all those things being considered are enough to land and microsoft power bi number one on our list

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