

| ERP VENDORS |



ERP
TODAY

annual vendor review 2022

Advanced
Epicor
IFS
Infor
Microsoft

Oracle
QAD
SAP
Unit4
Workday

ERP's role has changed – and finally the vendors are listening



This year's vendor report takes a close look at the 10 key ERP vendors that are suited to mid-market and enterprise customers. **BY PAUL ESHERWOOD**

I am repeatedly asked, "When are you going to change the name of your magazine?"

I always assume those posing the question are either suggesting that we should change our name because we don't just talk about ERP. Or, that ERP is such an unfashionable topic that we would be better served with a more dynamic title like 'enterprise software cloud digital transformation edge acceleration automation today'.

I always remind those who decry ERP that without it virtually none of those other sexier technologies would be relevant.

There is no doubt that the ERP market has changed: SaaS and cloud infrastructure has breathed new life into what was a very dry, transactional system of record. ERP projects are planned differently - gone are the days when any right-minded exec would sign off on a three year plan and sit back to wait for the results. ERP is now consumed in bite-sized pieces that can be implemented in relatively quick order to deliver a return on investment in months rather than years.

And ERP as a concept has moved away from being a series of appli-

cations that serve a particular line of business to become a dynamic platform from which enterprises can innovate. Modular and composable are terms that are bandied by vendors to demonstrate the absence of a monolith, encouraging ERP buyers to consider ERP in more friendly terms.

Today, the sensible approach to ERP design is for a simple clean core with an open architecture that allows the business to extend and innovate without compromising its foundations. Custom code is being consigned to the bin in favour of microservices architectures and no/low-code tools that connect horizontal and vertical functions building workflows and creating contemporary solutions to age-old ERP problems.

However, workflow platforms, collaboration tools and automation may be where the money is right now, but enterprise leaders must remember that transformation without an appropriate ERP backbone is analogous to building your dream house on wonky foundations. The groundworks, reinforced concrete and pilings that you never see are as important as the marble floors and shiny kitchen worktops.

ERP remains the foundation on

which virtually all transformation is possible. Its value to a business has increased rather than decreased as businesses need data more than ever to execute in a digital world. However, ERP's role within an organisation is changing; it used to be the case that the ERP was the 'be-all and end-all' - it was the beating heart of the organisation and its tentacles spread through the business like an out of control octopus. Traditional vendors enjoyed a vice-like grip on customers as ERPs were inextricably linked to every aspect of an enterprise's operations. Thankfully, vendors and customers have come to a new mutual understanding and ERP is rightly less obtrusive now than ever.

I wrote more than a year ago, "This evolution in narrative could be a blow to the ego for some vendors because it takes core ERP out of the limelight and replaces it with a completely new message. The ERP industry has grown up being front and centre of an enterprise but now it has to respectfully fade into the background and become a silent service."

I think the message is finally hitting home.

A word about our partners

ERP TODAY has collaborated again with Lumenia on its third 'Annual ERP Vendor Review'. Lumenia is an independent boutique consultancy specialising in ERP and business systems strategy, vendor selection and deployment. Despite their size they are one of the most respected vendor-agnostic authorities of ERP knowledge in Europe. I have worked with the Lumenia team for over a decade and their expertise and impartial acumen sets them apart from all other sources of ERP know-how. Lumenia does not sell software and their independence means that they have no vested interest in pushing clients towards particular software solutions. They focus instead on how enterprise applications can best be used to transform business processes and deliver measurable business benefit to their clients, whether this is through the deployment of new software or by getting more value from systems that are already in use. Lumenia has developed unique methodologies that allow clients to undertake ERP and business change programmes using structured processes that maximise the likelihood of project success by promoting business ownership, minimising risk and controlling cost, while ensuring that planned business benefits are realised.

None of the vendors have paid for their inclusion and the analysis which follows is our collective independent view of the respective offerings.



John Donagher



Ian O'Toole

Lumenia Consulting is delighted to partner once again with ERP Today in the production of this annual ERP vendor review. In advance of the vendor reviews, we would like to share a few thoughts on the ERP market in general. We have selected four trends to highlight this year.

Securing Supply Chains

During the first year of the pandemic the focus for most enterprise technology vendors was on enabling business continuity in remote environments, fostering connectivity and accelerating digital initiatives. ERP vendors were no different in this regard. Over the second year of the pandemic those achievements and initiatives, still in play for many, were built on with an additional focus on securing fragile and disrupted supply chains. Organisations in many sectors needed to closely monitor and re-organise supply chains to account for such diverse external factors as temporary lockdown-induced supply interruptions; a need for agile reaction to massive demand growth, for some, and sudden drops for others; and a re-drawing of political and trading relationships impacting the viability of some supply routes. The ERP market has reacted with an increased focus on extended supply chain analytics, AI driven agility and procurement spend control.

Microsoft's D365 Supply Chain Insights and enhancements to Oracle's Fusion Procurement Cloud are just two examples of this trend.

ESG and Sustainability

A second area of development for ERP vendors that we expect to see much more of in the near term is an increasing focus on supporting their customers' environmental, social and governance needs.

ERP customers need to ensure and evidence their sustainability credentials, whether motivated by altruism, impacts of the climate crisis, the demands of green investment funds, regulatory requirements or pressure from their own customers. At Lumenia we are seeing this come up more and more when helping organisations determine their solution requirements.

Some ERP vendors are ahead of the curve, SAP's Product Footprint Management solution being one example. Others are introducing incremental additional capabilities in this area and we expect to see that trend accelerate over the coming years.

Open Architectures

The transition to open architectures has been on the agenda for a long time now and continues to be important. All of the vendors covered in this report have moved in that direction, some for quite a while now and the rest catching up with a number of re-platforming releases over the past two years. Initially this enabled easier integration to other packaged solutions. Increasingly that openness has also allowed ERP business processes to extend beyond ERP.

Optimised and Extended Business Processes

A revolution of sorts, enabled by open architectures, has been gathering steam. Optimising and extending the reach of ERP business processes is being enabled by a variety of tools.

These range from low code/no code solutions to business process diagnostic and orchestration solutions. An example of the former is Microsoft's Power platform, a suite of low-code/no-code applications, which allows organisations to build and connect custom workflows and apps to ERP with minimal complexity. In the latter category, SAP's Business Process Intelligence from Signavio supports business process improvement by providing automated analysis of deployed business processes, identification of improvement opportunities and orchestration and governance of business process management initiatives. Another example is Workday Everywhere, which allows employees to quickly access Workday in their natural flow of work in digital workspaces such as Teams or Slack.

Many of the other ERP solution vendors in this report also have tools and capabilities to support the extension and optimisation of ERP business processes. These are now extending beyond basic workflow tools into much more open platforms. Beyond the ERP market, a range of solutions, from vendors such as OutSystems and ServiceNow, are providing alternative routes to custom workflow deployment and business process automation. Far from diminishing the importance of ERP to modern organisations such developments may provide opportunities for it to enable and support previously unattainable automation.



Advanced is one of the largest providers of business software and services based in the UK. They boast over 25,000 UK customers across a very broad spectrum of sectors and organisation sizes. Their product range stretches beyond what would traditionally be considered ERP to cover line-of-business and sector-specific solutions across a broad range of business areas. Their multi market solutions include Cloud Financials, Business Cloud Essentials, Cloud HR, Flexipay, Workforce Management, Clear Review and Cloud Marketplace. Advanced also provides a unified platform, MyWorkplace, which allows multiple products from their HR and financials portfolios to be deployed in one user interface with a single sign-on. Like many vendors, Advanced facilitates the extension of their core products with a variety of additional apps and widgets. Advanced products are delivered in the cloud, on hybrid models and on-premise. They offer a full range of managed services to support their applications and infrastructure.

Key products

Mid to enterprise

Cloud Financials (Financial Management), Cloud HR (Employee Management), Flexipay (Payroll), Clear Review (Performance Management), TMS (Time & Attendance), Cloud Marketplace (online supplier catalogue), Contract & Tender Management (Procurement)

Combined with vertical solutions

Cloud Engage (membership & fundraising), DRS and Work Hub (Social Housing and Field Service - Resource Scheduling & Workforce Management), TALENT (Sports - Ticketing), Staffplan (Social Care - Rostering) and Care Director (Social Care - Case Management), ProSuite and Cloud School (MIS - Education), Smart Apprentices (Colleges), bksb (Education - private organisations), Docman (Document Management) - as well as other niche Legal and Health solutions.

LINES OF BUSINESS

Public, mid and lower mid-market:

Finance, HR/payroll, procurement, document management, vertical solutions for third sector, membership and sports.

Health and care: Out-of-hours, urgent and unplanned care, document management / workflow for primary and secondary care, EHR community and clinical decision support.

Legal: Case management solutions

for solicitors and barristers, plus legal forms software.

Education: Student information systems for schools, academies / Multi Academy Trusts, further education and private training providers.

Business type suitability

Advanced's broad product range means that there are solutions within the portfolio that are suitable for many types of organisations of different scales with different requirements. Of their 'horizontal' back-office solutions - i.e. ones that are broadly applicable across many business sectors - they offer financial and procurement solutions ranging in suitability from small and medium business up to enterprise level. In the HR space they have a number of enterprise level solutions as well as mid-market and SME offerings including workforce management, time and attendance, payroll and access control. They have broadened their HR offerings further in 2021 with the inclusion of two new eLearning products and the rollout of MyWork-space across their HR customer base.

SIZE OF BUSINESS

- Advanced products are mainly suitable for mid-market customers with some products suitable for large enterprise.

Vertical suitability

While the range of 'horizontal' multi market solutions mentioned above can be found across many sectors and will suit most, Advanced brings a particular fit to an array of vertical and niche markets through a variety of specialist solutions covering such sectors as education, field service management, charities, membership-based organisations, care providers, sports and entertainment, and professional and legal services. These range from core back office solutions to those that address specific HR and workforce management needs, to the niche service delivery and management needs of some of these sectors.



VERTICAL MARKETS

Public and private sector

Legal

Education

Health and care

Third sector

Go-to-Market strategy

Advanced sells and implements directly as well as through a dedicated partner channel. They have 43 active channel resellers in the UK. The size of this channel reflects the breadth of solutions and verticals served and allows Advanced to wrap their solutions in service delivery that is really close to the verticals and customer types served, thus bringing additional value to the core product proposition.

Advanced works with its UK technology channel partners through a programme it calls TruePartner. Its product development teams engage with independent software vendor (ISV) partners to ensure that its cloud product sets facilitate further development by ISVs enabling enhanced product specialisation.

Licensing and pricing

Naturally, Advanced cloud solutions are priced on a subscription model, and this applies to most of their product range. However, some products are also available on more traditional perpetual licence and services model. The number of SaaS customers has increased over 2021 and should continue to do so, as more and more existing customers migrate to newer cloud-based solutions. However, as with many vendors, a significant proportion of the client base is still on a perpetual model, reflecting longevity of tenure in many cases.

Customers

VIRGIN MONEY Virgin Money is an Advanced performance management software customer. As the organisation grew, Virgin Money wanted to revise its approach to feedback and appraisals for staff to encourage growth and development. Advanced's Clear Review product has enabled them

to affect positive changes to the organisational culture.

McCAIN To reduce processing time and human error through the automation of complex calculations, McCain has invested in Advanced's payroll solution, Flexipay. Using Flexipay has enabled the McCain team, across multiple organisations, to operate smoothly and increase accuracy in payroll processing.

WEST MIDLANDS GROWTH COMPANY The West Midlands Growth Company is a long-standing Advanced finance customer. They moved from an on-premise product to Cloud Financials. This has enabled the team to achieve enhanced efficiencies and accuracy around financial reporting. This has improved strategy delivery and performance of the business as a whole, and enables better data-informed decision making.

KEY STRENGTHS OF THE PRODUCT

Given the breadth of solutions available from Advanced, it is impossible to list the benefits of each here. Suffice to say that its very breadth of focus is a key strength. It is not breadth in a 'one-size-fits-all' sense; rather it is in the sense of a wide portfolio of very focussed solutions. This can be attractive to organisations wishing to avoid the square peg/round hole challenge of adapting processes to more generalist solutions. Some of the verticals served by Advanced - legal, education and care provision stand out as examples - are not typically well served by more traditional ERP or back-office solutions, so Advanced can provide particularly strong options here. Advanced continues to add to its solution set having added new eLearning products for second level (bksb) and further education (Smart Apprentices) in 2021 as well as Cloud Trade (document automation) and Isosec (authentication and identity

management for the NHS).

Furthermore, with its portfolio of line-of-business solutions, Advanced is well positioned to have a presence in organisations that also have larger ERP solutions in place.

Although this focus on niche verticals and line-of-business solutions might suggest that Advanced products tend to be used in smaller organisations exclusively, it lists such organisations as the NHS, Deutsche Bank and London City Airport as customers.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

With such a broad range of solutions available from Advanced, deployment considerations vary across the range. However, most Advanced products are now cloud-deployed SaaS solutions and consequently many technical deployment considerations are simplified. In terms of deployment effort, the very fact that the solutions are quite focussed potentially makes for simpler deployments, compared to larger generalist ERP implementations with knock-on impacts from change across end-to-end business processes. MyWorkspace should also allow for easier user adoption by providing a connected and common user experience across many HR and finance solutions.

DEPLOYMENT

Advanced products are mainly deployed in private cloud or hybrid environments. Some are available on public cloud.

EPICOR

Epicor is a US headquartered mid-market provider of ERP and business applications with a focus on manufacturing, distribution and building supply merchants. Epicor is long established and has over 20,000 customers in 150 countries around the world.

It markets six main products in the UK. The Epicor Kinetic platform was launched during 2021, bringing the latest version of the primary Epicor ERP solution with a browser-based user interface accessible from any device, a configurable and guided user experience, artificial intelligence capabilities and built-in social collaboration. This solution, and earlier versions of it, are widely used in manufacturing, distribution and engineering field service businesses. Epicor added Epicor CPQ (configure-price-quote) to its product range in 2021 via the acquisition of KBMax.

Epicor Bistrack targets building supply merchants. Epicor Prophet 21 is an ERP for distribution businesses. Epicor Tropos is a process manufacturing solution and Epicor Advanced MES provides manufacturing execution capability which can complement ERP solutions in manufacturing environments.

Key products

Epicor Kinetic

Epicor BisTrack

Epicor Prophet 21

Epicor Tropos

Epicor Advanced MES

Epicor CPQ

LINES OF BUSINESS

- Manufacturing and operations
- Finance
- Sales
- Inventory management
- Production planning
- Manufacturing execution
- Service management
- Collaboration
- Delivery scheduling



Business type suitability

Across its product range Epicor products serve customers ranging from the very small to the large. The Epicor Kinetic product has historically been positioned as a mid-market solution. Epicor states that it typically works with organisations generating revenues in excess of £25m per year. Epicor Kinetic, in particular, has many implementations in organisations with revenues at multiples of that figure into the hundreds of millions of pounds. To appeal further to larger enterprises, Epicor launched its Cloud Enterprise Services package in 2021. This provides greater control and flexibility to manage complex BOM's and MRP across multiple plants, facilities, and warehouses worldwide on a scalable, flexible and secure cloud platform.

SIZE OF BUSINESS

- Epicor serves customers ranging from the very small to the very large. However, its end-to-end ERP solution is perfectly suited to the needs of the mid-market and upper mid-market. Typically, Epicor works with organisations generating revenues in excess of £25m per year.

Vertical suitability

In the UK, Epicor provides innovative and highly focussed industry productivity solutions to manufacturers, distributors and building supply merchants. Within these sectors, Epicor has customers within many sub-verticals such as: metal fabrication; industrial machinery; plastic and rubber products; plumbing supplies; food and beverage; hi-tech electronics;

VERTICAL MARKETS

Manufacturing

Distributors

Building supply merchants

Metal fabrication

Industrial machinery

Plastic & rubber products

Plumbing supplies

Food & beverage

Hi-Tech electronics

Tooling

Instruments & controls

Fasteners valves & springs

Electrical assembly

Steel stock-holding

Furniture & fixtures

Medical devices

tooling; instruments and controls; fasteners, valves and springs; electrical assembly; steel stock-holding; furniture and fixtures; and medical devices. The addition of Epicor CPQ should provide Epicor with the opportunity to strengthen its appeal to manufacturers seeking to deliver self-service B2B e-commerce through visual product configuration and connected directly to demand planning and production.

Go-to-Market strategy

Epicor sells and implements directly in the UK and also through a focussed partner channel. Epicor lists eight active channel partners in the UK market and claims to have almost 150 resources dedicated to the delivery of Epicor ERP in the UK and Ireland. It has over 200 partners globally. While this channel is well developed, it is not as broad as some of Epicor's larger competitors. Epicor does also have a well-established UK presence itself and supports its prospects in identifying the most suitable partner as well as providing backup expertise when needed. Epicor's channel includes partners that can enhance the depth of vertical experience and can augment core Epicor solutions with add-ons and supplementary products to meet specific customer requirements.

Licensing and pricing

All Epicor products are typically available on a concurrent user basis for most functional areas, with subscriptions licence models available for SaaS cloud implementations. While not completely unique, concurrent user models are less prevalent across the industry. This can be particularly attractive to manufacturers with multiple shifts where concurrency reduces the required user count compared to a named user model. There are some exceptions to this model - for example the HCM elements of the ERP solution are licensed on an FTE basis (as is typical for HR solutions).

Customers

WD-40 COMPANY WD-40 is a globally renowned manufacturer of household products and lubricants. The company encompasses a group of brands featuring a full range of high performance products across maintenance, industrial cleaning, hobbyists and home. The UK headquarters covers Europe, the Middle East, Africa and India with a mixture of regionally based offices and distribution partners throughout the regions. Epicor Kinetic seamlessly integrates additional WD-40 regional operations across Europe and automates order processing, shipping, and invoicing.

BRADFORDS BUILDING SUPPLIES One of the largest independent Builders Merchants in the UK, Bradfords Building Supplies have used Epicor BisTrack to help safely serve customers during the COVID-19 pandemic and convert the delivery process to a touchless 'collect later app'.

PJH GROUP A leading UK distributor of bathrooms, appliances, sinks and taps. PJH Group uses Epicor Prophet 21 to streamline warehousing and distribution operations across its eight sites in the UK, as part of its digital transformation strategy.

KEY STRENGTHS OF THE PRODUCT

Epicor claims as a key strength that, as an organisation, it truly understands the industries that it serves. This is reflected in deep manufacturing industry capabilities and functionality. Epicor tends to win deals based on industry specialisation and knowledge of specific processes related to discrete manufacturing subsectors such as fabricated metals, industrial machinery, high tech and many more. It has key capabili-

ties to address 'xTO' manufacturing (engineer, configure, or assemble-to-order) in mixed modes, which is a key differentiator. Configure-to-order is naturally enhanced now with the introduction of Epicor CPQ. Epicor Kinetic has a broad range of functionality that will suit many organisations in the target verticals. That range of functional reach includes financial management, customer relationship management, sales, product management, project management, human capital management, service and asset management, production management, supply chain management and planning and scheduling. While it targets the mid-market, Epicor Kinetic can be an ideal solution for larger organisations wishing to implement a hub-spoke model with a Tier 1 solution at the core and a Tier 2 solution like Epicor providing deep functionality with simpler implementation in manufacturing sites or divisions.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

Epicor claims that its products are primarily deployed as multi-tenant cloud solutions, but customers have the option to deploy hybrid, single-tenant, or on-premise. Epicor Kinetic is available in multi-tenant, single-tenant and on-premise varieties with the cloud solutions being deployed on Microsoft's Azure platform. As already pointed out, this deployment flexibility serves its target sectors well.

Epicor issues major release upgrades every six months with minor updates and maintenance releases for incremental enhancements and security best practices issued more frequently.

DEPLOYMENT

- Epicor products are primarily deployed as multi-tenant cloud solutions, but customers have the option to deploy Epicor products as hybrid, single tenant, or on-premise as well to best-fit their technology requirements and future cloud strategy.



IFS has established itself as a major player in ERP, enterprise asset management and field service management solutions across a range of industries. Known for its particularly strong offerings for asset-intensive and project-based organisations, IFS has invested in innovative new technologies, such as digital twins, augmented collaboration, internet of things, and intelligent process automation. In 2021, IFS expanded into the enterprise/IT service management and customer engagement management spaces with the acquisitions of Axios Systems and Customerville respectively. 2021 also saw the launch of IFS Cloud, updating the solution architecture. IFS continues to offer customers a range of deployment options, and IFS Cloud heralds a transition to an evergreen model, with a twice yearly feature update cadence rather than major version updates every two to three years. Various customer-focussed initiatives such as the IFS lifecycle experience portal and IFS customer success services have been launched or further developed, with plans for further enhancements in 2022.

Key products

IFS Cloud

Enterprise Service Management (ESM)
(includes ITSM) - IFS assyst

Customer Experience Management - IFS Customerville

LINES OF BUSINESS

IFS Cloud is a single, cloud-enabled solution designed for organisations who manufacture and distribute goods, build and maintain assets and manage service-focused operations. IFS' ERP focussed offering includes manufacturing, supply chain and project management, procurement, finance, human resources, customer relationship management, commerce and sustainability capabilities as part of facilitating the full lifecycle management of products, assets, customers and projects.

IFS Cloud is a leading ERP solution that enables you to streamline your business, grow customer service levels and unlock cost savings. The solution combines deep industry and functional strength with intelligent and autonomous capabilities that can be put to work from day one.

In 2021 IFS expanded into the Enterprise Service Management and Customer Engagement Management space with the acquisitions of Axios Systems and Customerville respectively.

Business type suitability

IFS' broad range of enterprise applications are targeted at upper mid-market enterprises and lower large-enterprise customers with global presence, that manufacture and distribute goods, maintain assets, and manage service-focussed operations. IFS tends to do well with manufacturers (particularly project-based and engineer-to-order), organisations that build and maintain assets, and organisations that manage service-focussed operations. Organisations with complex needs spanning more than one of these areas are a particular sweet spot for IFS as they can offer a comprehensive integrated solution. A good example would be an engineer-to-order manufacturer who also installs and provides after-market services for their products.

SIZE OF BUSINESS

- IFS products are suitable for all enterprise sizes from medium-sized businesses through to large enterprises.

Vertical suitability

IFS specifically focusses on five vertical markets: manufacturing; engineering, construction and infrastructure; energy, utilities and resources; service industries; and aerospace and defence. IFS also has specific expertise in a number of associated sub-industries such as food and beverage manufacturing, shipbuilding and maritime, and oil and gas. IFS has a long track record in each of these target verticals, with tailored solutions to meet the specific and unique needs of sectors such as defence and aviation maintenance. The functional breadth of the solution is an advantage in most verticals, with IFS offering both CRM and HCM functionality as part of the core suite.

VERTICAL MARKETS

IFS has expertise in 5 vertical markets and their associated sub-industry.

- Manufacturing
- Construction & engineering
- Energy, utilities & resources
- Service industries
- Aerospace & defence

Go-to-Market strategy

IFS has traditionally sold directly and delivered the vast majority of implementations itself, but this approach has changed and a partner channel is actively being developed. IFS currently has eleven channel partners in the UK and Ireland (up from nine in the last year) and a much larger network of partners and systems integrators globally. Channel partners tend to focus on organisations with turnover below £100m, with IFS continuing to sell direct to organisations above that threshold. Perhaps the most significant recent development in this space is the announcement of a planned services joint venture with BearingPoint, focussed on the European market.

Licensing and pricing

IFS' policy is to offer customers choice and they offer a range of licensing and deployment options. Customers can choose traditional on-premise deployments; deploy in their own data centres; use their own cloud providers such as AWS or Microsoft Azure; or use IFS Managed Cloud which is deployed on Microsoft Azure and managed by IFS. Despite the latest release being called IFS Cloud, the same version of the software is used regardless of the deployment model with no compromises in functionality. IFS continues to offer customers a choice of perpetual licensing or SaaS subscription on named user basis for core modules.

Customers

JOTUN A multi-national manufacturer of specialist paints and coatings with over 9,000 users across 46 countries, Jotun has been a long-standing customer of IFS. Jotun use IFS applications components for financials, manufacturing, logistics management, procurement, and maintenance, and recently announced

its intention to future-proof its operations by moving to IFS Cloud.

PUKKA PIES British food manufacturer Pukka Pies implemented IFS to improve efficiency and meet increasing challenges posed by customers and regulators. Using IFS across finance, sales, purchasing and production, they have achieved a 10 percent increase in business growth, a 30 percent increase in workforce capacity, improved product traceability and quality assurance, better data visibility and reduced manual data entry.

ASTON MARTIN COGNIZANT FORMULA ONE™ TEAM 2021 saw new cost cap rules imposed on F1 teams, limiting how much each team can spend on enhancing the race car's performance during a calendar year. The Aston Martin team used IFS to track costs, guide investment decisions and development choices, and evidence spend during competition accounting periods, ensuring spend compliance.

KEY STRENGTHS OF THE PRODUCT

IFS provides a very broad and ever expanding suite of applications covering enterprise and IT service management, manufacturing, supply chain and project management, finance, human resources, quality management, document management, customer relationship management, business intelligence, sustainability management and other core functionality to facilitate full lifecycle management of products, assets, customers and projects. Allied with deep industry experience and solutions that meet the specific needs of target verticals, IFS provides a very strong offering from a functional perspective. From a technology perspective, IFS cloud offers a single technology platform with one common user experience, one data model and one consistent support offering, giving

customers the ability to scale and extend the IFS functional footprint more easily. IFS cloud's architecture also embeds the latest in digital innovations, making it practical and affordable for customers to take advantage of technologies such as machine learning, augmented and mixed reality, artificial intelligence, and internet of things. IFS recognises that deployments generally need some level of tailoring, and provides this capability in a number of ways: through personalisation and configuration, 'extend on the inside', with IFS application customisation in a layered application architecture, and 'extend on the outside', using APIs to interact with external applications.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

IFS' strategy is to provide a suite of innovative, user-friendly products, built on a single platform, which are easy to tailor, extend and connect with, offering a choice of deployment options, and delivering genuine breadth and depth for their specific target industries and solution areas. The target market is mid-sized businesses (generally £50m and up) through to large enterprises, with the growing IFS partner channel catering mainly for the lower end of this range. The continuing expansion of the product footprint into complementary areas such as service management seems a wise move as organisations increasingly turn to services to create a competitive edge.

DEPLOYMENT

- IFS Cloud can be deployed in a single-tenant cloud, a remote location or on-premise. IFS offers customers choice and parity with no compromises over functionality. Whichever deployment customers choose they all get the same functional solution with no compromises or restrictions on how they can tailor to make it their own. Customers are also free to move between the two environments, providing 'portability'.



Infor is a large US-headquartered ERP and business systems vendor with global operations and a strong and long-standing representation in the UK. It offers a broad range of products available in the cloud and (some) on-premise. Apart from ERP solutions, it offers key enterprise applications for networked supply chains, enterprise asset management, warehouse management, workforce management, HCM, financial planning, integrated business planning, analytics and AI. It added MES to its product range in 2021 with the acquisition of UK headquartered Lighthouse Systems. Many of its ERP products are branded as industry CloudSuites signifying their focus. These include CloudSuite automotive, aerospace and defence, chemicals, construction and engineering, distribution, distribution enterprise, equipment, fashion, food and beverage, high tech and electronics, industrial and industrial enterprise. Two additional industry CloudSuites have become available in the UK this year – healthcare and public sector. In addition, Infor offers five core ERP products – M3, LN, Syteline, Infor Financials and Supply Management (formerly Lawson) and Infor SunSystems (financials). Infor also offers its own cloud platform and technology stack, Infor OS, including core technology components such as single sign on, security management, document management, collaboration (Mingle), integration (ION) and a data lake.

Key products

- Infor Industry CloudSuites
- Infor CloudSuite Automotive
- Infor CloudSuite Aerospace & Defense
- Infor CloudSuite Chemicals
- Infor CloudSuite Construction & Engineering
- Infor CloudSuite Distribution
- Infor CloudSuite Distribution Enterprise
- Infor CloudSuite Equipment
- Infor CloudSuite Fashion
- Infor CloudSuite Food & Beverage
- Infor CloudSuite High Tech & Electronics
- Infor CloudSuite Industrial
- Infor CloudSuite Industrial Enterprise
- Infor CloudSuite Healthcare
- Infor CloudSuite Public Sector

Other ERP systems of note: Infor M3, Infor LN, Infor Financials & Supply Management, Infor Syteline and Infor SunSystems

Other key enterprise software: Infor Nexus (networked supply chains), Infor OS, Infor d/EPM, Infor Birst (analytics), Infor Human Capital Management, Infor Workforce Management, Infor WMS, Infor Integrated Business Planning (IBP)

LINES OF BUSINESS

- Finance
- HR
- Distribution
- Manufacturing operations
- Supply chain
- Customer services

Business type suitability

Historically, Infor has been strongest in small to medium-sized enterprise level organisations. This has evolved and Infor now has a clear focus on substantial enterprise businesses as well. Smaller and early-stage high-growth companies are still well catered for by Infor’s channel so in terms of organisation scale the range of suitable businesses is wide. Many of the ERP solutions in the Infor product range have a wide functional footprint while others have a narrower focus. Consequently, there are solutions that fit traditional ERP customers and others that fit organisations with a narrower set of requirements, perhaps with a need to integrate to other internal line-of-business solutions – something Infor can also support using its ION integration platform.

SIZE OF BUSINESS

- Traditionally, Infor has focussed on small to medium enterprise level customers. However, this has evolved throughout recent years and they now have a clear focus on large enterprise businesses too.

Vertical suitability

Within core ERP solutions, Infor is most active in the following industry verticals – automotive, industrial manufacturing

and equipment, hi-tech, food and beverage, construction and engineering, distribution, equipment rental, retail, fashion, and aerospace and defence.

Within these industry verticals Infor has a strong pedigree in a variety of specific ‘micro-verticals’ – for example brewing, meat processing and baking within the food and beverage vertical. The strong manufacturing pedigree is further augmented by the inclusion of an MES within the overall product range now.

Beyond its traditional ERP product range, Infor claims a very strong offering in hospitality and property management.

VERTICAL MARKETS

- Automotive
- Industrial manufacturing and equipment
- Hi-tech
- Food & beverage
- Construction & engineering
- Distribution
- Equipment rental
- Retail
- Fashion
- Aerospace & defence
- Hospitality
- Property maintenance

Go-to-Market strategy

Infor addresses the UK market through a variety of channels including direct sales and implementation, partnerships with large systems integrators and consulting firms and channel partners. Infor has grown its list of active channel partners in the UK from eight to 12 over the past year, reflecting the importance of the channel to its ongoing growth plans. In general, these focus on the small to medium business market, which Infor defines as organisations having revenue below \$100m. Infor sees its channel as a key component of its growth plans with strong partners, self-sufficient from sales, through pre-sales and delivery.

Licensing and pricing

Infor offers a range of pricing models across its product set. Subscription-based models dominate but perpetual licences are available for some products and deployment models. Typically, Infor ERP pricing is based on named users. Depending on the solution, subscription costs may be bundled to include ancillary functions, which for some vendors tend to be sold as additional items. For the SaaS offerings, upgrades and technical support are typically included in the subscription as would be expected in a true cloud environment. As with many subscription models, discounts may be available for agreements that commit to multiple years.

Customers

ST PIERRE GROUPE Manchester headquartered international branded bakery business, St Pierre Groupe, implemented Infor CloudSuite Distribution Enterprise to replace legacy systems and help modernise business processes to support revenue growth and further international expansion. The

implementation was delivered on time, within budget and with an increased remit, by Infor partner Anthesis Group.

TRIUMPH MOTORCYCLES With operations stretching from the UK to Brazil, Thailand, and India, Triumph Motorcycles rolled out the first phase of its Infor LN project within 18 months adding the agility for improved product ordering and communication with customers. Infor LN's data-driven processes encouraged Triumph to assess its standard BOM and eBOM (engineering bill of materials) handling and streamline processes. It continues to roll out additional customer facing improvements.

PORTWEST Workwear manufacturer and distributor Portwest has deployed Infor M3 for over 200 users across its operations in 11 countries. To help enable international growth, ensure consistency across geographies, benefit from lower capital expenditure and remain on the most up-to-date version of M3, Portwest chose a multi-tenant cloud ERP deployment running on Amazon Web Services (AWS).

KEY STRENGTHS OF THE PRODUCT

Infor's key strengths might be described as breadth of capability coupled with depth in those verticals that it focusses on. Its CloudSuite solutions should perform very strongly in any comparison in their focus verticals while M3, LN and Syteline are strong in various manufacturing, industrial and service operations environments.

Infor focusses strongly on time-to-value. In practice this means that the vertically focussed CloudSuites should bring significant functional fit without significant in-project custom configuration to the table in those industry verticals. That underpins their Infor Agility implementation methodology which uses a 60:30:10® approach - aiming to deliver 60 per cent of requirements using vertically aligned good practice implementa-

tion accelerators with more time being spent on solutioning customer specific differentiator requirements (30 percent) and highly differentiating requirements (10 percent). Infor's overall technology stack, as well as its service offerings, continue to mature into a truly enterprise class set of capabilities. It claims improvements such as better cloud performance, testing as a service, better delivery capability, and shorter time to value. Across its portfolio of industry CloudSuites, Infor is investing in enhanced useability including next generation mobility, whilst providing an enhanced UI across all services (called Portal 2.0).

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

Infor claims its dominant deployment model across its product range is now multi-tenant cloud. Its cloud solutions are deployed on Amazon Web Services and updates for its multi-tenant SaaS products are typically deployed on a monthly basis. Overall, Infor cloud technologies serve more than 71 million users and approaching 15,000 customers worldwide.

However, Infor remains committed to offering customers a choice. It does offer both single-tenant and multi-tenant options, as well as on-premise, for some of its products. They see flexibility as a huge part of the attraction to cloud deployment and continue to claim commitment to not forcing upgrades, unlike many enterprise cloud applications.

DEPLOYMENT

- Infor is principally deployed in a multi-tenant public cloud environment. However, they still have a large customer base on legacy/on-premise solutions and remain committed to not forcing customers to upgrade to the cloud.



Microsoft provides a range of enterprise applications under the Dynamics 365 (D365) moniker and the naming evolves frequently. From an ERP perspective there is Business Central, generally aimed at smaller to medium size organisations, and D365 Finance, D365 Supply Chain Management, D365 Supply Chain Insights (currently available only on preview release) and D365 Intelligent Order Management, all pitched at medium to enterprise scale organisations. All are cloud first applications, but each can also be implemented on-premise. Microsoft is supported by a very strong partner channel and benefits from interoperability (some mature, some emergent) with its stack of business applications, cloud offerings, productivity tools and foundational platforms like Active Directory. D365 is becoming more and more open and extensible, natively with Intelligent Order Management and Supply Chain Insights, and using Microsoft's Power Platform. All ERP products have major updates released twice per year with minor ones released monthly.

Key products

- Dynamics 365 Finance
- Dynamics 365 Supply Chain Management
- Dynamics 365 Supply Chain Insights (preview)
- Dynamics 365 Intelligent Order Management
- Dynamics 365 Business Central

LINES OF BUSINESS

Dynamics 365 Finance and Supply Chain Management

- Finance
- Supply chain management (inc. but not limited to inventory management, warehouse management, manufacturing, supply chain planning)
- Commerce / retail
- Project management
- HR
- The wider Dynamics 365 Portfolio including customer engagement services, sales, marketing, customer service, CDP

Business Central

- Finance
- Sales and marketing
- Supply chain management
- Manufacturing
- Customer Service

Business type suitability

D365 Finance, D365 Supply Chain and related products are most suited to medium to enterprise scale organisations while Business Central suits small to medium organisations. There is some overlap in the middle in terms of organisation size but typically the larger products are most suited where multiple countries and companies are involved. D365 Finance and D365 Supply Chain naturally cover financial operations, manufacturing, inventory and related processes. D365 Intelligent Order Management supports digital commerce, order management and fulfilment. Commonly more than one of these applications will be deployed together interoperating to support the overall business. Business Central covers a similar scope but in a single solution suitable for smaller businesses with less complex requirements.

SIZE OF BUSINESS

- **Dynamics 365 Finance, Supply Chain Management & Intelligent Order Management**
> Medium to Enterprise businesses / organisations
- **Dynamics 365 Business Central**
> Small to medium sized businesses

Vertical suitability

Microsoft claims that both products are applicable to any vertical. While that may overstate things slightly it is true that both are widely used in product-based, service-based and not-for-profit organisations of a variety of stripes. Microsoft's ISV (independent software vendor) partners develop a range of vertical specific and niche add-ons which broaden this applicability further. In fact, it would be difficult to identify a vertical for which an ISV solution is not available. Like other vendors, Microsoft has a certified by Microsoft programme to ensure ISV products follow Microsoft standards and remain current with new release cycles.

VERTICAL MARKETS

Microsoft sells across all verticals for all the products.

Go-to-Market strategy

Like all of the large ERP vendors, Microsoft has a multi-faceted go to market strategy including direct sales and a diverse channel of partners, from large consulting organisations

and systems integrators to dedicated channel partners, some with a niche focus and their own ISV add-on solutions. Microsoft claims to have over 200 active partners in the UK. Direct sales are limited to medium to enterprise customers with channel partners covering everything from SME to enterprise scale. The vast majority of D365 implementations are partner-led and the channel includes partners capable of supporting the largest global implementations.

Licensing and pricing

Most Dynamics 365 deals are now subscription-based. Dynamics 365 applications are licensed based on 'assigned licences' that are dedicated to a named user or device and 'unassigned licences' that provide access to a feature or service at tenant level. There are a variety of assigned licence types covering full users, which provide access to a broad range of capabilities, and lighter additional users, for more limited access. A further category, 'attach licences' allows the cost-effective use of multiple applications by assigned users. Partners work with prospective clients to find the most suitable mix of users and to identify any additional unassigned licences that may be required for items such as additional environments or extra storage capacity.

Customers

FIELDFISHER Fieldfisher is an international law firm headquartered in London, with 22 offices in eleven countries. Fieldfisher uses D365 Finance across its operations for its purchase to payment cycle, its billing cycles, its general ledger and reporting. In addition, fee earners use it to record their time, claim expenses and book holidays.

DR. MARTENS The iconic British footwear brand operates wholesale and retail businesses with over 100 stores globally and is seeing continued retail and e-commerce growth. It implemented D365 Finance, Supply Chain and Fraud Protection. Dr. Martens has seen benefits in data visibility, inventory management and retail and sees D365 as positioning it for growth.

ILKE HOMES ilke Homes creates modular homes using advanced manufacturing and precision engineering at its 250,000 square foot factory in Yorkshire. They implemented D365 Business Central with Microsoft partner Cooper Parry IT. CPIT's Kickstart implementation service allowed ilke Homes to get started with a minimum viable product, and easily expand to accommodate future growth.

KEY STRENGTHS OF THE PRODUCT

Both tiers of Microsoft's ERP solution portfolio provide broadly functional solutions that will compete well in most ERP evaluations in their target markets. Additional functional capability can be found in both tiers based on ISV solutions. With the right ISV, either solution can provide a compelling proposition in many markets.

Perhaps a key differentiating strength, particularly in the higher tier range (D365 Finance, D365 Supply Chain Management, D365 Supply Chain Insights and D365 Intelligent Order Management) is openness to other D365 and Azure platforms through Microsoft's Dataverse (formerly named Common Data Service). All D365 solutions can be further extended via the low-code Power platform. This openness and extensibility is an important direction of travel across the industry, which Microsoft has fully embraced. It offers a much more comprehensive approach than many. The importance of this to Microsoft is

further illustrated by the acquisition in 2021 of Clear Software iPaaS solution which will strengthen Power Platform's ability to integrate with outside systems like SAP and Oracle. The preview release of D365 Supply Chain Insights, along with the acquisition in 2021 of Suplari (AI solution for analysing supply chain spend) suggests that the logical evolution Microsoft is pursuing is to drive predictive insights from this universe of data, whether D365 native or pulled from connected data sources.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

Naturally, Microsoft limits its certified cloud deployment options to its own Azure platform. A variety of deployment models are available. D365 Finance, D365 Supply Chain Management, D365 Supply Chain Insights and D365 Intelligent Order Management are all available as a single tenant solution on Azure or on-premise. In practice on-premise deployments are rare now and some partners will not offer them at all. On Azure, customers benefit from the simplicity that cloud deployments offer compared to the infrastructural overhead of running on-premise. Furthermore, they can maximise the interoperability with other Microsoft cloud services. Dynamics 365 Business Central is also available on Azure and on-premise.

DEPLOYMENT

- **D365 Finance, Supply chain management and Intelligent Order Management**

> Single Tenant, on-premise

- **D365 Business Central**

> Multi-tenant, on-premise



Oracle is strongly represented at the top tier of ERP solutions with its Oracle Fusion cloud ERP. It claims to be the industry's broadest and most integrated public cloud, creating business value for customers in every industry, functional domain, and geography.

Oracle fusion cloud enterprise resource planning comprises of eight modules: Accounting hub, Enterprise performance management (EPM), Financials, Oracle analytics for cloud ERP, Procurement, Project management, Risk management, Supply chain and manufacturing (SCM).

Oracle Fusion cloud procurement has been significantly updated over the past year. New functionality, leveraging technologies such as machine learning and AI, has been added to help organisations better manage spend and suppliers, both to control costs and ensure security and compliance of supply chains. It also added functionality to further support complex sub-contract procurement and the management of complex supply chains. Oracle Fusion cloud ERP can also integrate with the broader Oracle Fusion SaaS portfolio to provide broader reach within a single-cloud and technology stack.

Key products

Oracle Fusion ERP is comprised of eight modules:

- Accounting Hub
- Enterprise Performance Management (EPM)
- Financials
- Oracle Analytics for Cloud ERP
- Procurement
- Project Management
- Risk Management
- Supply Chain & Manufacturing (SCM)

LINES OF BUSINESS

Oracle supports virtually all lines of business within an enterprise



Business type suitability

As a Tier 1 ERP solution, Oracle Fusion cloud ERP is generally targeted at companies with \$200m in revenue and above, or with 1,000 employees and above. Though there are significant volumes of customers below that scale it can be considered the sweet-spot threshold. It provides most value in large multi-entity environments where the savings of its comprehensive cloud model can best be realised. Oracle Fusion cloud ERP is sold across all geographies and while Oracle does not disclose regional breakdown of customers it is well represented in the UK. By some external estimates the UK is its second largest customer base after the US.



SIZE OF BUSINESS

- Oracle Fusion Cloud ERP is generally targeted at companies with \$200m in revenue and above, 1,000 employees and above, and across all industries and geographies.

Vertical suitability

Oracle sells Fusion cloud ERP into all markets and verticals. These include: manufacturing; professional services; healthcare; life sciences; higher education; public sector; financial services; retail; oil and gas; utilities and leisure and hospitality. It is particularly well represented in professional services, financial services, government as well as various manufacturing sectors. It has deep functionality to support all of these sectors and supports industry focussed business processes. The variety of channel and direct implementation options mean that customers can find implementation partners with deep vertical experience and the global reach to help them get the most out of the technology.

VERTICAL MARKETS

Oracle sells Oracle Fusion Cloud ERP into all markets and verticals including manufacturing, professional services, healthcare, higher education, public sector, financial services, retail, oil & gas and utilities.

Go-to-Market strategy

Oracle sells and implements directly and through a variety of partners, including large systems integrators, large multi-practice consulting firms and specialist channel partners. While Oracle does not break out its partner numbers by location it is fair to say that the UK is well served through local Oracle presence, local partners and many large global partners having significant bases in the UK. Oracle keeps its partners supported and skilled through its Oracle PartnerNetwork (OPN) partner programme. This provides partners with resources to train and support specialised knowledge of Oracle's products and solutions, and opportunities to differentiate and develop to bring more value to their customers.

Licensing and pricing

Oracle Fusion cloud ERP is priced on a subscription pricing model. Pricing is defined within modules, so that different functional components may have different pricing elements, allowing customers to only pay for the components they require. Pricing units are quantified by different metrics including named users, record or transaction volumes (for certain functions), per environment and by employee numbers for some HCM cloud elements.

Customers

THE HOME OFFICE is using the full Oracle Fusion cloud applications suite to modernise its finance, HR, procurement, customer support and expense systems. By automating, standardising and integrating business processes across different functions, the move will increase productivity and reduce costs.

DIRECT LINE GROUP is using Oracle cloud ERP to benefit from standardised processes, automation of traditional administration tasks and to provide the ability to manage data from a single point of control. It has further enhanced its internal controls and compliance and enabled faster and more secure payment processing.

LONDON BOROUGH OF BROMLEY The London Borough of Bromley has moved to Oracle Cloud ERP. This has enabled the standardisation and automation of many business processes, increased productivity and improved the reliability of its financial monitoring processes and controls.



KEY STRENGTHS OF THE PRODUCT

Oracle Fusion ERP's strengths lie in the depth of functionality that can be delivered in a fully subscription-based truly cloud environment. Rather than providing legacy ERP products in a hosted environment and calling it cloud, Oracle took its time and migrated functionality to a cloud architected environment, only releasing elements as they were ready. That has now reached the point where Fusion Cloud ERP is a true Tier 1 cloud solution. Apart from leveraging the core business functionality of the legacy solutions, Oracle has incorporated and continues to develop emerging technologies including AI, machine learning, and IoT, to broaden domain and industry-specific functionality. The depth of Oracle's Fusion cloud ERP functionality means it is one of the few solutions that is suitable for the largest enterprise scale organisations. A particular strength for public sector organisations is the fact that Oracle

provides a dual-region government cloud. This means that public sector transactional data and back up data can be stored on UK soil with two UK data centres and a dedicated internet backbone connecting them. It was designed in conjunction with UK Government and Defence Ministries according to security principles outlined by the National Cyber Security Centre.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

As a true cloud delivered solution the technical complexity of implementing a Tier 1 solution like Fusion cloud ERP is significantly reduced during implementation. While it is typically delivered on Oracle's public cloud it is one of few clouds that are also available in total in a customer's own data centre. Oracle Cloud@Customer brings Oracle's complete portfolio of public cloud infrastructure, fully managed cloud services, and Oracle Fusion SaaS applications into the customer's data centre. This can address some of the concerns that customers in certain sectors still have with public cloud deployed solutions without incurring the inefficiencies inherent in private hosting. Oracle still enforces the customisation restrictions and updates policies of its public cloud deployments so it can manage the solution with the same economies of scale and provide the associated savings to the customer.

DEPLOYMENT

- Oracle Cloud ERP runs on Oracle Gen 2 cloud infrastructure. However, it can also deliver its Fusion SaaS applications at the customer's data centre through its Oracle Cloud@Customer offering. For the UK public sector, Oracle also provides a dual-region government cloud, which is the only dual-region sovereign cloud for use by UK public sector customers.



QAD continues to focus on solutions for manufacturers, as it has done for the last four decades, with over 300,000 QAD users in 2,000 manufacturers across 4,000 sites globally. Although cloud ERP offerings have been slower to gather momentum with manufacturers, QAD has seen a sizeable increase of 22 percent in cloud revenues in 2021 (on top of a 23 percent increase in 2020).

QAD Adaptive ERP is the core solution in a suite of applications covering the broad range of business processes that a manufacturing organisation will require, including financials, customer and service process management, supply chain and manufacturing. It also provides capabilities in analytics, business process management and integration. While QAD does not have an HR module, it ticks the boxes for the vast majority of capabilities needed by manufacturers. In addition to the core ERP product, QAD's portfolio of related solutions includes products addressing quality management (EQMS), supply chain management (DSCP), and global trade and transportation management (GTTM).

Key products

QAD Adaptive ERP

QAD Enterprise Quality Management System (eQMS)

QAD DynaSys Digital Supply Chain Planning (DSCP)

QAD Precision Global Trade and Transportation Execution (GTTE)

QAD Supplier Relationship Management (SRM)

LINES OF BUSINESS

- Manufacturing
- Supply chain
- Financials
- Customer management
- Transportation management
- Strategic purchasing
- Supplier management
- Service and support
- Analytics
- Business process management



Business type suitability

The QAD Adaptive ERP solution is designed for and targeted exclusively at manufacturers of all sizes, from start-ups through to SMEs and mid-market manufacturers operating on a single or small number of sites, to market-leading global companies. While suitable for smaller manufacturers, it is a scalable solution that also provides a good fit for multi-national manufacturing organisations with multiple sites across different geographies. Typical QAD customers tend to be mid-market manufacturers, or divisions of larger organisations. The solution provides a broad range of functionality to support different manufacturing environments (discrete, process, batch, and mixed mode), across a range of verticals.

SIZE OF BUSINESS

- QAD has built a solid customer base of global Fortune 1000 and mid-market manufacturers. With a proven track record of more than 40 years of industry leadership, QAD is ideally qualified to meet the business and technology requirements of global manufacturing companies worldwide.

Vertical suitability

QAD's explicit growth strategy is to focus on 22 sectors across six manufacturing verticals: automotive, consumer products, food and beverage, high-technology, industrial and life sciences. As an example, with the life sciences vertical, QAD focusses on life sciences contract manufacturing, diagnostics manufacturers, medical devices manufacturers, and pharmaceutical/biotechnology manufacturers. QAD engages with industry groups and standards bodies in these verticals to develop products and services to address evolving industry-specific needs. QAD has a long history in the automotive sector and this continues to be a major focus, accounting for 36 percent of revenue according to QAD's latest breakdown of revenue by vertical.

VERTICAL MARKETS

QAD focusses on six sectors within manufacturing:

- Automotive suppliers
- Consumer products
- Food and beverage
- Life sciences
- High technology
- Industrial

Go-to-Market strategy

QAD sells and implements directly as well as indirectly through dedicated channel partners and continues to expand and strengthen its partner network. In the UK market, QAD sells directly and also has a single dedicated channel partner, strategic information group (SIG). QAD partners now provide about four times as much consulting capacity as QAD's internal resources. This capacity is provided through dedicated channel partners such as SIG and, more recently, partnerships with large multinational service and consulting companies like Tata Consultancy Services, YASH, Infosys and Thirdware. This extended ecosystem enables QAD to offer support for large-scale global projects.

Licensing and pricing

QAD's cloud offering is subscription based, and licensed principally on the basis of named users, limited named users (with access to a limited range of functionality) and purchase requisition users. Non-core cloud modules (e.g. quality management and manufacturing automation solutions) are licensed separately on a named user or device basis. Cloud subscriptions include support as part of the offering. QAD does, on a very limited basis, support enterprise subscription licensing for QAD adaptive ERP, but typically only for large-enterprise scale implementations.

Customers

RENOLIT GROUP An international leader in the manufacture of high quality plastic films and related products for various technical applications, RENOLIT uses QAD Adaptive ERP across multiple sites within several divisions around the globe. One notable feature is that RENOLIT has deployed the fully-integrated QAD's enterprise quality management system (EQMS) solution.

GKN AUTOMOTIVE The largest global supplier of driveline technologies for the automotive industry, GKN Automotive has deployed QAD adaptive ERP in the cloud globally across its manufacturing facilities, encompassing all core ERP functions as well as cloud EDI for the entirety of the GKN business plus the QAD precision global trade and transport management solution.

SAINT-GOBAIN The Saint-Gobain high performance solutions, a €7.5bn division of the Saint-Gobain corporation, designs, manufactures and distributes a range of materials and solutions for industrial applications. The division has standardised globally on QAD adaptive ERP in the cloud including QAD automation solutions and production execution.

KEY STRENGTHS OF THE PRODUCT

QAD's depth of experience in providing solutions for manufacturers is undoubted, making QAD Adaptive ERP a very strong offering for any manufacturer falling within its target sectors. The main 2021 release of the product included updates to Adaptive UX user interface, as well as improvements in functionality and embedded analytics. Further significant investment in the product can be expected following the acquisition of QAD by Thoma Bravo in 2021. With a proven track record and a growing customer base, QAD also has a strong focus on helping manufacturers deal with the various day-to-day practicalities and compliance headaches of conducting business across multiple countries. Examples include support for the making tax digital (MTD) requirements in the UK and reporting requirements mandated by the Chinese government. The breadth of the solution is another strong point, with modules such as CRM for manufacturers, field service management, quality management, enterprise asset management and production execution augmenting the traditional core manufacturing

capabilities. This has been added to by the recent acquisition of WebJaguar, which will significantly enhance QAD's digital commerce capabilities. From a technology perspective, the QAD enterprise platform provides a modern technology architecture, making it easier for manufacturers to develop and maintain additional 'last-mile' functionality where required. Extensions and new apps can be created in a low code/no code environment, reducing the need for intrusive customisations, and the modular design means upgrades can be applied selectively.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

QAD is deployed as a single tenant cloud solution on either IBM Cloud, Flexential or Alibaba Cloud in China, with the option to deploy on dedicated virtual hosts. QAD is actively pushing customers towards subscription-based licensing and cloud deployments. While on-premise deployments may still be available, new functionality will be released in the cloud version first. QAD's focus on six manufacturing verticals means that, in theory, QAD adaptive ERP should be easier to configure and require fewer customisations. QAD enterprise platform, which enables the development of extensions and apps, plus integration with other enterprise applications, also enables less complex and faster implementations.

DEPLOYMENT

- QAD Adaptive ERP is a single tenant solution, meaning that the customer receives their own dedicated environments, with dedicated application code and databases. These can be deployed on dedicated virtual hosts for the customer if requested. Firewall rules and network/host-based segmentation separates the other customer environments.



SAP is the longstanding market leader in ERP but positions itself nowadays as much more than an ERP vendor. SAP describes its range of offerings as the ‘SAP Intelligent Enterprise Framework.’ Effectively this means a set of applications, infrastructure and services which are divided into eight categories: its foundational business technology platform, covering services and applications from identity management to database technology; development platforms and intelligent technologies such as AI; business process intelligence for business process analysis and improvement, underpinned by the 2021 acquisition of Signavio; intelligent suite, covering a range of business applications including ERP; industry cloud, providing vertical solutions for 17 industry segments; sustainability solutions including product footprint management, to help customers address environmental, social and corporate governance obligations; experience management solutions, to gain insights into sentiments and feelings of employees and customers; business networks, including procurement networks, such as the well-known Ariba and cloud infrastructure for deployment of SAP solutions. This review focusses on business applications and ERP in particular.

Key products

- SAP Business Technology Platform
- SAP Customer Experience and CRM
- SAP Supply Chain Management (SCM)
- SAP Digital Manufacturing Cloud
- SAP Human Experience Management
- SAP Intelligent Spend Management

SAP Sustainability Solutions:

- SAP Product Footprint Management
- SAP Environment, Health, and Safety Management
- SAP Responsible Design & Production
- SAP Sustainability Control Tower

SAP ERP Solutions:

- SAP S/4HANA Cloud (multiple deployment options, single code line)
- SAP Business ByDesign
- SAP Business One
- SAP ECC 6.0 (SAP ERP) legacy

Within the above product set and in the context of the Intelligent Enterprise, SAP S/4 HANA is the core ERP application.

LINES OF BUSINESS

• SAP S/4HANA:

Asset Management; Finance; Human Resources; Manufacturing; R&D/Engineering; Sales; Service; Sourcing & Procurement; Supply Chain; GRC & Cybersecurity

• SAP Business ByDesign:

Executive Management Support; Financial Management; Customer Relationship Management; Human Resource Management; Supply Chain Management; Project Management; Supplier; Relationship Management; Compliance Management

• SAP Business One:

Administration; Sales, Purchasing, Service; Financial Management; Project Management; Inventory & Distribution; Light Manufacturing

Business type suitability

SAP offers multiple ERP solutions ranging in suitability from the largest global organisations to SMEs. The flagship solution suite, S/4HANA, targets mid-sized to large organisations. It is available in multiple distinct flavours - a multi-tenant edition, a single-tenant edition on SAP’s S/4HANA enterprise cloud (HEC), a private cloud edition which is single-tenant, subscription-based and available from multiple hyperscalers (Microsoft Azure, Google and Amazon AWS) and finally, on-premise. Business ByDesign is another multi-tenant cloud (HEC) ERP solution from SAP but targeted at the mid-market. The final solution, targeted at SMEs, is Business One, available on-premise, hosted or as a subscription-based single-tenant cloud solution.

SIZE OF BUSINESS

• SAP S/4HANA:

> Mid-sized to large business

• SAP Business ByDesign:

> Midsized business

• SAP Business One:

> Small Business

• (SAP ERP) legacy:

> Mid-sized to large business

Vertical suitability

There is scarcely a vertical market not served by SAP ERP products, reflecting its long-standing pedigree, breadth of functional capabilities and strength of its delivery channels. SAP ERP solutions target many verticals in the following broad sectors: financial services; manufacturing, mining and mobility; public services; healthcare; consumer industries; energy and natural resources; service industries; sport and entertainment. S/4HANA, sometimes enhanced with SAP or partner industry-specific cloud solutions, is generally suitable for large organisations in most sectors. Business ByDesign is best suited to mid-sized service and project-based businesses, while Business One is targeted at SMEs in service and product businesses, including those with light

VERTICAL MARKETS

Financial Services

Manufacturing, mining & mobility

Public services

Healthcare

Consumer industries

Energy and natural resources

Service industries

Sports and entertainment

Go-to-Market strategy

SAP's industry focus extends beyond its product configurations to its go-to-market strategy. It has a rich channel partner network globally, with 63 active partners operating in the UK. SAP partners build, sell, service and run SAP solutions - adding expertise that extends reach, market penetration and functionality of SAP solutions to meet diverse customer needs. SAP's route to market includes direct sales and partner led engagements with partners ranging from large systems integrators and consulting firms to niche operators with a more boutique or tailored approach, sometimes with their own SAP certified add-on solutions with a specific focus on vertical or niche functional capabilities.

Licensing and pricing

S/4HANA is available as a pure SaaS model, as a licence subscription or as a perpetual licence. During 2021 SAP launched RISE with SAP, which is designed to accelerate digital transformation by bundling S/4HANA cloud in a single contract with other components of the intelligent enterprise framework, such as a business network starter pack, SAP process insights, embedded services and tools, as well as credits that can be used to choose from a huge number of cloud solutions covering analytics, integration, AI applications and database management. Business ByDesign is only available as a pure SaaS subscription, reflecting its multi-tenant architecture, and Business One is available on a licenced subscription or as a perpetual licensed.

Customers

INCHCAPE, a global automotive distributor, is the first RISE with SAP customer to go live in Europe. The S/4HANA implementation, on Google Cloud, included a global deployment of SAP SuccessFactors. Inchcape can now continuously analyse how its business processes are performing,

benchmarking them against industry standards and adapting them easily to new requirements and customer demands.

VODAFONE Working with SAP and Accenture, Vodafone has established a single digital core based on S/4HANA with additional SAP products SuccessFactors, Fieldglass, Concur and Ariba. The project helped Vodafone to significantly simplify its applications landscape and to achieve its key goals of automating and standardising its business processes while also realising significant employee net promoter score improvements.

BT GROUP selected SAP to deploy wide-ranging technology solutions across its business, including finance, procurement and workforce management. S/4HANA supported by the SAP Cloud Platform and SAP Analytics cloud is being used to drive its finance transformation programme, while Ariba, SuccessFactors and Fieldglass have been chosen to underpin transformation in procurement and human capital management processes respectively.

KEY STRENGTHS OF THE PRODUCT

The key strengths of S/4HANA might be considered functional breadth and depth. Few solutions can compete with its functional capabilities and standardised best-practice business processes, particularly when supplemented with SAP or partner Industry Cloud solutions. S/4HANA also provides intelligent automation solutions and embedded analytics to help drive increased productivity and better, more rapid decision making. In addition to these core ERP capabilities, SAP offers a leading range of complementary solutions such as SuccessFactors for HCM, Concur for travel and expenses and the Ariba procurement network. All are strong contenders in their own markets and complement the S/4HANA solution very well. SAP has positioned S/4HANA as the 'digital core' around which other solutions can

be implemented to enable the digital transformation many organisations seek and have supplemented this positioning with the RISE with SAP licensing initiative, which offers a simplified path to cloud-based ERP deployment and business process improvement. Business ByDesign and Business One, in contrast to S/4HANA, have strengths in their narrower focus. While not quite niche they both offer robust ERP solutions for smaller organisations - the former for mid-size service sector businesses primarily with the latter flexible enough for many SMEs that may not be comfortable with a multi-tenant solution.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

SAP is often considered a complex solution to deploy. This relates primarily to S/4HANA and its predecessor ECC6. While there are undoubtedly examples of complex, lengthy and costly deployments, they tend to be higher profile for SAP than for other vendors because of their market position and having more very large clients with more complex project environments. While S/4HANA projects are complex, they should be considerably simpler to deploy than ECC6 historically was, particularly when customers are willing to adopt SAP's standardised best-practice business processes. Business ByDesign and Business One tend to be easier to deploy because they are less complex products with fewer configuration options.

DEPLOYMENT

- **SAP S/4HANA:**
 - > Multi-tenant, single-tenant, hosted, on-premise
- **SAP Business ByDesign:**
 - > Multi-tenant
- **SAP Business One:**
 - > Single-tenant, hosted, on-premise
- **(SAP ERP) legacy:**
 - > Hosted, on-premise

UNIT4

Unit4 is a major player in ERP for people-centric organisations, with offerings firmly focussed on the needs of organisations who don't make, maintain or move physical products. Unit4 offers four main products: Unit4 ERP, a full ERP suite; Unit4 ERPx, a fully integrated ERP, HCM and FP&A solution built on Microsoft Azure cloud infrastructure; Unit4 financial planning and analysis (FP&A); and Unit4 human capital management (HCM). The HCM and FP&A products can be sold as best-of-breed solutions, or as part of an integrated Unit4 solution. Unit4 people experience suite is used to describe solutions encompassing some or all of ERP, HCM, FP&A, and other niche Unit4 products, with the Unit4 people platform, a micro-services-based technology platform. Unit4 recently acquired Compright's compensation planning solution, a comprehensive compensation solution for mid-market customers, particularly those with more complex multinational requirements. Compright's existing customers include leading organisations in life sciences, technology and media.

Key products

Unit4 ERP

Unit4 ERPx

Unit4 FP&A

Unit4 HCM

The People Experience Suite

LINES OF BUSINESS

• **Unit4 ERP** delivers a full ERP suite of financial management; human resources and payroll; planning, budgeting and forecasting; procurement management; project management; and enterprise asset management services-centric offerings

• **Unit4 FP&A** delivers a software solution for financial planning, budgeting and forecasting, financial consolidation, reporting, and analysis

• **Unit4 HCM** offers the spectrum from onboarding to modern performance management and learning management.

Business type suitability

Typical Unit4 customers will be people-centric and/or service-centric organisations with between 200 and 10,000 employees, and with turnover of £150m and upwards for commercial organisations. Unit4's products are suitable for large organisations operating in multiple countries, and are sold, deployed and supported globally. Service-based and people-based organisations with a large workforce who are struggling to manage environments where multiple systems are used to manage financials, people, projects, planning and business intelligence should consider Unit4's solutions.

Unit4 offers a choice of deployment options for ERP (on-premise, single-tenant and multi-tenant cloud), with on-premise and single-tenant cloud options for FP&A and multi-tenant cloud for HCM.

SIZE OF BUSINESS

• Suitable for all markets, but its focus is mid-market -200-20,000 employees, \$200m to \$1bn plus.

Vertical suitability

Unit4's target markets for its ERP and FP&A products are principally higher education, public services, not for profit, professional services organisations, and people-centred services industries, while the HCM product has a narrower focus on professional services organisations and the public sector. Within those verticals there are a number of significant sweet spots for Unit4. This includes local government, where Unit4 has historically been very strong, government agencies and universities. Large project-based management, engineering and architecture consultancy practices are a key focus within professional services.

VERTICAL MARKETS

• **Unit4 ERP:** People centred services industries, higher education, public services, not-for-profit, professional services organisations

• **Unit4 FP&A:** People centred services industries, higher education, public services, not-for-profit, professional services organisations

• **Unit4 HCM:** Professional services organisations, public sector

Go-to-Market strategy

Unit4 sell and deliver their solutions both directly and through a partner network comprising dedicated channel partners, systems integrators and consulting firms. Building a partner ecosystem is a key element of Unit4's strategy, with a range of different partner models and levels (select, premier and elite). Go-to-market partners sell, implement and support Unit4 solutions, service partners are extensively trained on Unit4 solutions to enable fast implementation, integration solutions, and support services, while technology and innovation partners enhance the functionality and performance of Unit4 solutions through software extensions and integrations. Unit4 currently has more than twenty active partners in the UK.

Licensing and pricing

Both perpetual and subscription licensing are available for the ERP and FP&A products, with subscription pricing only for the ERPx and HCM products.

Unit4 ERP licence costs are calculated using a full-time equivalent (FTE) users' metric, with a view to simplifying the licensing model. This licensing model, which is common for people-centric and HCM solutions, covers full-time, part-time, and temporary employees, plus potentially volunteers in the not-for-profit sector. FP&A is licensed on the basis of solution elements required, and named users of different types (modelling, planning, analytics) depending on their role in using the software.

Customers

EAST OF ENGLAND AMBULANCE SERVICE NHS TRUST Eeast provides accident and emergency services to over six million people, dealing with more than one million emergency calls each year. They deployed Unit4 ERP and FP&A remotely during the pandemic,

providing the organisation with a number of significant benefits including improvements in reporting and analysis, financial planning and service performance measurement.

WEST NORTHAMPTONSHIRE UNITARY COUNCIL

After Northamptonshire County Council was disbanded to form East and West Northants, West Northants became a Unit4 customer and carried out the implementation themselves in-house. While the project was challenging due to a migration from different legacy systems, the project was delivered on time and on budget with no disruption to services.

CHERWELL DISTRICT COUNCIL

Cherwell's implementation was delivered remotely, on time and on budget, during the pandemic by Unit4 partner Embridge. Benefits so far include a huge reduction in processing time for bank reconciliations; a 40 percent time-saving for many processes; and contributing to a reduction in the council's running costs by approximately 33 percent over five years.

KEY STRENGTHS OF THE PRODUCT

Unit4 ERP provides financials; human resources and payroll; procurement management; project management; and enterprise/estate asset management services. FP&A delivers financial planning; budgeting and forecasting; financial consolidation; reporting and analysis. HCM offers advanced HR functionality, from recruitment through onboarding to performance and learning management.

A key strength for Unit4 lies in their long heritage of providing people-centric solutions for organisations in their target verticals. The not-for-profit sector is a good example, with Unit4 providing functionality to support requirements in areas such as grant management, projects, and auditing and compliance reporting.

The big development for Unit4 over the past year has been the launch of ERPx, Unit4's next-generation cloud platform.

ERPx became available in Q1 2021, delivering fully integrated ERP, HCM and FP&A, on a unified architecture, with rapid deployment and industry-specific innovations out-of-the-box. Unit4 announced its first ERPx customer in January, with 62 new customers signed up by the end of Q3 2021. Its modern cloud platform is also designed to enable customers and partners to consume and build new services simply that help them differentiate and pivot as business conditions change.

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

While many organisations considering Unit4 solutions may be satisfied with the standard financial reporting and analysis provided by Unit4 ERP, the FP&A solution provides additional functionality that is likely to be attractive to larger or more complex organisations. FP&A's capabilities will likely be a fundamental element in delivering business benefits in such organisations.

Unit4's new ERPx solution, aimed at mid-market services organisations, is also garnering attention and it will be interesting to see how this offering develops.

2021 also saw the launch of a new implementation approach, On-Boarding4U, designed for ERPx implementations, and Unit4 industry mesh, an integration cloud service providing pre-built data flow connectors.

DEPLOYMENT

Unit4 ERP

- On-prem
- Single tenant (shared and dedicated deployment)
- Multi-tenant

Unit4 ERPx

- Multi-tenant

Unit4 FP&A

- On-prem
- Single tenant (shared and dedicated deployment)
- Multi-tenant

Unit4 HCM

- Multi-tenant



Workday has emerged as one of the big success stories in the world of ERP over the last 16 years. In an industry not generally noted for the emergence of new players - all of the other vendors featured in this review have been around for considerably longer in some shape or form - Workday has risen from a start-up in 2006 to a position towards the top of the charts. And it shows every sign of staying there, with over 22 percent growth in global revenue in fiscal year 2021 and over 1,350 customers in the UK. While originally best known for its HCM offering, Workday now boasts a much broader solution suite, making it suitable for a wide range of business types and industries. Workday's multi-tenant solution means every customer is on the same version. New functionality is added regularly, and the company has also been active in acquiring complementary solutions.

Key products

- Workday Financial Management
- Workday Accounting Centre
- Workday Adaptive Planning
- Workday Prism Analytics
- Workday Projects
- Workday Human Capital Management
- Workday Journeys
- Workday Workforce Optimisation
- Workday Learning
- Workday Payroll
- Workday Peakon Employee Voice
- Workday Recruiting
- Workday Scheduling
- Workday Talent Optimisation
- Workday People Analytics
- Workday Expenses
- Workday Inventory
- Workday Procurement



LINES OF BUSINESS

- HR
- IT
- Sales
- Finance
- Accounting

Business type suitability

Workday's suite of products covers finance, procurement, human capital management, planning and analytics, which effectively means it could be deployed by organisations in any sector. Workday customers are generally mid-size and large organisations. The full Workday suite tends to be used as a corporate-level solution, and by organisations in service-centric and people-centric sectors. Workday HCM has a much broader target market, and is a market-leading solution in its own right, as is the highly regarded Workday Adaptive Planning which provides financial, workforce, sales and operational planning.

SIZE OF BUSINESS

- Workday is suitable for mid-sized to large enterprises.

Vertical suitability

Workday is used across a broad and diverse range of sectors including communications, energy and resources, financial services, government, healthcare, education, hospitality, insurance, life sciences, manufacturing, media and entertainment, non-profit, professional

and business services, retail, and technology. Workday's history and reputation as an HCM solution makes it a strong candidate for organisations with large numbers of employees. Workday competes at the higher end of the market, facing competition from the likes of SAP, Oracle and Microsoft in larger enterprises, more focussed vendors such as Unit4 for people-centric organisations, and specialist HCM vendors.

VERTICAL MARKETS

- Retail
- Financial Services
- Professional and business services
- Communications
- Energy and Resources
- Government
- Healthcare
- Higher Education
- Hospitality
- Insurance
- K-12
- Life Sciences
- Manufacturing
- Media and Entertainment
- Non-profit
- Technology

Go-to-Market strategy

Workday has developed an ecosystem of services partners across the globe and has a stated aim of expanding this further to support local deployments. Service partners are an important element in Workday's overall go to market strategy, with the majority of customers using partner services for deployments rather than contracting directly. Workday's own professional services team focusses on more complex projects, strategic clients and implementations involving new features. There are various partner types, covering advisory services, deployment services and application managed services. Partners range in scale from 'boutique' to major regional or global organisations. Partners may specialise in specific products, industries, or functional areas.

Licensing and pricing

Workday subscription costs for core financial and HCM modules are based on the number of full-service equivalent (FSE) workers in an organisation. This is Workday's pricing metric which converts the total number of workers in an organisation into a weighted equivalent based on the number of workers in various categories. For example, each salaried worker may be equal to one FSE, whereas four part-time workers may equate to one FSE. When engaging with Workday it is advisable to know how your workforce breaks down by categories to inform discussions on subscription costs, particularly for organisations with significant part-time or seasonal workforces.

Customers

FINANCIAL OMBUDSMAN SERVICE The Financial Ombudsman Service (FOS) was set up by Parliament in 2001 to resolve complaints between financial businesses and their customers. Every year over 1 million people contact the service. In November 2021, Workday Financial

Management and Workday Human Capital Management went live, helping to digitally transform FOS' back office and operations.

LLOYDS BANKING GROUP

Lloyds Banking Group is live on Workday Human Capital Management (HCM), and has recently used Workday Extend to help it to improve employee engagement.

PRIMARK Primark is part of Associated British Foods and has 391 stores across 13 countries with approximately 70,000 colleagues. It is live on Workday Human Capital Management.

and by the announcement of Workday Everywhere, which provides packaged connectors that bring Workday tasks and insights directly into digital workspaces such as Teams, Slack and Microsoft Viva to help organisations elevate their employee experiences. Workday Everywhere allows employees to quickly access Workday in their natural flow of work, without having to toggle between different applications, thus improving employee productivity and engagement.



KEY STRENGTHS OF THE PRODUCT

A significant selling point for Workday is what they describe as the 'Power of One': a single application with a single user experience, database, security model and code base, in comparison with some other solutions which are comprised of many moving parts. That said, the core of financials and HCM has been augmented through acquisitions to provide a more rounded and compelling suite of solutions. During 2021, Workday continued this trend by announcing the intention to acquire Zimit, one of the only configure price quote (CPQ) solutions built specifically for services industries such as communications, media, technology, and professional and business services, and by acquiring VNDLY, an industry leader in cloud-based external workforce and vendor management technology. The existing HCM suite has also been significantly enhanced by the full integration of 2020's Peakon acquisition (to be known in future as Workday Peakon Employee Voice)

EASE OF DEPLOYMENT AND KEY CONSIDERATIONS

Workday solutions are now firmly established as a credible option in mid to large organisations, where the ERP project scope does not include manufacturing or complex supply chain management. Workday touts its 97 percent customer satisfaction rating and uses this as a key selling point. There is good availability of resources globally through the partner networks, an important consideration for global organisations. Unlike many cloud ERP suites, Workday was developed for the cloud as a multi-tenant solution, and has no legacy pre-cloud technological heritage. That model tends to favour using standard out-of-the-box functionality rather than customisation, which helps to reduce complexity during implementation.

DEPLOYMENT

- Workday is deployed as multi-tenant SaaS



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