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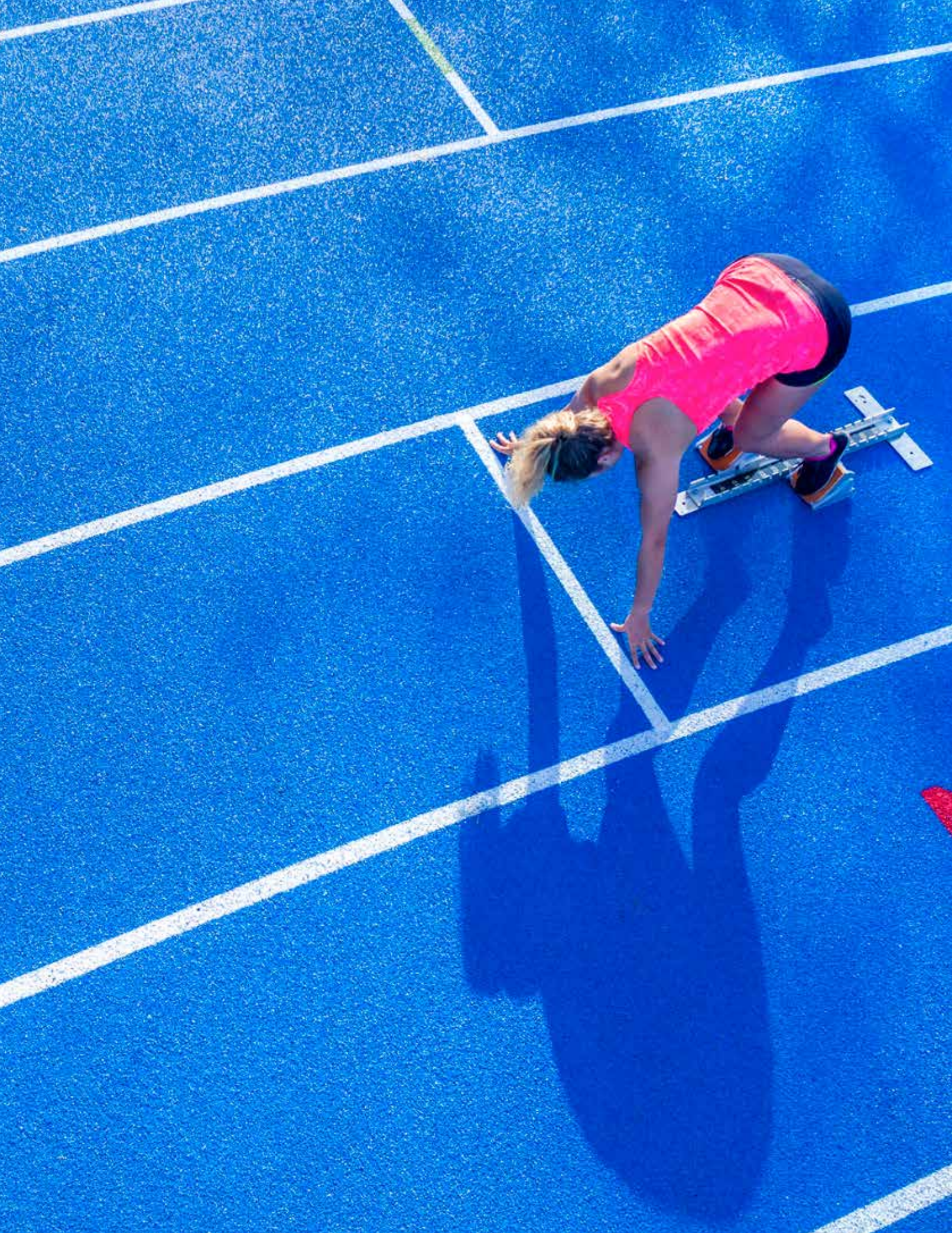**NEW:**
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FROM THE CEO'S DESK

Technical Debt is the Silent Killer of ERP Transformation

ERP systems are the backbone of modern enterprises—but increasingly, they're being strangled by something many executives don't see until it's too late: technical debt.

At a glance, your ERP might be "working fine." Orders process, invoices get paid, reports are run. But scratch the surface and you'll find layer upon layer of outdated custom code, hard-coded integrations, bolt-on fixes, and decade-old workflows duct-taped to modern requirements. That's not transformation—that's survival. And it's fragile.

Technical debt is the accumulated cost of quick fixes and shortcuts in software development that come back to haunt you. In ERP, it's often rooted in legacy systems that were heavily customized during initial implementation—especially with platforms like SAP ECC, Oracle EBS, or Dynamics AX. Back then, it seemed smart to tailor everything to your business. But now, as vendors push cloud-native platforms (SAP S/4HANA Cloud, Oracle Cloud ERP, Dynamics 365), those same customizations are massive roadblocks.

Consider this: it is estimated that by 2027, 70% of ERP transformation failures will be attributed to underestimating legacy complexity and technical debt. That's a staggering figure, but one I see reflected every day in conversations with CIOs and operational executives. You can't innovate if your core system is rigid and tangled in code no one wants to touch.

Let's take a real-world example. One of our manufacturing clients wanted to shift to SAP S/4HANA to gain real-time analytics and automation. What should have been an 18-month journey turned into 30 because of legacy ABAP customizations no one fully understood. Each modification had to be rewritten, retested, and revalidated. The cost? Millions in delays—and lost competitive advantage.

So, what's the answer?

First, get honest about your ERP baseline. Conduct a "technical debt audit." Tools like SAP's Custom Code Analyzer or Oracle's Application Upgrade Advisor can show you just how deep the rabbit hole goes.

Second, embrace the clean core. This means standardizing processes where possible and using low-code/no-code extensions (like SAP BTP or Microsoft Power Platform) instead of heavy customization. You keep the system upgradeable and agile.

Third, treat ERP as a product, not a project. This mindset shift—from a one-time implementation to ongoing lifecycle management—forces you to consider not just cost and scope, but also sustainability. How will this decision age? Can it scale with AI and automation?

And finally, make your architects your best friends. Business leaders often see architecture as a tech-side issue. It's not. The wrong architectural decision today is your business bottleneck tomorrow.

In a time when agility, compliance, and customer experience are all ERP-dependent, technical debt is not just an IT concern—it's a strategic threat. The companies winning today are the ones who treat ERP transformation not as a migration, but as a modernization—one that starts by cutting the dead weight.

Let's stop pretending ERP is a back-office tool. It's your digital nervous system. And like any system, it can only operate at peak performance if it's lean, clean, and built to adapt.

Mark Vigoroso

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AI, DATA, AND AUTOMATION

Cutting through the Noise and Navigating the New Frontier of Enterprise Value

BY MARK VIGOROSO

I n the era of digital transformation, artificial intelligence (AI), data analytics, and automation are not merely buzzwords—they are strategic imperatives. The convergence of these technologies is reshaping industries, redefining competitive advantage, and demanding a recalibration of executive decision-making. For C-level leaders, crafting a comprehensive strategy for AI, data, and automation is no longer optional. It is the linchpin of sustainable enterprise value.

Yet for all the promise, the path to adoption is fraught with complexity. From integrating generative and agentic AI systems to navigating governance, compliance, and workforce transformation, the execution challenge is real. This article provides a practical roadmap for executives seeking to align cutting-edge technologies with business priorities, regulatory requirements, and long-term ROI.

AI's impact is inseparable from the data it draws on and the automated systems through which it operates. AI interprets data; automation acts on those insights. The interplay is crucial.

"Think of AI as the brain, data as the senses, and automation as the body," said the CIO of a global logistics firm. "Together, they create a learning, adaptive enterprise."

Agentic AI—systems capable of autonomous decision-making within defined constraints—represents the next

> **"** AI, data, and automation are not silver bullets—they are force multipliers.**"**

frontier. Unlike traditional AI models, which require constant human supervision, agentic AI operates with goal orientation, continuously learning and optimizing.

Large Language Models (LLMs) like GPT-4, Claude, and enterprise-specific variants are redefining knowledge work. From generating legal drafts to answering customer queries in natural language, LLMs promise not just automation but augmentation—an entirely new layer of digital capability.

Predictive analytics, meanwhile, provides foresight. It enables decision-makers to act preemptively, not reactively—forecasting everything from supply chain disruptions to customer churn.

AI adoption is not plug-and-play. A practical, four-stage framework ensures that deployment is grounded, scalable, and aligned with business strategy.
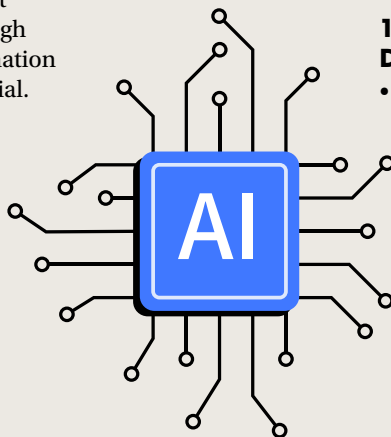
1. Strategic Alignment & Business Case Development

- **Define Use Cases:** Prioritize areas where AI can deliver measurable impact—fraud detection, personalized marketing, dynamic pricing.
- **Quantify ROI:** Estimate returns using metrics aligned with business KPIs, such as cost-to-serve, conversion rates, or asset uptime.
- **Assess Readiness:** Conduct an organi-

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zational maturity assessment across data infrastructure, talent, and governance.

2. Data and Infrastructure Readiness
• **Data Quality and Accessibility:** Ensure datasets are clean, integrated, and compliant with standards like GDPR and CCPA.
• **Model Infrastructure:** Choose between cloud, hybrid, or edge deployment. For high-performance workloads, consider vector databases and GPU acceleration.
• **Vendor Strategy:** Evaluate partnerships for model provisioning (OpenAI, Anthropic), orchestration platforms (Data-Robot, H2O.ai), and infrastructure (AWS, Azure, GCP).

3. Governance, Risk, and Compliance
• **Ethical Guardrails:** Establish principles around fairness, explainability, and accountability. Appoint an AI Ethics Officer.
• **Model Auditing and Validation:** Adopt tools for drift detection, adversarial testing, and interpretability (e.g., SHAP, LIME).
• **Regulatory Alignment:** Stay ahead of AI-specific legislation such as the EU AI Act and U.S. AI Bill of Rights.

4. Deployment, Monitoring and Continuous Improvement
• **Pilot Programs:** Run limited-scope pilots to test efficacy and gather feedback. Use these to refine assumptions.
• **MLOps and AIOps:** Use DevOps-like practices for continuous deployment, versioning, and monitoring of AI systems.
• **Human-in-the-loop Design:** Integrate human oversight where necessary to maintain control and safety.

Governance isn't a brake on innovation—it's a necessary accelerant. Without it, AI initiatives risk collapse under scrutiny. A 2024 study showed that only 32% of executives feel "very confident" their AI is compliant and ethically sound. That's a significant gap—and a call to action. Robust AI governance should include the following: Cross-Functional Councils involving legal, compliance, IT, operations, and business units; Risk Heat Maps that map model and data risk across the enterprise; Third-Party Reviews, or regular audits to identify hidden biases, black-box models, or training data gaps; and Incident Management Plans, which are playbooks for managing AI-related errors, from misclassification to hallucination.

"In highly regulated industries like healthcare or finance, governance can't be an afterthought," said a Chief Compliance Officer at a multinational bank. "It must be embedded from design to deployment."

In these early days of the AI age, there are several myths that need to be debunked. The most significant myths are as follows:

> **" AI changes jobs more than it erases them. It automates routine tasks but amplifies creative, strategic, and interpersonal functions."**

MYTH 1: AI Delivers Immediate ROI
Reality: Strategic value often takes time to materialize. Short-term wins are possible, but transformative returns require integration, iteration, and cultural change. Recent reports suggest that only 8% of firms effectively scale AI. Why? Because they underestimate the time and investment needed for full adoption—including re-skilling, change management, and infrastructure. But beware of "death by proof-of-concept." While ROI may not be immediate, have a plan to scale within a handful of use cases beyond the first few demonstrations of business impact.

MYTH 2: AI Will Eliminate More Jobs Than It Creates
Reality: AI changes jobs more than it erases them. It automates routine tasks but amplifies creative, strategic, and interpersonal functions. The World Economic Forum predicts that while 85 million jobs may be displaced by 2025, 97 million new roles will emerge—data scientists, AI trainers, compliance analysts, and more. Enterprises are investing in upskilling programs like IBM's SkillsBuild and Google's AI Career Certificate to bridge the gap.

MYTH 3: Ethics Slows Down Innovation
Reality: Ethics reduces friction, builds trust, and accelerates adoption. Take Microsoft's Responsible AI framework—it didn't slow its pace. It enabled them to move faster in regulated sectors like defense, education, and finance. Ethical AI builds a brand moat. Companies with clear, well-communicated AI values gain customer loyalty, employee engagement, and investor confidence.

Technology is only part of the equation when it comes to AI, data and automation. Success depends at least as much on human capital, organizational change management, skills development, talent acquisition and retention, and functional evolution. AI adoption must be sponsored from the top. CEOs and boards must signal its strategic importance and provide cover for experimentation. Transparent communication about AI's purpose, potential, and limits can reduce fear and resistance. Empower employees as co-creators, not just end users. Cross-training employees in data literacy and AI fundamentals pays dividends. Encourage AI fluency across all departments—not just IT. Case in point: a major European telco launched an internal AI academy. Within a year, over 5,000 employees had completed courses, leading to 47 new AI-driven initiatives initiated from within business units.

You can't manage what you can't measure. C-level leaders must define success in AI not by experimentation, but by impact. Dashboards and OKRs should track AI initiatives alongside traditional performance metrics. Best practice is to review quarterly, iterate often.

Common KPIs associated with AI impact include:

• **Operational Efficiency:** Reduction in manual hours, error rates, or time-to-resolution.

• **Customer Experience:** Improvements in Net Promoter Score (NPS), retention, or personalization accuracy.

• **Revenue Growth:** Uplift from targeted marketing, dynamic pricing, or new AI-enabled services.

• **Risk Mitigation:** Fewer compliance breaches, faster anomaly detection, improved model explainability.

Agentic AI – referred to increasingly as the digital workforce – is gaining steam as potentially the most transformative AI application. By way of example, a global e-commerce platform recently deployed agentic AI bots to autonomously manage supply chain disruptions. These agents analyzed weather data, social media sentiment, and vendor performance to reroute shipments in real-time. The result? A 21% reduction in delayed orders, 14% savings in logistics costs, and a customer satisfaction boost of 11%. The initiative was so successful it's now being replicated in other business functions. What made it work? Executive sponsorship, robust data infrastructure, and real-time monitoring. Plus, a fallback mechanism: human supervisors had override authority.

CxOs should be contemplating the following questions now, in order to set their companies up to fully capitalize on the transformative potential of AI, data and automation:

• Which parts of our business could benefit most from GenAI or agentic AI?

• Do we have a governance framework robust enough for emerging regulations?

• Are our data assets clean, connected, and compliant?

• What's our talent strategy for AI? Are we hiring and upskilling at the right pace?

• How do we align AI projects with measurable business outcomes?

AI, data, and automation are not silver bullets—they are force multipliers. When guided by strategy, governed responsibly, and deployed with human-centered intent, they unlock transformative value. C-level leaders stand at a crossroads. The tools are ready. The frameworks are proven. What's needed now is bold but disciplined execution. The winners in the AI era will be those who move not just fast, but wisely—aligning technological ambition with ethical stewardship and business impact. The time to lead is now. ■
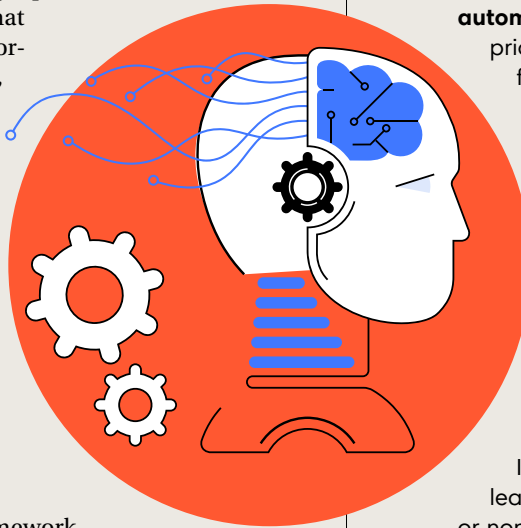
WHAT THIS MEANS FOR ERP INSIDERS

• **Don't get lost in the technical complexities of AI, data, and automation.** C-level leaders must prioritize identifying specific business problems within the ERP system by focusing on defining clear use cases and quantifying the potential ROI using relevant business KPIs such as reduced order fulfillment time, increased customer retention and improved inventory accuracy. Moreover, whether those issues are supply chain inefficiencies, customer service bottlenecks, or financial reporting delays, organizations must ensure their AI and data plans align with the overall business strategy for those specific issues. This keeps initiatives grounded and focused on delivering real value rather than chasing the latest tech trends.

• **AI is the "brain," data the "senses," and automation the "body."** Organizations that prioritize data quality and governance as foundational understand this concept, as the effectiveness of any AI or automation initiative hinges on the quality, accessibility, and compliance of the data within and connected to their ERP system. C-level leaders must ensure investments are made in data cleansing, integration, and establishing robust data governance frameworks. Furthermore, as AI adoption increases, so does the need for strong ethical guardrails, model auditing, and regulatory alignment. Ignoring these foundational elements will lead to flawed insights and potentially risky or non-compliant AI deployments within the ERP environment.

• **Implementing AI and automation within an ERP context is not just a technology project.** It is a significant organizational change that includes the human element. C-level leaders must actively address the human capital implications, including potential job role changes and the need for upskilling employees to work alongside AI-powered systems. Planning for change management, transparent communication about the purpose and impact of these technologies, empowering employees as co-creators, and investing in training programs are crucial to overcome resistance and foster a culture of adoption. The focus should be on augmenting human capabilities with AI and automation within the ERP workflow, rather than simply replacing human tasks.

SECURING THE DIGITAL CORE

What Business Leaders Need to Know About Cybersecurity and Risk Mitigation for ERP Systems

BY ROBERT HOLLAND

E RP systems are the digital lifeblood of today's enterprises. They run critical operations and store priceless data that organizations simply can't afford to lose. But as these systems evolve and move to cloud environments and they are more deeply connected across a growing set of enterprise solutions, they have also become bigger targets for cyberattacks. For decision-makers, securing ERP systems is no longer just IT's concern; it is a business imperative.

Why the Old Way of Securing ERP Systems Are No Longer Sufficient. Traditional SAP security typically focuses on user access controls and permissions. But in today's hyper-connected environment, that approach no longer provides sufficient protection. Additional complications like Oracle GRC recently reaching the end of life only adds complexity to these challenges, although GRC solutions need to be complemented with cybersecurity tools.

ERP Today spoke with JP Perez-Etchegoyen, co-founder of Onapsis, who stated that "Cybersecurity for SAP involves applying traditional cybersecurity or IT security concepts to SAP landscapes, which is very different from traditional SAP security."

In other words, you can't just treat an ERP system like any other business application. And, no matter which ERP system an organization is using, the same adjustments need to be made. It is vital that traditional cybersecurity methodologies be applied to every ERP deployment.

Gaurav Singh, Senior Cyber Security Manager at Under Armour, adds: "Cybersecurity is about bringing together two different worlds. One is traditional security, and the other is ERP security which, for IT security teams, can often be a black box. To have effective security you need to bring those

> "
> Cybersecurity is about bringing together traditional security with ERP security."

two different worlds together and tell them that you are not just SAP security, you are SAP cybersecurity."

That means understanding not just the ERP solution itself, but the broader technology ecosystem that supports it—especially as more organizations embrace cloud-based platforms. Something that is extremely important for the connections and integration points between cloud-based systems and other critical enterprise solutions.

Cloud Changes the Game—And the Security Rules. The move to the cloud, especially with offerings like RISE with SAP, is transforming how companies handle ERP. While cloud providers handle the infrastructure layer, the responsibility for securing the application and data layers stays firmly with the customer. This will differ depending on whether the ERP solution is a software-as-a-service solution or is simply leveraging infrastructure provided by the vendor.

As Mariano Nunez, CEO and co-founder of Onapsis, warns: "The main challenge we see today is how organizations protect their ERP applications as they go to the cloud. It's about understanding the shared security responsibility model."

Even though ERP vendors have improved their guidance around who does what, confusion still lingers. And in a crisis, clarity matters.

"Even if you're delegating operational responsibilities to a partner, it's still the customer's name on the headlines," Nunez reminds us.

The Attack Surface Is Growing. As businesses modernize and migrate, ERP systems are no longer protected by traditional on-prem firewalls. They're more exposed, more interconnected, and require more thoughtful security planning.

New environments and enterprise platforms such as SAP's Business Technology Platform (BTP) provide fresh possibilities for innovation—but also new risks. According to Nunez: "For some customers, deploying SAP BTP can feel like the 'Wild West' because they don't know what they don't know."

If you're building AI use cases or custom applications in the cloud, securing your configurations, APIs, and development practices is critical to keeping your environment safe.

Common Misconceptions That Put Businesses at Risk. Despite the increased focus on cybersecurity, there are myths that continue to create blind spots for organizations:

• *"We're behind a firewall—we're safe."* Not anymore.

• *"We have a dedicated ERP security team—that's enough."* Not quite.

As Gaurav Singh explains, siloed thinking continues to plague many organizations:

"The infosec guys assumes that, because the SAP guys are so GRC heavy, they have everything covered. At the same time the SAP team can assume that everything is okay because there is a separate cybersecurity team. This siloing is still common today."

Breaking down these walls between teams is essential to building a cohesive, end-to-end defense.

Why Attackers Love ERP—and What It Could Cost You. Cybercriminals are increasingly targeting ERP systems because they know that's where your crown jewels live—your sensitive business data and mission-critical processes.

"Attackers know that the money is in ERP systems," says Nunez. "That is where the most critical data resides."

As an example, Nunez worked with a customer where an "SAP security breach" was cited as a "major factor" in a company's Chapter 11 bankruptcy. This was because the breach disrupted operations and derailed compliance with financial reporting.

The stakes are real. According to Onapsis research, there has been a 400% increase in ransomware incidents affecting SAP systems and a 5X increase on the price of cyber weapons that are designed to target SAP systems.

AI: A Double-Edged Sword. Artificial Intelligence is also changing the cybersecurity landscape—on both sides. Attackers are using AI to craft more convincing phishing campaigns, while defenders are using it to improve detection and response.

For companies using AI within ERP environments, data security becomes even more crucial. Nunez points out it's vital to secure the applications that generate the data in the first place because they are the ones housing the data and can be the most vulnerable. This means putting extra focus on enterprise platforms, where many AI use cases are deployed.

Getting Ahead of the Curve: What Leaders Can Do. So, what should business leaders prioritize? Here's a simple roadmap:

• *Start with visibility.* "It absolutely starts with visibility," Nunez emphasizes. "Know your current security posture—and where it needs to go."

• *Automate wherever possible.* Whether you're on-prem, in the cloud, or running hybrid systems, automation helps manage complexity and enforce consistent security controls.

• *Integrate ERP security into your broader enterprise security efforts.* No need to reinvent the wheel—just make sure ERP systems aren't left out of security planning.

• *Build in security from the start.* Particularly during major shifts like ERP implementations.

Invest in Talent—Or Grow It From Within. There's a shortage of cybersecurity experts today, but that presents a big opportunity for professionals already working with ERP systems.

"Every company today is struggling with getting SAP cybersecurity experts on their teams," Nunez says. "It's much easier to learn security if you already know SAP."

Resources like the recently published book Cybersecurity for SAP are great for anyone looking to bridge that gap. Singh stresses the importance of taking a deliberate approach: "It starts with really prioritizing and being purposeful about securing and reducing that gap in your organization."

Lean on the Partner Ecosystem. You don't have to go it alone. Partner ecosystems can bring valuable tools, expertise, and services to the table. Onapsis, for example, works closely with SAP to "identify and mitigate vulnerabilities," and has recently launched the SAP Defenders community. This helps customers stay informed and protected.

Final Word: ERP Cybersecurity Is a Business Priority. In today's threat-filled world, securing your ERP systems takes more than just following old security playbooks. It requires a shift in mindset—a holistic, risk-based approach that spans people, process, and technology.

By improving visibility, strengthening collaboration, automating intelligently, and tapping into expert partnerships, organizations can confidently secure their digital core and navigate what's next. ∎

THE INDISPENSABLE LINK

Integration, Composable Architectures, and Value Maximization for Modern CFOs within ERP Systems

GRANT SUNESON

Emerging technologies and worldwide volatility have thrown the role of the CFO into disarray. Now, these leaders must transcend traditional accounting and reporting functions. Modern CFOs are now strategic leaders, tasked with driving business value, optimizing performance, and navigating a complex technological landscape.

Central to achieving these objectives within an organization's core Enterprise Resource Planning (ERP) system are two interconnected pillars: robust integration and the proactive maximization of the ERP's inherent capabilities. By establishing seamless data flows across various systems and fully leveraging the functionalities embedded within their ERP, CFOs can unlock unprecedented levels of efficiency, gain critical insights, and ultimately steer their organizations toward sustained growth and profitability.

Integration Unlocks Value. The significance of integration cannot be overstated in the contemporary business ecosystem. As organizations increasingly adopt specialized applications and cloud-based services to address specific needs, the ERP system, while often serving as the central nervous system, must effectively communicate and exchange data with these disparate platforms.

The speed of decision-making has accelerated dramatically, necessitating real-time access to information from across the organization. Whether it's sales data, supply chain information, or customer relationship management details, the ability to consolidate and analyze this information within the ERP, facilitated by tight integrations, empowers CFOs and other C-suite leaders to make informed decisions on demand.

"If you look at CFOs, CIOs, CROs, they're all looking to make decisions effectively on-demand. The ability to push information in real-time and extract information real-time

> **"**
> **Whenever the C-suite needs to make a decision, they can have that information on demand**

means that whenever the C-suite needs to make a decision, they can have that information on demand at their fingertips. Every time there's a crisis, and you can argue tariff wars and trade uncertainty is one of those, then it merits more information being captured, analyzed and then understood," said Bob Stark, Global Head of Enablement at Kyriba.

Having integration ready on day one of any significant system implementation or upgrade, such as a move to cloud platforms like SAP S/4HANA or Oracle Cloud, is essential. Without these connections, organizations risk operating in silos, leading to delayed insights, inaccurate reporting, and ultimately, an inability to react swiftly to market changes or internal performance indicators.

Key data points, such as cash flow and liquidity, are particularly pressing in today's landscape of economic uncertainty. Integration with banking systems and other financial platforms provides CFOs with a real-time view of their cash position, enabling proactive management of liquidity and informed decisions regarding investments and borrowing.

However, achieving effective integration is not without its challenges. One significant obstacle is the lack of a clear understanding of the organization's data strategy. Without a defined vision for what data needs to be connected, why, and with what frequency, it becomes exceedingly difficult to prioritize integration efforts and ensure that APIs and other connectivity tools are utilized effectively. Prioritization itself can also be a hurdle, as organizations juggle numerous competing initiatives and may not fully recognize the strategic importance of robust integration.

Moreover, the openness of the systems that need to be integrated with the ERP plays a crucial role. If these external platforms lack open APIs (Application Programming Interfaces), building and maintaining integrations can become

complex and time-consuming, potentially leading to technical debt, which can hinder scalability and future upgrades.

The concept of technical debt is also relevant within the ERP itself, particularly concerning customizations. While some specialized functions may seem necessary, excessive customization can impede integration efforts and complicate future upgrades. Generally, integrations should leverage pre-built connectors whenever possible, ideally within a low-code or no-code environment, to minimize the effort and risk associated with bespoke interfaces that may not be sustainable over time.

Leveraging the Power of Composable Architecture. The concept of composable architecture is also presented as a trend that CFOs should be aware of. Composable architecture, often interchangeable with cloud-native architecture or microservices, represents a modular approach consisting of loosely coupled microservices or headless systems deployed together.

One of the primary advantages of a composable ERP for CFOs is the enhanced agility in financial operations. Businesses can adapt much more quickly to changing business models, such as evolving global tax compliance requirements, by swapping out specific components rather than overhauling the entire system.

Composable ERPs have also shown the ability to deliver and improve real-time insights. This is crucial for CFOs who need up-to-date information to make informed decisions, as highlighted by the need for real-time data for effective decision-making in today's accelerated business environment.

"You tend to get much cleaner, more timely financial data with composable architectures. It reduces long term costs and tech debt because traditional ERPs come with a high degree of customization and high degree of maintenance costs. The footprint with traditional, monolithic ERPs is much heavier, so it's more expensive for you to operate and run. With Compostable architecture, you're only deploying the services that your business needs, and not deploying the whole monolith, even though you only need maybe 30% of that. It has a much lighter footprint," said Dinakar Hituvalli, CTO and SVP of product development at Deltek.

Reduced long-term costs and technical debt are also significant benefits. Traditional ERPs often accumulate a high degree of customization and maintenance costs, with heavier footprints. Composable architectures allow organizations to

> "You tend to get much cleaner, more timely financial data with composable architectures."

deploy only the services they need, resulting in a lighter footprint and lower operational expenses.

Ultimately, a composable architecture future-proofs the finance technology stack. Its cloud-native nature allows for the easier integration of new and emerging capabilities without disrupting core processes. This is particularly relevant in the context of rapidly evolving technologies like AI, which is a significant trend reshaping financial decision-making. The ability to plug in new AI-powered functionalities without major system overhauls is a key advantage for CFOs looking to leverage these advancements.

In essence, composable ERP architecture provides CFOs with a more agile, insightful, cost-effective, scalable, and future-ready foundation for their financial operations compared to traditional monolithic systems. This modular approach empowers finance teams to adapt to change, gain timely insights, and leverage new technologies more effectively, ultimately contributing to better strategic decision-making and value creation for the organization.

ERPs are Empowered by Connection and Flexibility. For modern CFOs to effectively navigate the complexities of today's business landscape and drive maximum value within their ERP systems, focusing on robust integration is essential. By establishing seamless data flows through strategic integration initiatives, CFOs can gain the real-time insights necessary for agile decision-making.

The evolving role of the CFO as a strategic partner with technology leaders, coupled with a commitment to data-driven decision-making and a forward-looking perspective on technological advancements, will be critical in harnessing the full potential of ERP systems and positioning organizations for continued success in the years to come.

The interconnection between a strong data strategy and the effective implementation of AI underscores the fundamental importance of a well-integrated data environment as the bedrock for future innovation and value creation within the ERP ecosystem.

Businesses also need flexibility to maintain a competitive advantage in times of volatility. Composable ERPs can offer users the ability to manage operations reliably and efficiently. By allowing users to mix and match different software programs, organizations can find the ideal form for their tech stack to take. ▪

ADEPTIA'S INNOVATION ENGINE

Deepak Singh on Simplifying Data Integration for the Modern Enterprise

BY MARK VIGOROSO

I n the ever-evolving landscape of enterprise technology, the ability to integrate data across systems and organizations swiftly and securely has become a business imperative. At the heart of this transformation is Adeptia, an enterprise-class data integration platform, and its Chief Innovation Officer, Deepak Singh, who has helped guide the company from inception to its current position as an enabler of real-time, AI-powered data connectivity.

In a conversation with ERP Today, Singh shared insights into Adeptia's market positioning, differentiation, and the company's trajectory following its acquisition by PSG Equity.

At its core, Adeptia specializes in automating intercompany data connections, enabling organizations to quickly and securely exchange data with customers, partners, and suppliers—without relying heavily on IT resources.

"We help customers like Visa, Fidelity, Voya Financial, and the NIH set up automated data flows with thousands of external organizations," Singh explained. "That data might be structured or unstructured, but it all needs to be validated, converted, and processed quickly—often in near real time."

While Adeptia is system-agnostic, it is frequently deployed alongside ERP giants like SAP, Oracle, and Microsoft Dynamics. Singh pointed to a major deployment with Sencora (formerly AmerisourceBergen), which uses Adeptia to integrate 17 e-commerce platforms and thousands of pharmacy partners with SAP HANA.

"ERP systems are the backbone, but they aren't built to handle the external data integra-

> "
> ERP systems are the backbone, but they aren't built to handle the external data integration use cases that are becoming more common

tion use cases that are becoming more common," Singh said. "Our customers want flexibility—and control—so we offer both cloud and on-premise deployment options, which is a big differentiator."

Indeed, the ability to deploy on-premise remains vital for Fortune 500 companies with strict data security and compliance requirements. "For mission-critical operations, relying solely on a cloud-based integration layer isn't always feasible," he added.

Singh outlined three primary differentiators that set Adeptia apart in the competitive world of data integration:

• *Business-First Design:* Unlike traditional integration tools geared toward IT developers, Adeptia's platform is designed for use by business analysts, reducing the dependency on IT and accelerating time to value.

• *Deployment Flexibility:* Customers can deploy the platform on-premise, in their private cloud, or via a SaaS model—allowing full control over mission-critical data pathways.

• *AI-Driven Automation:* Over the last four years, Adeptia has infused its platform with AI that automates complex data mapping, validation, and transformation tasks. "What used to take weeks or months—like mapping EDI 850 messages to SAP—now takes minutes," Singh said.

While Adeptia's value proposition begins with integration, its impact reaches into customer experience, time-to-market, and operational efficiency. Singh cited examples where clients' Net Promoter Scores improved after switching to Adeptia, thanks to faster data exchanges and better real-time visibility.

"The business teams are often the drivers,"

Singh said. "They want to modernize customer experience. But IT is tasked with the execution. That's where we come in —offering a collaborative platform that satisfies both."

As organizations re-evaluate aging ERP platforms and legacy EDI systems, Singh sees a massive opportunity. "Companies are coming to us to modernize both their ERPs and how data enters those systems," he said. "They're shifting from static batch processes to real-time API-driven interactions."

Adeptia's roadmap includes expanding support for emerging ERP platforms like Microsoft Dynamics 365 Business Central, enhancing AI-powered mapping, and strengthening hybrid deployment capabilities.

"We're just getting started," Singh said. "With PSG behind us and a strong leadership team in place, the next 12 to 18 months will be about scaling everything—from go-to-market to innovation." ∎

> ❝
> What used to take weeks or months—like mapping EDI 850 messages to SAP—now takes minutes

WHAT THIS MEANS FOR ERP INSIDERS

• **Adeptia fits companies on ERP modernization journey.** Adeptia has deep experience integrating with ERP platforms like SAP, Oracle, NetSuite, and Microsoft Business Central, which enables streamlined order-to-cash, inventory, EDI, and API integration processes with internal and external stakeholders. From a time-to-value perspective, Adeptia claims to cut partner/customer data onboarding times from eight weeks to less than one week, and industry benchmarks consistently show that faster customer/partner integration leads to improved NPS, revenue realization, and operational agility.

• **Don't confuse Adeptia for a low-end iPaaS.** With average deal sizes in the $100K–$200K+ range, Adeptia is more expensive than some low-end iPaaS or open-source options, so it may not be suitable for startups or small businesses with minimal integration needs. Adeptia focuses on intercompany data exchange rather than general-purpose integration or full application orchestration, so enterprises needing broader app-to-app integration (e.g., CRM + marketing + analytics) may need complementary tools. While simpler than developer tools, Adeptia still requires upfront setup and process planning—especially for larger ERP environments, so enterprises should plan to invest time in architecture, training, and governance.

• **Why Adeptia vs. Boomi, or Mulesoft, or Informatica?** Adeptia is designed for non-technical users (e.g., analysts, operations managers) to create and manage integrations via a no-code, drag-and-drop interface. MuleSoft, Informatica, and Boomi are developer-centric. They offer powerful tools, but require more IT involvement and coding for setup and maintenance. Also Adeptia offers both on-prem and cloud deployment options, ideal for regulated industries or companies with hybrid ERP environments. MuleSoft and Boomi are primarily cloud-first platforms. While some hybrid capabilities exist, on-premise control is more limited. Informatica offers hybrid options, but often with more complexity and higher licensing costs. And Adeptia is purpose-built for ecosystem connectivity— setting up data flows between ERP and thousands of customers, suppliers, or partners. MuleSoft and Boomi are strong for application-to-application (A2A) integrations, APIs, and internal workflows—but may require add-ons or custom code for high-volume B2B onboarding. Informatica has strong data management tools, but its EDI and B2B capabilities are more complex and expensive to scale.

NAVIGATING ERP AND DIGITAL MODERNIZATION

Strategic Insights for Technology Leaders

BY ROBERT HOLLAND

As digital transformation accelerates, organizations are finding themselves at the center of a rapidly evolving ERP landscape. For CIOs, IT leaders, and enterprise architects, choosing the right ERP system is a strategic opportunity to redefine how technology delivers business value. This makes it crucial for technology leaders to navigate modernization challenges, leveraging their ERP system's expanding platform ecosystem, and preparing their teams for what comes next.

Facing the Crossroads of ERP Modernization.
The path to a modern ERP environment is often paved with uncertainty. At the heart of many transformation conversations is the move to cloud-based ERP, which promises streamlined adoption and business innovation—but the journey is far from linear.

Nick Miletich, COO at Proterra, summarizes the core challenge: "I would say the biggest challenge and the biggest conversations we continually have is about how to navigate this journey." For many organizations, aligning legacy systems, cloud readiness, and business goals introduces both technical and strategic friction.

SAP customers, for example, must manage the integration of SAP S/4HANA or RISE with SAP, SAP Business Technology Platform (BTP), as well as newly introduced offerings such as SAP Business Data Cloud. The combination of these solutions can introduce complexity that often overwhelms customers. As Miletich explains, "Some clients haven't even started using cloud-based data stores. This makes the jump to multiple new solutions a big pill to swallow. And they

> "Cloud-based ERP offers streamlined adoption and business innovation, but the journey is far from linear."

come to us to talk through what that journey is going to look like."

Steele Arbeeny, North American CTO at SNP, points to another pressing issue: articulating the value of modernization efforts. "You need a better story than that," he says, referring to the difficulty in justifying investment when the visible gains may seem incremental. "It's a struggle to connect that story to the size of the investment."

Strategic Modernization: Start Small, Think Big. To avoid analysis paralysis, many leaders are adopting phased, pragmatic approaches to transformation. According to Miletich, "A lot of clients automatically expect that it is necessary to update underlying data platforms, ERP systems, and infrastructure at the same time. And that's not the case." Instead, 80% of Proterra's work involves gradual steps—starting with an initial move to cloud-based infrastructure, then layering in an ERP update and introducing modern development principles.

This modular mindset also aligns with SNP's "selective migration" approach. As Arbeeny explains, organizations can "pick and choose what you want to migrate and what you don't," allowing for surgical modernization while optimizing cost, time, and impact.

The Power of Platform, Data, and Business AI. ERP vendors today are doing more to expand their platform ecosystems, reshaping how organizations build digital capabilities. However, even when the solutions offered are fully managed software-as-a-service offerings, Miletich points out that "you still need technical teams to do what we would consider standard

administrative tasks," reinforcing the need for clear ownership and skills alignment across technical teams.

Data strategy is becoming a linchpin of the ERP modernization roadmap. This is because having cleansed and harmonized data is a vital part of centralization projects and preparation for future innovation. But organizations are also looking to ensure that they aren't replicating data unnecessarily. This shift reduces latency and improves data integrity across systems.

It also lays the groundwork for business-grade AI, where contextually trained algorithms operate on real-time data, not stale extracts. But as Arbeeny warns, "If your data isn't good, you're not going to get value out of it." Modernization is the moment to cleanse, archive, and reshape data into an AI-ready foundation.

Partnering for Progress. Technology partners remain essential allies in executing digital strategy. Miletich highlights their indispensable role: "The augmentation and innovation of what the partners bring has been absolutely beneficial to everything we've done." From strategy and compliance to migration and integration, experienced partners offer the vertical expertise and solution depth that ERP customers need to accelerate value realization.

As Arbeeny notes, partners are often the crucial translators between the ERP vendor and customer business needs: "Here's how we can use data from the ERP system, data from other systems, and third-party data to make this end result better."

Rethinking Skills for the Modern Professional. In this hybrid future, IT professionals must evolve. Traditional skills—like ERP administration—remain relevant, even as new capabilities like managing cloud platforms and enterprise architecture gain prominence.

"The cloud skill set I think is going to be the hot commodity," says Miletich, citing the need to monitor resource usage, manage environments, and optimize connectivity. Other industry experts are focused on the value brought by enterprise architecture which bridges technologies to deliver real business value and is tremendously important when most organizations are running solutions from multiple vendors in a variety of landscapes.

Importantly, Arbeeny calls out the enduring importance of functional insight: "What is the customer doing? How can we improve the customer journey with all these tools, right?"
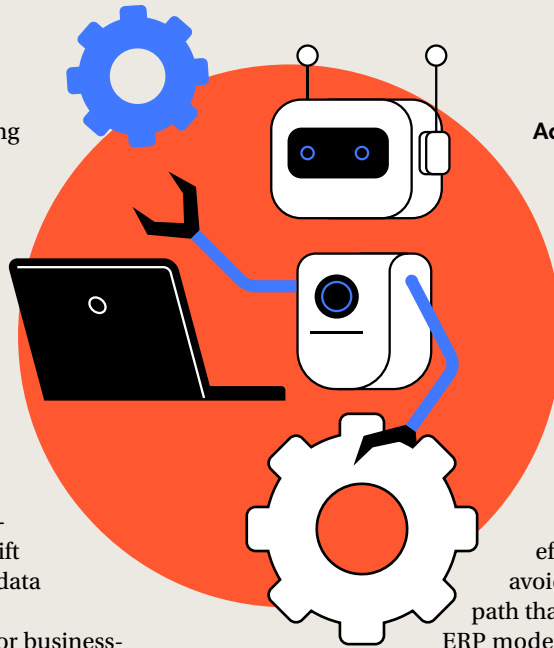
Act with Purpose, Engage with Strategy

For organizations still in deliberation, the message is clear: delay only increases risk. Miletich encourages teams to understand and grasp the changes that are occurring within ERP systems today. Having that knowledge is key to planning for future innovation. The journey can be taken in phases, but there must be a starting point.

Arbeeny adds a final note of focus: "Start with doing it for the right reason. Everything should begin with a value discussion." By grounding transformation efforts in business outcomes, ERP leaders can avoid tech-for-tech's-sake initiatives and chart a path that aligns IT execution with enterprise growth. ERP modernization is not a single project—it's an ongoing commitment to agility, intelligence, and innovation. Whether simplifying the core, embracing cloud platforms, activating business AI, or building a future-proof workforce, success requires proactive engagement, clear business alignment, and trusted partners. As ERP ecosystems continue to evolve, technology leaders who act with clarity and conviction will be best positioned to turn transformation into sustained advantage. ∎

WHAT THIS MEANS FOR ERP INSIDERS

• **Prioritize a Phased Approach to ERP Modernization.** Avoid the trap of "big bang" transformations. Instead, break your ERP modernization journey into manageable phases. Begin by enhancing cloud readiness, then layer in an ERP upgrade or initiatives that will streamline manageability over time. This approach reduces risk, accelerates time to value, and aligns better with resource availability and organizational readiness.

• **Build a Unified Data Strategy to Unlock AI Potential.** Invest early in data quality, governance, and integration—especially if AI or business analytics are part of your roadmap. Leverage enterprise platforms to eliminate replication, enable real-time visibility, and extend insights beyond just the ERP system. Clean, well-structured data is foundational to realizing meaningful business outcomes from AI and automation initiatives.

• **Engage Partners Strategically for Transformation Expertise.** Partners bring critical experience, industry-specific knowledge, and technical capabilities to navigate complex migrations, integration efforts, and new platform adoption. Collaborate closely with partners who understand your business model and can help translate evolving offerings into clear, executable value-driven strategies.

A TRANFORMATIVE LEAP

The Emerging Role of Automation and Hyperautomation in Finance

GRANT SUNESON

The Inherent Limitations of Manual **Finance Processes.** Finance departments have historically been burdened with a multitude of manual tasks, ranging from data entry and invoice processing to account reconciliation and report generation. While these processes may have been manageable in simpler times, the increasing complexity of business operations and the sheer volume of financial data have exposed their significant limitations.

Manual processes are inherently time-consuming, diverting valuable resources and personnel away from more strategic activities. They also require human intervention, which inevitably leads to errors and oversights, potentially resulting in financial misstatements and compliance issues. Manual processes require significant manpower, often straining finance teams that are under pressure to accomplish more work without increased staffing.

Drawn-out manual processes can leave organizations in the dark, hindering access to timely and accurate financial information vital for informed decision-making. Additionally, Manual processes struggle to scale with business growth and increasing data volumes, creating bottlenecks and inefficiencies.

Manual processes also introduce the potential for errors in financial reporting workflows, which increases the risk of non-compliance and financial penalties. These inherent drawbacks underscore the urgent need for a paradigm shift

> **"**Hyperautomation represents a significant leap beyond basic automation.**"**

in how finance processes are executed. Automation and hyperautomation offer a compelling solution by addressing these limitations head-on and ushering in an era of enhanced efficiency, accuracy, and strategic focus.

The Transformative Power of Automation in Finance. Implementing automation across various finance functions yields a multitude of benefits, streamlining operations and improving overall financial management:

- *Streamlined Accounts Payable (AP) Processes*: Automation can significantly improve AP workflows by automating tasks such as invoice receipt, data capture, routing for approvals, and payment processing. This reduces manual data entry, minimizes errors, accelerates processing cycles, and improves vendor relationships.

- *Enhanced Accounts Receivable (AR) Management:* Automation in AR can streamline collections processes through automated outreach to clients, reminders for upcoming payments, and management of payment delays. Hyperautomation further enhances this by using AI to proactively identify customers likely to be late and recommending incentives to encourage timely payments.

- *Accelerated Financial Close:* Automating daily matching and reconciliations is crucial for an efficient and accurate financial close process. Manual processes are time-consuming and error-prone, but automation ensures real-time data validation, faster error detection, and seamless integration across financial systems, allowing finance teams
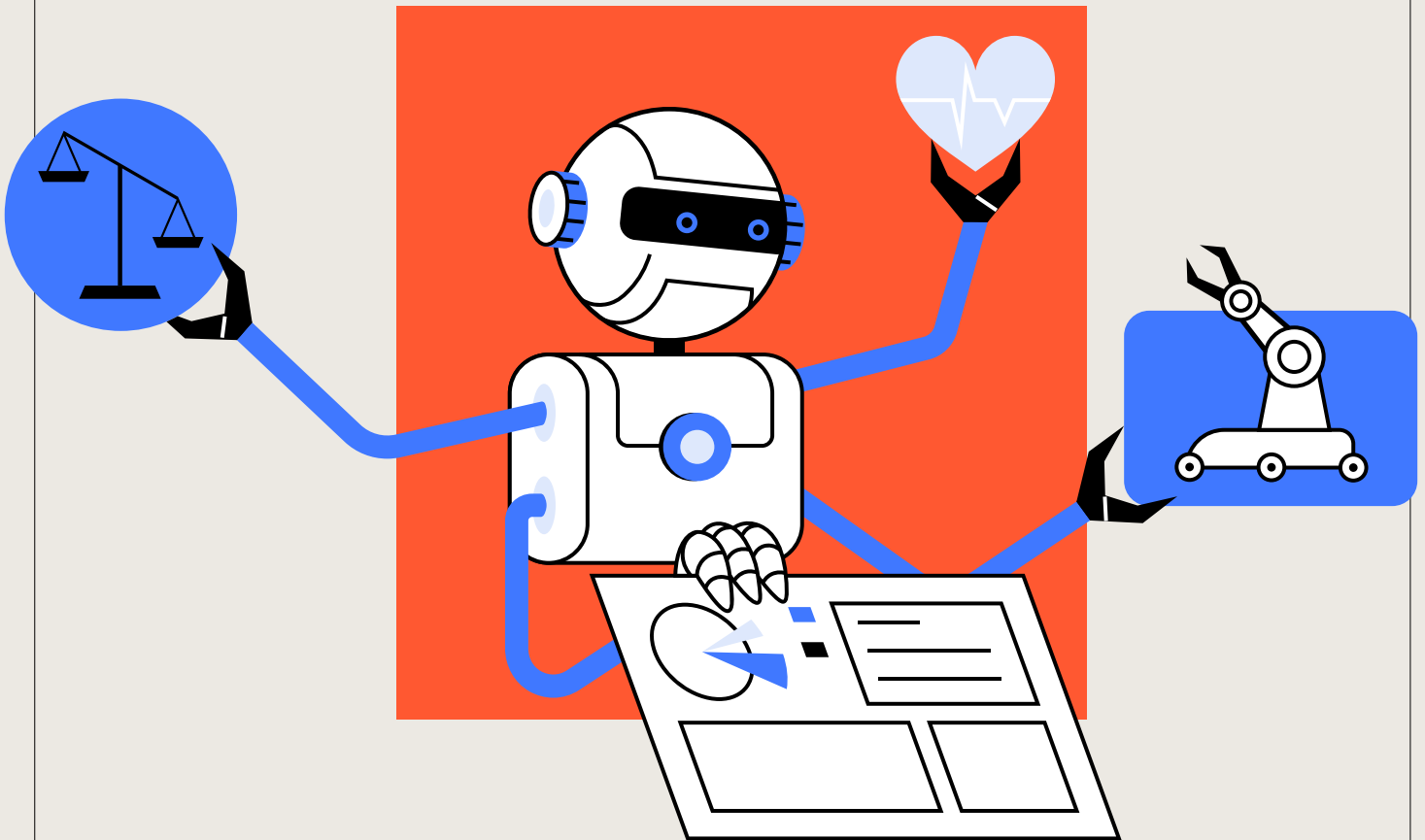
to close their books faster. Solutions like SAP Advanced Financial Closing and platforms from third-party vendors automate balance sheet reconciliations, transaction matching, and journal entries.

- *Improved Efficiency and Productivity:* By automating repetitive and mundane tasks such as data entry, reconciliations, and report generation, automation frees up finance professionals to focus on more strategic activities and decision-making, leading to higher productivity and better resource allocation.

- *Enhanced Accuracy and Reduced Errors:* Automation minimizes human intervention in critical processes, thereby significantly reducing the likelihood of errors and ensuring greater accuracy in financial data. This leads to more reliable financial reporting and better-informed business decisions.

- *Better Compliance and Audit Readiness:* Automated reconciliations and reporting improve audit readiness, regulatory compliance, and financial transparency by eliminating bottlenecks and inconsistencies.

The Evolution from Automation to Hyperautomation.
Automation, in its essence, involves the use of technology to perform tasks with reduced human intervention. This has been a pursuit for decades, with organizations seeking efficiencies and cost savings by automating mundane and repetitive activities through various tools and techniques. However, the current decade has ushered in a new paradigm with the integration of artificial intelligence (AI) and machine learning (ML) into automation frameworks. This synergistic combination has led to the advent of hyperautomation, which is the merger of tools like AI, ML, robotic process automation (RPA), with the goal of pushing automation even further.

Hyperautomation represents a significant leap beyond basic automation. It encompasses a more sophisticated framework that includes discovery and analysis of processes, language-centric process construction leveraging Natural Language Processing (NLP), and continuous measurement, monitoring, and refinement of business processes. This underscores the understanding that in today's intricate business environment, achieving true operational excellence requires a holistic and intelligent approach to automation, moving beyond simple task execution to encompass contextual decision-making and augmentation of human capabilities.

The Advanced Capabilities of Hyperautomation in Finance. Building upon the foundation of automation, hyperautomation leverages the power of AI, ML, and other advanced technologies to address more complex and nuanced aspects of finance processes.

- *AI-Driven Decision Making:* Hyperautomation aims for increasingly AI-driven decision-making, enabling systems to handle processes that require contextual understanding and judgment. For instance, in collections, NLP can be used to interpret client requests for payment extensions and AI can provide contextual decisions on approvals.

- *Predictive Analytics and Forecasting:* ML algorithms can analyse vast amounts of financial data to identify trends, patterns, and anomalies, leading to more accurate financial forecasts and enabling data-driven decision-making. AI can proactively inform collections agents about customers likely to be late, allowing for preemptive action.

- *Natural Language Processing (NLP) for Enhanced Communication:* NLP can streamline communication-intensive processes within finance, such as initiating outreach to clients, intercepting requests, and providing contextual responses. This can significantly improve efficiency and the quality of interactions.

- *Process Discovery and Optimisation:* Hyperautomation involves the discovery and analysis of existing processes to identify areas for automation and improvement. This enables organizations to optimize their workflows intelligently, rather than simply automating inefficient processes.

- *Intelligent Automation of Complex Tasks:* Hyperautomation can tackle more complex tasks that require a combination of different technologies and intelligent decision-making, such as handling exceptions in invoice processing or managing intricate reconciliation scenarios.

- *AI-Driven Fraud Detection and Prevention:* Advanced analytics and AI algorithms can identify and prevent fraudulent activities by detecting unusual patterns and transactions in financial data, providing a proactive approach to safeguarding organisational assets.

Specific Applications of Automation and Hyperautomation in Finance. There are several essential finance workflows that are beginning to be transformed by automation and hyperautomation:

- *AR/Collections:* Hyperautomation technologies can dramatically improve the collections process by predicting late payments, providing recommendation analytics for incentives, and using NLP for streamlined communication and contextual decision-making.

- *Financial Close:* Automation is crucial for reducing the time and errors associated with the financial close process, with solutions automating reconciliations, transaction matching, and other key activities.

- *Tax Compliance:* Automation can streamline payroll tax calculations, provide real-time regulatory updates, and reduce the administrative burden of managing complex tax requirements across multiple jurisdictions.

- *Procure-to-Pay (P2P):* While traditionally focused on invoice automation, solutions are expanding to incorporate other aspects of the P2P process, such as processing order confirmations and delivery notes, enhancing efficiency across the entire cycle.

Navigating the Adoption of Automation and Hyperautomation. While the benefits of automation and hyperautomation are compelling, successful adoption requires careful consideration of several key factors. First and foremost, high-quality, cleansed, and harmonized data is the bedrock of effective AI and ML-driven automation. Organizations must ensure their data management practices support the accuracy of automated processes and the insights generated.

Companies should identify specific areas where automation and AI can have the most significant impact, particularly focusing on repetitive, mundane, or data-intensive tasks and processes where forecasting and planning insights are needed.

Investing in training and upskilling the workforce is crucial to ensure employees can effectively utilize AI-powered tools and adapt to evolving roles. Automation is not intended to replace humans entirely, but rather to augment their capabilities and allow them to focus on higher-value activities. AI and automation solutions require constant feeding, monitoring, and optimization to maintain their effectiveness and adapt to changing business needs.

Looking Ahead: The Future of Finance with Intelligent Automation. The landscape of finance is continuously evolving, with AI and automation remaining at the forefront of technological advancements. Emerging technologies like agentic AI and advancements in large language models hold the potential to further transform finance processes, enabling even more sophisticated levels of automation and intelligent decision-making.

While the specific trajectory of these technologies remains to be fully seen, the fundamental importance of automation and hyperautomation in driving efficiency, accuracy, and strategic value in finance is undeniable. Organizations that proactively embrace these transformative tools will be better positioned to navigate the complexities of the modern business environment and achieve sustainable success. ∎

> "
> High-quality, cleansed, and harmonized data is the bedrock of effective automation."

ERP TODAY PRESENTS

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VERTEX

ADVANCES INDIRECT TAX COMPLIANCE WITH TECHNOLOGY, PARTNERSHIPS, AND CULTURE TO DELIVER

CONNECTIONS

BY MARK VIGOROSO AND GRANT SUNESON
PHOTOS DREW WIEDEMANN

David DeStefano

EXCLUSIVE INTERVIEW

THAT WIN

INDIRECT TAX TEAMS OF COMPLEX AND LARGE ENTERPRISES ARE UNDER MORE PRESSURE THAN EVER.

The rapid pace of change—driven by shifting tax rates, evolving regulations, emerging technologies, and the increasing complexity of global commerce—creates significant challenges. With over 20,000 taxing jurisdictions worldwide requiring compliance, the adoption of AI, the move to the cloud, and the growing global focus on e-invoicing mandates, organizations must take a forward-looking approach to stay ahead.

Yet sometimes, companies must reflect on the past to stay ahead of today's fast changing environment. This is the case for Vertex, Inc. – a leading global indirect tax technology company utilized by more than 60% of the Fortune 500.

Propelled by advanced capabilities on its global platform and proliferating legislative changes, 2024 was a transformative year for Vertex, seeing total revenues increase by more than 16% to $667 million, and its stock price nearly double. The company's profitability increased significantly, driven by a 29% increase in cloud revenue. Even coming off such a strong year, CEO David DeStefano still looks back to Vertex's roots in its beginnings as a family business, having been founded in 1978 by Ray Westphal.

"We went public in 2020 after 40 years of operating privately," said DeStefano. "Throughout my journey I learned the importance of long-term thinking. This mindset allows us to invest ahead of the curve with an eye toward the evolving landscape of technology and regulation – often considering where we need to be positioned two years from now, and sometimes even three to four years ahead for larger shifts. We work backwards from there and invest accordingly."

DeStefano has served as President and CEO since November 2016 and was named Chairperson of the Board in 2020. His long tenure with the company started in 1999, previously serving as Executive Vice President and Chief Financial Officer. That tenure instilled a deep understanding of Vertex's evolution and the intricacies of the tax technology landscape. Under his leadership, Vertex has expanded its global footprint and successfully transitioned to a public company amidst the challenging period of the COVID-19 pandemic.

Building on this strong foundation and leadership, Vertex is well-positioned to embrace the opportunities that lie ahead. Vertex estimates its total addressable market (TAM) for tax technology solutions at approximately $30 billion. Current adoption rates are below 10%, indicating significant growth potential as businesses increasingly seek automated tax compliance solutions.

Pain Relief Through Trust and Collaboration

Companies often start with homegrown solutions or basic ERP functionalities for indirect tax, but as they scale, expand globally or face increasing complexity, these initial setups often can't keep

up. This is where Vertex steps in, offering not just technology, but trust.

"Ultimately, what we're selling is trust. It's not just about solving today's problem. It's that business is going to continue to change, and so we must earn that trust every day through a valued experience," said DeStefano.

He adds that Vertex is positioned at the center of commerce and compliance, enabling businesses to navigate growth and change with confidence. This support is rooted in accuracy, flexibility, and a vast tax content library encompassing more than one billion data-driven effective tax rates and rules that reflect the intricate regulations of jurisdictions worldwide.

Though important, this content is only as good as the platform that delivers it. This is why Vertex designed its technology to deliver a comprehensive end-to-end global tax platform with flexibility in mind, ensuring it can be deployed in diverse envi-

ronments – multi-cloud, single tenant cloud, self-hosted, or hybrid.

Finance and tax professionals are primarily looking for efficiency gains and continuous compliance from tax technologies like Vertex offers, according to recent research from Wellesley Information Services. In fact, 61% of these professionals identified increased efficiencies as the top benefit they expect from tax compliance software. "We have less budget and headcount allocated to tax than we have had before. This has forced us to work even more efficiently with the tight deadlines that we have in front of us," said a finance and accounting leader at a retail and distribution company.

Vertex places a strong emphasis on understanding and meeting the evolving needs of its customers. The company's annual "Exchange" conferences in the U.S. and Europe serve as critical touchpoints for nurturing connections, facilitating learning, product training, and peer-to-peer

VERTEX

networking – bringing together industry leaders, tax professionals and technology innovators. These events also provide a valuable listening post for Vertex to gather customer feedback, to inform future capabilities and solutions, and foster relationships within the industry ecosystem.

Vertex has dedicated significant time and effort to achieving certifications, deep integrations, endorsements within leading ERP systems (such as SAP, Oracle and Microsoft) and fostering strong relationships with top technology providers and consulting firms. Vertex's partnership with SAP exemplifies its strategic integration and innovative approach. DeStefano highlights the combination of tax and technology expertise and team proficiency that sets Vertex apart, reinforcing, "the amount of IP we have, combined with the expertise of our team, is evidenced in the 20+ integrations and solutions we've developed for SAP." This illustrates the depth and sophistication of the company's technical expertise.

Building trust has paid significant dividends for Vertex over the years, helping customers prepare for a shifting tax compliance landscape. DeStefano said that the company has relied on customer insights not only to build Vertex's customer base, but also to develop solutions that continue to push innovation.

"Anytime we consider a new technology, we bring customers and partners together to co-innovate because they are part of the solutions we build. We bring them along on the journey," said DeStefano. This collaborative process, built on a long-standing foundation of trust, is more important than ever.

The company enhances its technological capabilities, expands its service offerings, and strengthens its position through strategic partnerships with companies like Shopify. In November 2023, Vertex became the first Shopify Tax Platform Partner to integrate directly into Shopify, automating global indirect tax calculations for enterprise companies. Beyond Shopify, Vertex is gaining significant momentum with ERP partners, particularly through integrations with platforms like NetSuite. This unified approach simplifies tax compliance, enabling businesses to scale efficiently while maintaining accuracy across its systems.

"ANYTIME WE CONSIDER A NEW TECHNOLOGY, WE BRING CUSTOMERS AND PARTNERS TOGETHER TO CO-INNOVATE, BECAUSE THEY ARE PART OF THE SOLUTIONS WE BUILD. WE BRING THEM ALONG ON THE JOURNEY"

Tight SAP Integrations

Vertex maintains a strong, long-standing partnership with SAP, driven by ongoing collaboration and engagement. Dedicated efforts to enhance and expand this relationship ensure continued support for SAP customers at every stage of their SAP S/4HANA journey.

"As SAP has sharpened its focus on transformation, Vertex has established a go-to-market strategy with SAP to accelerate value delivery. Positioned to support customers throughout this journey, Vertex helps navigate the transition from ECC to SAP S/4HANA, including engagement with the RISE with SAP and GROW with SAP programs," said DeStefano.

This strategic partnership is integral to Vertex's global go-to-market strategy. The close relationship with SAP has evolved into a multi-faceted collaboration encompassing technology alignment, joint initiatives, and deep integration within the SAP ecosystem.

The development of purpose-built Accelerators for SAP further enhances the user experience and reduces manual requirements. This provides Vertex with a key advantage in its ability to support customers across different deployment models, acknowledging that while SAP drives for cloud adoption, many enterprises still operate on-premise ERP systems.

"Vertex is SAP's indirect tax solution and partner, no matter the platform. Whether SAP is offering on-premise or cloud solutions, Vertex ensures indirect tax is covered. While the focus is on the cloud, solving tax challenges for all SAP customers remains the priority," said DeStefano.

Likewise, Vertex continues to expand its partner network with other leading ERP providers such as Oracle and Microsoft – ensuring customers can seamlessly integrate tax automation into their existing business systems.

Looking Ahead: AI and Tax Compliance

Companies are becoming more familiar and adopting artificial intelligence (AI) technologies to support business functions and efficiencies for essential tax workflows. Looking to the future, AI is poised to play an increasingly significant role in tax compliance. Vertex approaches AI with a pragmatic perspective, emphasizing the need for "human in the loop" guidance, governance, and controls.

The use of Generative AI (GenAI) and Large Language Models (LLMs) may not be appropriate for

"WHAT FIRES ME UP IS THE ENORMOUS OPPORTUNITY IN FRONT OF US TO SUPPORT CUSTOMERS. CONSTANT CHANGE IN BUSINESS MODELS, REGULATORY REQUIREMENTS AND TECHNOLOGICAL ADVANCEMENTS CREATE OPPORTUNITY FOR INNOVATION"

all tax processes. Indirect tax calculation requires a "deterministic" logic to produce precise and consistent outcomes, whereas the probabilistic nature of AI does not always guarantee the exact same results each and every time.

That said, Vertex sees opportunities to develop and integrate AI capabilities in different aspects of the tax lifecycle management processes. The company is actively integrating GenAI with applications such as Smart Categorization to manage vast product catalogs as well as Vertex Copilot to help customers gain higher productivity with their use of Vertex applications. AI is driving innovation across new features, capabilities and products and will be a foundational key and strategic technology foundation for their product portfolio.

"We've already launched copilots, but we're taking it further. Smart Categorization is phase one, and now we're looking at agentic AI not only in our products, but how it can work across the entire indirect tax lifecycle. You start upstream from tax determination, but you ultimately have to go down through compliance, filing, and audit where agentic AI could play. We're also thinking about how agentic AI can work to improve the relationship and engagement between some of our ecosystem partners," said DeStefano.

Culture is Crucial

After 25 years with Vertex, DeStefano remains just as passionate about helping customers solve their biggest challenges. He attributes this to the company's collaborative culture. This allows Vertex to continue to innovate in the tax space and take advantage of the opportunities that come with change.

"What fires me up is the enormous opportunity in front of us to support our customers. Constant change in business models, regulatory requirements and technological advancements create opportunity for innovation. Our team is filled with passionate individuals who are eager

to embrace these changes and drive new developments," said DeStefano.

The company has been recognized among the "50 Best Remote Large Places to Work," reflecting its dedication to embracing remote work and investing in employee well-being and development. To foster a collaborative culture, Vertex demonstrates a strong commitment to community involvement and engagement. Initiatives like a global week of service, support for disaster relief efforts, and the integration of philanthropic activities into its customer conferences underscore this value-driven approach.

In his personal life, DeStefano remains committed to community engagement, serving on the Advisory Board for Corporate Social Responsibility at the Satell Institute and the Board of Trustees of the Joseph Fund in Camden, New Jersey.

The focus on culture permeates Vertex's growth strategy. Recent acquisitions like ecosio and LCR Dixon exemplify a targeted approach based on cultural alignment, recognizing that a strong cultural fit is crucial for successful integration. These acquisitions are also one of many ways the company seeks to expand its organizational capabilities and market reach.

The company also fosters business resource groups, open to all employees, which play a key role in creating a supportive and inclusive environment where every employee can thrive. Vertex's highly engaged workforce and commitment to continuous collaboration enables them to remain agile and responsive to global customers and employees.

With a mission to support businesses worldwide, Vertex is actively broadening its reach into new global markets. This expansion aims to provide localized tax solutions that cater to the specific regulatory requirements of diverse regions, enabling companies to navigate complex tax landscapes with confidence. As Vertex continues to navigate the complexities of indirect tax in a rapidly evolving technological and regulatory landscape, its enduring principles of long-term vision, a focus on people and culture, deep customer understanding, and strategic innovation position it for continued success. The journey, marked by adaptability and a commitment to solving real-world challenges for its clients, offers a compelling case study in sustained growth and relevance in the dynamic world of enterprise software. ∎

Learn more about Vertex
—

FILLING THE GAPS

MICHAEL ROSS, CHIEF STRATEGY AND PRODUCT OFFICER
AT FINTECH COMPANY TRINTECH SHARES HOW COMPANIES
CAN FIND THE RIGHT PARTNERS TO MAXIMIZE
THE VALUE OF THEIR ERP INVESTMENT

BY GRANT SUNESON

CFOs and finance leaders are being tasked with more to accomplish than ever before. With stagnant budgets and increasingly complex regulatory hurdles around the world, this can be a daunting challenge.

To help the office of the CFO understand how to best leverage its ERP to drive value and innovation, ERP Today recently sat down with Michael Ross, Chief Strategy and Product Officer at Trintech.

Filling the Gaps

Ross highlighted how important it is to find the right partner to help guide the way in the financial close automation landscape. Though platforms like Oracle and Workday are powerful on their own, companies like Trintech help to "fill the gaps" by providing functionalities that these ERPs don't inherently cover in detail, particularly in the complex area of Record to Report (R2R) activities.

"I'd say the office of the CFO and Financial Services was later to technology. We see that that is a market that is going through a transformation cycle, with new banking cores, new GLs, and new ERPs. We also see new compliance obligations really targeting financial services, with banks and capital markets. That really drives scale requirements. We're seeing that as a space that we want to make more accessible to more customers because we see that scale for financial services just continuing to grow," said Ross.

A key tool companies can rely on in this area is Artificial Intelligence (AI). Trintech is working to develop an in-house LLM with unique capabilities and the exploration of agentic AI models for tasks like matching, reconciliation, and journal entry automation. There are varying levels of AI readiness across industries, especially in heavily regulated sectors like financial services, so companies need flexible solutions that can adapt to different compliance environments.

Finding the Right Solutions

The most effective solutions are not one-size-fits-all. By offering platforms like Cadency for large enterprises and Adra for mid-sized organizations, Trintech caters to a wider range of organizational needs and complexities.

"We believe fundamentally that there are different segments and industries that need unique capabilities, right. Trintech is a great example; we run Adra. If we ran Cadency, it would be like driving a Mack truck when we need a Porsche. If you're a Fortune 10 company, Cadency is a great choice. They're

TRINTECH

both great cars, but every car has a great buyer," said Ross.

Ross also highlighted Trintech's vertical market focus, particularly in financial services and retail. The company is investing in solutions tailored to the unique needs and scale requirements of these industries, including leveraging technology gained through acquisitions to enhance banking-specific capabili-

Michael Ross

ensure data quality. Though tools like those that Trintech provides can play a vital role in achieving financial reporting accuracy and controls, companies must ensure that their data is AI-ready.

"If you look three to five years out, everything will evolve around your view of data and AI. If you are AI centric, it all comes back to your data. You need to think about how to get the data clean

> If you look three to five years out, everything will evolve around your view of data and AI. If you are AI centric, it all comes back to your data. You need to think about how to get the data clean and crisp

ties. This targeted approach emphasizes the importance of specialized solutions in addressing complex reconciliation and close challenges within specific sectors.

While Trintech remains open to opportunistic inorganic growth, Ross emphasizes the strong focus on organic growth driven by the significant

opportunities to improve financial close processes for existing and potential customers across their target ERP and vertical markets.

In his advice to a prospect navigating digital transformation in the office of the CFO, Ross stresses the critical importance of understanding their business readiness for AI and the need to

and crisp, whether it's for tools like Cadency for financial access and controls or other tools. This is one of the areas where we're starting to have customers come to us because they realize they need to get their data in order to use AI. And we're a tool that helps with financial reporting accuracy and controls," said Ross. ∎

WHAT THIS MEANS FOR ERP INSIDERS

• Filling the Gaps in ERP Functionality
White ERP platforms like have powerful for financial management functionalities, they often lack detailed coverage for important activities like Record to Report (R2R). Companies must seek out partners like Trintech to fill these gaps with automation solutions for reconciliation, transaction matching, journal entry automation, and compliance reporting. The financial services sector, in particular, faces growing complexity

with new compliance obligations and evolving banking structures. Trintech's solutions help finance teams handle these challenges and scale effectively.

• Leveraging AI is challenging, but likely will prove to be a worthwhile investment. The role of AI in financial close processes is slowly expanding. AI adoption varies across industries, but has been slower in highly regulated sectors like financial services, making flexible and adaptable AI-driven

solutions essential. Ross advised companies to ensure their data quality is AI-ready to maximize the benefits of automation and improve financial reporting accuracy. Trintech is developing its own RN LLM and exploring agentic AI models to automate complex tasks like reconciliation and journal entry management.

• Tailored Solutions for Different Business Needs. Trintech offers specialized solutions based on business size and complexity.

Cadency is designed for large enterprises, while Adra caters to mid-sized organizations. Ross compared the two to a Mack truck and a Porsche—both effective, but suited for different needs. Trintech also focuses on specific verticals like financial services and retail, providing targeted solutions to meet industry-specific challenges. The company aims for organic growth while remaining open to strategic acquisitions to enhance capabilities.

Powering the Net Zero Race

How EDF Renewables Scales with IFS Cloud   BY MARK VIGOROSO

As governments and energy giants scramble to meet net zero targets, EDF Renewables is tackling the challenge with urgency and clarity. Speaking at IFS Connect UKI 2025 in Birmingham, UK, a senior leader from EDF explained how the organization is leveraging IFS Cloud as the digital backbone of its ambitious growth strategy. EDF aims to produce 10 GW of clean energy annually by 2035 across wind, solar, battery storage, and green hydrogen.

"We're the most diverse renewable electricity generator in the UK and Ireland," the EDF representative said. "We've adopted IFS not just for today's asset management but to support our full lifecycle from development to decommissioning."

EDF Renewables went live with IFS Cloud two years ago, adopting the cloud-native platform. The decision was driven by an immediate need for robust asset operations functionality but with a long-term view of platform-wide integration. Today, a third of the company's 700+ employees use IFS daily.

What stood out during EDF's presentation was less about flashy AI features and more about strategic alignment. EDF emphasized how critical IFS's culture and customer success model had been—pointing to the support received through success managers, industry user groups, and peer collaboration at global events like IFS Unleashed.

"We only know what we know," the EDF leader noted, citing how IFS's business value assessments helped the company revalidate implementation decisions and optimize for future scale. With plans to quintuple operations by 2035, EDF is actively reengineering workflows within IFS Cloud to ensure the platform can scale seamlessly alongside the business.

Though cautious about AI, EDF is positioning itself to take advantage of upcoming releases—starting with version 24R2. "We're a risk-aware company," they said. "But AI will be a game changer once we align it with our roadmap and use cases." ∎

EDF is actively reengineering workflows within IFS Cloud

WHAT THIS MEANS FOR ERP INSIDERS

Integrate asset, capital PM, and ESG management. Energy companies pursuing net zero mandates should assess whether their digital architecture is future-ready. Prioritize systems that integrate asset operations, capital project management, and ESG data in a single platform. EDF's success shows the value of adopting IFS Cloud from the outset and leveraging the partner ecosystem, including business value assessments and advisory boards. Companies should establish a roadmap that includes version upgrades, workforce enablement, and eventual AI adoption—while resisting bolt-on sprawl. Treat ERP not as a back office enabler but a strategic foundation for grid modernization and renewable expansion.

IFS plays the industry-specific card again. IFS Cloud offers energy and utilities companies an advantage: industry-specific functionality across project-centric and asset-centric workflows embedded in a composable, cloud-native architecture. The platform supports the full energy lifecycle—from development to decommissioning—and includes advanced planning, work order automation, ESG reporting, and grid asset visibility. EDF's experience illustrates how IFS enables rapid operational maturity while preserving flexibility for growth. With embedded AI tools like Planning & Scheduling Optimization (PSO) and Emissions Management on the horizon, IFS is evolving from transactional ERP to an intelligent operations platform for clean energy producers.

Energy industry depth bodes well for IFS. As the global energy transition accelerates, the ERP market for utilities and renewables could exceed $25 billion by 2030. Legacy ERP vendors often struggle with the agility and lifecycle-specific capabilities new energy players need. IFS's sector focus, single data model, and embedded intelligence position it as a viable challenger to legacy providers like Oracle and SAP. With deep domain expertise, a growing footprint in the UK and EU, and expanding AI features tailored to the field, IFS is well-positioned to become the platform of choice for renewable-first, digitally driven utilities over the next five years.

HOW QUIET
CONTROLS AND
SMART QA CAN
SAVE MILLIONS

The Hidden
ROI
of Testing and
Monitoring in
ERP Systems

BY JENNIFER LAWINSKI
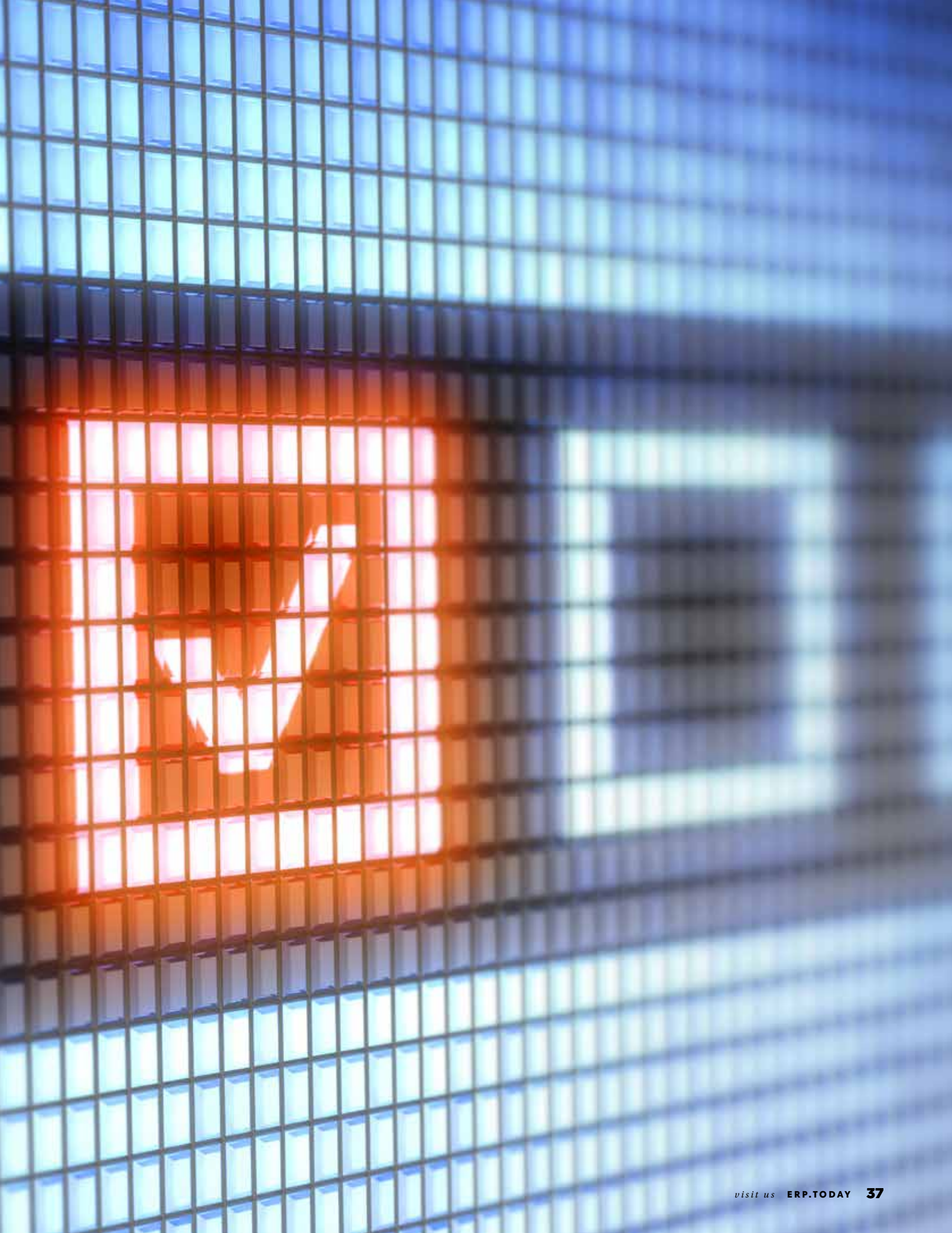
Enterprise Resource Planning (ERP) systems are the digital nervous system of the modern enterprise. They connect departments, streamline processes, manage data, and support critical business functions—from finance to supply chain to human resources. And yet, for all their importance, ERP systems are often treated as if they'll run themselves once deployed.

This misplaced confidence can be a costly mistake.

ERP systems are dynamic, not static. They evolve constantly—whether through software patches, configuration updates, new user roles, or integration changes. And with each change comes a potential risk: a misaligned workflow, a security vulnerability, a data error, or a compliance breach. Even small issues can have large consequences, rippling across systems and departments.

Fortunately, organizations don't have to wait for things to break before they act. By investing in robust testing, continuous quality assurance (QA), and real-time monitoring, businesses can dramatically reduce risk, improve ERP performance, and uncover significant return on investment—often in places they never thought to look.

Tricentis, Original Software, and Delinea are helping enterprises shift from reactive to proactive ERP management, with strategies that deliver both operational resilience and real financial gains.

The Cost of Errors: It's Not Just Technical

When an ERP system fails, the impact can be immediate—and painful. Imagine an inventory system that misallocates stock, a payroll module that delays employee pay, or an access rights issue that exposes sensitive financial data. These aren't just glitches; they're business-critical failures that can disrupt operations, damage trust, and invite regulatory scrutiny.

Studies suggest that more than half of ERP implementations experience some form of post-deployment disruption, often caused by insufficient testing or a lack of proactive system oversight. And as ERP platforms increasingly shift toward agile, cloud-native architectures with frequent updates and integrations, the potential for disruption only grows.

That's why leading organizations are embracing a new mindset: one that treats ERP quality and monitoring not as optional extras, but as essential components of long-term success.

Tricentis: Speed Meets Stability

In a world of rapid deployment and continuous updates, Tricentis is redefining how enterprises approach ERP testing. The company's platform leverages AI-driven test automation to validate complex ERP workflows, data integrations, and user processes across multiple environments—all at scale and speed.

Traditional testing methods often rely on manual scripting and lengthy QA cycles, which slow down innovation and miss key edge cases. Tricentis flips that model by integrating directly into Continuous Integration/Continuous Delivery (CI/CD) pipelines, enabling real-time validation as part of every update or change.

With automated testing, companies can simulate thousands of use cases in just a few hours, catching issues before they reach production. The result: fewer rollbacks, smoother launches, and more confident innovation.

Tricentis, Original Software, and Delinea are helping enterprises shift from reactive to proactive ERP management.

For organizations operating on platforms like SAP, Oracle, or Microsoft Dynamics, this kind of continuous testing can be a game-changer—transforming ERP from a risk to a growth enabler.

Original Software: Testing from the User's Point of View

While backend automation is vital, the success of any ERP system ultimately rests on the experience of the people using it. That's the focus of Original Software, a company that brings testing down to the ground level—where workflows meet real users.

Original Software's tools help bridge the gap between IT and business users by enabling end-to-end functional testing and user acceptance testing (UAT) without requiring technical expertise. Users can record their interactions with the system, highlight inconsistencies, and test business-critical tasks—without ever writing a line of code.

This approach ensures that ERP systems aren't just technically sound, but also usable and aligned with day-to-day workflows. It also fosters collaboration between departments, reduces reliance on IT for testing support, and shortens the time to go-live readiness.

By uncovering issues that might otherwise be missed—such as workflow breakdowns, data entry friction, or unexpected user behaviors—Original Software helps companies reduce post-launch support calls, improve adoption rates, and increase overall productivity.

Delinea: Watching What Matters Most

Beyond functionality and usability lies another critical ERP dimension: security. Especially in large or regulated organizations, user access and permissions must be tightly controlled to avoid conflicts of interest, data leaks, or compliance violations.

Delinea's Fastpath offers an integrated solution for access monitoring, segregation of duties (SoD) conflict detection, and audit readiness. Its tools provide real-time insight into who has access to what within an ERP environment—and whether that access introduces risk.

Testing and monitoring drive real, measurable returns.

By continuously analyzing roles, permissions, and user behavior, Fastpath can automatically flag anomalies, enforce policy controls, and generate audit-ready reports. This streamlines compliance with standards like SOX, GDPR, and HIPAA, while also reducing the internal burden of manual review.

For many organizations, the savings are twofold: fewer audit findings (and associated penalties), and significantly reduced staff hours spent on access reviews and documentation.

Where the ROI Hides (and How to Find It)

Testing and monitoring might not carry the same flash as a new analytics dashboard or AI module—but they drive real, measurable returns. Here's where businesses can often find hidden value:

• **Downtime Avoidance:** For large enterprises, an hour of ERP downtime can cost anywhere from $100,000 to over $1 million. Preventing just one major outage easily justifies the cost of a QA platform.

• **Shorter QA Cycles:** Automated testing can reduce ERP testing cycles from weeks to days—accelerating release timelines and enabling more responsive business operations.

• **Fewer Support Tickets:** Identifying issues before deployment means less post-launch firefighting, fewer help desk calls, and lower user frustration.

• **Compliance Confidence:** Proactive access monitoring means smoother audits, fewer surprises, and a lower risk of non-compliance fines.

• **Happier Users:** Systems that are tested for real usability see better adoption, faster onboarding, and fewer training challenges—translating to improved workforce productivity.

In short, ERP QA isn't just about reducing risk. It's about enhancing performance, reducing waste, and growth.

A New Standard for ERP Success

As ERP systems become more agile, modular, and interconnected, the margin for error shrinks. Businesses can no longer afford to rely on reactive maintenance or one-time testing strategies.

The future of ERP requires continuous validation, real-time oversight, and user-centered design—all underpinned by platforms like Tricentis, Original Software, and Delinea.

These aren't just tools; they're strategic assets that help businesses stay one step ahead of risk, change, and complexity. Because in the world of enterprise technology, what you don't see coming is often what costs you most. ∎

WHAT THIS MEANS FOR ERP INSIDERS

• **Proactive ERP Testing Saves More Than It Costs**
Relying on manual testing or waiting for problems to emerge post-deployment is a high-risk, high-cost strategy. Automated testing platforms allow businesses to validate thousands of workflows quickly and accurately, dramatically reducing downtime, deployment delays, and costly rollbacks. By integrating testing into continuous delivery pipelines, organizations can ensure ERP changes are stable and reliable—without slowing innovation. In many cases, avoiding a single system failure or critical bug more than justifies the investment in automated testing. Smart QA isn't a cost center—it's a business continuity strategy with measurable returns.

• **Usability Testing Drives Adoption and Productivity**
Technical success doesn't guarantee operational success. If ERP users can't navigate workflows, perform key tasks, or trust the system, adoption will suffer—and support costs will rise. Bringing a user-centric lens to ERP testing enables business teams to test real-world scenarios without needing technical skills. This approach uncovers hidden issues like inefficient workflows, UI friction, and misaligned processes before they impact productivity. By involving users in the testing process and addressing their needs early, companies reduce resistance, accelerate onboarding, and maximize ROI from their ERP investment.

• **Access Monitoring Prevents Compliance Headaches**
Security and compliance risks often lurk in overlooked corners of ERP environments—especially around user permissions and segregation of duties. Continuous, automated monitoring can flag risky access patterns and simplify audit preparation. For decision-makers, this means fewer fines, faster audits, and tighter control over who can access what. Beyond compliance, real-time access visibility enhances governance and trust across the enterprise. By embedding monitoring into day-to-day operations, companies move from reactive defense to proactive risk management—unlocking not just security benefits, but operational efficiency and peace of mind.

THE F

OF AI, AUTOMATION, AND QUANTUM

UTURE

COMPUTING IN ENTERPRISE SOFTWARE

AN INTERVIEW WITH CHRISTIAN PEDERSEN, IFS CHIEF PRODUCT OFFICER

BY MARK VIGOROSO

FS Chief Product Officer Christian Pedersen recently sat down with ERP Today CEO Mark Vigoroso to discuss the evolving landscape of enterprise software, the impact of AI and automation, and the future of quantum computing. The conversation provided insight into IFS's vision for innovation and the broader industry shifts that will redefine enterprise technology over the next decade.

Pedersen emphasized that enterprise customers across all industries are either actively investing in AI-driven automation or are on the verge of doing so. According to him, the push toward autonomous business operations is inevitable and will be a key differentiator in the coming years.

"There's no doubt that every single business is thinking about what autonomous business means to them," said Pedersen. "This naturally leads to a broader conversation about AI and AI agents."

IFS aims to ensure that its customers don't have to struggle with the complexity of emerging technologies. "Our pledge to customers is that we take care of the technology so they can focus on outcomes," Pedersen stated, reinforcing IFS's focus on practical, results-driven innovation.

AI AND AUTOMATION

AI is undeniably playing a role in reshaping the workforce. But Pedersen dismissed fears that AI would replace human jobs outright, instead arguing that AI will enhance human capabilities.

"AI is not going to replace people," he said. "But people who are really good at using AI will become preferred over those who don't."

He likened today's AI revolution to past industrial revolutions, such as Ford's introduction of the assembly line in the early 1900s. While disruptive, such technological advancements ultimately led to improved quality of life, higher wages, and greater efficiency.

Pedersen also pointed out that AI-driven automation will be essential in addressing the growing workforce gap caused by declining fertility rates.

"The global fertility rate is dropping fast, particularly in the Western world and China," he noted. "If we don't adapt through automation, we'll face massive labor shortages that will severely impact productivity."

Beyond AI, Pedersen touched on another transformative technology: quantum computing. While industry opinions on its timeline vary—SAP CEO Christian Klein has projected its impact within three years, while Microsoft CEO Satya Nadella is more conservative—Pedersen believes that quantum computing will become essential sooner than many expect.

"There's no doubt that we will need quantum computing to meet the rising demands of enterprise technology," he said. "Current power grids won't be able to support the exponential growth in data processing. Quantum computing will be necessary to sustain the scale of AI-driven operations."

He cited examples of data center power limitations, noting that many are already struggling to scale due to energy constraints. "It's not just about computational power; it's about sustainability," he added.

Even as we navigate rapidly emerging and evolving technologies like AI and quantum computing, we are still wrestling with legacy challenges like moving from on-premises to cloud deployment of enterprise applications, including ERP. While industry leaders like IFS, SAP and Oracle have been pushing cloud adoption, many businesses remain hesitant.

More than half of the world still runs on-premise ERP and, despite the incentives, cloud migration is moving at a slower-than-anticipated pace.

Pedersen acknowledged the challenge but remained optimistic. "I think everyone will be able to keep up," he said. "Some industries, like aerospace and defense, are inherently more conservative, and rightfully so. But ultimately, adaptation is necessary."

IFS remains focused on enabling customers to navigate the future of enterprise technology with confidence. With AI-driven automation, workforce transformation, and the potential of quantum computing, the next decade promises significant changes across industries.

"As with every industrial revolution, change is tough," Pedersen concluded. "But history has shown that those who adapt emerge stronger." ∎

Christian Pedersen

"AS WITH EVERY INDUSTRIAL REVOLUTION, CHANGE IS TOUGH, BUT HISTORY HAS SHOWN THAT THOSE WHO ADAPT EMERGE STRONGER."

WHAT THIS MEANS FOR ERP INSIDERS

• **The increasingly autonomous enterprise will rely on restructured workforce.** As GenAI, Agentic AI and other automation transforms business processes, repetitive, rule-based tasks (such as data entry, reporting, and customer service inquiries) will become fully automated, leading to job reductions in administrative and clerical roles. But AI-augmented jobs will increase, where workers leverage AI agents to enhance decision-making, productivity, and customer interactions. A shift from manual execution to oversight will emerge—employees will manage AI systems rather than perform low-level tasks themselves. The workforce will need new skills to collaborate with AI agents, creating demand for AI Trainers & Prompt Engineers, AI Ethics & Governance Specialists, AI-Augmented Managers, and Technical Experts in AI Integration. AI will enable hyper-productivity, reducing the number of hours needed for traditional work. Some companies may shift to four-day workweeks as AI increases efficiency. Work will become more strategic and creative, with AI handling repetitive tasks. Industries slow to adopt AI may struggle to stay competitive, leading to layoffs and industry shifts. Governments and businesses will need to invest heavily in reskilling programs to help displaced workers transition into AI-enhanced roles. And lifelong learning will become mandatory, with workers constantly upgrading their AI-related skills.

• **The past 18 months have seen a number of AI-enabled capabilities come from Pedersen's team**. IFS now has an AI-powered assistant designed to improve decision-making and user engagement by providing timely knowledge and guidance. The initial integration focused on IFS Cloud help and support information, boosting productivity through accessible insights. Also, the company has a dynamic, AI-driven homepage that offers live project status visibility, anomaly detection, and corrective action suggestions. This feature enhances productivity by providing users with real-time insights and interactive widgets to manage assets and services more effectively. IFS has also integrated AI into Failure Modes, Effects, and Criticality Analysis (FMECA) which allows for detailed assessments of potential asset failures, their probabilities, and consequences. AI aids in extracting insights from unstructured data like manuals and maintenance reports, optimizing maintenance strategies to enhance asset availability and reduce costs. IFS now offers customers a Manufacturing Scheduling Optimization (MSO) Simulation, which is an AI-driven production planning and scheduling engine that considers factors such as component shortages, lead times, and demand variability. By analyzing various "what-if" scenarios, manufacturers can optimize resource allocation, maximize capacity utilization, and better meet customer demand. And the company has released AI-Enhanced Service Management, with features like the AI-powered Home for Dispatchers that provide intelligent insights to assist in task prioritization and resource allocation. This enhancement facilitates efficient scheduling and improves decision-making processes within service management operations.

• **IFS customers reaping benefits.** Cheer Pack North America implemented an industrial automation solution utilizing robotics and IFS. ai to optimize production planning and materials movement. This integration led to anticipated annual savings of $1.5 million and allowed staff to transition to more skilled tasks, addressing labor shortages. Noble Corporation integrated IFS. ai capabilities to analyze extensive data, identify potential failure patterns, and inform preventative maintenance strategies. This approach aims to optimize maintenance schedules, reduce downtime, and enhance operational efficiency. By extending IFS software across multiple locations, Hexagon Agility improved order-to-ship processes, reduced product costs by avoiding overtime, and utilized actual costing data to support more aggressive pricing strategies. The implementation also automated configurations and customizations, enhancing operational efficiency. Ainsworth adopted IFS Field Service Management (FSM) to streamline processes, increase efficiency, and enhance customer service. The flexible solution allowed Ainsworth to manage the service needs of its client base effectively, supporting rapid growth and improved data accuracy. Doppelmayr utilized IFS for sales, engineering, manufacturing, installation, and maintenance of ropeways, making it the central data hub. The software's real-time visibility through configurable dashboards bolstered their daily operations and project management, handling about 150 projects yearly.

IBM and Oracle's Unified

Bridging AI

BY SUPARNA CHAWLA BHASIN

Approach to Enterprise AI
Strategies

The integration of artificial intelligence (AI) into enterprise technology is helping transform business operations and drive efficiency, innovation, and competitive advantage. As generative AI evolves, IBM and Oracle are at the forefront, embedding AI into core business processes and integrating it into enterprise applications and cloud infrastructure to drive secure, scalable, and high-impact transformation. The IBM and Oracle partnership enables organizations to harness AI's full potential. Beyond accelerating AI adoption, this is also helping redefine enterprise intelligence—optimizing operations, enhancing decision-making, and maximizing technology investments. Together, IBM and Oracle are shaping a future where AI is not just an enhancement but a fundamental driver of innovation and competitive success.

Transforming Enterprise AI with Innovation and Business-Centric Solutions

IBM has long been a pioneer in AI, from Watson's early innovations to today's enterprise AI solutions. IBM's AI strategy rests on two pillars: IBM Software, which provides security-focused and transparent enterprise AI, cloud, security, and automation solutions, and IBM Consulting, which drives large-scale business transformation, technology implementation, and managed services, leveraging IBM and ecosys-

tem partner technologies. In fact, IBM is one of few major technology companies with a global consulting business at scale, which is a key differentiator when it comes to helping clients deploy AI. IBM's AI book of business has grown to over $5 billion across software and consulting, with 80% of bookings coming from IBM Consulting.

Oracle also has a long history with AI and innovative technologies, embedding AI directly into Oracle Fusion Cloud Applications Suite, offering a robust, scalable AI solution with tight control over data security and governance. With over 100 generative AI-driven capabilities already live and 50 ready-made AI agents across the suite, Oracle enables business users to change the way work gets done with AI through enhanced decision-making, workflow automation, and improved productivity. As Jody Clayton, group vice president, Advanced Technology - SaaS Technology, Analytics, AI & Emerging Technology at Oracle, emphasizes, "Oracle's AI strategy is built on over 40 years of enterprise technology and applications expertise, seamlessly integrating AI into both data platforms and business processes. Our cloud infrastructure is engineered for performance and cost efficiency, making it the preferred choice for running AI workloads. By having a complete infrastructure, data, and application cloud platform, Oracle is able to drive AI services and embedded intelligence across the enterprise, helping improve the efficiency of all employees."

Oracle's AI strategy is anchored in three critical components. First is high-quality, context-rich data, which is essential for AI success, and Oracle's data platforms provide a solid foundation for AI-driven automation. Second is a cost-efficient AI infrastructure, as Oracle's cloud infrastructure is optimized for AI workloads, which can help reduce training and deployment costs while helping to enhance processing power. And third is deep connectivity across critical business processes, as Oracle integrates AI across key business functions, including finance, HR, supply chain, and customer experience. Rod Johnson, executive vice president, cloud applications, Oracle, says, "A prime example of Oracle's AI-driven transformation is its own financial operations. With Oracle Fusion Cloud Enterprise Resource Planning (ERP) and Oracle Fusion Cloud Enterprise Performance Management (EPM), Oracle has achieved a record-fast financial close cycle, consistently reporting earnings in under ten days. In addition, Oracle has saved approxi-

mately 80,000 hours annually through AI-enhanced forecasting and budgeting. For businesses, these capabilities translate to tangible improvements, such as increased accuracy in demand planning, enhanced decision-making, and greater operational efficiency."[1]

Oracle's AI solutions offer customers the opportunity for significant productivity gains and operational efficiencies. Whether optimizing finance, HR, or supply chain operations, AI in Oracle Fusion Applications is intentionally embedded into business processes to help deliver real-world impact, optimize workflows, and maximize revenue potential.

Co-owning Enterprise Transformations

Collaboration is at the heart of IBM Consulting's strategy, with a strong focus on collaborating with industry leaders like Oracle to deliver AI-powered solutions that can help drive measurable business outcomes. With an open ecosystem approach, IBM Consulting meets clients where they are, leveraging AI models from IBM, Oracle, and other business partners to enhance business processes and bring together the strengths of both companies to help deliver optimized enterprise solutions.

With a legacy of AI leadership, IBM embeds generative AI capabilities into its implementation methodologies and platforms to help customers with Oracle deployments. A key enabler of this strategy is IBM Consulting Advantage, an AI-powered delivery platform that equips consultants with generative AI agents, assistants, and applications to augment their work supporting clients. IBM Consulting Advantage leverages IBM and business partner technologies and provides predefined frameworks, industry templates, business process flows, and intelligent workflows that streamline implementation and reduce manual effort through automation. Chacko Thomas, Americas Oracle Leader, IBM, highlights, "Oracle customers get out-of-the-box AI-powered SaaS, but as implementers, that is just our starting point. At IBM, we aim to enhance the entire implementation lifecycle by helping clients boost their productivity from design to testing. With IBM Consulting Advantage agents, assistants, and applications, our consultants are leveraging AI-powered tools to streamline processes and reduce manual effort, like generating test scripts. It is about delivering the best of Oracle Fusion Applications

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"ORACLE'S AI STRATEGY IS BUILT ON OVER 40 YEARS OF ENTERPRISE TECHNOLOGY AND APPLICATIONS EXPERTISE, SEAMLESSLY INTEGRATING AI INTO BOTH DATA PLATFORMS AND BUSINESS PROCESSES"

JODY CLAYTON
Group Vice President, Advanced Technology – SaaS Technology, Analytics, AI & Emerging Technology at Oracle

for clients while optimizing implementation with IBM's productivity tools."

IBM Consulting's deep industry expertise helps organizations align AI adoption with their sector-specific challenges, helping clients navigate Oracle's existing AI capabilities and identify where custom AI solutions are required. IBM's acquisitions of Accelalpha and Applications Software Technology LLC have expanded its Oracle consulting expertise across industries such as supply chain and logistics, finance, and the public sector to support clients in their digital transformations with Oracle Fusion Applications. By enhancing Oracle Fusion Applications with industry-specific expertise, frameworks, and additional AI solutions, IBM Consulting enables Oracle customers to maximize efficiency and innovation while reducing time-to-value.

Additionally, with multi-cloud flexibility—including Red Hat OpenShift, certified on Oracle Cloud—IBM helps organizations deploy AI-driven automation across hybrid and multi-cloud environments, enabling scalability and adaptability. As Shobhit Varshney, VP & Sr. Partner, Americas AI Leader, IBM, emphasizes, "The synergy between IBM and Oracle extends beyond automation into AI model integration. Oracle customers can leverage IBM watsonx AI models within Oracle Fusion Applications, combining IBM Granite models with Oracle's AI stack. IBM watsonx Orchestrate further enhances this ecosystem, enabling digital labor coordination across platforms so that organizations can tailor AI-powered automation to their unique business needs."

Starting the Transformation Journey

For many organizations, the biggest challenge with AI-driven automation is knowing where to start. Oracle makes this easier with hundreds of built-in AI capabilities in Oracle Fusion Applications, many of which can be activated with minimal effort. IBM further simplifies the process by helping customers optimize these AI-driven capabilities, accelerating adoption and immediate value realization.

Oracle has long been at the forefront of business process automation, with over 100

"THE SYNERGY BETWEEN IBM AND ORACLE EXTENDS BEYOND AUTOMATION INTO AI MODEL INTEGRATION. ORACLE CUSTOMERS CAN LEVERAGE IBM'S WATSONX AI MODELS WITHIN ORACLE CLOUD APPLICATIONS, COMBINING IBM'S GRANITE MODELS WITH ORACLE'S AI STACK AND COHERE MODELS."

SHOBHIT VARSHNEY
VP & Sr. Partner,
Americas AI Leader
at IBM

"ORACLE CUSTOMERS GET OUT-OF-THE-BOX AI-POWERED SAAS, BUT AS IMPLEMENTERS, THAT IS JUST OUR STARTING POINT. AT IBM, WE ENHANCE THE ENTIRE IMPLEMENTATION LIFECYCLE— BOOSTING PRODUCTIVITY FROM DESIGN TO TESTING."

CHACKO THOMAS
IBM's Americas
Oracle Leader

generative AI and machine learning capabilities embedded in its applications. Now, the company is advancing further with the release of new AI agents and its AI Agent Studio for Oracle Fusion Applications, which combines large language models (LLMs) with other technologies to accomplish complex tasks that previously could only be done by humans. This shift represents a major transformation in automation, moving beyond rigid, rule-based workflows to intelligent decision-making. By embedding AI-driven workflows within its enterprise applications, Oracle enables organizations to streamline operations while maintaining tight control over data governance and security. IBM provides consulting services and solutions to help clients implement and derive greater value from Oracle Fusion Applications, leveraging IBM Consulting Advantage to accelerate AI transformation.

Conclusion

As AI adoption accelerates, enterprises seek solutions that integrate intelligence while providing security, scalability, and efficiency. IBM and Oracle offer distinct yet complementary AI capabilities to help drive business transformation. IBM specializes in AI consulting and secure, enterprise-specific AI models designed for transparency and control. Meanwhile, Oracle embeds AI directly into all layers of the technology stack, helping enhance automation, decision-making, and operational performance.

Together, they create a robust AI-enabled enterprise ecosystem, combining Oracle's built-in AI with IBM Consulting services to drive business transformation, technology implementation, and managed services . This synergy enables organizations to harness AI confidently, helping to drive efficiency, agility, and competitiveness in an increasingly intelligent business landscape. ∎

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ACT NOW TO AVOID SOARING RISKS AND COSTS

TIME'S RUNNING OUT

ON SAP ECC

THOMAS FAILER, CEO OF DATA MIGRATION INTERNATIONAL

BY RADHIKA OJHA

HIGHLIGHTS WHY THE MOVE TO SAP S/4HANA IS A MUST TODAY.

T he countdown is on. With SAP's mainstream support for ECC (ERP Central Component) ending in 2030, businesses delaying the transition to SAP S/4HANA are not merely postponing an upgrade; it's an invitation to escalating risks, missed opportunities, and potential stagnation in an increasingly competitive digital landscape.

In an interview with ERP Today, Thomas Failer, CEO of Data Migration International, argues that the time to migrate to SAP S/4HANA is not approaching—it is here.

The Tangled Web of Legacy Data

According to Failer, the pervasive problem of legacy data lies at the heart of the urgency. He explains: "Decades of operational history often reside within SAP ECC systems, much of it outdated, redundant, and unstructured. This digital baggage acts as a significant anchor, inflating costs, creating compliance nightmares, and severely hindering digital transformation initiatives."

Moreover, maintaining these sprawling legacy environments consumes a lion's share of IT budgets – often as high as 60-80% – leaving scant resources for strategic innovation. The sheer volume of this data slows down system performance, complicates upgrades, and makes extracting meaningful insights a herculean task.

Failer added, "Legacy data is often riddled with inconsistencies, duplicates, and quality issues. This "dirty data" undermines the accuracy of analytics, cripples the potential of AI and automation, and leads to flawed decision-making."

Due to these factors, compliance becomes a precarious tightrope walk as outdated systems struggle to meet evolving regulatory demands like the General Data Protection Regulation (GDPR) and California Consumer Privacy Act (CCPA), exposing businesses to hefty fines and reputational damage. The lack of proper data governance and retention management within legacy ECC systems makes audits and legal discovery processes costly and time-consuming.

"DIRTY DATA" UNDERMINES THE ACCURACY OF ANALYTICS.

Clean Core and the Imperative of Clean Data

Failer points to a compelling alternative to solve this problem: SAP's strategic direction, embodied in the "Clean Core" and "Composable Enterprise" vision. "This future-ready architecture emphasizes a modular, flexible, and agile approach to enterprise resource planning," he notes. "The Clean Core advocates for a standardized, lean digital foundation in SAP S/4HANA, minimizing customizations and ensuring seamless upgrades, while the Composable Enterprise envisions a landscape of interoperable business capabilities that can be assembled and reassembled as needed."

However, the realization of this transformative vision is intrinsically linked to the quality of the underlying data. "You simply cannot build a Clean Core on a foundation of dirty, outdated data," Failer says. "Migrating massive volumes of legacy baggage into SAP S/4HANA defeats the purpose, bloating the system and perpetuating existing inefficiencies."

Similarly, a Composable Enterprise relies on consistent, high-quality data flowing seamlessly between its modular components. Thus, fragmented or unreliable data undermines the agility and flexibility this architecture promises.

The JiVS Solution

Data Migration International (DMI) offers a powerful solution to navigate this complex transition: the JiVS Information Management Platform (IMP). Failer states, "JiVS provides a strategic and intelligent approach to managing legacy data, enabling businesses to break free from the constraints of their SAP ECC systems and embrace SAP S/4HANA with confidence."

The core principle of JiVS is the separation of historical data from active applications. Instead of a "lift and shift" approach that blindly migrates everything, JiVS extracts all legacy data (SAP and non-SAP) at the application layer, preserving its full business context. This data is then securely archived in a legally compliant and audit-proof manner. This means businesses retain 100% access to their historical data for audits, compliance, and operational needs, even after the legacy ECC system is decommissioned.

"With the historical data safely managed, JiVS enables businesses to selectively migrate only the necessary, high-quality data to SAP S/4HANA," Failer says. "This targeted approach drastically reduces data volume – often by up to 90% – stream-

lining the migration process, accelerating timelines, and significantly lowering costs."

DMI estimates that JiVS can reduce overall IT operating costs by up to 80% by enabling the retirement of expensive legacy systems and optimizing data storage. Furthermore, JiVS incorporates automated data quality analysis and cleansing, ensuring that only clean, relevant, and enriched data makes its way into the new SAP S/4HANA environment. "This supports SAP's Clean Core principles and lays a solid foundation for leveraging advanced analytics, AI, and automation," adds Failer.

Overall, the solution's benefits include:
- Exceptional data transfer speed up to 30TB/day
- Zero business disruption and no downtime
- No need for costly or lengthy pre-projects
- More than 3,000 successful projects worldwide and a robust global partner network
- Over 3,000 supported business objects

The Fast Track to Freedom

The transformative power of DMI's approach is evident in the success stories of companies that have embraced JiVS. Failer shares the compelling example of a leading automotive company that successfully retired its SAP ECC system in only four months.

He notes that faced with the looming 2030 dead-line and the burden of a complex legacy landscape, the company partnered with DMI to implement JiVS. "By separating and archiving their vast historical data, we could significantly reduce the scope and complexity of their SAP S/4HANA migration, allowing them to transition to the modern platform at an unprecedented speed, freeing them from the constraints of their legacy system, reducing IT costs, and gaining the agility needed to thrive in a rapidly evolving industry," Failer says.

The Time for Action is Now

SAP's vision for a Clean Core and Composable Enterprise offers a path to agility and innovation, but it demands a commitment to clean, high-quality data, which can be provided by DMI's JiVS solution, which addresses the challenges of legacy data, streamlines SAP S/4HANA adoption, and unlocks significant cost savings. "The ticking clock is a clear call to action: businesses still on SAP ECC must act now to secure their future and embrace the transformative power of SAP S/4HANA," Failer concludes. ∎

JIVS PROVIDES A STRATEGIC AND INTELLIGENT APPROACH TO MANAGING LEGACY DATA

WHAT THIS MEANS FOR ERP INSIDERS

• **Historization prevents vendor lock-in and supports business agility.** Recognize the strategic advantage of historization – separating and archiving historical data in a vendor-neutral format. By utilizing solutions like JiVS IMP, users gain independence from the core operational system for accessing and managing historical records.

This prevents vendor lock-in, as your valuable historical data remains accessible even if you choose to migrate to a different ERP system in the future. Furthermore, having a readily accessible, well-governed historical data archive enhances business agility by providing a comprehensive and compliant data foundation for analytics, reporting,

and responding to evolving business needs without impacting the performance or complexity of your active ERP system.

• **Accelerate SAP S/4HANA migration while ensuring compliance.** To expedite your move to SAP S/4HANA and maintain robust compliance, prioritize the separation and secure archiving

of historical data. Retaining historical data in an audit-proof environment separate from your active SAP S/4HANA system allows you to meet regulatory requirements without bogging down your new environment with legacy baggage.

• **Clean Core is impossible without clean data.** Avoid the temptation of a "lift and shift" approach.

Instead, invest in data cleansing and harmonization before migration. By ensuring that only clean, standardized data populates your SAP S/4HANA system, you can minimize customizations, streamline processes, and fully leverage the benefits of the Clean Core architecture, including easier upgrades and faster adoption of new innovations.

SYSPRO'S NEXT CHAPTER

FUELED BY

INVESTMENT,

FOCUSED ON

MANUFACTURING'S

FUTURE

A LOOK AT HOW SYSPRO IS RAPIDLY ADVANCING ITS GROWTH, INNOVATION, AND TRANSFORMATION EFFORTS.

BY MARK VIGOROSO AND RADHIKA OJHA

For nearly five decades, SYSPRO has carved a distinct niche in the complex world of Enterprise Resource Planning (ERP). Built on a foundation of deep specialization in manufacturing and distribution, the company cultivated a global footprint and a loyal customer base, often navigating the path from a founder-led vision.

But 2025 marked a significant inflection point. With the backing of leading global private equity investor, Advent, SYSPRO embarked on an accelerated journey of growth, innovation, and transformation, poised to redefine its role as a critical partner in its customers' digital evolution.

The investment by Advent isn't just a financial transaction; it represents a paradigm shift for a company proud of its heritage. As Jaco Maritz, CEO, SYSPRO, explains, the move from a long-standing founder-led structure introduces new dynamics and opportunities. "This is our first transaction, to the extent that we brought in Advent," Maritz notes. "So obviously, there's quite a shift in the business, moving from the way that we did things, to a new paradigm."

The Advent Catalyst: More Than Capital

Advent's interest in SYSPRO stemmed from recognizing the company's core strengths which, Martiz notes, include, "mission-critical embedded software within our customers," its deep specialization in the resilient manufacturing sector, and its established global footprint.

However, he candidly shares another key element of Advent's calculus: "The other thing they really liked about us is everything we have not done yet." This

THE MAIN THEME AROUND VALUE EXTRACTION, IS [THE] MOVE TOWARDS A CLOUD BUSINESS

JACO MARITZ
CEO, SYSPRO

perceived untapped potential forms the foundation of Advent's growth thesis.

"One of the reasons why we were quite interested in [partnering with] them is the fact that they are growth orientated, and are really looking at the landscape, our position in it, and how we grow," Maritz emphasizes.

Prioritizing Growth

With Advent's support, SYSPRO's strategic priorities for the near-to-mid-term center around three pillars:

Growth and Efficiency: This involves strengthening market position, particularly in the UK (bolstered by the recent acquisition of a key business partner there) and North America, while maintaining its stronghold in Africa. Efficiency gains are sought in go-to-market strategies, offering development, and customer support processes.

Extending the Offering: Led by Chief Solutions and Technology Officer Chris Lloyd, based in Manchester,

ERP

England, this involves enhancing SYS-PRO's solutions through technology, innovation, and expertise. Crucially, the Advent partnership introduces new mechanisms like M&A, allowing SYSPRO to "come to the market a lot quicker with some of the changes to technology and functionality changes," a departure from the previous "do it ourselves" approach, as Maritz describes it.

Extracting Value via the Cloud: The "main theme around value extraction," according to Maritz, "is [the] move towards a cloud business." This encompasses far more than just technology deployment. "We're not only talking about a technology," he clarifies. "We're talking about the way that we manage, the way that we report, the way that we measure the commercial models the way that we do value-based pricing, as well as then, obviously, our technology and our solutions."

While manufacturing has sometimes lagged in cloud adoption, Lloyd, who oversees SYSPRO's product management, technology, and development, confirms a shift. "From our clients, we've seen a strong uptake in the cloud offering more recently," he states.

Maritz concurs, observing a distinct change in customer conversations over the past year: "There's a clear shift from our customers and new sales engagements that's not just asking about cloud, but are interested in a cloud solution." SYSPRO's distinct positioning of SYSPRO ERP and SYSPRO Cloud ERP acknowledges this reality, meeting customers wherever they are on their cloud journey.

AI: The Manufacturer's Co-Pilot
No technology discussion is complete without addressing Artificial Intelligence (AI). For SYSPRO, particularly given its manufacturing focus, AI presents significant opportunities beyond the hype. Lloyd envisions AI evolving into a "digital co-pilot that helps monitor the business... monitors key workflows, flags anomalies, and automates complex processes."

However, he stresses the importance of maintaining human oversight, especially in critical manufacturing en-

vironments. "The ultimate vision here is continuous automation while still keeping the human in the loop," Lloyd explains. "There's going to be a big shift where people are happy for AI to flag certain things [but] there's this trust barrier of letting AI take action. And that's where this concept of keeping the human in the loop will be critical."

The potential use cases for AI in manufacturing and distribution are compelling: intelligent production scheduling, optimized material requirements planning, predictive maintenance, enhanced quality control using cognitive AI, and sophisticated cost optimization.

"These are key value drivers in man-

THE ULTIMATE VISION HERE IS CONTINUOUS AUTOMATION WHILE KEEPING THE HUMAN IN THE LOOP.

CHRIS LLOYD,
CPO, SYSPRO

aging a complex manufacturing world," Lloyd asserts. He believes that while AI demand might currently seem market-driven, its practical value in manufacturing will quickly equalize expectations. "For manufacturing, AI is going to be equalized quite quickly in terms of how much it can bring to that complex environment," Lloyd says.

SYSPRO is already integrating AI capabilities, leveraging machine learning and document recognition for tasks like automating accounts payable processing. Current development focuses on streamlining customer purchase order-to-sales order workflows, automating stock replenishment triggers, and intelligent requisition approvals – tangible operational benefits delivered through AI.

Deep Roots, Sharpened Focus
SYSPRO's enduring strength lies in its unwavering focus on manufacturing and distribution. While adjacent industry opportunities exist, the immediate strategy involves deepening penetration within current verticals rather than broad horizontal expansion. "A big opportunity for us [is] actually to go even deeper into some of those industries," says Maritz, citing Food & Beverage as an example where SYSPRO can enhance its offering for specific sub-segments.

This industry specificity is a powerful differentiator. Maritz highlights the importance of speaking the customer's language: "Customer executives, not only need to be confident that we are experts from a technology perspective, but they also want to know that we can solve their business problem. Having that conversation on the business level is critical, and that's when a specialization matters."

Maritz believes that for customers, choosing SYSPRO over competition often comes down to "the ability to solve [the problem] and actually provide the most cost-effective solution." This isn't merely about price but about value delivered efficiently. Relationships built on trust and demonstrated expertise are also key.

Lloyd adds crucial product-centric reasons: The sort of length and depth of the features within the manufacturing distribution space, SYSPRO's ability to scale with customers as they expand, its strength in customizing and configuring SYSPRO to the exact customer needs, and the ability to integrate deeply into embedded processes.

SYSPRO seeks customers with clear technology and transformation plan, ready to leverage the platform's depth, even if they start smaller and scale up. Maritz contrasts these ideal engagements with scenarios where the customer wants the latest but basic digitization like scheduling is still needed: "So with them, we say 'Okay, let's get

your scheduling onto the system, then we can talk about AI."

The Power of Partnership

SYSPRO's growth and solution strategy heavily relies on a robust partner ecosystem, encompassing both Independent Software Vendors (ISVs) and Value-Added Resellers (VARs). "ISVs and partnerships are absolutely core to our strategy," states Maritz.

These partnerships are cultivated both proactively, based on market trends, and opportunistically, driven by specific customer needs. The goal is transparency and collaboration. "We do foster and drive partner collaboration for that transparent relationship between us, the ISV and the customer," Lloyd explains.

Maritz links this back to specialization. Just as SYSPRO focuses on its core strengths, partners like CRM specialists bring their expertise to the table. "We are specialists, and then, say, the customer requires a CRM system. It gives us opportunity to bring [the ISV or VAR] to the table as the CRM specialist," he notes. The VAR channel also remains fundamental, as SYSPRO operates as a channel-driven company. These partners provide es-sential implementation, support, and localized industry expertise that SYSPRO couldn't replicate centrally. "Within our partner base also, we build those skills and specialization within specific industries," Maritz adds.

Forging Ahead

Internally, the shift from a founder-led entity to a private equity-backed organization inevitably impacts company culture. Maritz acknowledges the significance of this transition, emphasizing the need to retain skills and talent while embracing new ways of working, facilitated by a supportive Advent model.

The investment firm has brough expertise and hands-on mentorship model to SYSPRO, leveraging a network of specialists who act as mentors and advisors to SYSPRO's senior leadership team (SLT). "Each of the SLT members has got somebody that almost shadows them as a mentor and an advisor," Maritz reveals. "So, we suddenly went from trying to do this on our own to here's somebody that's actually done [it before]." This model has provided practical guidance, instilled confidence and accelerating strategic initiatives.

SYSPRO now stands at a compelling juncture. Armed with decades of industry expertise, fortified by strategic investment, and guided by experienced leadership, the company is doubling down on its manufacturing and distribution focus while embracing cloud, AI, and an ecosystem approach. As it forges ahead on these initiatives, for manufacturers and distributors navigating their own complex digital transformations, "SYSPRO aims to be more than just an ERP provider; it aims to be the indispensable platform and partner for future success," Maritz concludes. ∎

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Learn more about SYSPRO

WHAT THIS MEANS FOR ERP INSIDERS

• **Cloud is a core strategic priority, not just an option.** SYSPRO, fueled by the investment from Advent views the shift to a cloud business as central to its future strategy and value extraction. This goes beyond just offering cloud deployment and involves changes in management, reporting, commercial models, and the overall technology stack. The company's future development and focus are heavily weighted towards enhancing and expanding its cloud capabilities, responding to a clear increase in customer demand for cloud solutions observed in the last 12 months.

• **Expect accelerated innovation and offering expansion from SYSPRO.** The partnership with Advent provides SYSPRO with new resources and mechanisms, including the potential for Mergers & Acquisitions (M&A). Given these factors, the industry can anticipate a potentially faster pace of innovation and the introduction of new functionalities compared to SYSPRO's historical "do it ourselves" approach. This acceleration applies to extending the overall offering, likely including more advanced cloud features and integrations.

• **SYSPRO's plans include integrating AI and deepening platform capabilities.** The company is actively incorporating AI into its solutions, envisioning it as a digital co-pilot for manufacturing processes while keeping the human touch. This, combined with a strong focus on building out its ISV partner ecosystem, signals a move towards becoming a more comprehensive platform player. Future SYSPRO versions will likely offer more integrated intelligence and broader capabilities through both native development and tighter partner integrations, often facilitated via its cloud platform.
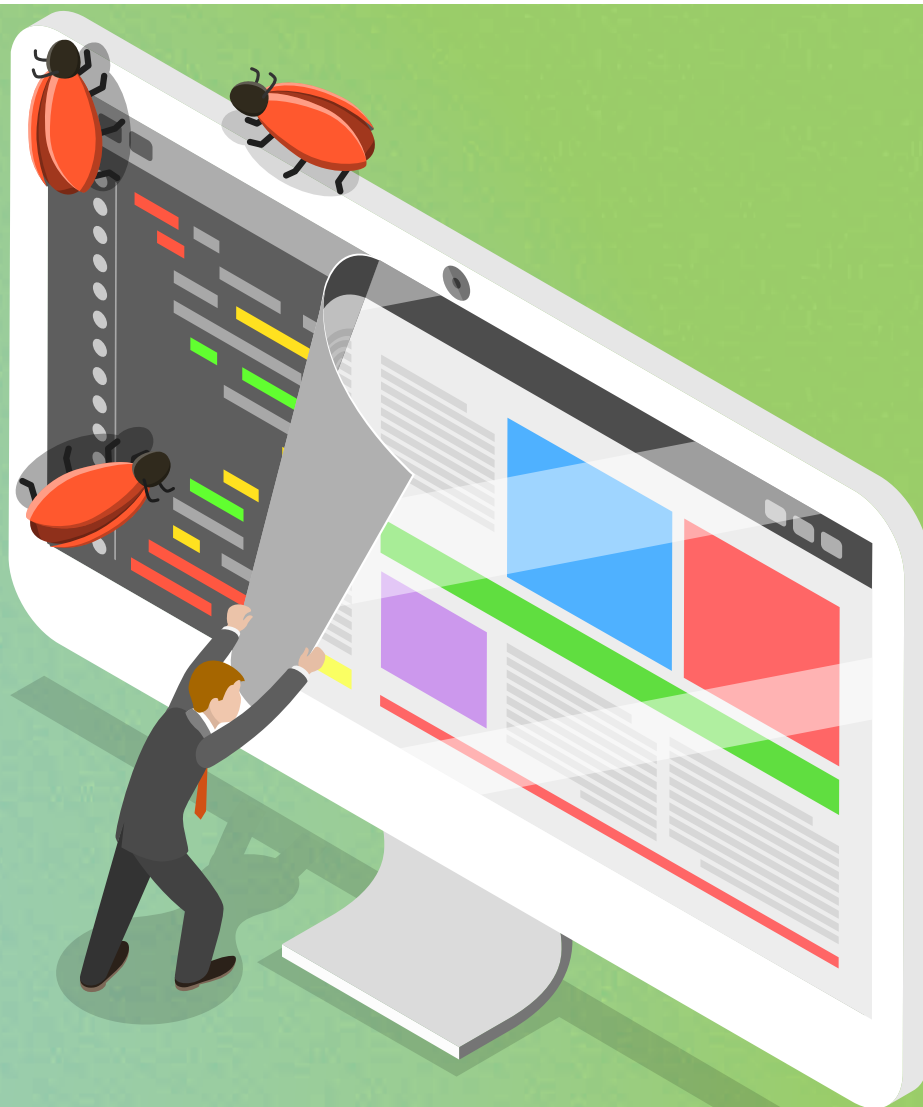
Protecting and maximizing ERP Investment through Testing

Original Software CEO Colin Armitage on why testing is essential to maximize ERP investment and minimize risk

BY GRANT SUNESON

A s organizations invest in ERP upgrades, such as the move to SAP S/4HANA or Infor CloudSuite, the need for improved workflows and streamlined processes has become more apparent than ever before. This is especially impactful when it comes to software testing.

With new upgrades and implementations arriving more frequently than before, the enterprise software landscape is constantly in flux. This means businesses face new challenges in ensuring the quality and stability of their increasingly complex application ecosystems.
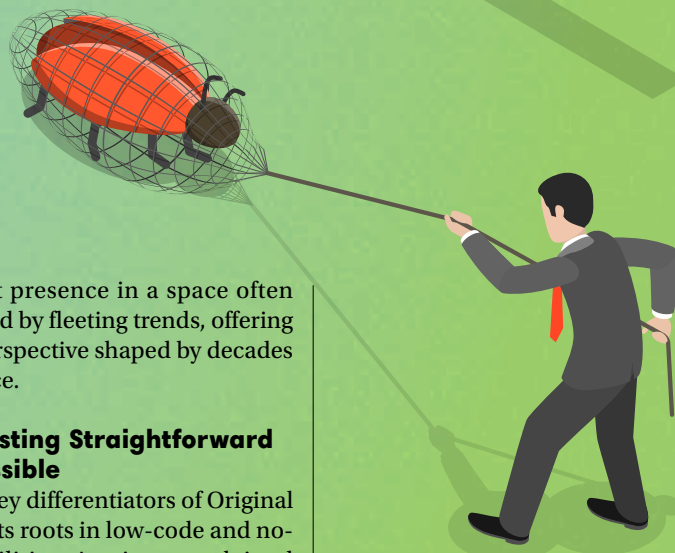
In an exclusive interview, Colin Armitage, CEO of Original Software, provided invaluable insights into the critical world of end-to-end testing, helping companies understand how they can mitigate risk and meet their quality goals. With a history stretching back to 1997, Original Software has been a consistent presence in a space often characterized by fleeting trends, offering a unique perspective shaped by decades of experience.

Making Testing Straightforward and Accessible

One of the key differentiators of Original Software is its roots in low-code and no-code capabilities. Armitage explained that the decision to avoid a code-based testing solution was fundamental from the company's inception, as it was fundamental to problem-solving.

"If you are trying to test a code base as it is, why on earth would you want to build another code base to test the first one? The testing code would be just as likely to have bugs in it as the code being tested. You would need specialized skills to build it, and you haven't made the problem easier. You've made it harder," said Armitage.

QA AND TESTING

Beyond simply eliminating code, this approach tackles other inherent challenges in traditional test automation, such as managing timing dependencies. The common practice of embedding fixed-duration wait loops in test scripts highlights their inflexibility and potential for failure if application response times vary. Original Software's solution intelligently handles timing, recognizing when the application is ready for the next action.

Adapting to the new Enterprise Software Landscape

Original Software's core business revolves around helping organizations achieve their quality goals while managing and reducing risk. This is particularly crucial during major upgrades and the implementation of new applications, ensuring a "risk informed state of play" when companies go live.

This is especially important in the modern technology landscape. ERP vendors are increasing the rate of updates, and companies cannot test the software the same way they have done in the past.

"Recently, a lot of ERP vendors have moved to monthly updates. What you could do to test something if it was only once a year was fine. If you have to test every month, you can't go and rip 20 or 30 of the key business users out of the business every month for two weeks. It is just physically impossible. So, it tends to be at that more operational level there where they've reached a point where they just can't continue testing the way they have been doing it," said Armitage.

Armitage added that the ability to test business processes seamlessly across multiple applications becomes not just advantageous but "essential." Original Software's platform rises to this challenge by supporting a wide array of applications, from modern browser-based ones to desktop applications and even legacy IBM emulators, recognizing their continued importance in some business processes.

This is particularly important for companies that are now managing multiple

IF YOU HAVE TO TEST EVERY MONTH, YOU CAN'T GO AND RIP 20 OR 30 OF THE KEY BUSINESS USERS OUT OF THE BUSINESS EVERY MONTH FOR TWO WEEKS. IT IS JUST PHYSICALLY IMPOSSIBLE.

ERP systems due to acquisitions. The ability to support these diverse environments is crucial for their companies navigating consolidation efforts.

"We may run into somebody who says, 'we're an SAP shop,' but they'll be using Salesforce as a CRM rather than SAP or they will be using something else for their e-commerce. For an end-to-end business process, you'll typically be visiting multiple applications. So, it's not a nice idea to support multiple applications. It's essential," said Armitage. "And it is that end-to-end testing, the ability to test the process across applications, that is essential. You don't want to see application boundaries. You just want to be able to test the business process. It's very much a strength of ours, going across applications."

Understanding Challenges and Evolving to Meet Them

With nearly 30 years of experience in the testing space, Original Software under-

stands where technologies like automation can be helpful and where business process overhauls are more likely to yield the desired results.

When looking to improve their testing workflows Armitage says companies should start off by taking a step back and evaluating their business pain points. For instance, companies often request test automation as their first order of business. Yet taking the time to review their current practices may reveal that the real issue isn't a lack of automation but the disruptive impact of user acceptance testing (UAT), where key users are taken away from their regular duties.

"Companies can argue that maybe they could automate their testing, but that's difficult if there's new features. There's always going to be an element of manual testing done on that. But more importantly, that familiarization with either changes or new features has to be done by the users, and that, again, has an impact on the business," said Armitage

While automating UAT might seem like a solution, it's challenging with new features, and the crucial familiarization aspect for users will always require manual input, impacting business operations. Therefore, enhancing the efficiency of this process can be a significant win for companies.

Armitage cautioned against the expectation of automating everything, as it "doesn't make any sense" for processes which run infrequently. Instead, he advocated prioritizing the automation of core processes that would cripple the business if they failed. He used the analogy of building a "survival pack" of automated tests for critical processes like order-to-cash or procure-to-pay, allowing companies to quickly verify their core functionality after a new release.

Recognizing that some companies, especially in test automation, might need extra support, Original Software also offers a "fast start service" involving remote embedding of its personnel to help build initial test assets quickly. However, the bedrock of the company's offering remains itscomprehensive software platform.

Incorporating AI into Testing

Original Software has long been ahead of the curve on AI, incorporating it in a practical sense to solve fundamental testing challenges. Armitage illustrated this with the example of identifying UI elements, explaining how their AI can understand what a user would intuitively call an element (e.g., the "User" text box) rather than relying on technical HTML identifiers that are meaningless to a business user.

This focus on user-friendliness and readability is crucial for making test scripts accessible to a wider audience. While promising further developments in AI for its offerings, Armitage emphasized a realistic approach, learning from the initial over-promising often associated with new technologies. This allows Original Software clients like Costco to have an accurate expectation that it is refining what it already does well, rather than doing anything radically different.

"Costco uses part of our platform. It takes them three days to run the extraction because their live database is so big. They were delighted when we managed to shave around 20% off their time. That's a big win, because they can get back to their day jobs earlier on and do more testing with the available time," said Armitage.

Building a Business Case

While many IT experts will understand the importance of sophisticated testing capabilities, the reality is that they also need to build a business case that emphasizes the importance of testing to business leaders. However, this can be difficult, particularly when the primary benefit is avoiding potential catastrophes rather than generating direct revenue.

Armitage acknowledged that the "tipping point" for investment varies among customers. Companies that have experienced significant negative impacts from software failures often find the justification straightforward.

However, for others, the impetus might come from middle management facing increasing pressure due to inadequate testing coverage or the rising frequency of software updates.

Colin Armitage

The shift towards monthly updates by vendors like Infor, compared to the less frequent updates of on-premise systems like SAP ECC or Oracle EBS, makes traditional manual testing approaches increasingly unsustainable.

IT'S NOT A NICE IDEA TO SUPPORT MULTIPLE APPLICATIONS. IT'S ESSENTIAL. YOU DON'T WANT TO SEE APPLICATION BOUNDARIES. YOU JUST WANT TO BE ABLE TO TEST THE BUSINESS PROCESS.
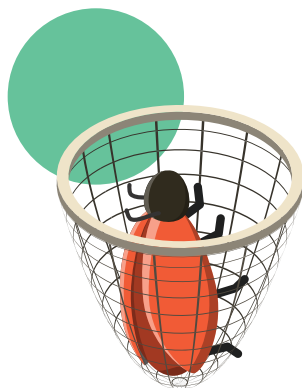
Armitage emphasized the need to present a compelling case to senior management, which Original Software assists customers in doing. Highlighting real-life examples of companies narrowly avoiding major issues can be a powerful tool.

Adapting to the New Normal

Companies often struggle to adapt to the rate of change in the new technological landscape. Armitage said that the move to the cloud has changed the rules in terms of vendor relationships and it also means that businesses are not in control of how often they need to run tests on their software.

Finding a partner like Original Software in this new environment is essential. It can help companies not only understand the technology landscape as it now exists but allow them to adapt to it. With new software deployments and upgrades constantly being rolled out, businesses need to have confidence that their investments are being protected from risk and can deliver the value they need to reach their business goals. ∎
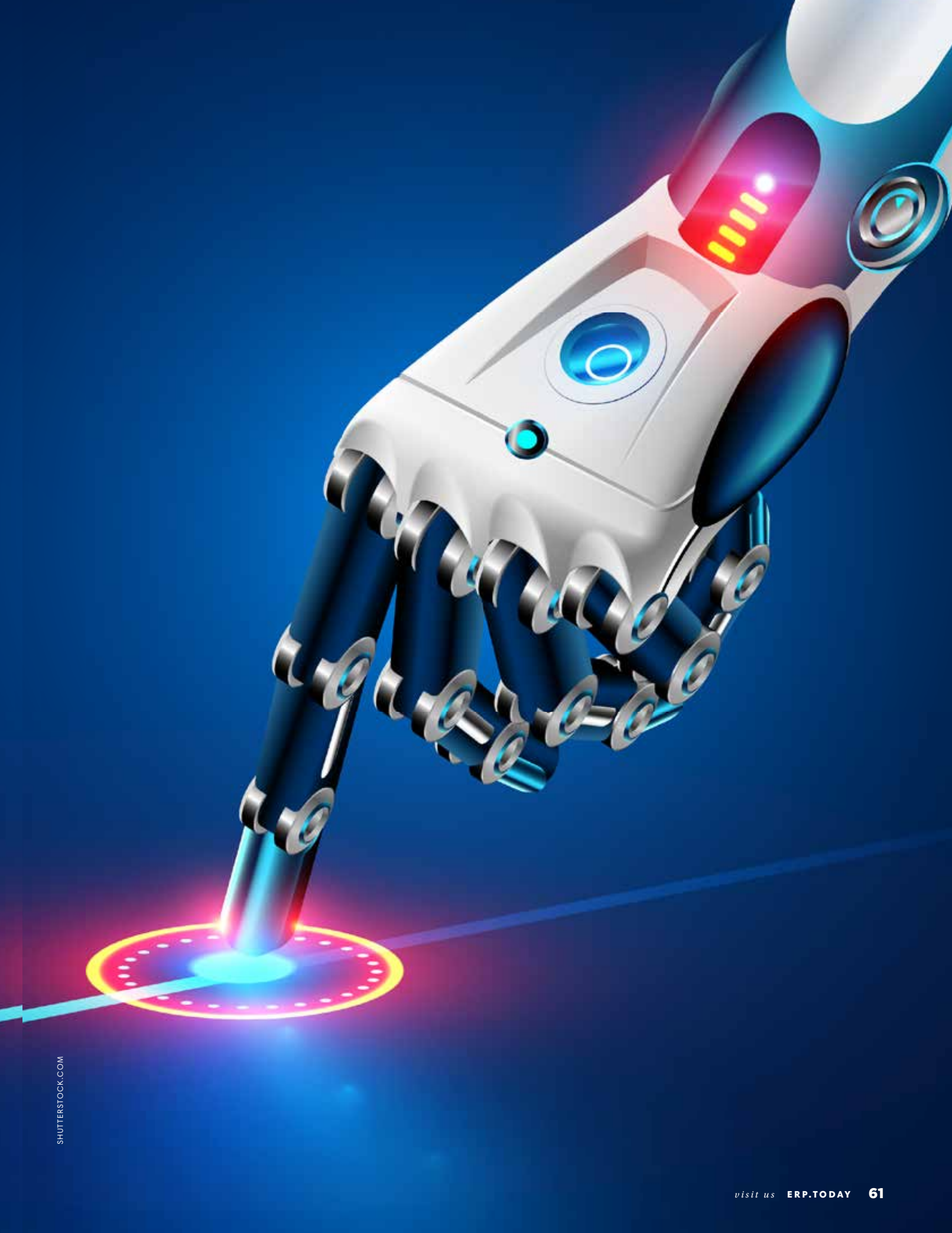
Learn more about Original Software

THE RISE OF
INTELLIGENT
BUSINESS

AI IS REWRITING THE RULES FOR ERP USERS IN THE MANUFACTURING AND SUPPLY CHAIN INDUSTRIES.

BY RADHIKA OJHA

MANUFACTURING

ntegrating Artificial Intelligence (AI) into Enterprise Resource Planning (ERP) systems is a present-day reality that is reshaping industries and driving unprecedented efficiency. From manufacturing floors to intricate supply chains, AI is providing the intelligence needed to navigate today's complex business environment. Today, ERP solution and services providers like QAD, NTT DATA Business Solutions, IBM, and Inetum are providing users in these industries with customized AI solutions that help alleviate many challenges.

Unlocking the Autonomous Advantage in Supply Chains

The modern supply chain is a dynamic and often unpredictable entity. AI is providing the key to unlocking an 'autonomous advantage,' driving substantial business value. The numbers speak for themselves. According to the early findings of a study by the IBM Institute for Business Value (IBV), organizations with a higher investment in AI for supply chain operations witnessed an impressive 11.02% revenue growth in 2024, a substantial 61% premium compared to the 6.83% growth experienced by their less-invested peers.

This significant growth is fueled by AI's ability to deliver real-time, personalized responses to transactional inquiries and drive improvements across critical areas like supply chain management, bottleneck identification, and design innovation. AI's proactive capabilities are also crucial, allowing businesses to anticipate issues and generate mitigation plans.

By deploying AI across essential workflows such as global trade management and supplier selection, companies can achieve unprecedented levels of efficiency and resilience. The ability to explore and test hypothetical scenarios using data further empowers businesses to prepare for impactful events through autonomous orchestration.

Facing Manufacturing Headwinds with "Pragmatic AI"

The manufacturing sector is grappling with a trifecta of challenges today: escalating operational costs, the complexities of global supply chains, and a widening skills gap. Recognizing this, QAD is championing a practical approach to AI that focuses on enhancing manufacturing operations through "'Pragmatic AI" and low-code/no-code extensibility.

> **AI IS PROVIDING THE KEY TO UNLOCKING AN AUTONOMOUS ADVANTAGE.**
>
> **THE ABILITY TO ANALYZE VAST DATASETS ALLOWS GENERATING INSIGHTFUL RECOMMENDATIONS.**

This approach empowers manufacturers to integrate data-driven solutions that adapt to their unique needs and improve decision-making without compromising existing workflows. This philosophy emphasizes delivering tangible results rather than getting caught up in theoretical applications.

A prime example of this is the direct embedding of AI into QAD's core solutions. The company uses AI to recommend commodity classification codes for optimal cross-border taxation and customs clearance, demonstrating how AI can be seamlessly integrated to address specific, pressing operational needs. This leads to measurable improvements without disrupting established processes.

These additions to QAD's platform enable manufacturers to achieve systemic improvements through better data visibility and optimizing critical areas like supply chain, production quality, and workforce execution.

Simplifying Custom Gen AI

The power of generative AI (GenAI) is undeniable, but the process of creating custom models can often be intricate and resource-intensive. NTT DATA Business Solutions is simplifying this process with its innovative GenAI Connector. This tool is designed to streamline the creation of custom generative AI models, allowing businesses to leverage their own data and select the most suitable large language models to rapidly build and refine AI applications.

The GenAI Connector significantly reduces the complexities involved in GenAI development by offering a user-friendly process. Users can effortlessly load business data, configure models, and iterate on their performance. This streamlined approach profoundly impacts ERP systems as it automates routine tasks like data entry, document processing, and report generation.

Additionally, the ability to analyze vast datasets allows for generating insightful recommendations, identifying hidden patterns and anomalies, and forecasting potential outcomes. Together, these features provide businesses with a significant competitive edge.
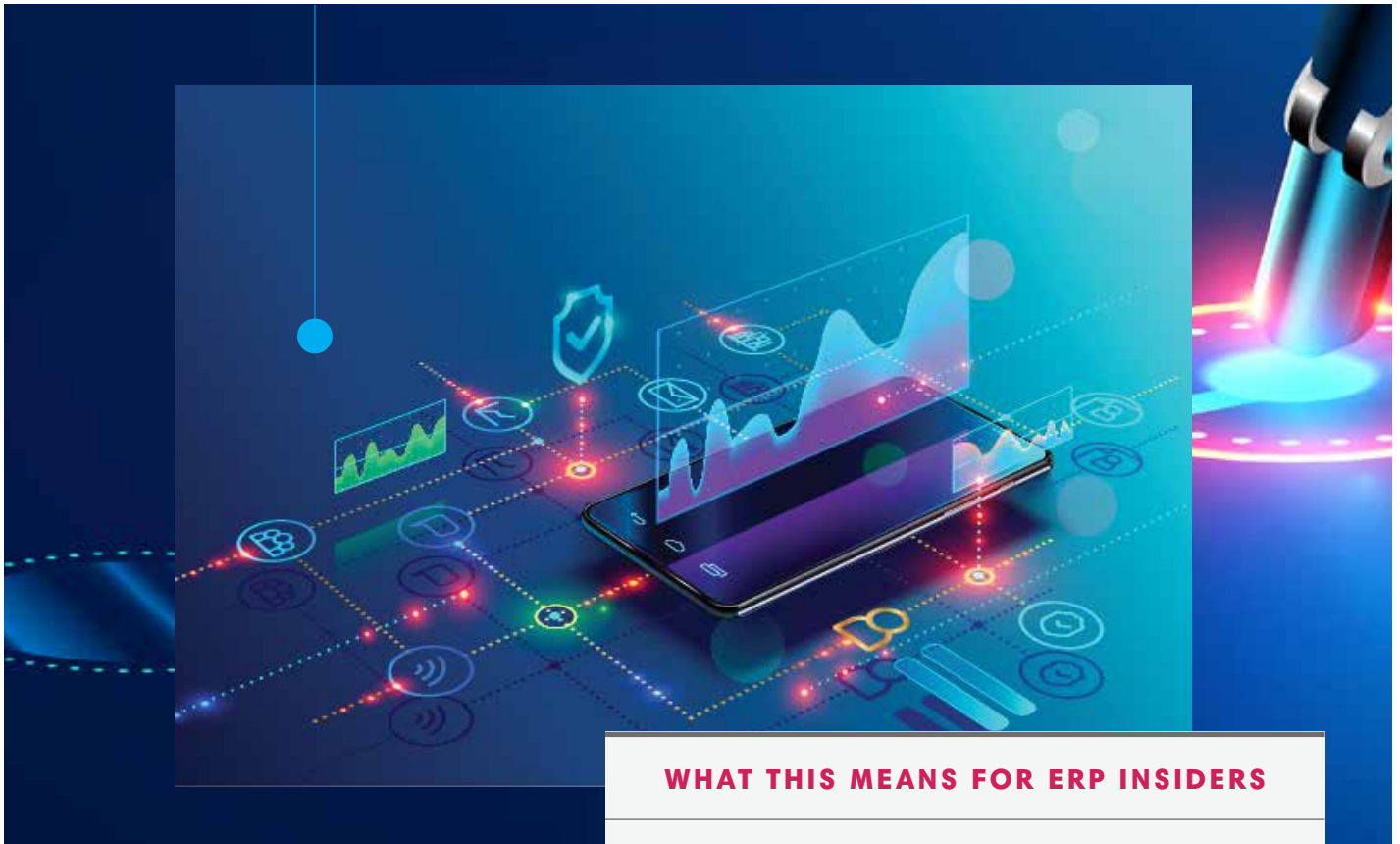
High-Impact GenAI Deployment

Recognizing the transformative potential of Generative AI, Inetum launched its GenAI Factory initiative in April 2024. This initiative is designed to support clients through every

stage of their GenAI projects, from the initial spark of an idea to full-scale deployment. These services are structured around four key pillars: Assimilation, Qualification, Prototyping, and Scaling.

Through Assimilation, Inetum assists teams in selecting suitable models and technologies. Qualification involves a thorough evaluation of business challenges to determine the feasibility of GenAI solutions. Prototyping focuses on developing initial models to validate concepts. Finally, Scaling ensures the successful deployment of GenAI solutions, complete with training programs for seamless integration.

Inetum strategically collaborates with industry giants like Microsoft and SAP to integrate cutting-edge technologies into their offerings. The company's focus is on industries where GenAI can deliver the most significant impact, including banking, energy, the public sector, and customer experience.

The Future is Intelligent

The integration of AI into ERP systems represents a fundamental shift towards the intelligent enterprise. As AI continues to evolve, its role in ERP will only become more profound, empowering organizations to operate with greater agility, efficiency, and foresight. ∎

WHAT THIS MEANS FOR ERP INSIDERS

• Navigate the hype and focus on what's best for you. While AI offers significant potential for ERP, users must be discerning about its application. Focusing on practical AI solutions, like those offered by QAD, that address real operational problems with a human-in-the-loop approach is key to avoiding the pitfalls of overhyped or ineffective AI implementations. Prioritize AI tools that offer tangible benefits and integrate seamlessly into your organization's existing workflows rather than going for something new that might not ease your processes or increase your ROI.

• Explore the potential of custom GenAI models. The emergence of tools like NTT DATA Business Solutions' GenAI Connector and Inetum's GenAI Factory make it easier for ERP users to explore the development of custom generative AI models tailored to their specific business needs. This opens opportunities to automate complex tasks, gain unique insights from data, and enhance decision-making in ways that off-the-shelf solutions might not fully address. Consider how custom GenAI models could provide a competitive edge by leveraging their proprietary data.

• Embrace the evolution towards autonomous supply chains. The trend towards AI-enabled supply chains, including the development of AI agents, signifies a shift from reactive to proactive supply chain management. This means the potential for systems that can anticipate disruptions, optimize inventory levels, and even make autonomous decisions within defined parameters. Understanding this evolution and exploring how AI can enhance visibility and resilience in their supply chains is crucial for future success.

IFS

Charting a New Course

Van Oord builds its future on IFS Cloud

BY RADHIKA OJHA

In the dynamic world of marine contracting, staying ahead requires internal agility, data-driven insight, and excellence in execution. Van Oord, a global leader renowned for its complex dredging, offshore wind, and marine infrastructure projects, recognized this need when the company chose to overhaul its legacy ERP system.

Faced with a fragmented IT landscape, the challenge of retaining knowledge amid personnel turnover, and the increasing complexity of its projects, the company embarked on an ambitious transformation program aptly named Founding the Future. At the heart of this initiative lies the implementation of IFS Cloud, a strategic move designed to create a unified, future-proof backbone for the entire organization.

In conversation with ERP Today, Ralph Staal, Program Manager for the IFS implementation at Van Oord, shed light on the strategic imperatives that led the organization to embark on this journey.

"A couple of years ago, we knew we had to focus on leveraging the data we create daily," Staal explained. "How-

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> ## IFS Success has really helped us make sure that we made the right decisions.
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> **RALPH STAAL**
> PROGRAM MANAGER
> FOR IFS IMPLEMENTATION
> AT VAN OORD

ever, we struggled to translate that into proper initiatives that harmonize our application landscape and secure the foundational business processes in finance, procurement, and supply chain, especially on the project side."

Addressing Complexity

A key driver was the evolving nature of Van Oord's work and workforce as its projects became increasingly complex. Compounding this was the attrition of personnel as they take a lot of knowledge with them, making it imperative for Van Oord to set up a system that can institutionalize this valuable experience.

"By implementing a degree of standardization, we would have a way to retain knowledge and use that for our future projects to create better budgets, designs, and forecasts," Staal said.

The desire to be more data-oriented was also paramount, with Staal emphasizing the practical need "to make sure we have the right data at the right time with the right person looking at it to take the right decision."

A Strategic Fit

Given these goals, a simple cloud migration wouldn't do for Van Oord; it was a ground-up implementation that also included replacing a legacy finance system. Van Oord is already a construction and engineering customer for IFS and after a thorough selection process, IFS Cloud, emerged as the clear choice for its maritime business too. "IFS really stood out," Staal recounted. "We found that IFS had the best understanding of how contracting projects work; in terms of terminology and functionality, we just found that they were a good fit for our industry."

The platform's balance between standardization and flexibility was also appealing. "IFS is configurable, but it's not extremely customized," Staal observed, adding, "We're trying to stick to standard as much as possible."

According to Staal, the move toward the cloud was logical. "When we roll out the solution, we want to have one that is connected, reusable, and scalable," he confirmed.

Navigating the Implementation Journey

Implementing a new ERP across a global, project-centric organization is inherently challenging. Van Oord faced hurdles like migrating from an extremely

fragmented application landscape, establishing data and process ownership in an environment where these concepts were relatively new, and aligning numerous stakeholders across traditional organizational silos.

"Aligning with all the stakeholders so that we don't face resistance later is the real challenge," Staal admitted. Adding to the complexity, Van Oord is simultaneously implementing other major systems, like Workday and new planning solutions, requiring careful coordination and integration.

When Staal spoke with ERP Today in April, the project was nearing a major milestone. "We are at the final stages of the acceptance phase and will begin the user acceptance test phase for our first release in two weeks," he shared. "Our first real entity will go live in June."

Throughout this complex process, Van Oord has leveraged IFS Success—an engagement model delivering the

knowledge and tools for customers to realize their true, long-term business potential. Staal noted that IFS Success "has really proven its worth, helping with explaining the best practices, doing design validations, and providing guidance on critical decisions."

He added: "IFS Success has really proven its worth in the past year and half. [The] Customer Success Manager could look at some of the things we're missing in our project and utilize IFS Success to provide that value to our project and our organization and that came in many different forms."

"IFS Success has helped us make sure that we made the right decisions," Staal affirmed adding that he expected IFS Success to continue playing a large role in helping the company set up future support organization.

Future Focus

Van Oord expects significant benefits once the system is up and running in H2 this year. Technically, scalability and the ability to stay current with IFS updates by adhering to standards are key. For the business, Staal expected "better decision making through rolled-up data and insights, enhanced collaboration between the departments, and greater efficiency via reduced manual work, leading to faster financial closing and fewer errors." Improved procurement cycle times and supplier performance management are also major targets.

IFS Cloud and Success also provides a foundation for future innovation. "As soon as we have this solid foundation in place, we can shift our focus [to] more innovative developments on top of our cloud solutions," Staal said, hinting at future explorations like AI, enhanced sustainability tracking, and Quality, Health, Safety, Environment modules within IFS.

The Human Element

However, Staal emphasized that technology is only part of the equation. Effective change management, handled by a dedicated stream within the program using tools like a change network of ambassadors, remains critical. The biggest challenge is embedding ownership within the business itself.

"The business is also taking ownership of what we deliver because the change will not happen in the project, but in the business department," he explained.

Reflecting on the broader lessons learned and insights from IFS Success, Staal concluded, "The real challenge is to really step away, and not so much look at a solution, but at how you work together and what you want to achieve together. In the end, it's about people working in a solution, not a solution dictating how people should work." ∎

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Learn more about IFS

WHAT THIS MEANS FOR ERP INSIDERS

• **Industry-specific cloud ERP is the norm for complex sectors**. The market for cloud ERP is expected to hit around $74 billion by 2029, growing over 12% annually. However, the real momentum for companies in asset-intensive, project-driven sectors like Van Oord lies in industry-specific cloud solutions. While manufacturing leads overall ERP adoption, specialized providers gain traction because they embed deep domain knowledge, relevant KPIs, and pre-configured processes like complex project accounting or asset lifecycle management out-of-the-box. Generic solutions often require heavy, risky customization to meet these unique demands, whereas industry-focused platforms like IFS Cloud offer a faster path to value and align better with specific operational needs.

• **Balance control, integration, and vendor alignment.** Companies like Van Oord operate globally, often in remote locations, manage high-value assets, and handle complex projects, making its enterprise application strategy critical. When considering hybrid cloud ERP, key decision criteria include data governance & security, integration complexity, edge capabilities, and vendor industry focus. For the latter, for example, IFS focuses on asset-intensive, project-centric, and service-focused organizations in sectors like Construction, Energy, Utilities, Aerospace & Defense, Manufacturing, and Maritime. Aligning your needs with a vendor's core competency reduces implementation risk and ensures the platform evolves with relevant industry capabilities.

• **Foster supply chain resilience amid volatility.** Near-term factors like shifting tariffs highlight the need for supply chains built for resilience, not just static efficiency. Organizations should, therefore, expect their Cloud ERP provider to offer capabilities like unified visibility, scenario modeling, sourcing flexibility, and agile execution. For instance, Babcock International (Energy & Marine) leverages IFS as a full ERP across complex, multi-billion-dollar projects (like aircraft carrier construction and nuclear submarine maintenance). The company has completed over 4,630 projects using IFS, relying on it as a "single point of truth" for managing materials, costs, labor, and asset maintenance across 12,000 users.

From Checkout to Connected Commerce

How TCS is Modernizing Retail Tech Operations

BY MARK VIGOROSO

In an era where retailers face margin pressure, complex customer journeys, and escalating expectations for agility, Tata Consultancy Services (TCS) is carving a distinct path—not by flooding the market with commodity services but by tightly coupling domain expertise, proprietary IP, and outcome-based delivery models. As Abhijit Niyogi, VP and Retail Business Unit Head at TCS, explained during a visit to TCS's London offices. "We don't just implement tech—we co-own the outcome."

One of the most illustrative examples is the long-standing partnership between TCS and Coop Denmark, a grocery cooperative with nearly 900 stores. Coop began a multi-year SAP transformation journey in 2019, but the true value began to materialize when TCS helped the retailer stabilize, operationalize, and optimize the business post-implementation. "ERP success isn't go-live. It's value realization," Niyogi emphasized.

What sets TCS apart in a crowded services landscape is its focus on filling the "white space" left by traditional ERP and commerce platforms. TCS's Optumera, for instance, is an AI-powered merchandising assistant that simulates pricing, space, and assortment optimization scenarios. It proactively recommends actions to boost revenue or outmaneuver competitors. "It's like equipping your merchants with predictive binoculars," says Niyogi.

Another flagship solution, OmniS-tore, offers a composable and scalable unified commerce checkout platform. Retailers such as B&Q (UK) and Croma (India) use it to enable mobile checkouts, contactless payments, personalized in-store promotions and "save the cart" features. Unlike monolithic POS systems, OmniStore's microservices architecture allows retailers to plug and play only what they need.

With AI-infused at the core, both platforms are now evolving toward agentic AI capabilities that learn from historical data and reason through new contexts to assist with tasks like promotions, inventory management, and customer personalization in real time.

Moreover, TCS's philosophy revolves around strategic partnership, not volume-based sales. "We work deeply with a few hundred customers," Niyogi said. Most of TCS's retail contracts are outcome-based, some even include gain-sharing models tied to business KPIs like forecast accuracy and store productivity.

For TCS, the path to transformation begins with operating model simplification, leveraging decades of domain and IT expertise to eliminate redundant roles, streamline governance, and align service levels to business metrics. Niyogi notes, "Retailers want fewer moving parts, not more dashboards. They want business impact, not just green IT SLAs." ∎

> Optumera and OmniStore are now evolving toward agentic AI capabilities.

WHAT THIS MEANS FOR ERP INSIDERS

• **Operational transformation can yield returns that can fund ongoing digital transformation.** Retailers embarking on ERP transformations should treat go-live not as an endpoint but a springboard for operational reengineering. TCS's work with Coop Denmark illustrates the value of long-term stabilization, business adoption, and continuous optimization. Retailers should insist on value realization phases post-deployment and use trusted partners to drive workforce alignment, supply chain agility, and personalized commerce initiatives from the core out.

• **Excellence as a GSI and ISV is a rare combination.** TCS's dual role as a systems integrator and software innovator provides unique leverage. Platforms like Optumera and OmniStore are not bolt-ons but composable, retail-native systems designed to fill ERP gaps. Optumera uses AI to dynamically optimize pricing and inventory strategies, while OmniStore ensures seamless checkout experiences across physical and digital channels. Together, they give retailers actionable levers for margin growth, customer retention, and omnichannel excellence.

• **TCS's USP appears purpose-built for retail modernization demand.** In a global retail tech market expected to surpass $500 billion by 2030, TCS's blend of verticalized consulting, patented solutions, and outcome-based services is a differentiator. While Accenture and Capgemini offer scale, few can match TCS's domain depth and proprietary IP. The company's approach is well-positioned to resonate with retailers under pressure to modernize without disruption. With a growing customer base in Europe and the Americas, and active co-innovation across platforms like SAP, Microsoft, and Oracle, TCS is poised to expand its influence as a strategic transformation partner for retailers.

ENTERPRISE VIEWS

GLOBAL PHARMACEUTICAL DISTRIBUTOR ADVANCES DIGITAL TRANSFORMATION WITH SAP S/4HANA

BY MARK VIGOROSO

As part of its ongoing digital transformation journey, an international provider of pharmaceutical wholesaling and logistics is set to implement SAP S/4HANA as part of a broader effort to modernize enterprise systems and enhance operational efficiency. The initiative aligns with the company's strategic vision to optimize processes, leverage AI-driven insights, and improve supply chain agility starting in a key EMEA region's dynamic healthcare and pharmaceutical distribution sector.

With decades of experience in the local market, this company is part of a global healthcare network, which operates in multiple countries, including the Czech Republic, France, Germany, Norway, the Netherlands, Spain, Turkey, and the United Kingdom.

The company's IT Director shared insights into the company's transformation plans, emphasizing the critical role of SAP S/4HANA in streamlining finance, logistics, and ERP functions.

"Today, we process approximately 130,000 invoices daily and serve 22,000 pharmacies out of the 30,000 in this region," he explained. "Our legacy ERP system, has functioned primarily as an accounting tool rather than a fully integrated enterprise system. The move to SAP S/4HANA will enable us to digitize manual processes, enhance financial planning, and integrate AI-driven analytics."

The transformation roadmap at the company is structured into three key phases:

1. ERP Assessment & Business Case Development (2025)
• Conducting a feasibility study to define current system gaps.
• Engaging local SAP partners for process mapping.
• Securing executive approval for the transition.

2. Implementation Kickoff & Rollout (2026)
• Launching a global SAP S/4HANA implementation in collaboration with the company's international teams.
• Standardizing procurement, financial forecasting, and supply chain management processes.
• Migrating warehouse management systems (WMS) and financial operations into a unified SAP framework.

3. Full System Deployment & Optimization (2027-2028)
• Expanding AI-driven insights for demand forecasting and inventory management.
• Integrating extended warehouse management (EWM) to optimize stock replenishment.
• Enhancing real-time financial reporting and risk management.

The IT Director highlighted the organization's focus on leveraging AI within the SAP ecosystem.

"We manage millions of invoices per month, yet financial visibility remains a challenge. AI-powered tools in SAP S/4HANA, such as predictive analytics and automated risk assessments, will bring much-needed transparency," he noted. "Our priority is to apply machine learning models for stock replenishment and pricing strategies, ensuring cost efficiency and adaptability in market fluctuations."

The move to SAP S/4HANA also positions this region of the company as a potential SAP center of expertise for the broader network of regional teams.

"This region has a deep talent pool of SAP professionals, and our goal is to leverage this strength to become an SAP knowledge hub within our organization," the IT Director stated. "We have already engaged with SAP's regional General Manager to explore collaboration opportunities."

This initial regional team at this company is also implementing Workday for HR. The IT Director noted that the existing HR system is essentially a custom developed solution based on a

"THE MOVE TO SAP S/4HANA WILL ENABLE US TO DIGITIZE MANUAL PROCESSES, ENHANCE FINANCIAL PLANNING, AND INTEGRATE AI-DRIVEN ANALYTICS."

local HR application, but is not an enterprise-grade solution. The company will not leverage Workday's full feature set to begin with, and will continue for a time to manage some HR processes like payroll outside of Workday. And deep integration with SAP S/4HANA is not currently planned.

Reflecting on the transformation process, the IT Director emphasized the importance of:

• Prioritizing Employee Training: "Training should not be an after-thought—it must be a priority from day one to ensure smooth adoption."

• Long-Term Vision Over Short-Term ROI: "Companies should avoid focusing only on immediate financial returns and instead take a long-term strategic view when investing in digital transformation."

• Managing Organizational Change: "Shifting company culture is just as important as implementing new technology. Employees need to understand the 'why' behind the transformation."

With a two-year implementation timeline, the company is focused on laying the groundwork for a seamless SAP S/4HANA deployment. The company anticipates that Spain's SAP roll-out—currently underway—will provide valuable insights into best practices for a multi-market single-instance strategy.

As the transformation progresses, the company aims to redefine its IT landscape, embracing cutting-edge AI, automation, and cloud-first strategies to stay ahead in the evolving pharmaceutical distribution industry. ∎

WHAT THIS MEANS FOR ERP INSIDERS

• **Industry fit remains a key factor for ERP.** It's worth noting that a significant majority—95%—of the world's life sciences companies utilize SAP solutions, which include SAP S/4HANA. This high adoption rate underscores SAP's strong presence in the pharmaceutical industry, encompassing various segments such as research and development, manufacturing, and distribution. SAP S/4HANA offers specialized functionalities tailored to the pharmaceutical sector, including features like SAP Advanced Track and Trace for Pharmaceuticals. This application assists companies in complying with international and regional drug serialization mandates, effectively combating counterfeit medications and enhancing supply chain transparency. Such capabilities are particularly beneficial for pharmaceutical distributors like Alliance Healthcare aiming to ensure product authenticity and regulatory compliance.

• **Define a clear cloud strategy: public vs. private.** Selecting the appropriate cloud deployment model is crucial for migrations like this pharmaceutical company is undergoing. SAP S/4HANA offers two primary options: *Public Cloud (GROW with SAP):* Ideal for small to medium-sized businesses seeking rapid deployment with standardized processes. This model leverages preconfigured best practices, allowing for swift implementation, often within weeks. However, customization options are limited, making it suitable for organizations that can operate within SAP's standard configurations. *Private Cloud (RISE with SAP):* Suited for larger enterprises with complex requirements necessitating extensive customization. This model provides greater control over the environment, supporting tailored processes and integrations. The trade-off includes longer implementation timelines and potentially higher costs due to the bespoke nature of the deployment.

• **Single ERP instance across multiple countries is achievable.** Deploying a single-instance ERP across multiple countries like this global company is endeavoring to do is a complex but strategic approach that can deliver standardized processes, improved compliance, and enhanced visibility across global operations. A "Global Template with Localization" approach ensures consistency while allowing flexibility for regional needs. This starts with a Global Core Model, consisting of standardized business processes for finance, supply chain, procurement, HR, and reporting; centralized master data management (MDM) and governance; and consistent security and compliance policies. Then there are localized configurations, including adjustments for country-specific tax regulations, legal compliance, reporting standards (GAAP, IFRS), and HR policies; language support and multi-currency capabilities; and integration with local banking, tax, and payroll systems. A multi-national single instance strategy must also contemplate regulatory compliance and data residency. Each country has unique regulatory compliance, security, and data residency requirements. Companies must ensure ERP is configured for VAT/GST, electronic invoicing, statutory reporting (e.g., SAF-T, Making Tax Digital in the UK), and compliance with Sarbanes-Oxley (SOX), IFRS, and local GAAP standards. And CIOs must ensure ERP complies with data protection laws like GDPR (Europe), CCPA (California), PDPA (Singapore), and China's PIPL, and choose regional cloud hosting where data sovereignty laws apply.

NAVIGATING THE CLOUD

AN SMB'S PERSPECTIVE

ACUMATICA ERP USERS SHARE THEIR REAL-WORLD EXPERIENCE OF IMPLEMENTING AND USING A CLOUD ERP SYSTEM.

BY RADHIKA OJHA

CHOOSING THE PROPER ENTERPRISE RESOURCE PLANNING (ERP) SYSTEM IS A HIGH-STAKES DECISION. ALTHOUGH TECHNICAL CAPABILITIES, SCALABILITY, AND COST ARE CRITICAL FACTORS, THE USER EXPERIENCE (UX) ULTIMATELY DETERMINES HOW EFFECTIVELY AN ERP PLATFORM INTEGRATES INTO DAILY OPERATIONS. THUS, A WELL-DESIGNED, INTUITIVE SYSTEM CAN EMPOWER EMPLOYEES, STREAMLINE WORKFLOWS, AND DELIVER REAL-TIME INSIGHTS. CONVERSELY, A CUMBERSOME, RIGID SYSTEM CAN CREATE INEFFICIENCIES, CAUSE FRUSTRATION, AND LEAD TO FAILED IMPLEMENTATIONS.

Acumatica, which specializes in providing cloud-based ERP solutions for small and medium-sized businesses (SMBs), has gained traction across industries due to its flexibility, customization, and user-focused design. But how does it perform in real-world scenarios? ERP Today caught up with Acumatica users from different industries to get their perspectives on the opportunities and challenges of using ERP systems and to explore their valuable lessons for businesses navigating their own ERP journeys.

Empowering Users

One of the most significant advantages of deploying an Acumatica system cited by users is its adaptability. Unlike many ERP systems that impose rigid workflows and static interfaces, Acumatica allows businesses to tailor the system to their needs.

Bob Scott, CFO at Carma, a West Coast-based general contractor and one of the early adopters of Acumatica's ERP platform, noted, "The platform's flexibility, particularly in user interface customization, is invaluable. Employees can configure screens to display only relevant data—such as hiding units of measure when dealing with subcontractor invoices—eliminating unnecessary clutter."

"Moreover, Acumatica enables individual users to personalize their dashboards without affecting others, allowing different departments to work more efficiently while maintaining a cohesive system," he added.

This contrasts with luxury bathrobe distributor Boca Terry's experience with NetSuite, where they struggled with rigid character limits and formatting constraints that clashed with its existing inventory system. "For companies like ours that deal with complex supply chains and unique operational needs, Acumatica's customization features provide a significant UX advantage," said Bruce Cohen, President of Boca Terry. "This enables us to mold the system to our workflows rather than forcing us to adapt to the software's limitations."

Beyond interface adjustments, data accessibility is another major UX highlight. Scott, a self-described "data junkie," lauded Acumatica's straightforward data retrieval system. "A simple yet powerful feature—an "Excel button" embedded within queries—allows us to export data seamlessly without the cumbersome process of exporting, reformatting, and reimporting. This seemingly minor convenience has significantly enhanced our productivity by reducing repetitive tasks and facilitating rapid analysis," he said.

Enhancing Data Visibility

For many businesses, the transition to Acumatica has meant a radical transformation in operational efficiency. For example, Boca Terry experienced a substantial workflow overhaul after implementing Acumatica.

"Before adopting the platform, we relied on multiple disconnected systems, including an Access database, Act CRM, and QuickBooks for finance," Cohen said. This fragmented approach led to

THIS LEVEL OF AI INTEGRATION COULD REVOLUTIONIZE ERP UX

BOB SCOTT / CFO, CARMA

redundant data entry, inefficiencies, and difficulty tracking orders across departments. Cohen noted that with Acumatica, these silos have been eliminated. "Sales orders entered by representatives now flow automatically through inventory management, finance, and shipping, reducing manual intervention and the risk of errors," he added.

Beyond automation, the ERP platform's cloud-based infrastructure has improved data accessibility for key stakeholders. Cohen highlighted how he and his brother can now instantly access critical financial reports—including profit and loss statements and balance sheets—without requiring direct input from the finance team. "The ability to generate on-demand, customized reports, such as commission and shipping reports, further enhances usability, ensuring that we have access to the data we need when we need it," he explained.

For companies that rely on real-time insights to drive decision-making, this level of transparency and accessibility is invaluable and a must-have in an ERP platform.

Navigating Change Management
The transition phase is critical to determining long-term user satisfaction. During a user discussion at the Acumatica 2025 Summit in Las Vegas this year, the panel underscored key best practices in this area.

They highlighted the importance of employee buy-in and structured preparation. "By involving employees early, clearly communicating the benefits of the new system, and creating a dedicated implementation team, we could ease the transition," a user from the construction industry told the audience. "Our proactive use of Acumatica University courses allowed employees to attend workshops with foundational knowledge, ensuring a smoother learning curve."

Similarly, another panel member emphasized the value of a sandbox environment, which allows employees to experiment with the system without affecting live data. "This hands-on training method reduces anxiety, builds confidence, and ultimately enhances user experience post-implementation," he said.

However, even with thorough preparation, obstacles can arise. Cohen states, "Boca Terry experienced delays in migrating financial data, requiring extended parallel operations."

During the panel discussion, a user gave an example of how they had to temporarily maintain legacy systems to close pre-existing projects. The user advised businesses to plan implementations during slower business periods to mitigate such disruptions.

Another crucial factor is the role of the Value-Added Reseller (VAR) in the implementation process. Cohen and Scott underscored the importance of working with knowledgeable, responsive partners who understand industry-specific needs.

Boca Terry's collaboration with ITEC and Carma's strong relationship with Action (formerly Alliance Solution Group) were instrumental in ensuring a smooth transition and ongoing support. According to Scott, "A well-chosen implementation partner can make the difference between a frustrating rollout and a successful digital transformation."

ACUMATICA

ACUMATICA'S CUSTOMIZATION FEATURES PROVIDE A SIGNIFICANT UX ADVANTAGE

BRUCE COHEN / PRESIDENT, BOCA TERRY

Leveraging AI for Actionable Data
Acumatica revealed its AI-first strategy during the Acumatica Summit this year, showcasing innovations designed to empower SMBs. Under this strategy, the company has prioritized trust and security, with a focus on privacy-by-design principles. It uses native private large language models (LLMs) to ensure customer data remains isolated from public training models. Each AI implementation undergoes rigorous security assessments, giving businesses the confidence to adopt AI at their own pace.

These AI-driven features hold promise for streamlining workflows, automating routine tasks, and simplifying data retrieval.

Scott is enthusiastic about AI's potential, particularly in data analytics and decision-making. "Imagine a system where users can ask natural language questions like "Who are our top customers this quarter?" or "What's our most profitable project?" and receive instant insights," he said. "This level of AI integration could revolutionize ERP UX by making data analysis more intuitive and actionable."

Looking ahead, the integration of AI and other emerging technologies will further refine the ERP user experience, making it more intelligent, intuitive, and impactful.

In conclusion, the message is clear for businesses navigating the complexities of digital transformation: a well-designed ERP isn't just about functionality; it's about empowering users to work smarter, faster, and with greater confidence. ∎

Learn more about Acumatica

WHAT THIS MEANS FOR ERP INSIDERS

• **Planning, preparation, and employee buy-in are crucial.** Companies that want a hassle-free ERP implementation must get their employees on board. It is necessary to create a dedicated implementation team and utilize training resources like Acumatica University to prepare for workshops to ensure everyone within the organization is on board with the change. Being prepared and fostering collaboration is critical for navigating the implementation process. During the Acumatica

event, the panel also stressed the need to understand existing business processes before implementing a new system, advising organizations to take the time to get their business processes right during implementation, as it will pay off in the long run.

• **A flexible, customizable, and cloud-based ERP system offers significant advantages.** Acumatica's customizable user interface allows users to configure screens to their specific needs and roles.

It also eases data access with features like the direct "Excel button." Compared to disparate systems, the unified and cloud-based nature of ERP platforms like Acumatica provides immediate access to reports and streamlined processes, such as order management and shipping. A SaaS model and cloud-based architecture are beneficial, particularly for new businesses looking to minimize infrastructure costs and leverage remote work capabilities.

• **It is vital to select the right VAR and value their expertise and ongoing support.** Implementation partners or VARs play a crucial role in the successful implementation of an ERP system. Users can rely on the partner's expertise, especially when unaware of all the system's capabilities. For example, Carma's positive, relationship-based experience with their VAR underscores the importance of this partnership beyond just a transactional vendor relationship.

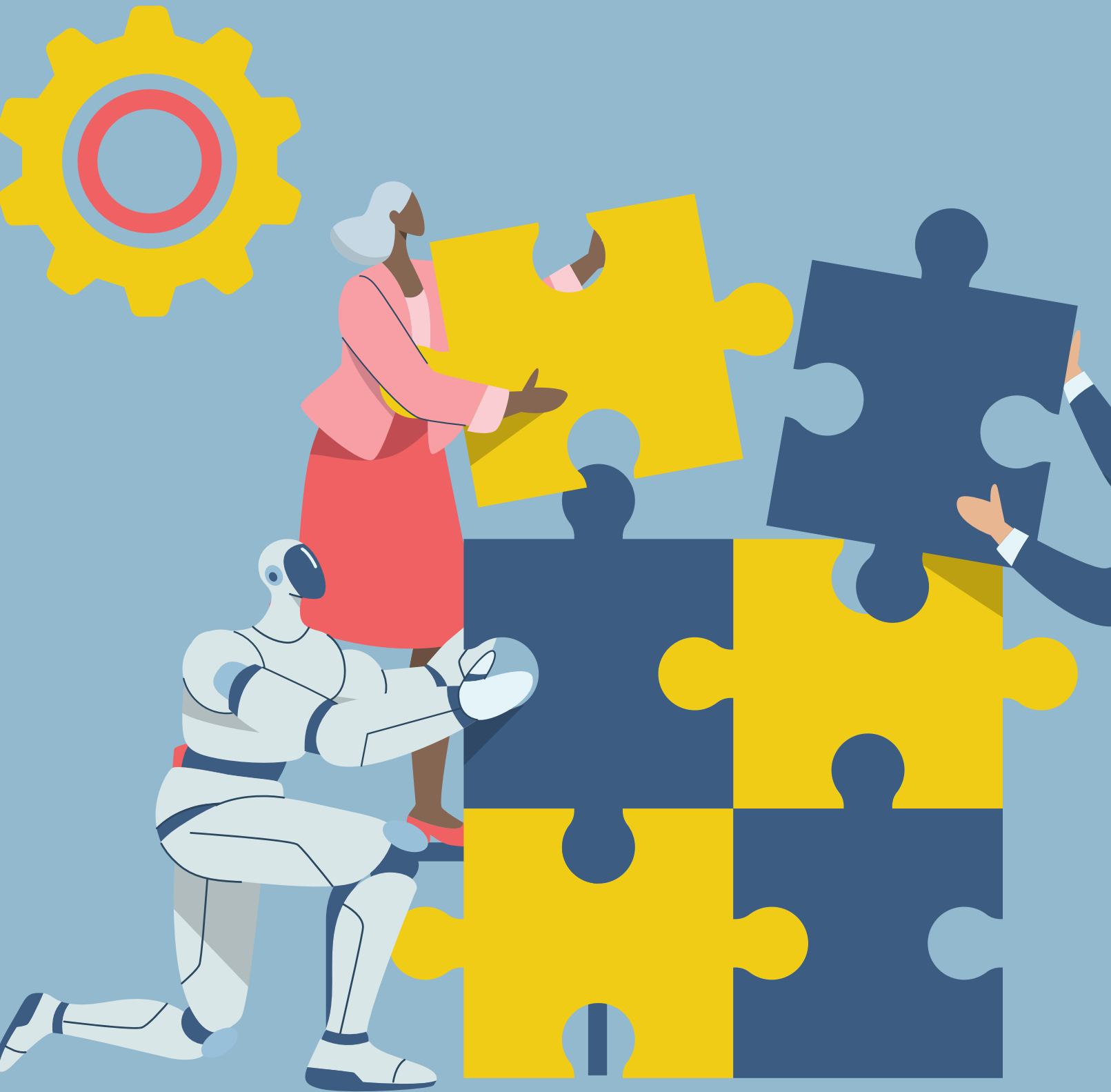# Become an ERP Today Pro Member for FREE

Leveling Up with **Automation**

How Lifetime Products Empowered its Workforce with Dynamics 365

BY JENNIFER LAWINSKI

For any company with a legacy spanning decades, modernization is not a one-time project—it's a continuous imperative. Lifetime Products, the brand behind iconic basketball hoops and a wide range of outdoor and lifestyle goods, understood this well. While its slogan—"Made for All-Stars by All-Stars"—captured the spirit of the consumer brand, the company's internal systems needed modernization to match that forward-looking energy.

In 2019, Lifetime made a pivotal move: replacing its outdated ERP with Microsoft Dynamics 365. This wasn't merely a software upgrade. It marked a strategic shift designed to enhance customer experience, empower employees, and strengthen competitiveness in a demanding market.

Breaking Down Legacy Barriers

Prior to the transformation, Lifetime struggled with an aging ERP system that limited data access and operational agility. "The initial driver was getting accurate business intelligence," said John Bowden, CIO at Lifetime Products. Siloed data and limited visibility into operations hindered informed decision-making and restricted the company's ability to act with speed and precision.

Bowden also emphasized that professional development for employees was a key metric for success: "One of our major deployment ROI initiatives was to ensure professional growth for our employees." Legacy systems, with their clunky interfaces and disconnected workflows, had been holding staff back. The move to Microsoft Dynamics 365 represented a chance to remove those obstacles.

A Collaborative Transformation

Lifetime's implementation of Microsoft Dynamics 365 wasn't a solo act. Partnering with Microsoft's FastTrack for Dynamics 365 team, the company focused on a business-first approach that put people and process at the center of the deployment. The goal was to create a unified platform that could support not only current operations but future innovations in automation and AI.

"Microsoft Dynamics 365 was working so well, we felt that we could rebalance to optimize employee opportunity," said Sinahi Lopez, Global IT Functional Manager at Lifetime. "Using AI and autonomous agents is just the next level for us."

Autonomous Agents in Action

With a stable ERP foundation in place, Lifetime quickly moved to introduce autonomous agents within Microsoft Dynamics 365 Finance and Supply Chain Management. These agents tackled tedious, repetitive tasks—such as account reconciliation and e-commerce order processing—freeing employees for more strategic work.

The results were dramatic. In one division, automating order processes led to a 95 percent efficiency improvement within two months. Manual tasks were eliminated, order fulfillment accelerated, and customers reaped the benefits.

MICROSOFT

"With autonomous agents in Microsoft Dynamics 365, we're giving our people the tools they need to make an impact," said Ted Esplin, COO. "I'm proud of that."

A New Workforce Strategy: Rebalancing

Instead of framing automation as a job-reducing force, Lifetime adopted a more holistic approach they call "rebalancing." The concept focuses on maximizing existing labor—redistributing time saved through automation to higher-value activities across the business.

This collaborative, incremental approach helped ease fears around job displacement. Lifetime estimates it can ultimately rebalance 20% of its knowledge workforce—freeing employees to take on more creative and strategic roles. For example, in its Mexico division, automating accounts receivable tasks enabled the sales team to focus more on marketing and strategic initiatives.

Leading Cultural Change Through Learning

Implementing automation isn't always smooth sailing. "Sometimes they're pretty tough conversations," Bowden admitted. But a longstanding culture of operational efficiency made it easier to introduce new technologies with employee buy-in.

> **"**
> ## One of our major deployment ROI initiatives was to ensure professional growth for our employees."
>
> **JOHN BOWDEN**
> CIO AT LIFETIME PRODUCTS

A commitment to continuous learning also played a key role. Lifetime actively encourages Microsoft certifications and technical upskilling. "Exploring the technology deeply and deploying autonomous agents has elevated my team," said Lopez. "It's rewarding to see how much people appreciate the time we save them."

What's Next: A Roadmap of Intelligent Automation

Lifetime is continuing its automation journey with the planned rollout of a Supplier Communications Agent to proactively reduce delays in its supply chain. And the potential doesn't stop there. "The agents and automations get better over time," Bowden explained. "You can revisit an area and get a second wave of rebalancing."

That iterative model—introducing one automation wave, learning, and then optimizing further—has become central to Lifetime's transformation strategy.

Advice for CIOs: Think Business First

For peers embarking on similar journeys, Bowden is clear: "These aren't IT projects. They're business-driven initiatives." He emphasized that he and his team spend more time working alongside business leaders than in the IT department. Understanding the needs of business units is critical to identifying and implementing the right solutions.

Maintaining a strong relationship with HR is just as essential. "When you get to the rebalancing area, you need a lot of support from HR," he noted. That partnership is key to managing transitions, addressing employee concerns, and aligning workforce planning with automation gains.

Bowden also encourages leaders to take advantage of available resources, pointing to Microsoft case studies as valuable blueprints for successful transformation.

> **"**
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>
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> COO AT LIFETIME PRODUCTS
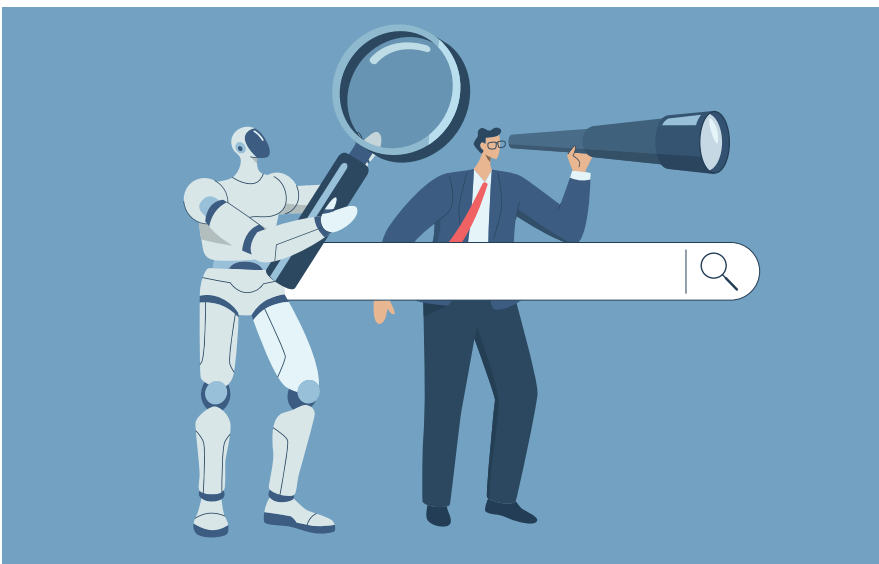
> **"** Exploring the technology deeply and deploying autonomous agents has elevated my team"

SINAHI LOPEZ
GLOBAL IT FUNCTIONAL MANAGER, LIFETIME

A Blueprint for Modern ERP Success

Lifetime Products' journey with Microsoft Dynamics 365 and autonomous agents is a compelling example of how ERP modernization can drive meaningful organizational change. By aligning technology with workforce strategy, prioritizing employee development, and maintaining close collaboration between IT, business, and HR, the company has created a model for intelligent transformation—one that's as focused on people as it is on process. ∎

WHAT THIS MEANS FOR ERP INSIDERS

• **Rebalancing the workforce through automation drives efficiency and resilience.** Lifetime Products used Dynamics 365 to strategically rebalance 20% of its knowledge workforce, not by cutting jobs, but by automating routine tasks and reallocating employees to higher-value roles. This approach reflects a broader trend: McKinsey reports that organizations using automation and reskilling to redeploy labor can reduce workforce costs by 20% to 30% while improving productivity. With Dynamics 365's AI-first architecture and agent-based automation capabilities, companies can unlock similar

efficiencies—provided they align technology deployment with clear workforce strategies and robust change management.

• **Cross-functional collaboration and governance are essential for sustainable transformation.** Lifetime's success with automation was rooted in tight coordination between IT, business leadership, and HR. This ensured that automation served business priorities and employee development alike. Deloitte research shows that companies with strong cross-functional collaboration are three times more likely to achieve

their transformation goals. However, the technical architecture of Dynamics 365—while highly extensible through Power Platform and Azure—also introduces complexity. To avoid overcustomization and technical debt, organizations must establish clear governance, adopt a composable architecture, and maintain disciplined change management across teams.

• **Upskilling and AI readiness will define tomorrow's competitive edge.** Lifetime's culture of "aggressive learning," backed by Microsoft certification programs, prepared its workforce to actively embrace

automation and AI. This aligns with PwC's Global Workforce Survey, where 77% of employees expressed willingness to retrain to stay competitive. As cloud ERP adoption grows at a projected 14% CAGR through 2030, and AI becomes central to enterprise software value, Dynamics 365's native AI integration and predictive analytics will drive operational intelligence. But realizing this potential requires more than deployment—it demands that companies invest in data quality, modular processes, and employee readiness to sustain digital momentum and capitalize on autonomous orchestration.

Your Next ERP Will Think for Itself

Microsoft's Bold Vision for Autonomous ERP

BY MARK VIGOROSO

Enterprise resource planning (ERP) systems have always promised control, structure, and efficiency. But if you ask Georg Glantschnig, VP of Microsoft Dynamics 365 AI ERP at Microsoft, that's not enough anymore. Today's ERP, he argues, must evolve into something intelligent, autonomous, and user-adaptive—capable of learning from its users, not just serving them.

"Practicality is the new aspiration," Glantschnig says. "ERP can no longer just support a business process. It needs to run it."

At a glance, that might sound like yet another AI-era platitude. But under the surface, Microsoft is staking out a radically different ERP future—one powered by agentic AI, consumption-based economics, and a design philosophy that favors human adaptability over system rigidity.

For decades, ERP platforms have remained largely consistent in one critical way: users input data into forms, and systems output reports. That model, Glantschnig says, is crumbling.

"We're moving into an AI-first architecture," he explains, "where agents—not just users—interact with ERP systems."

These agents are not just assistive bots. They are increasingly autonomous actors capable of executing tasks on behalf of departments, customers, and even entire business units. Think demand forecasting, invoice reconciliation, or workforce scheduling—without human initiation.

Microsoft's roadmap includes a three-tier framework:

• Exposing granular services like invoicing or order-taking via APIs for agent communication.

• Creating an agent development platform, enabling Microsoft, partners, and customers to build their own.

• Redesigning the user experience, so people interact primarily with agents rather than systems.

In other words, the ERP of tomorrow is less like a cockpit and more like a team of autonomous copilots. For Microsoft, this isn't just a tech evolution. It's a business model transformation. The traditional user-based licensing structure begins to break down when agents replace users in core workflows. That opens the door to consumption-based and outcome-based pricing—a model already familiar to Azure customers, but new to ERP.

At the same time, Glantschnig is quick to differentiate Microsoft from rivals that merely retrofit AI into legacy software.

"Some ERP vendors just took their on-prem stack and hosted it in the cloud. That's not cloud-native—and it's definitely not AI-native," he says.

"We've reimagined how software is delivered, tested, maintained, and even monetized."

That reimagination is also reflected in Microsoft's "Power of One" stack—a cohesive suite of cloud infrastructure (Azure), low-code extensibility (Power Platform), data fabrics (Microsoft Fabric), and productivity tools (Office, Teams). For Microsoft Dynamics 365 customers, that ecosystem delivers modularity without fragmentation.

"Everything works together, but it's also composable. You can choose what you need without sacrificing integration," Glantsching says.

But autonomy requires trust—and in ERP, trust is hard-earned. Customers want control, visibility, and assurance that AI won't take their processes off the rails. Glantschnig says Microsoft is meeting that demand with features like:

• Explainability and audit trails

• Human-in-the-loop control

• Governance for agent creation and management

"It's like when GPS first came out," he analogizes. "We all kept paper maps in the glove compartment. Now, we trust the system. ERP will follow that same trajectory."

Value realization used to mean successful deployment. Not anymore.

"Success isn't go-live. It's continuous business value," says Glantschnig. "And that value has to be shared between Microsoft, our partners, and the customer."

This mindset is shaping new programs like Fast-Track, which helps customers implement, monitor, and extract value from Microsoft Dynamics 365 continuously. It also informs Microsoft's future pricing evolution: as agents shoulder more of the workload, licensing may shift from user-based to outcome- or consumption-based.

Looking two to three years ahead, Glantschnig's vision is simple—but transformative: "ERP should adapt to the user—not the other way around."

That means no more training manuals. No more endless customizations. Just a system that evolves by observing how it's used—and anticipates what comes next. If Microsoft succeeds in delivering this vision, Microsoft Dynamics 365 won't just be the practical choice—it will be the preferred one. And for the first time in a generation, ERP may actually live up to its promise: not just managing the business, but making it smarter, faster, and more human. ∎

"It's like when GPS first came out. We all kept paper maps in the glove compartment. Now we trust the system. ERP will follow the same trajectory."

GEORG GLANTSCHNIG

• **ERP is evolving toward intelligence—are you ready?** Some reports say that by 2026, 75% of ERP implementations will include embedded AI features to support autonomous decision-making. Microsoft Dynamics 365 is betting on this shift, enabling ERP systems to not just assist, but execute operational tasks—such as forecasting, invoicing, and workforce scheduling—without human initiation. This evolution from system-of-record to system-of-action transforms what IT leaders must prioritize: not just integrations, but agent orchestration, governance, and explainability. Microsoft Dynamics 365's agentic AI framework supports autonomous workflows while maintaining human-in-the-loop control. Companies like Majans (a CPG manufacturer) have already reported double-digit improvements in operational efficiency using AI-enabled Dynamics modules. Business leaders should assess their readiness not just for implementation, but for a future where ERP decisions are made by algorithms, not analysts. To capture this value, organizations need to invest in data quality, trust frameworks, and AI literacy across finance, supply chain, and operations.

• **ERP licensing is moving from users to outcomes.** Traditional ERP licensing has revolved around users and modules. But as Dynamics 365 evolves into an AI-first, agent-driven platform, Microsoft is paving the way for consumption-based and outcome-based pricing models—a shift already familiar to Azure customers. This has major implications for procurement, budgeting, and value realization strategies. Leaders must begin forecasting value not just by the number of seats, but by measurable operational outcomes, such as cycle-time reduction, forecasting accuracy, or invoice throughput. Microsoft's FastTrack program

helps customers track these metrics, enabling continuous value assessment post-deployment. One global electronics manufacturer reported a 30% reduction in manual journal entries within six months of deploying Dynamics 365 Finance with Copilot. CIOs should challenge vendors on how licensing aligns to business value and ensures that future ERP roadmaps include flexibility for automation-led workflows that no longer fit legacy pricing models. Ignoring this shift could lead to overpayment—or underutilized innovation.

• **Consider the full-stack advantage of Microsoft.** By operating Dynamics 365, Power Platform, Office 365, and Azure as a cohesive suite, organizations benefit from deep native integration across business applications, infrastructure, and collaboration tools. Microsoft's Common Data Model (CDM) and Dataverse enable consistent data definitions across services, reducing time spent on mapping, reconciling, or synchronizing data between siloed systems. This streamlines enterprise architecture and reduces total integration cost (TIC) by up to 40%. Microsoft's full-stack approach uses a single identity and access model (via Azure Active Directory), enabling centralized role-based access control (RBAC), multifactor authentication (MFA), and compliance enforcement across data, apps, and infrastructure. Organizations benefit from 360-degree threat protection via Microsoft Defender, Purview (compliance & data governance), and Sentinel (SIEM). This reduces security management complexity and improves audit readiness across ERP, productivity, and custom apps—all governed in a unified compliance portal. And Microsoft's full stack enables composability: organizations can modernize incrementally— adopting Dynamics 365 Sales or Finance modules without overhauling everything at once. Through Power Platform connectors, Azure Logic Apps, and REST APIs, enterprises can extend or integrate with best-of-breed or legacy systems while maintaining governance.

BEHIND THE

HOW RFK RACING LEVERAGES SYSPRO ERP TO GAIN A COMPETITIVE EDGE ON AND OFF THE RACE TRACK.

BY RADHIKA OJHA

PIT WALL

n the adrenaline-fueled world of professional motorsports, where every millisecond counts, operational efficiency is as critical as raw horsepower. RFK Racing, a powerhouse in NASCAR, understands this reality better than most. To maintain its competitive edge, the team embraced cutting-edge enterprise resource planning (ERP) technology through its partnership with SYSPRO.

While fans see high-speed thrills on the track, behind the scenes, a sophisticated digital infrastructure powers the team's operations. SYSPRO's ERP system provides RFK Racing with the precision and agility needed to thrive in one of the world's most demanding sporting environments.

SYSPRO

High-Performance Integration and Compliance

Motorsports teams operate under strict regulations governing safety, component specifications, and performance standards. Failure to comply can lead to disqualification, hefty fines, or worse—safety hazards for drivers and crews.

With SYSPRO's tools, RFK Racing ensures that every part purchased for its cars meets NASCAR's rigorous requirements. Moreover, SYSPRO provides robust integrations to specific ERP data needed by the race systems to build and manage racing day performance and compliance. For example, if there is a critical question about a part during a pre- or after-race inspection, the information used by the race day systems can show compliance and sourcing information managed in SYSPRO and other systems. This data can then be combined into real-time data if needed.

This level of oversight not only keeps RFK Racing compliant but also enhances overall vehicle reliability, a critical factor in racing events.

MANAGING INVENTORY IN MOTOR SPORTS PRESENTS A UNIQUE CHALLENGE.

SYSPRO PROVIDES ROBUST INTEGRATIONS TO SPECIFIC ERP DATA NEEDED BY THE RACE SYSTEMS.

Mastering Inventory Complexity

Managing inventory in motorsports presents a unique challenge. Unlike traditional manufacturing where parts may remain in warehouses for months, racing teams' cycle through components or the warehouse and inspection processes at an astonishing rate. A new car is built for every race and knowing that all parts procured have complete rigorous inspection and certification prior to going out on the track is essential. Not just for safety but also compliance.

As RFK Racing's trusted back-office application managing purchasing, parts and finance, SYSPRO helps maintain a meticulous oversight of RFK Racing's procurement and inventory. The system enables:

• Automated tracking of parts using lot and serial traceability.

• Improved cost efficiency, reduced overstock while preventing critical shortages.

This approach allows the team to maintain peak performance while keeping operational expenses in check.

ERP and the Future of Motorsports

RFK Racing's integration of ERP technology with SYSPRO is part of a broader shift in motorsports. As racing organizations become more data-driven, teams are investing heavily in automation, predictive analytics, and AI-enhanced decision-making. Thus, ERP systems will continue to play a pivotal role in streamlining operations, ensuring compliance, and maximizing performance both on and off the racetrack.

For industries beyond motorsports, RFK Racing's adoption of SYSPRO demonstrates how tailored ERP solutions can support highly specialized manufacturing and operational environments. Whether in aerospace, healthcare, or industrial equipment, businesses that require rapid component turnover, stringent inventory tracking, and data insights can benefit from ERP-driven efficiencies. ∎

WHAT THIS MEANS FOR ERP INSIDERS

• **Robust integration is a must for accurate data.** SYSPRO's capability of providing robust integrations to specific ERP data enables immediate access to critical data on purchasing, parts and finance, empowering users to make swift, informed decisions. This is particularly valuable in dynamic environments where responsiveness is crucial, as demonstrated by its application in RFK Racing's pre- or after-race inspection.

• **Complex assemblies require robust inventory and traceability.** SYSPRO's detailed inventory management and lot/serial traceability features are essential for managing complex assemblies. This capability is critical for industries with stringent quality and safety standards, providing granular control over components from procurement to installation.

• **Tailored solutions for specialized manufacturing.** SYSPRO demonstrates an ability to adapt its ERP solutions to the unique demands of specialized manufacturing environments, such as high-performance automotive. This highlights the importance of selecting an ERP system that can be customized to address specific industry challenges and operational complexities.
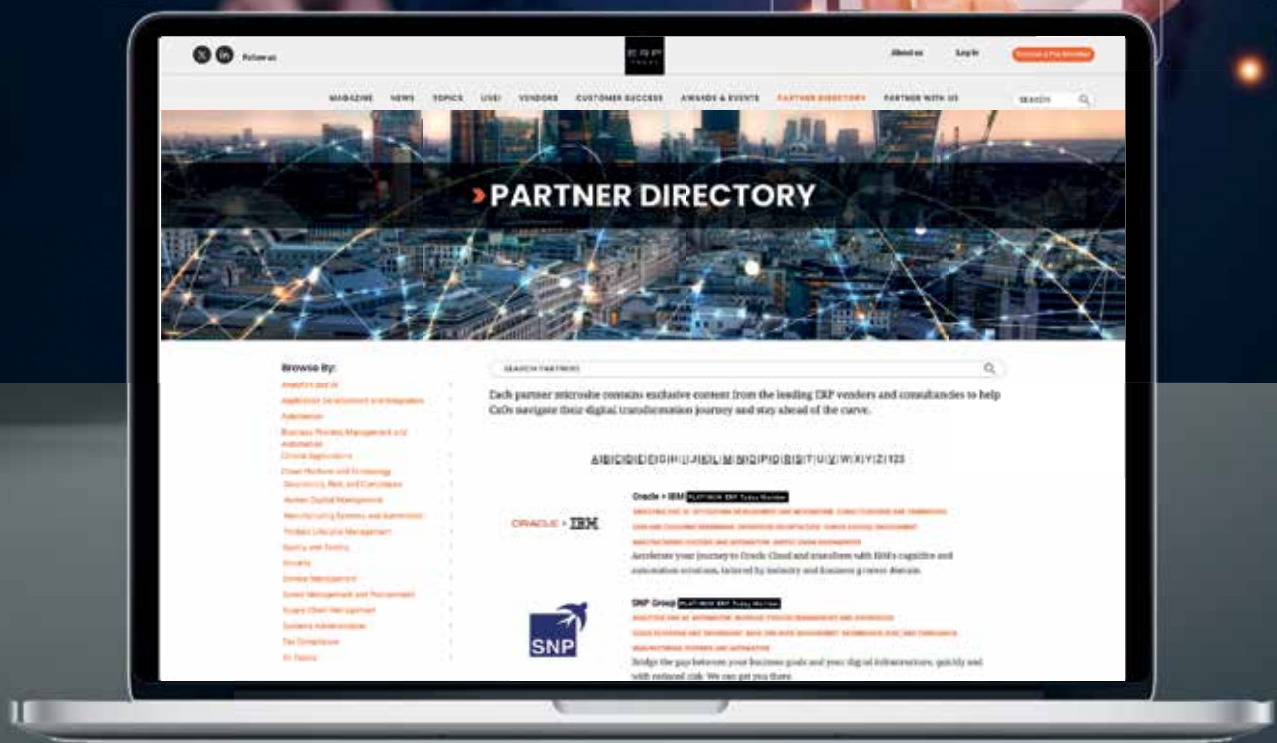
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EPICOR

Modernizing Mission-Driven Retail

How Goodwill Industries of Northwest Ohio boosted revenue, retention, and donations with Epicor Propello

BY JENNIFER LAWINSKI

In the world of nonprofit retail, where every dollar earned drives social impact, technology can be a powerful force multiplier. For Goodwill Industries of Northwest Ohio, that reality became abundantly clear when aging point-of-sale systems began holding the organization back—threatening not just operational efficiency, but also its broader mission: helping people overcome barriers to employment through job training and placement programs.

Faced with failing registers and outdated processes, Tim Kralovic, Vice President of Donated Goods, led the charge to overhaul the retail operation. His goal: implement a modern retail management platform that could streamline transactions, improve data visibility, and ultimately increase revenue to support the nonprofit's community mission.

To modernize its point-of-sale system the organization chose Epicor Propello, a cloud-native POS system purpose-built for the unique needs of modern retailers.

Out with the Old: Reaching a Tipping Point

Prior to implementing Propello, Goodwill Industries of Northwest Ohio operated 15 retail locations using dated Casio cash registers paired with standalone credit card readers. The system was fully manual, labor-intensive, and prone to error. "We needed an intuitive system that made transactions as simple as possible for both our employees and customers," says Kralovic. "Reduc-

ing manual entry and the risk of human error was a top priority."

The search for a modern solution led the team to evaluate multiple platforms—but many posed challenges. "Some systems pushed features we weren't ready to use and came with inflated costs," he explains. After speaking with other Goodwill branches already using Epicor Propello, Kralovic found what he was looking for: a scalable, user-friendly solution that wouldn't strain the budget.

Fast, Smooth Implementation

Epicor Professional Services took the reins on implementation, completing the rollout to all 15 locations in just 90 days—despite the complication of a store remodel mid-project. "Epicor went above and beyond," Kralovic recalls. "I was in the middle of a remodel and felt no pressure at all. The team had it covered."

Even staff who missed formal training due to the remodel picked up the system quickly. On opening day, with five times the usual customer volume, employees managed the surge with confidence after only a short morning walkthrough.

Daily Efficiency Gains

The benefits of the new system were immediate and tangible. One of the most impactful changes was the reduction in end-of-day closing activities. By automating processes that

were previously manual—like counting tills—Goodwill saved roughly two hours of payroll per day per location.

These time savings compound quickly across the organization, freeing up hours that can be redirected to other high-value activities that benefit both staff and customers.

Driving Loyalty and Donations

With Propello, Goodwill Industries of Northwest Ohio launched a new points-based customer loyalty program that gives shoppers tangible rewards when spending thresholds are met. The program, fully integrated into the checkout process, allows cashiers to notify customers of their points in real time and even prints reward details on receipts.

Beyond building loyalty, this switch also improved margins. By consolidating disparate discounting efforts into a single reward program, the portion of sales affected by discounts dropped from 5% to 3.5%, boosting profitability.

Meanwhile, the automated "round up" donation prompt at checkout has revolutionized customer giving. No longer reliant on manual cashier prompts or math, the automated feature has led to a 33% increase in donations at the register, directing even more funds to the nonprofit's mission.

> **"**
> **Propello allows us to create a sales environment that works for us now, and has room to grow..."**
>
> **TIM KRALOVIC**
> VICE PRESIDENT OF DONATED GOODS, GOODWILL INDUSTRIES OF NORTHWEST OHIO

Empowering Employees and Reducing Turnover

Propello's intuitive interface has also played a key role in improving employee satisfaction. For an organization heavily reliant on part-time labor—often from individuals requiring flexible work schedules—the ability to rapidly onboard new hires is crucial.

"Eighty percent of our employees report being 'very satisfied' or 'satisfied' with the tools they have," says Kralovic. As a result, the organization has achieved a 25% reduction in employee turnover, a significant win in a challenging labor market.

Data That Drives Smarter Decisions

For the first time, store managers and employees alike have access to real-time data on sales and inventory. Each store can tailor its stock based on localized sales trends, while head cashiers and leadership use Propello dashboards to track performance and celebrate wins.

One standout metric: average ticket size increased from $15 to $17.10, representing a 15% jump in transaction value. "Employees can now see the results of their efforts in real time, and it motivates them," Kralovic says.

Scalable with Room to Grow

Perhaps the most powerful part of Goodwill's transformation story is the flexibility of the Propello platform. With its cloud-native foundation, Propello offers the scalability and configurability needed to evolve alongside the organization's needs.

"We see Propello as a blank canvas," says Kralovic. "It allows us to create a sales environment that works for us now, and it has room to grow as we diversify and expand."

For Goodwill Industries of Northwest Ohio, the decision to implement Epicor Propello has delivered results that extend well beyond retail performance metrics. From operational efficiency and improved customer engagement to happier employees and increased mission funding, the transformation has touched every part of the organization.

In a sector where every efficiency gained translates to more lives impacted, the right technology doesn't just improve business—it powers purpose. ∎

WHAT THIS MEANS FOR ERP INSIDERS

• Prioritize Scalable, User-Friendly Systems to Support Workforce Agility
Goodwill's success with Epicor Propello highlights the value of intuitive, easy-to-learn platforms—especially for organizations with high employee turnover or part-time staff. Investing in technology that minimizes onboarding time and reduces friction in day-to-day tasks can improve employee satisfaction and retention while maintaining operational continuity.

• Use Integrated Technology to Turn Everyday Transactions into Strategic Revenue Streams
By automating donation prompts and consolidating loyalty programs within its POS, Goodwill turned checkout interactions into powerful tools for fundraising and customer retention. Tech leaders should look for systems that allow for seamless upsell, donation, and engagement opportunities at the point of sale.

• Leverage Real-Time Data Visibility to Drive Smarter, Store-Level Decisions
Goodwill's ability to access daily sales data and performance dashboards helped them increase average transaction size and fine-tune inventory. Business technology leaders should ensure their platforms offer actionable analytics that empower frontline teams and improve organizational alignment.

How CFOs can Navigate Challenges to Deliver Real-time Results

BY GRANT SUNESON

The role of the CFO in the modern business world is changing every day. These leaders are no longer siloed among their teams – CFOs are tasked with touching every part of the organization, ensuring that costs remain in check while margins are maximized.

These new responsibilities cannot be achieved by relying on the same methods and techniques that CFOs of yesteryear leaned on. Rather, financial executives need to have dynamic, cutting-edge tools and partnerships that allow them to deliver results quarter after quarter.

Data Means the World

To help understand the challenges that the modern CFO faces and how they can overcome them, ERP Today sat down for an exclusive interview with Lee An Schommer, Chief Product Officer and General Manager, ERP Reporting and BI at insightsoftware.

Schommer emphasized the importance of data in empowering CFOs to be able to perform at their best.

"We know that CFOs are now becoming the arbiter of truth around the health of the business. If I'm a CFO and I care about all the data. I don't just care about financial reporting. I care about the supply chain and operational data," said Schommer.

To drive the performance of their finance teams, CFOs need to be able to access clean, accurate data above all else. This allows them to make timely, informed decisions that drive business performance and reduce risk.

In the volatile economic environment in which organizations must now operate, financial leaders are expected to go beyond reporting historical results—they must proactively guide strategy, optimize cash flow, and support agile responses to emerging challenges.

Real-time data enables CFOs to monitor KPIs, detect financial anomalies early, and identify trends that influence forecasting, budgeting, and resource allocation.

Without real-time insights, CFOs risk basing decisions on outdated or incomplete information, leading to missed opportunities or costly errors. Accurate data also strengthens stakeholder confidence, ensures compliance with financial regulations, and improves internal governance.

For example, during financial close or audits, immediate access to reconciled, validated numbers reduces

delays and increases transparency.

Moreover, as companies adopt digital finance transformations, real-time visibility across operations becomes essential for managing working capital, aligning with ESG goals, and supporting enterprise-wide automation initiatives.

In essence, real-time data empowers CFOs to shift from reactive to strategic leadership—supporting innovation, operational excellence, and long-term value creation in a rapidly evolving business landscape.

Flexibility and Connectivity are Paramount

Organizations often seek to strengthen their positions and expand operations through mergers and acquisitions. This presents numerous challenges for finance teams – many of which can be

> **"WE KNOW THAT CFOS ARE NOW BECOMING THE ARBITER OF TRUTH AROUND THE HEALTH OF THE BUSINESS."**
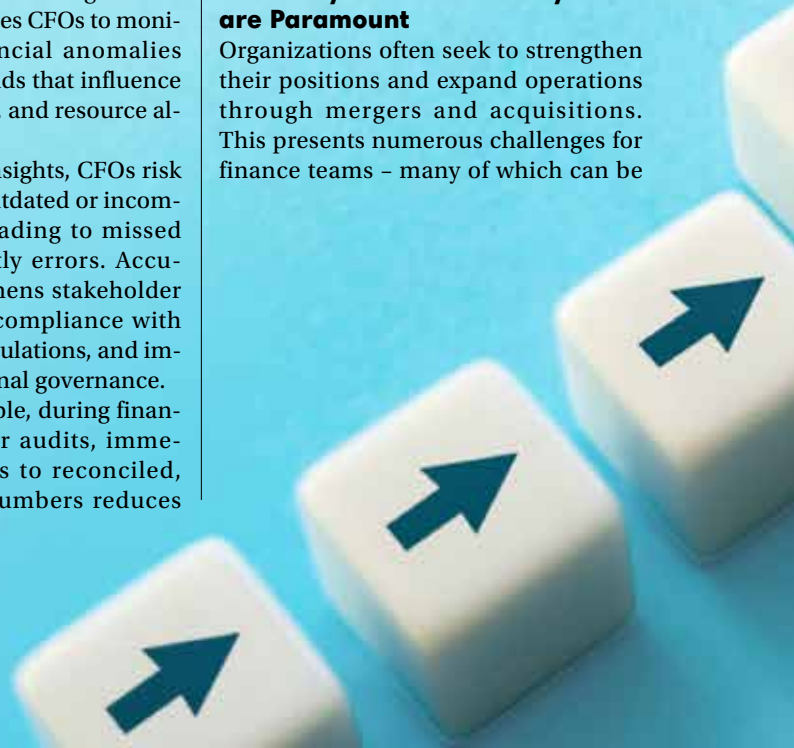
handled by complementing and extending existing ERP systems by connecting to their data.

This is a major reason why insightsoftware focuses on out-of-the-box connectivity. It can integrate with a wide array of systems, including major ERP platforms like SAP, Oracle, and Microsoft Dynamics, as well as over 140 other ERPs and EPMs, and modern cloud data sources.

This capability is particularly valuable for companies that are highly acquisitive or operate with multiple, potentially legacy, ERP systems and need to bring all that data together to manage their business. The company's pre-built connectors allow them to achieve this faster than others.

"Let's say your company has nine instances of ECC and they are so customized because SAP said we can make you whatever you want. All of these different notes, like you've just customized ECC.

The idea of breaking all of that does not sound great. One of the things that we do is we enable you to treat ECC like an Infor like a snowflake database. You don't move all of it. We can let you run in parallel and create and make sure that everything moves over and stays intact. It makes it easier to rip the Band-Aid off and figure out how to rebuild everything if you go for a period of time where you're just treating it like a third party instance," said Schommer.

"IT MAKES IT EASIER TO RIP THE BAND-AID OFF AND FIGURE OUT HOW TO REBUILD EVERYTHING IF YOU GO FOR A PERIOD OF TIME WHERE YOU'RE JUST TREATING IT LIKE A THIRD PARTY INSTANCE."

Strategic Priorities

Looking ahead, Schommer highlighted some of the strategic priorities her organization has and how those dovetail with the important work that modern CFOs are seeking to accomplish.

1. Adopt Meaningful AI: In 2025, AI is everywhere. While it can be helpful, the hype has often surpassed the deliverables. This is why Schommer emphasizes "meaningful AI." Companies should seek out AI that solves real productivity challenges, particularly for the Office of the CFO, rather than just adding AI as a feature for marketing purposes.

"One thing we are focusing on more and more is AI that is focused on the office of the CFO's challenges. Getting the right pre-built content, analyzing the data, spitting it out and actually having it inform my model my business model, and creating a report for me based on the following dynamic. We're really doing more and more on the AI front and getting into agentic AI," said Schommer.

AI is most effective when it is able to automate tasks like pulling reports, analyzing data to inform business models, and using agentic use cases to proactively schedule reporting and highlight anomalies or changes in data sources.

2. Maximize the Migration Journey: The migration from legacy ERP systems to newer versions or cloud platforms is a significant focus for many companies around the world. These businesses are facing mandates or incentives to move as ERP vendors are increasingly pushing them towards newer solutions. Schommer says insightsoftware aims to provide "safe passage" for reporting and analytics during these migrations.

A crucial part of this is ensuring report portability. Insightsoftware allows customers to run their legacy and new systems in parallel during the transition, while still being able to bring clean data together. This diminishes the difficulty of migrating heavily customized systems, like multiple instances of a customized ERP, by treating the legacy system like a third-party instance.

Beyond just technical connectivity, insightsoftware also offers consulting services around process optimization, using tools like process mining and data mapping to help customers improve workflows during migration, countering the tendency to simply replicate old, potentially inefficient, processes in the new system. It aims to help make the business case for migration more compelling by mitigating costs and risks and increasing benefits.

"WE'RE REALLY DOING MORE AND MORE ON THE AI FRONT AND GETTING INTO AGENTIC AI."

3. Find ERP-Focused Solutions: Companies should seek out partners that work to understand their business challenges and offer a comprehensive set of capabilities tailored to their specific ERP environment. These ERP-focused solutions help businesses to streamline operations, reduce silos within their teams, and provide visibility to all relevant parties.

Solution and Product Portfolio
insightsoftware's solutions connect to and make sense of data, boosting business performance with smart data solutions. The portfolio covers various areas critical to the Office of the CFO and broader business operations:

• Budgeting & Planning: Solutions to streamline and automate planning processes, improve data quality, enhance decision-making, support continuous planning, and integrate with ERPs/EPMs.

• Operational Reporting & Analytics: Solutions for informed day-to-day decision-making and optimizing operations across various business areas like supply chain, manufacturing, sales, and marketing. It offers built-in ERPSmarts and self-service capabilities. Products include Angles Professional and Angles Enterprise for Oracle.

• Financial Reporting: Solutions specifically designed for finance professionals to access and analyze ERP data efficiently, provide strategic guidance, understand the business state, and save time through automation. These tools allow users to pull real-time ERP data into formats like Excel or Web reports, often with drill-down capabilities, without needing technical expertise.

• Close & Consolidation: Solutions to automate and accelerate the financial close process, ensuring accuracy and compliance. They help reduce close time, improve data quality, handle complex consolidation scenarios (multiple

entities, currencies), and provide performance insights.

• Tax & Compliance: Solutions to optimize tax and compliance management, offering faster processing and a single source of truth. Capabilities include supporting tax provisioning, country-by-country reporting, BEPS Pillar 2, and transfer pricing.

• Accounting & Treasury: Solutions to manage complex financial data, comply with regulations, and optimize performance. This area includes streamlining equity administration and reporting (cap table management, ESPPs), and consolidating IFRS 16 lease data for compliant reporting.

• Embedded Analytics: Solutions designed for ISVs to integrate data-driven features like interactive dashboards and reports directly into their own applications, providing self-service analytics to their end users. Logi Symphony is highlighted as a product built for this purpose.

• Automation & Data Management: Solutions to speed up processes, consolidate data from multiple sources in real-time, and manage data efficiently. Capabilities include automating manual ERP processes, managing master data, and streamlining product information management.

These solutions leverage the power of data to enable better decisions, improve efficiency, reduce errors, and save time, integrating with existing ERP and EPM systems.

Finding the Financial Future
Though there are challenges, modern CFOs can look ahead to a bright future. Finding solutions through partners like insightsoftware can help businesses to navigate complex data landscapes, particularly those centered around multiple ERP systems.

By leveraging exciting capabilities reporting, analytics, and advanced data management solutions, finance leaders can make smarter decisions more quickly than ever before. ■