

# PANORAMA

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## CONSULTING GROUP



**2022 Clash of the Titans**

**SAP vs. Oracle vs.  
Microsoft vs. Infor**

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# Introduction

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Panorama Consulting Group developed this analysis to compare the “titans” of the ERP industry: SAP, Oracle, Microsoft, and Infor.

The report analyzes responses collected from Panorama’s Enterprise Software Benchmark Survey between September 2020 and October 2021. The dataset includes 112 respondents who have implemented SAP, Oracle, Microsoft, or Infor enterprise systems for their organizations. The analysis is based on a variety of solutions offered by these four vendors.

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



## VENDOR OVERVIEW

The four titans are considered “Tier 1” ERP vendors. This means the vendor provides a flagship offering designed for companies with more than \$750 million in annual revenue. Most companies of this size have complex processes or complexity around consolidation and entity management.

While these vendors target enterprise-sized organizations, they also have systems suited for a variety of company sizes. An overview of each vendor is provided below:



SAP’s customers are typically enterprise-sized and midmarket companies. SAP solutions can be deployed in a public or private cloud, or in a hybrid environment.



Oracle provides a set of core applications as well as industry-specific applications. The vendor has a comprehensive set of cloud options, including public cloud, cloud at customer, and on-premises.



Microsoft’s enterprise software options include a variety of solutions within its overall Dynamics 365 offering. Microsoft is continually developing new data centers to support its cloud capabilities across its solution set.



Infor’s primary focus has recently been on its industry-specific ERP solutions, which are designed for enterprise-level and small- and medium-sized businesses. These solutions are delivered in the multi-tenant cloud and hosted through Amazon Web Services.



# TYPES OF PROJECTS

There are a variety of different types of projects that typically involve enterprise systems. Three of the most notable include:

- ERP Implementation – a technology-focused project
- Technology Enabled Business Improvement – a project involving process redesign with systems enablement
- Digital Business Transformation – a project leveraging digital technologies to create a new digital business model

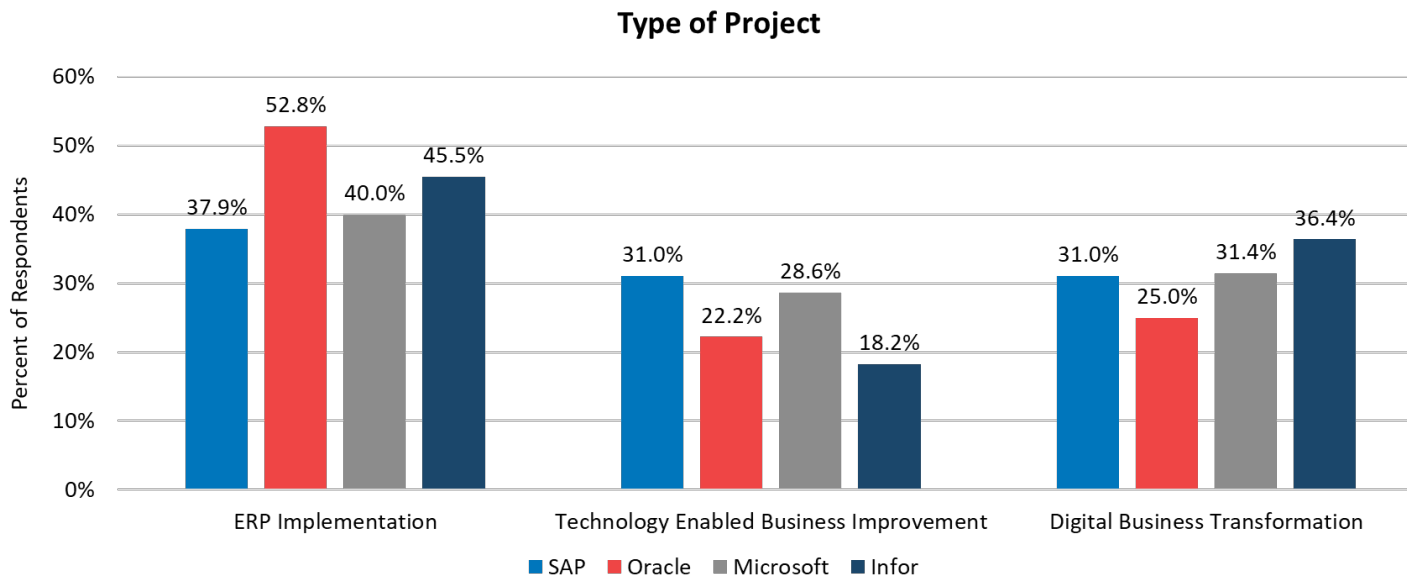
## Digital business transformation is most common among Infor customers.

Last year, Infor customers were least likely to pursue digital transformation. However, with Infor's increased focus on their CloudSuite products, digital platform, functional apps, and analytics offering, it's understandable that more customers are leveraging these tools to create new digital business models.



### Digital business transformation is least common among Oracle customers.

Oracle's client base is divided among multiple products, including Oracle E-Business Suite, ERP Cloud, NetSuite, and Oracle JD Edwards EnterpriseOne. While we saw reporting of digital transformation from ERP Cloud customers, many of our respondents were NetSuite customers whose projects were considered ERP implementations. This indicates the success of Oracle in growing their mid-market presence.



## INCLUDED BUSINESS FUNCTIONS

There are a variety of business functions that end-to-end ERP systems are designed to automate. However, many organizations automate only a few of these functions, while leaving the rest for future project phases or keeping them within their legacy systems for the foreseeable future.

We asked respondents about some of the most common business functions included in ERP projects to discover which functions are of highest priority to customers of different vendors.

**A focus on Sales & Customer Relationship Management functionality is most common among Microsoft customers.**

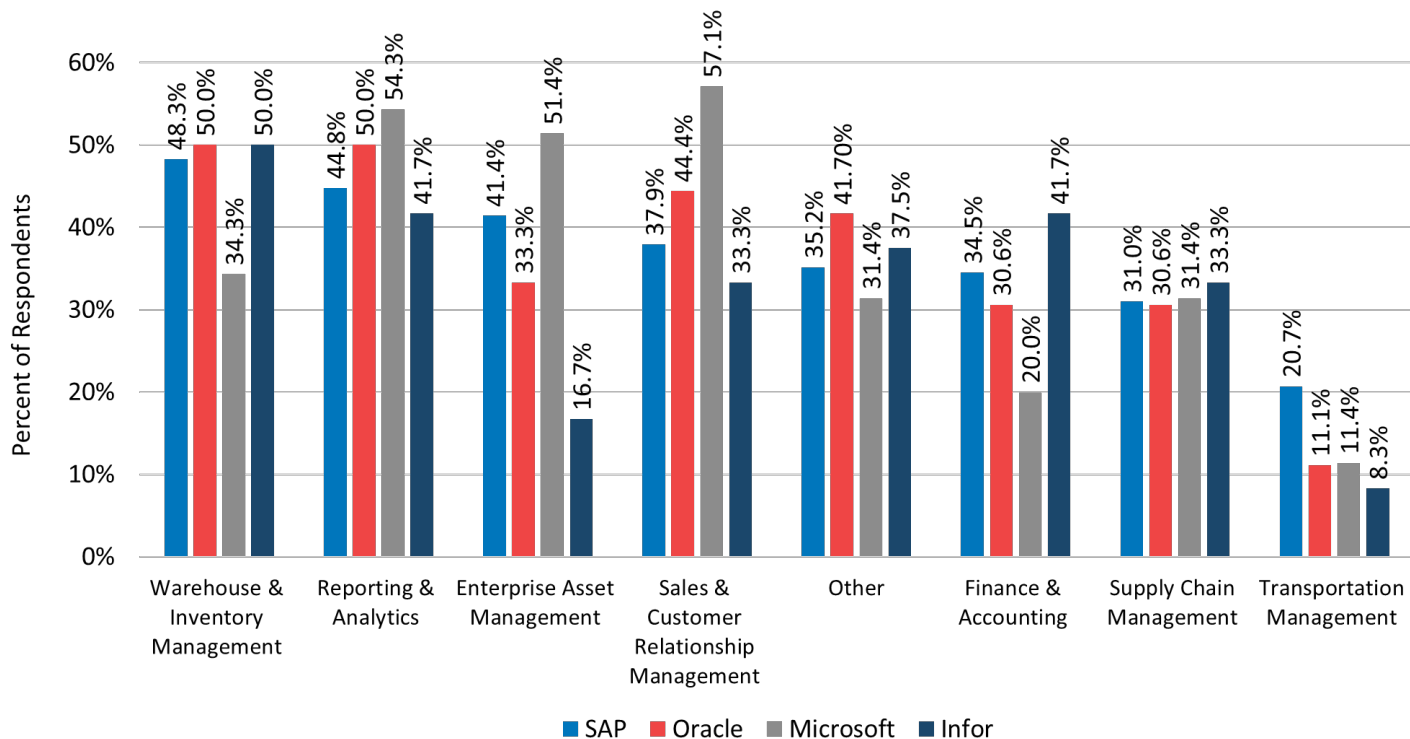
Recognizing the effort that Microsoft has put into developing its Dynamics CRM solution over the last several years, Microsoft customers seem eager to implement this robust functionality. We have found that the CRM solution is a strong product that has integration and commonalities with the vendor's Dynamics 365 ERP solutions.



**A focus on Transportation Management functionality is most common among SAP customers.**

SAP is one of the few vendors (across all Tiers) with a transportation component within its ERP system. We can see why large organizations with complex transportation processes might be attracted to SAP as the vendor has strong performance in financial accounting as well as budgeting and planning.

**Functions Included in Project**



*(The "Other" category includes Human Capital Management, Budgeting & Planning, Product Lifecycle Management, eCommerce, and Production.)*



# PROJECT COST

Setting realistic cost expectations requires a big picture view – you need to consider not just the cost of the software but the total cost of ownership. In other words, how much will the implementation cost in addition to the cost of the technology itself?

Commonly overlooked implementation costs include:

- Internal resources
- Backfill resources
- External consultants
- Organizational change management

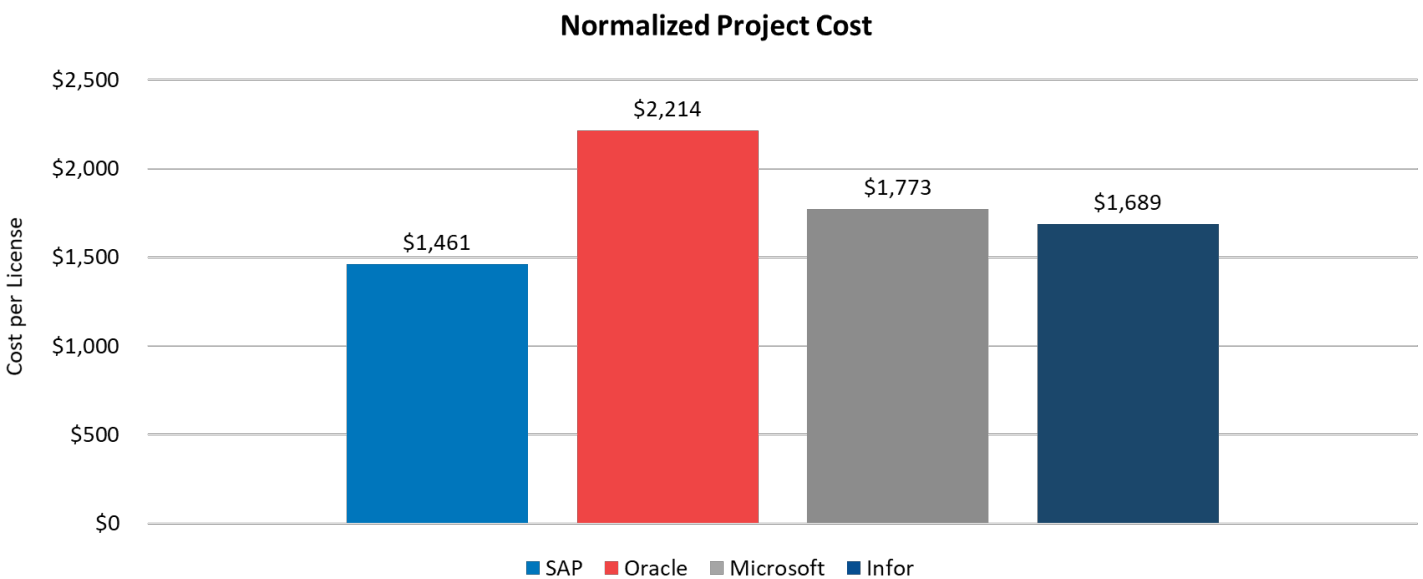
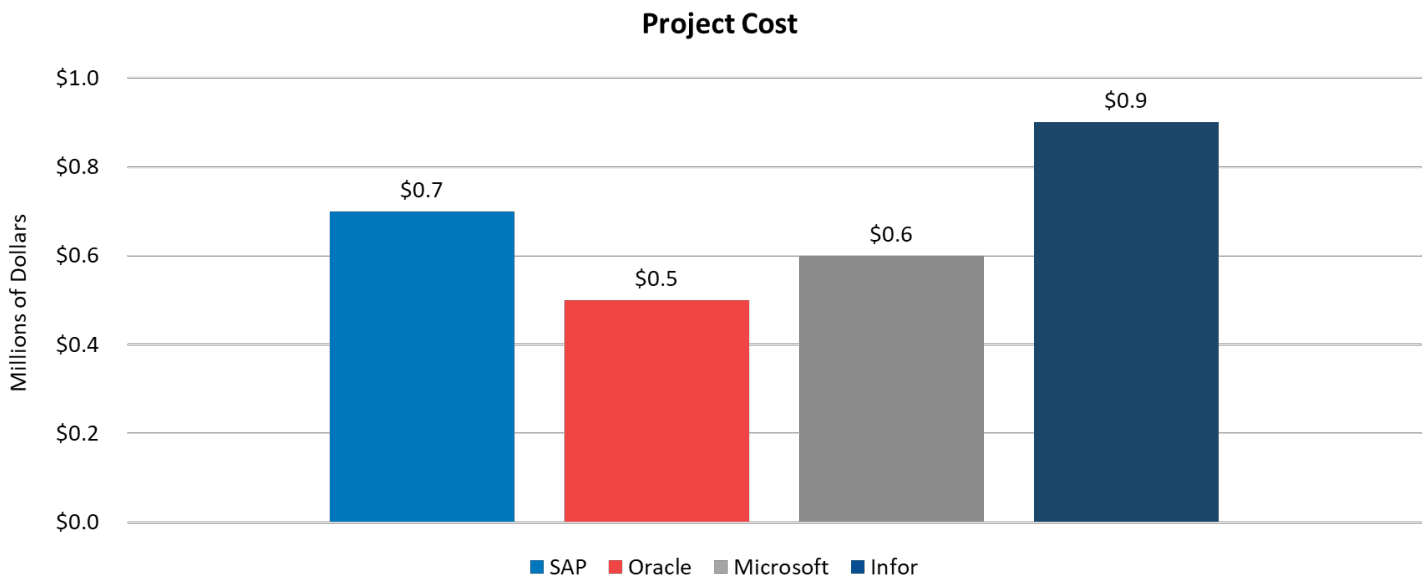
## **Organizations that completed implementation of an Oracle product spent the most on their projects.**

ERP systems, in general, have grown in complexity, breadth, and capability. As such, many Oracle customers reported implementing products, like business intelligence, or investing in an infrastructure deployment – both of which are costly endeavors. This does not mean that these customers were necessarily over-budget. Many organizations adequately budget for complex deployments and end up right on-budget (or sometimes even under-budget).

## **Organizations that completed implementation of an SAP product spent the least on their projects.**

Recently, SAP has been reducing complexity in their software and implementations. After years of declaring “simple” as a slogan, focusing on industry-specific models, and moving away from heavy programming to increased software configuration, SAP seems to be helping customers achieve shorter implementation timelines.

The first graph depicts the actual average project cost for each vendor. Normalizing this cost based on the average number of licenses purchased brings us to very different figures, as seen in the second graph.



# PROJECT DURATION

What begins as a soundly planned effort can snowball into a project with a bigger scope than you expected.

It's true. Organizations often find themselves overcommitted, under-prepared, and behind schedule. Some of the project durations reported in our survey reflect this overcommitment, while others reflect the nature of the project, the size of the organization, or the types of technologies implemented.

## **Organizations that completed implementation of an Oracle product spent the longest amount of time on their projects.**

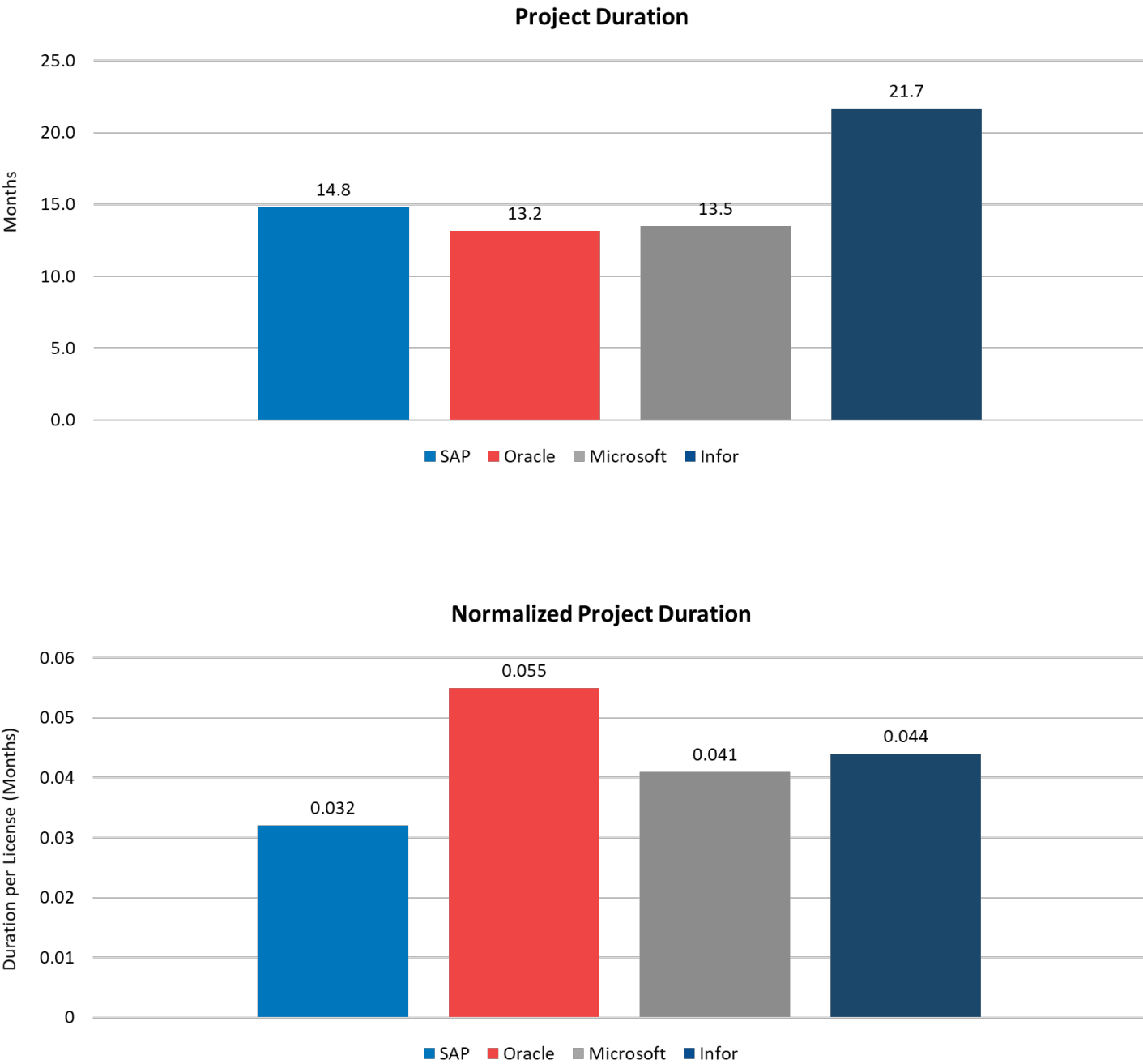
Longer project durations often contribute to costlier implementations, so it's unsurprising to see Oracle with not only the most expensive projects but the longest. Also, it's worth noting that Oracle's market, with a legacy of data rich clients, tends toward a heavier investment in analytics and infrastructure, as well as tools like artificial intelligence and machine learning. These tools are time-intensive to implement.

## **Organizations that completed implementation of an SAP product spent the shortest amount of time on their projects.**

The reverse is also true: Shorter project durations often contribute to less costly implementations. Oddly enough, the products implemented by SAP customers in our study included SAP Business All-in-One, SAP Business One, SAP ByDesign, and SAP S/4 HANA, all of which are robust systems that can be time-intensive to implement.

One explanation for the discrepancy could be that SAP has many large customers, which can bring down the normalized calculation.

The first graph depicts the actual average project duration for each vendor. Again, normalizing this duration based on the average number of licenses purchased brings us to very different figures, as seen in the second graph.





## Conclusion

Is one of these vendors right for you? The only way to find out is to follow an ERP selection methodology encompassing everything from strategic alignment to process mapping and improvement.

While our number one piece of advice is to follow a proven methodology, some of the other advice we provide clients includes:

- Build a selection team with at least one member from every department, business unit, and location.
- Focus on your differentiating business requirements to simplify the RFP process.
- Use demo scripts to ensure vendors demonstrate the functionality most relevant to your business requirements.

Panorama's ERP consultants help organizations evaluate software and prepare employees for organizational changes. We're eager to help your organization select a system that aligns with your organizational goals.

Click the Button Below to Schedule Your **Free Consultation** With an ERP Expert!

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# About Panorama Consulting Group

Panorama Consulting Group is an independent, niche consulting firm specializing in business transformation and ERP system implementations for mid- to large-sized private- and public-sector organizations worldwide. One-hundred percent technology agnostic and independent of vendor affiliation, Panorama offers a phased, top-down strategic alignment approach and a bottom-up tactical approach, enabling each client to achieve its unique business transformation objectives by transforming its people, processes and technology.

## Panorama's Services

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