

P A N O R A M A
CONSULTING GROUP

2024 Clash of the Titans

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

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Introduction

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 2022 and September 2023. The dataset includes 109 respondents who have recently 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.



Respondent Overview

\$400.5 M

Median Annual Revenue

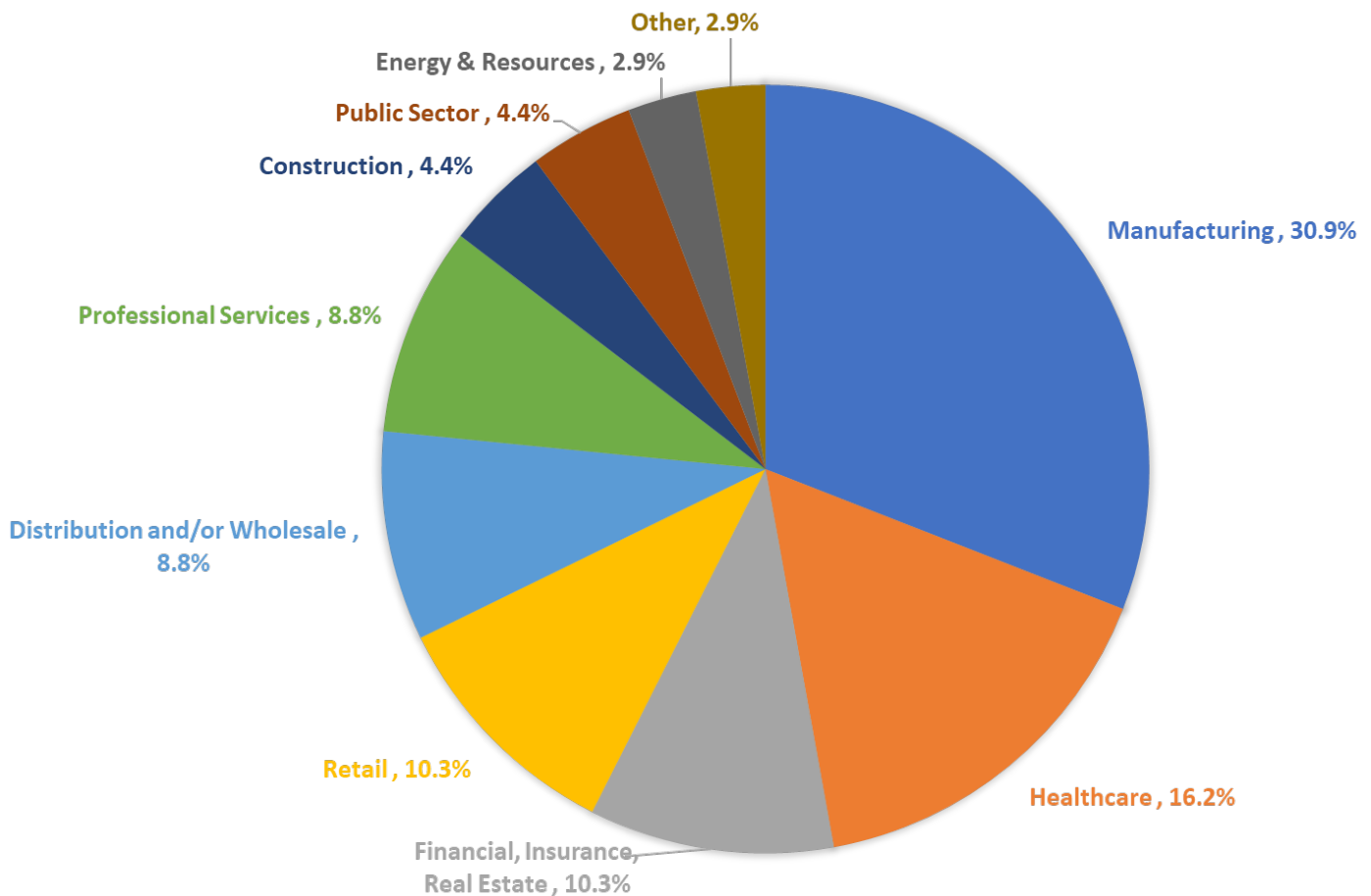
750.5

Median Number of Employees

45%

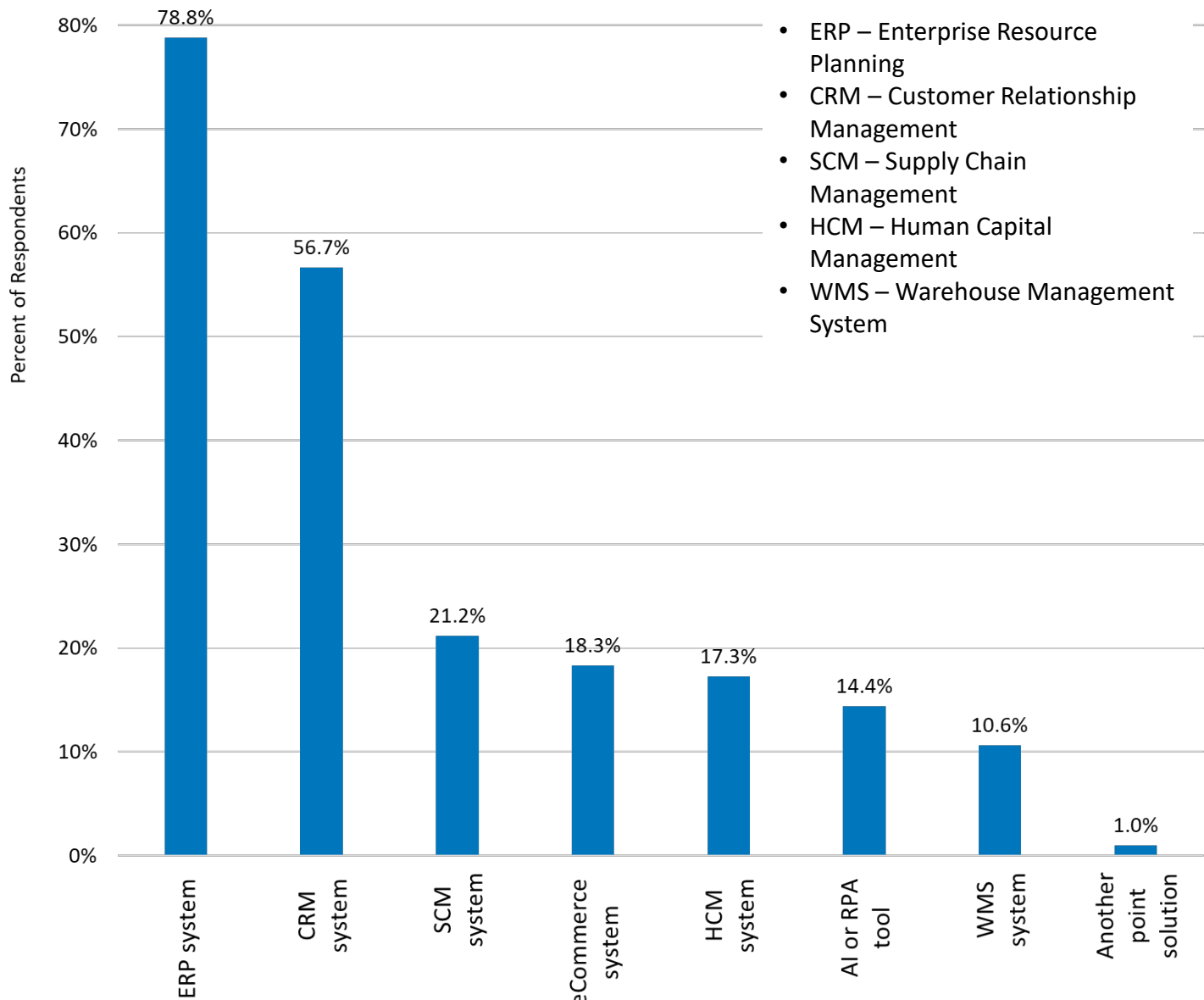
Percentage of Multinational Organizations

Industry Breakdown



Respondent Overview

Type of Software Selected



Vendor Overview



- More than 230 million cloud users
- Currently migrating many of its SAP ECC customers to SAP S/4HANA
- New AI assistant, Joule, to be embedded throughout entire cloud enterprise portfolio (announced September 2023)



- Spans 46 interconnected geographic commercial and government cloud regions (Oracle Cloud)
- Complete suite of SaaS applications that directly connect with Microsoft Azure
- New AI capabilities for analytics self-service users (announced September 2023)



- More than 200 products and cloud services (including the Azure cloud platform)
- Recently released Dynamics 365 for Sales Enterprise, which is designed to be a comprehensive sales solution for large enterprises
- New AI copilot for Microsoft Dynamics 365, spanning both its CRM and ERP (announced March 2023)



- Over 15k customers in the cloud (including Infor CloudSuite)
- Multitenant subscription as a service for all flagship products and edge applications
- New solution on the Infor Marketplace that combines the capabilities of ChatGPT with information in the Infor cloud environment (announced July 2023)

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

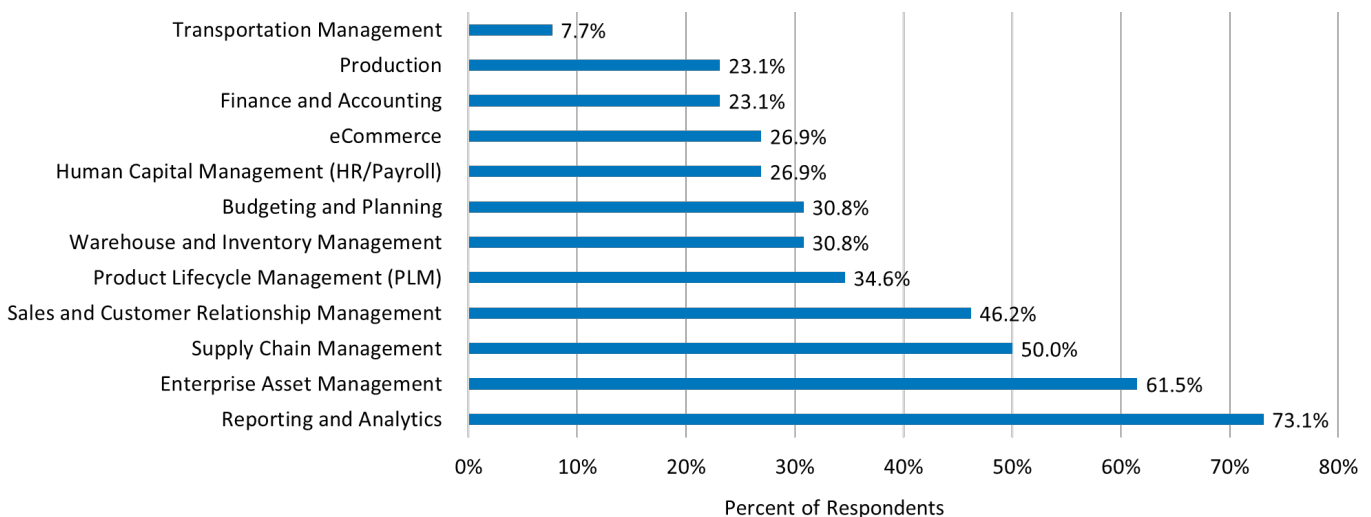
Functionality Implemented

We asked organizations what functions were part of their implementation. Respondents could select from eleven functions and could select multiple options.

The most common functionality that SAP customers implemented was Reporting & Analytics.

SAP tends to have very large customers. Large organizations and enterprises are particularly aggressive in cutting costs, managing margins and restructuring internal departments. This effort requires data for driving business decisions. New reports, queries, and analytical tools are often needed to better understand current and future scenarios.

Functionality Implemented by SAP Customers

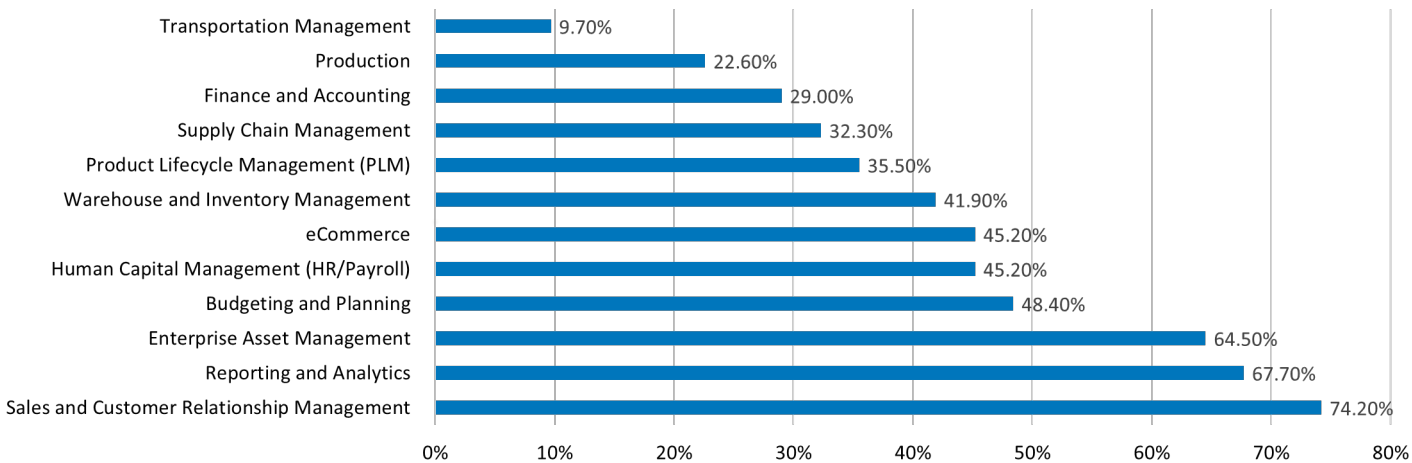




The most common functionality that Oracle customers implemented was Sales and Customer Relationship Management.

Over the last several years, Oracle has put an emphasis on the Customer Experience (CX). Oracle is a leader in this space as a result of heavy investment in technology and people over the last decade. Oracle’s ability to capture consumer data in the marketplace is unprecedented because of their platform and large-scale adoption of applications. High adoption of their Sales Enablement and CRM applications is not a surprise.

Functionality Implemented by Oracle Customers

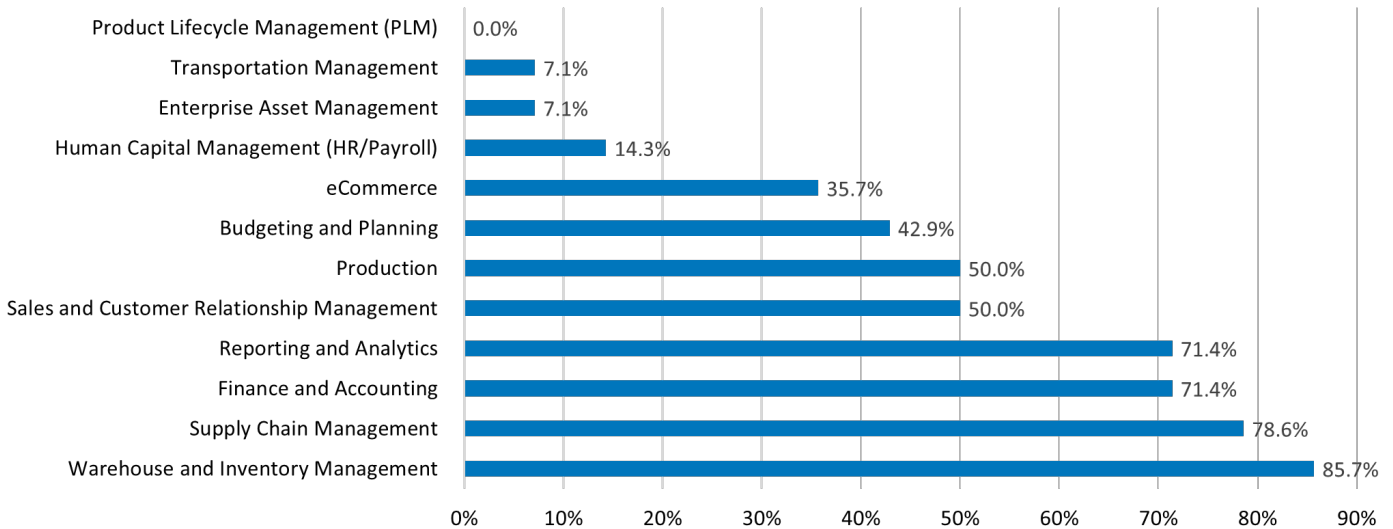




The most common functionality that Infor customers implemented was Warehouse and Inventory Management.

Infor continues to improve its WMS and inventory management capabilities. Applications that are now mature in the cloud enable a more rapid implementation of WMS and inventory control functions. Internal IT support for Infor’s advanced applications is lighter with more functionality developed natively in the Infor CloudSuites.

Functionality Implemented by Infor Customers

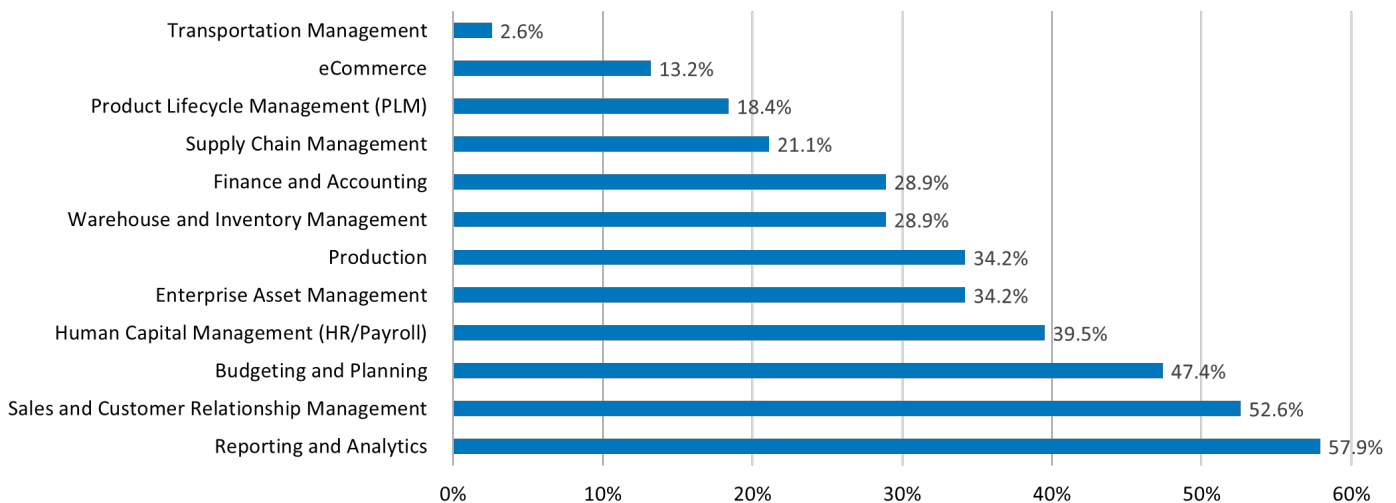


The most common functionality that Microsoft customers implemented was Reporting & Analytics.



Much like SAP, Microsoft has large organizations running its platform. Most of these customers own a version of Power BI. It's one of the most popular applications on the market, and it's favorably priced. This reporting & analytics tool enables companies to identify opportunities for cost cutting as well as new market opportunities. One thing to note is that organizations often need to update their version to support full design and development capabilities.

Functionality Implemented by Microsoft Customers



Deployment & Hosting Decisions

We asked organizations what type of software they selected. The options were “on-premise” and “cloud (hosted, managed services, or SaaS).”

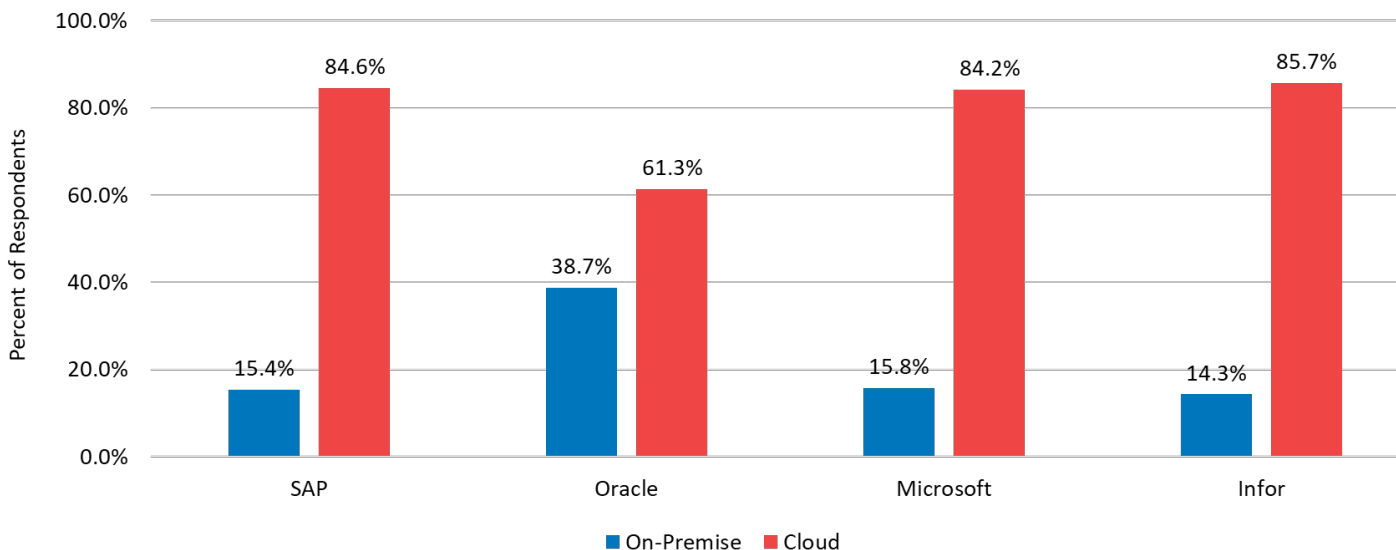
For those who selected cloud software, we asked if they chose a hosted/managed services model or a SaaS model.



Among all respondents there was a preference for cloud software over on-premise software, but the strongest preference for cloud was among Infor customers.

While Infor stood out as having the most cloud customers in our survey, it’s important to note that all four vendors have moved to cloud applications and subscription billing. Most of these vendors will not sell their on-premise versions. These versions are either laggard in development or receive no development at all.

On-Premise vs Cloud

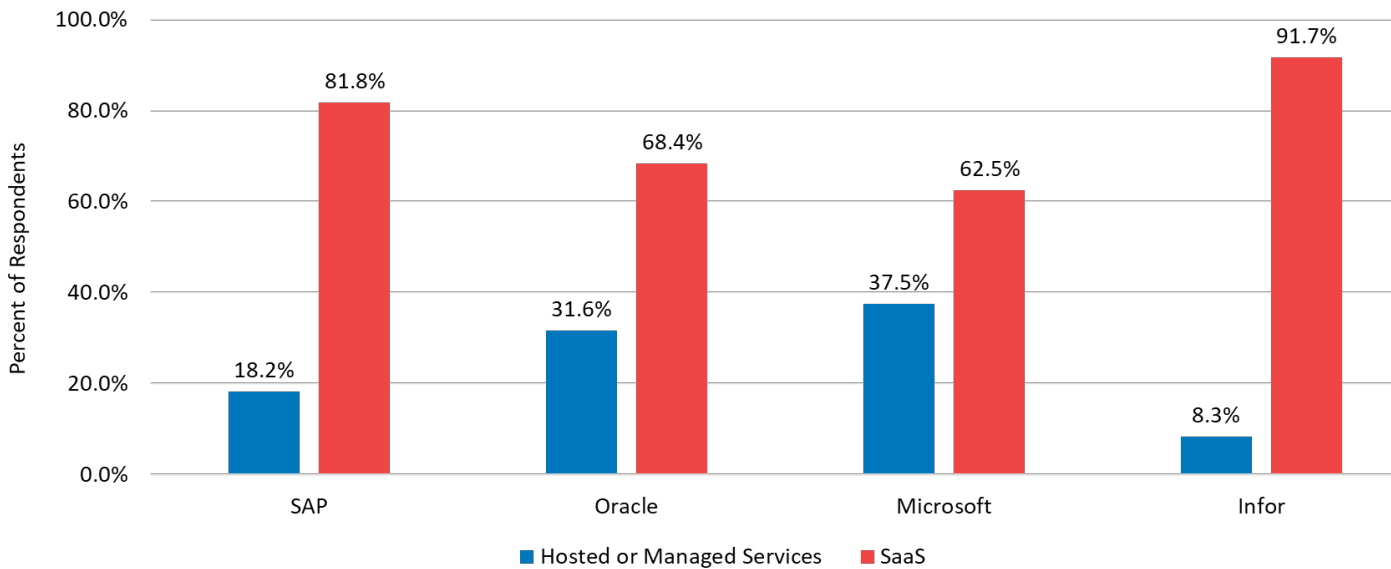




Among all respondents there was a preference for SaaS hosting models over hosted or managed services models, but the strongest preference for SaaS was among Infor customers.

While Infor stood out here, as well, most organizations in general are increasingly showing a preference for SaaS. Organizations across industries continue to focus on reducing their IT debt and burden. SaaS models are often very efficient for companies always looking to be on the latest version of their applications.

Hosted/Managed Services vs SaaS



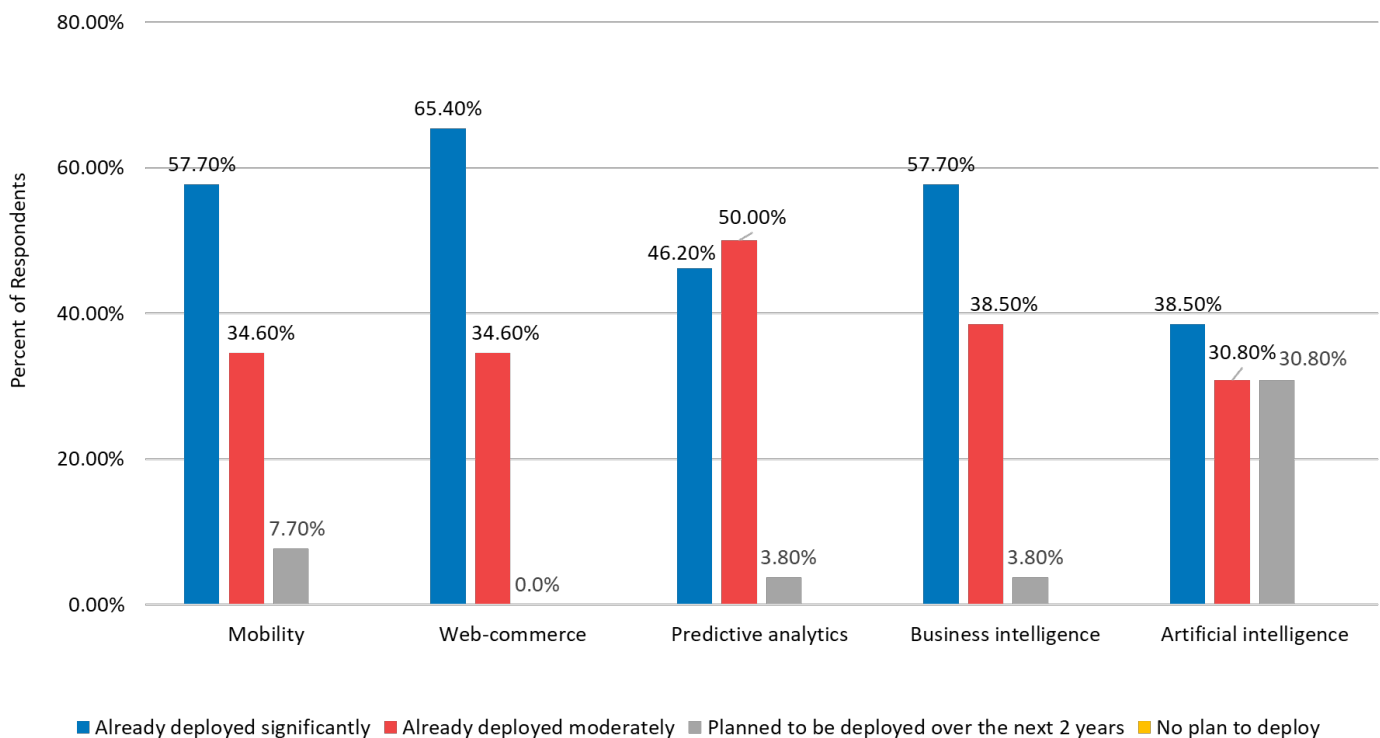
Other Digital Initiatives

We asked organizations which digital initiatives were part of their enterprise software project. Respondents could select from five different initiatives and indicate their stage of adoption (Already deployed significantly; Already deployed moderately; Planned to be deployed over the next 2 years; No plan to deploy).

SAP customers were more likely than others to say that they already implemented or planned to implement AI.

Typically, these are large organizations with resources dedicated to continuous improvement. Enterprises must be especially forward thinking, so they typically invest more in new technologies.

Focus on Various Digital Initiatives Among SAP Customers

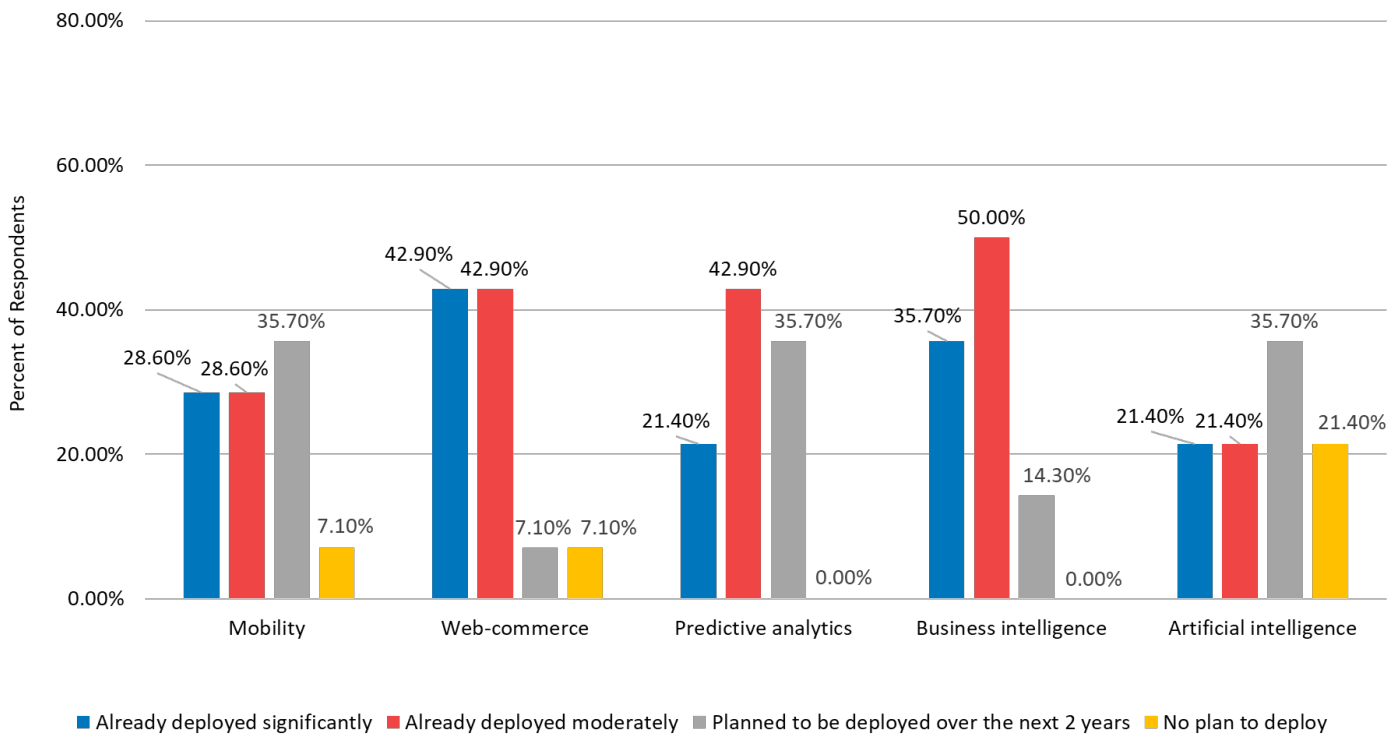




Infor customers were less likely than others to say that they already implemented or planned to implement AI.

AI currently has more action in customer service and financial companies. Many Infor customers are manufacturing companies. However, Infor's AI and integrations capabilities continue to improve.

Focus on Various Digital Initiatives Among Infor Customers



Customization Decisions

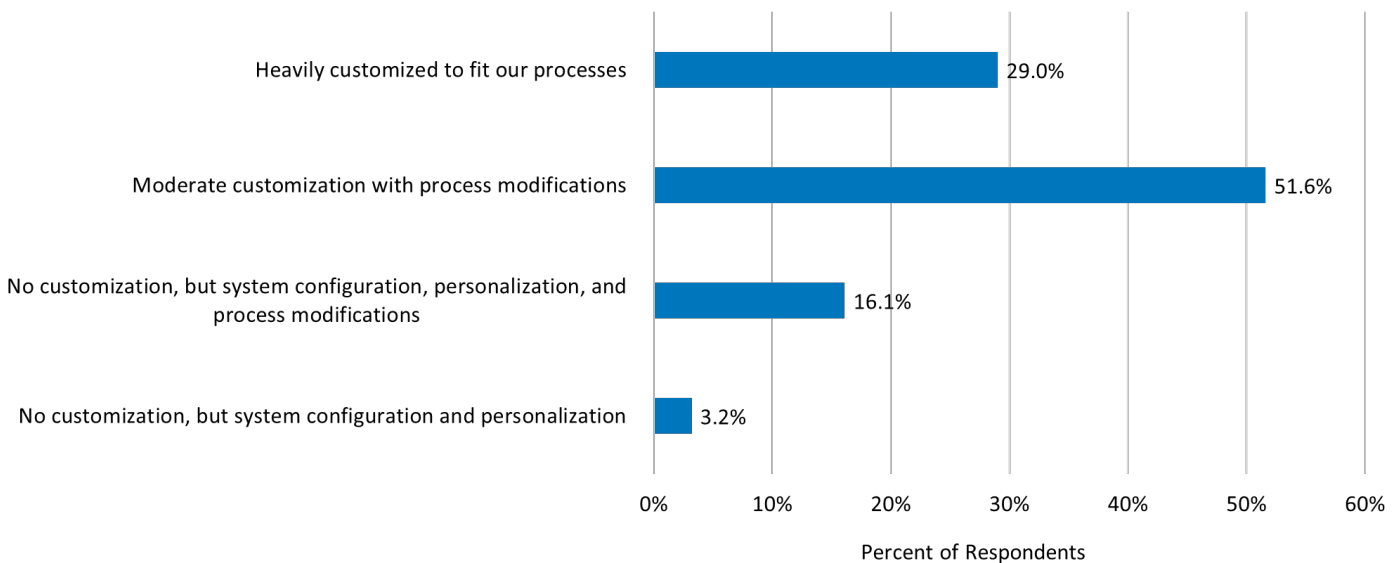
We asked organizations about their implementation approach when it came to software customization. Respondents could select from one of four approaches.

Oracle customers chose to do the most software customization.

ORACLE

As Oracle's cloud platform continues to mature, development and enhancement is becoming easier for customers to accomplish. In fact, many Oracle customers can enhance the product themselves without the help of a system integrator.

Customization Decisions of Oracle Customers

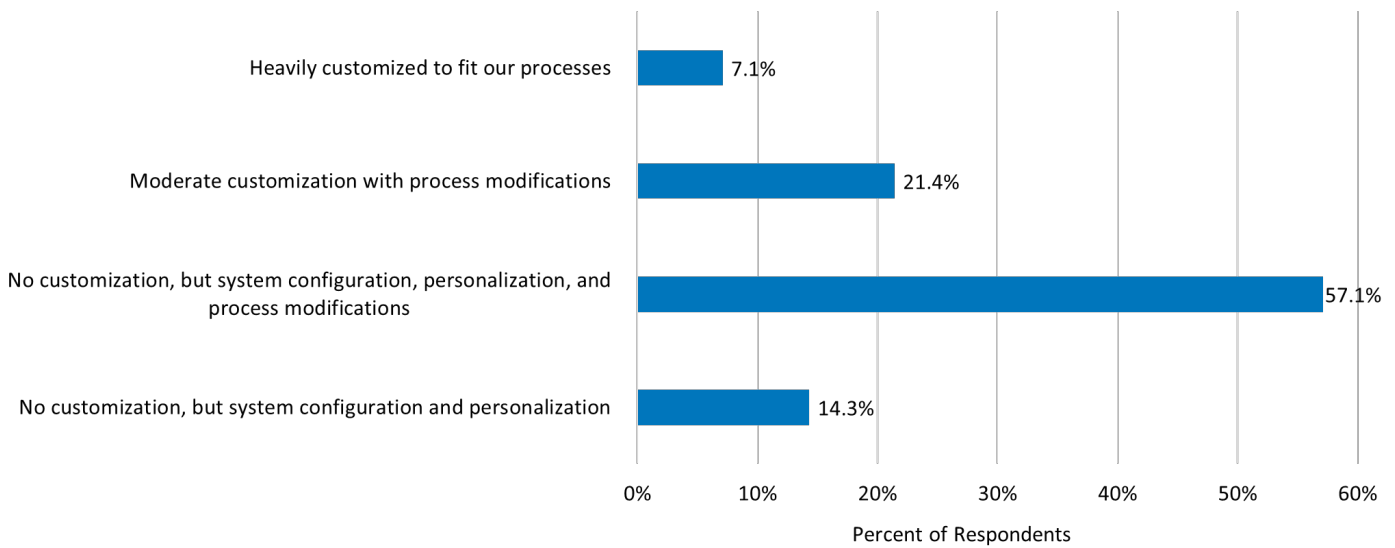




Infor customers chose to do the least software customization.

The Infor CloudSuites are positioned for certain vertical industries. As more of a built-for-purpose solution than a general ERP, the CloudSuites tend to require less customizations to meet customer requirements.

Customization Decisions of Infor Customers



PROJECT COST

We asked organizations how many licenses or users they purchased. We then asked them to estimate the total cost of their project.



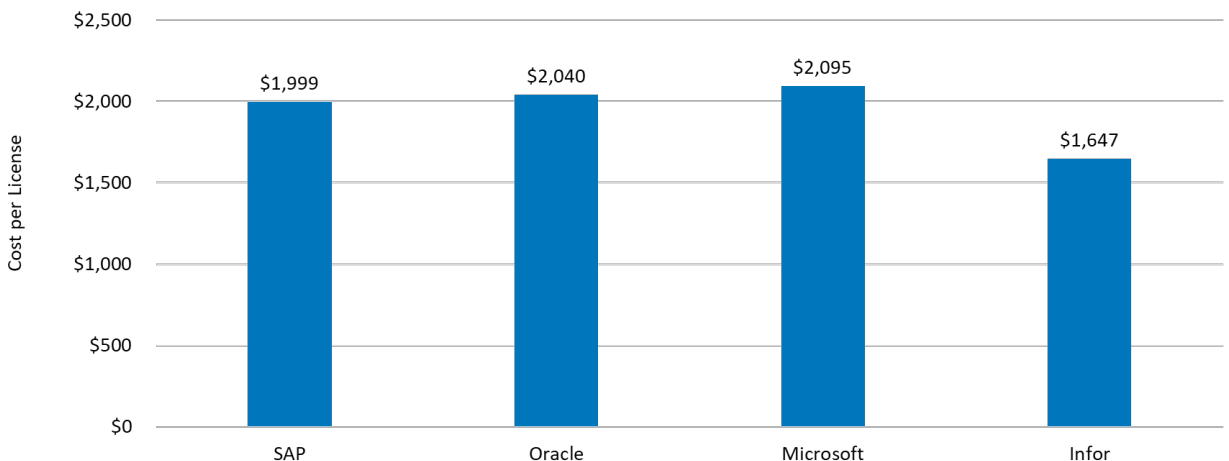
Normalized for number of licenses purchased, Infor customers spent the least on their projects.

Normalized for number of licenses purchased, Microsoft customers spent the most on their projects.



	SAP	Oracle	Microsoft	Infor
Project Cost	\$0.8 M	\$0.7 M	\$0.7 M	\$1.0 M
# of Licenses Purchased	401	325	317	605
Normalized Project Cost	\$1,999	\$2,040	\$2,095	\$1,647

Normalized Project Cost





Conclusion

SAP, Oracle, Microsoft, and Infor each have a variety of systems that can support data-driven decision making, but you must understand your organization's specific needs.

What are your pain points? What are your organizational goals? How can you use data and technology to support those goals?

Along the way, you can engage Panorama's ERP consultants to help you get everyone on the same page. When your team is aligned around a defined data strategy, you'll have a better idea of what system might meet your needs.

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

FREE CONSULTATION

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, technology, and data.

Panorama's Services

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