

For: Application
Development
& Delivery
Professionals

The Forrester Wave™: Financial Performance Management, Q3 2013

by Paul D. Hamerman, September 11, 2013

KEY TAKEAWAYS

FPM Solutions Boost Forecasting And Performance Analysis

Finance professionals today must plan and analyze faster and more often. FPM vendors offer flexible and highly scalable forecasting and performance measurement capabilities that can analyze both internal and external data. As these solutions evolve, they will enable companies to see the future with more clarity and analyze performance in real time.

The FPM Market Is Growing As Finance Pros Look To Step Up Their Game

The FPM market is growing because more finance professionals see these solutions as a way to address their top challenges in planning, compliance, and management reporting. This growth is largely due to the fact that finance pros can no longer rely solely on Excel for planning, reporting, or more sophisticated forecasting and analysis.

SaaS Differentiates Newer Offerings From Traditional Deployment Models

As on-premises applications become outdated and difficult to maintain, SaaS becomes more attractive to firms seeking faster implementation, lower cost, and easier upgrades. Only three of the evaluated vendors have native SaaS today, but the others will follow; we expect SaaS to become the primary FPM deployment model within three to five years.



The Forrester Wave™: Financial Performance Management, Q3 2013

How The Top 11 Providers Stack Up In A Rapidly Evolving Market

by [Paul D. Hamerman](#)

with [Mike Gilpin](#) and Nasry Angel

WHY READ THIS REPORT

In Forrester's 55-criteria evaluation of financial performance management (FPM) vendors, we identified the 11 most significant software providers — Adaptive Planning, Host Analytics, IBM, Infor, Longview Solutions, Oracle, Prophix Software, SAP, SAS, Tagetik Software, and Tidemark Systems — in the category and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help application development and delivery professionals and their finance colleagues select the right partner for their FPM solution needs.

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Forrester conducted demonstration-based software evaluations and strategy briefings in April 2013 with the 10 vendor companies participating in this study. We also surveyed 40 user companies provided to us as references by the vendors.

Related Research Documents

[Planning, Analysis, And Reporting Solutions Drive Financial Performance Management](#)
January 23, 2013

[Align Financial Processes And Systems For Better Business Value And Compliance](#)
August 18, 2011

[The Forrester Wave™: Business Performance Solutions, Q4 2009](#)
November 19, 2009



FPM SOLUTIONS REPORT, ANALYZE, AND PREDICT BUSINESS PERFORMANCE

The financial performance management (FPM) software category is comprised of a set of planning, reporting, and analytical applications that help organizations manage financial and business information for the past, present, and future (see Figure 1).¹ Using FPM, firms can:

- **Document the past with financial reporting, consolidation, and disclosure.** Financial management is governed by complex accounting procedures and regulations that dictate how firms capture, control, and report financial results. Financial consolidation software supports a compliance-driven reporting process and is a must-have for firms with multiple lines of business, multiple legal entities, and international operations. A newer category of solutions — disclosure management — helps public companies compose and deliver complex regulatory reports and electronic filings.
- **Understand their current state with performance measurement and management reporting.** Firms require timely information to monitor and measure business performance and analyze profitability. Firms use FPM solutions to monitor key performance indicators (KPIs), create complex cost allocation models to assess the profitability of products and customers, and set strategies for and track their progress in executing their strategic goals and initiatives. These solutions enhance performance information with graphical visualizations, mobile apps, and powerful in-memory analytics platforms.
- **See into the future with planning, budgeting, and forecasting (PBF).** Forward-looking plans, forecasts, and budgets enable organizations to manage financial resources, chart strategies, and anticipate change. These capabilities are increasingly important in the fragile and volatile global economic environment. With the inherent modeling flexibility of PBF solutions, firms can create plans, budgets, and forecasts with a variety of time horizons, calculation methods, and collaborative inputs.

Figure 1 The Functional Scope Of Financial Performance Management



Financial Information Challenges Include Complexity And Process Bottlenecks

Finance has a complex array of business processes that challenge most firms in achieving process automation, speed, integration, and efficiency. In an age in which real-time information is possible, finance processes play out in relatively slow motion, driven more by control and accountability than by business performance. Firms attempting to deliver timely and relevant financial and business performance information face several challenges:

- **System complexity lengthens the process of closing the books.** One of the biggest challenges firms face is that too many systems need to feed the core accounting (general ledger) systems, such as procurement, inventory, fixed assets, and accounts receivable. These feeds often occur periodically as batch updates. In addition, most large firms — and many medium-size ones — don't have a single accounting system; rather, they have several sets of books that they need to consolidate. Having too many moving parts adds delay and complexity to the process of summarizing transactions and closing the books.
- **Financial reporting regulation and compliance is burdensome.** Businesses that trade securities on public exchanges, as well as those in regulated industries and the government sector, face complex and changing regulations for financial reporting. Taxes, currencies, international and localized regulations, and internal control requirements like Sarbanes-Oxley add to the challenge. Technology requirements for regulatory filing are also mandated, as with the US Securities and Exchange Commission's requirement to file in a standardized file format (XBRL).
- **Compliance requirements conflict with performance analysis.** Accounting and financial reporting systems traditionally rely upon periodic processes that are a function of the retrospective and controlled discipline of accounting. Transactional system interfaces typically rely on batch plumbing, which may be adequate for accounting needs. Managing business performance, however, requires actionable and immediate analytic insights, which is at odds with the compliance-driven processes that are ingrained in the accounting discipline.
- **Firms struggle with budgeting and need more planning agility.** Many firms find the traditional budgeting process too inflexible and time-consuming to be sustainable. Planning and forecasting have taken on mission-critical importance in today's volatile economy, requiring faster and more flexible planning cycles than budgeting allows. Relying on spreadsheets to manage the full array of planning processes is increasingly untenable, due to poor data aggregation and data integrity controls.

The FPM Market Landscape Is Evolving Toward SaaS, Mobile, And Big Data

Firms are showing a growing appetite for software-as-a-service (SaaS) in FPM; this is likely to have a major impact on market activity, accelerating its overall growth.² In addition, big data and in-memory computing technologies promise transformational opportunities for planning and analysis

scalability and analytics insight related to business performance.³ Usability and flexibility will further influence buyer choices and the role of IT in managing solutions. In 2013 and beyond, technology evolution will shape the FPM market as:

- **Adoption of SaaS financial solutions accelerates in FPM.** SaaS adoption is already mainstream in several application areas, such as human resource management and customer relationship management, and is rapidly gaining momentum in the finance arena, including both core financial accounting and FPM. Hundreds of firms have already made the transition to SaaS or “cloud”-based FPM systems, and this adoption will continue to accelerate.⁴ SaaS FPM adoption will increase as traditional on-premises vendors retool for SaaS and as pure-play SaaS vendors like Adaptive Planning, Anaplan, Host Analytics, and Tidemark Systems continue to gain momentum.
- **Big data opens new possibilities for performance modeling and analysis.** Big data platforms like Hadoop and in-memory computing platforms like SAP HANA allow the collection, processing, and analysis of huge, multidimensional data sets at lightning speed. In the context of FPM, this technology changes business use cases in terms of the type of data that can be analyzed; it also resets expectations regarding timeliness and the speed of information delivery.
- **External information adds context to planning and performance analysis.** Data from the outside world, such as financial metrics, currencies, interest rates, commodity prices, stock market data, economic indicators, weather, and traffic will increasingly be available as information-as-a-service. For example, Host Analytics currently offers external data for use in its applications via its Decision Hub product.
- **FPM buyers place a premium on flexibility, easy upgrades, and usability.** As business modeling tools, FPM solutions must continue to emphasize nontechnical modeling and process flexibility. Today’s generation of FPM systems are designed to be set up and managed by business professionals, and updated more frequently — and less disruptively — by the vendors. Usability continues to advance in delivering graphical visualizations of FPM data, although natively integrated Excel will continue to persist as the preferred user interface of finance professionals.

FINANCIAL PERFORMANCE MANAGEMENT EVALUATION OVERVIEW

To assess the state of the FPM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top FPM vendors. Although we evaluated product capabilities as an integrated suite, buyers often consider the capabilities as point solutions. The solutions we evaluated varied from components with a unified architecture to a portfolio of discrete products. In addition, product usage patterns range from highly distributed and participative processes, such as budgeting and forecasting, to highly controlled, compliance-driven processes like financial consolidation and disclosure management. Due to the variety of usage patterns, companies may buy FPM solution components rather than full suites, and may mix and match products from

different vendors. Clients can use the custom weighting feature in the downloadable Forrester Wave model to adjust the weightings as needed for different buying scenarios.

Evaluation Criteria Focus On Functionality, Technology, Strategy, And Market Presence

After examining past research, user needs assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 55 criteria, which we grouped into three high-level buckets:

- **Current offering.** Our evaluation of current capabilities focused on the functional capabilities for planning, including budgeting and forecasting; financial consolidations and disclosure management; and performance measurement, such as scorecards and KPIs. We also placed significant emphasis on the business intelligence foundation; technical capabilities like usability, flexibility, mobility, and social; and customer success.
- **Strategy.** We evaluated each vendor's go-to-market strategy in terms of overall vision, development plans, cohesiveness and completeness of offerings, time-to-value, SaaS, and pricing transparency. Our strategy assessment also considered the technology vision, level of investment in research and development, and strategic alliances.
- **Market presence.** The market presence criteria, which determine the size of the symbol on the Forrester Wave graphic but have no weight in terms of overall scoring, include the vendor's financial viability, the size of the customer base, and sales and implementation delivery footprint.

Evaluated Vendors Range From Technology Giants To FPM Specialists

Forrester included 11 vendors in the assessment: Adaptive Planning, Host Analytics, IBM, Infor, Longview Solutions, Oracle, Prophix Software, SAP, SAS, Tagetik Software, and Tidemark Systems. Each of these vendors has (see Figure 2):

- **A solution breadth encompassing planning, reporting, and performance analysis.** Each vendor that was invited to participate offers a solution set comprising planning, budgeting, and forecasting plus at least one of the following solutions: financial consolidation and reporting, disclosure management, or business performance analysis (e.g., scorecards and analytic reporting).
- **Mindshare in client software evaluations.** The vendors included in this study are often mentioned in inquiries from Forrester clients and are typically included in client vendor evaluations.
- **The ability to serve enterprise accounts.** Vendors included in this evaluation have the ability to scale to serve the corporate planning, reporting, and performance management needs of customers with more than \$1 billion in revenues, as indicated by customer adoption.

In order to consider emerging market players like Tidemark Systems in this evaluation, we did not use a minimum size threshold. We invited 11 vendors to participate in this study, 10 of which accepted our invitation; only Oracle declined to participate. Due to Oracle's breadth of offering and sizable market presence in FPM, we decided to include Oracle as a nonparticipant.⁵

Figure 2 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product name	Product version
Adaptive Planning	Adaptive Planning, Adaptive Consolidation, Adaptive Discovery	2013.1
Host Analytics	Host Analytics EPM Suite	13.2
IBM	<ul style="list-style-type: none"> • Cognos Controller • Cognos Financial Statement Reporting • Cognos Disclosure Management • Cognos Business Intelligence • Cognos TM1 • SPSS Forecasting • Cognos Business Viewpoint • Cognos Insight 	10.1.2 6.61 10.2 10.2 10.2.1 SPSS Statistics 21 & SPSS Modeler 15 10.1.1 10.2
Infor	Infor Corporate Performance Management	10.4
Longview Solutions	Longview 7	Longview 7.1
Prophix Software	Prophix	10 R3
SAP	<ul style="list-style-type: none"> • SAP Business Planning and Consolidation (versions for NetWeaver and Microsoft Platform) • SAP Disclosure Management • SAP Financial Closing Cockpit • SAP Financial Consolidation • SAP Financial Information Management • SAP Intercompany • SAP Notes Management • SAP Profitability and Cost Management • SAP Strategy Management 	10.0

Source: Forrester Research, Inc.

Figure 2 Evaluated Vendors: Product Information And Selection Criteria (Cont.)

Vendor	Product name	Product version
SAS	• SAS Financial Management	5.3
	• SAS Strategy Management	5.4
	• SAS Activity Based Management	7.2
	• SAS Profitability Management	2.2
Tagetik Software	Tagetik 4	4.2.1
Tidemark Systems	Tidemark	Tidemark Spring 2013

Vendor selection criteria

A reasonably comprehensive FPM solution. Solution breadth must encompass planning, budgeting, and forecasting, as well as one or more of the following: financial consolidations and reporting, disclosure management, and business performance analysis.

Mindshare among Forrester clients. The evaluated vendors appear on client vendor selection lists and clients mention them in inquiries.

The ability to support enterprise accounts. The vendors are able to serve companies with revenues in excess of \$1 billion, as indicated by customer adoption.

All products needed to be generally available on or before June 30, 2013.

Source: Forrester Research, Inc.

FPM VENDORS OFFER PLANNING VERSATILITY, REPORTING, AND INSIGHT

FPM vendors must continue to innovate and change in order to remain competitive. Evolving delivery models, emerging technologies, new players, globalization, and industry-specific requirements continue to challenge the biggest players to stay on top of their game. The evaluation uncovered a market in which (see Figure 3):

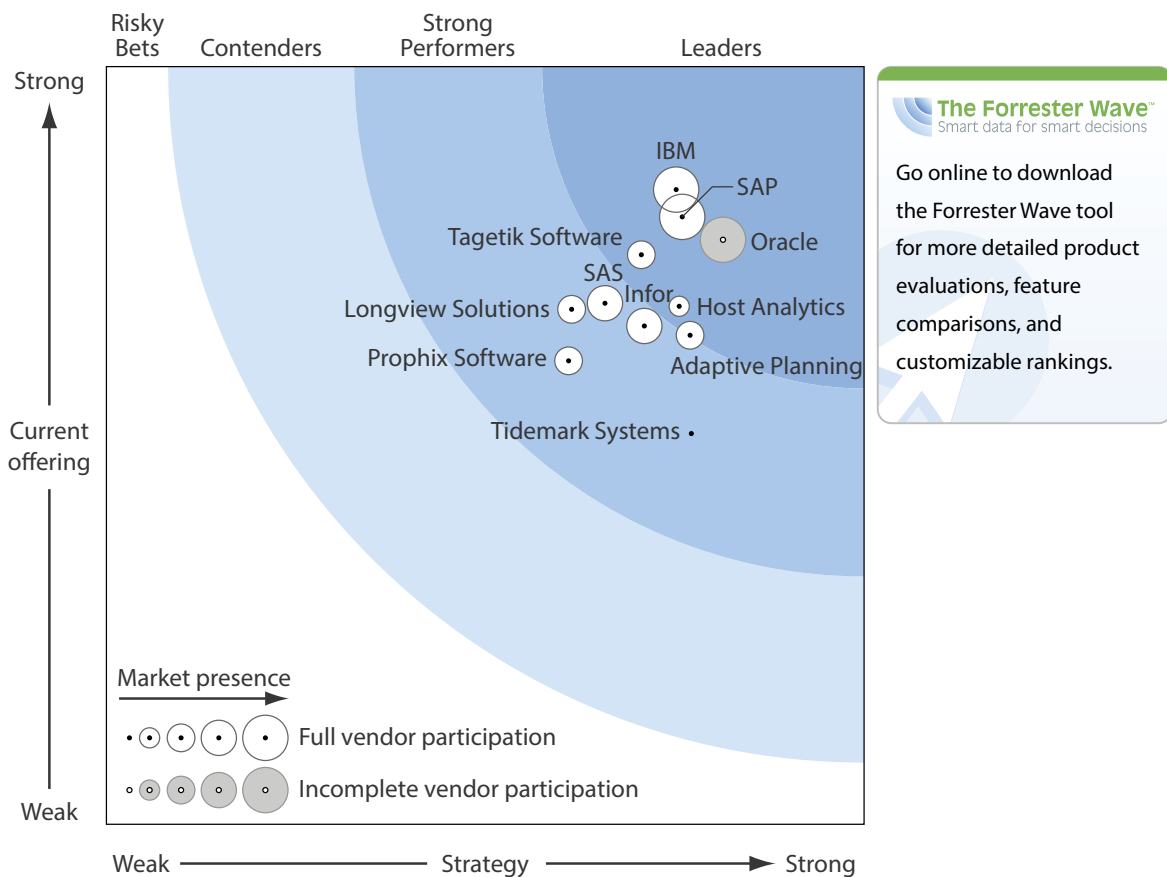
- **IBM, SAP, Oracle, Tagetik Software, and Host Analytics lead the pack.** Three of the largest technology vendors in the world — IBM, Oracle, and SAP — are also leaders in FPM, with mature solutions that scale to support the world’s largest enterprises. They are joined as Leaders in this Forrester Wave evaluation by FPM specialists Tagetik Software and Host Analytics. Tagetik Software has been winning large customers with its very deep financial functionality, while Host Analytics is rising in the market with a solid solution delivered entirely in the cloud.
- **Infor, SAS, Adaptive Planning, Longview Solutions, and Prophix Software are competitive.** In this highly competitive market, these players offer differentiated approaches and value propositions. SAS has a highly flexible solution set with depth in predictive planning, costing,

and strategy management. Adaptive Planning, a fast-growing SaaS player, is rapidly deployable and easy to use. Infor offers mature functionality with an innovative technology strategy. Prophix Software offers a well-rounded, cost-effective solution that plays well at medium-size companies. Longview Solutions meets the needs of complex customers looking for high levels of scalability.

- **Tidemark Systems offers a unique and visionary approach.** Tidemark Systems, a visionary startup, is looking to disrupt the FPM category with compelling usability and a product built with the latest advanced technologies like mobile, social, cloud, and big data.

This evaluation of the FPM market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 3 The Forrester Wave™: Financial Performance Management, Q3 '13



Source: Forrester Research, Inc.

Figure 3 The Forrester Wave™: Financial Performance Management, Q3 '13 (Cont.)

	Forrester's Weighting	Adaptive Planning	Host Analytics	IBM	Infor	Longview Solutions	Prophix Software	SAP	SAS	Tagetik Software	Tidemark Systems
CURRENT OFFERING	50%	3.23	3.42	4.19	3.29	3.40	3.06	4.01	3.44	3.76	2.58
Planning, budgeting, and forecasting	25%	3.20	3.60	4.00	2.85	4.00	3.90	3.55	3.60	3.85	2.50
Financial close, reporting, and disclosure	25%	2.10	3.40	4.90	4.20	3.55	2.90	4.65	2.50	4.75	0.70
Performance measurement and analysis	15%	3.40	3.50	4.60	3.45	3.75	2.80	4.50	5.00	3.35	3.15
Business intelligence foundation	10%	3.20	3.00	3.80	2.80	3.00	2.20	3.80	3.90	2.80	3.60
Other technology characteristics	15%	3.80	3.10	3.55	3.00	3.00	2.95	3.25	3.30	3.10	3.80
Customer experience	10%	5.00	3.80	3.60	2.80	2.00	2.80	4.20	2.80	3.60	3.80
STRATEGY	50%	3.85	3.78	3.76	3.55	3.07	3.05	3.80	3.29	3.53	3.86
Product strategy and vision	92%	3.75	3.85	3.65	3.60	3.25	3.05	3.70	3.40	3.40	4.15
Strategic alliances	8%	5.00	3.00	5.00	3.00	1.00	3.00	5.00	2.00	5.00	0.50
MARKET PRESENCE	0%	2.80	1.93	4.62	3.44	2.33	2.52	4.69	3.44	2.30	0.93
Financial viability	45%	3.00	1.40	5.00	3.80	2.60	2.20	5.00	4.20	2.60	1.40
Installed base	45%	2.55	2.55	4.15	2.95	2.25	2.95	4.30	2.55	1.95	0.55
Delivery footprint	10%	3.00	1.50	5.00	4.00	1.50	2.00	5.00	4.00	2.50	0.50

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders Show Depth And Breadth In Multiple FPM Processes

- IBM provides sophisticated FPM products and is continuously improving its approach.** IBM has made significant investments in a portfolio of FPM solutions that offer deep functionality and maturity. The cornerstone of the IBM Performance Management portfolio is a flexible and powerful planning solution (IBM Cognos TM1), along with highly functional solutions for consolidations, disclosure, and performance analytics. The solution set is evolving with initiatives in usability, mobility, and SaaS.

- **SAP has a mature portfolio that is migrating to its HANA in-memory platform.** SAP offers highly functional products in its SAP enterprise performance management (EPM) portfolio, but there are some product overlaps and architectural disparities. Going forward, we expect SAP to increasingly leverage its HANA in-memory platform to provide real-time performance and scalability and deliver multitenant SaaS solutions.
- **Oracle delivers breadth and depth with its Hyperion EPM portfolio.** With a broad set of products in its Oracle Hyperion EPM portfolio, Oracle is a formidable competitor for large-scale financial consolidations and planning applications. The solutions tend to reflect higher levels of technical complexity and ownership costs, but Oracle has recently introduced cloud services (i.e., SaaS) offerings for planning/budgeting and financial reporting to accelerate time-to-value.
- **Tagetik Software provides sophisticated capabilities for financial heavy lifting.** Tagetik Software joins the ranks of the Leaders in this Forrester Wave evaluation with a unified platform that supports the full breadth of FPM functionality. It has capabilities that appeal to large enterprises with sophisticated financial planning and reporting needs and has earned strong customer loyalty. Tagetik's road map includes incorporating in-memory database technology from Microsoft and SAP and HTML5 for mobility; the firm currently offers a cloud deployment option.
- **Host Analytics enables financial agility in the cloud.** Host Analytics shows the most breadth and maturity among the rapidly growing SaaS-only FPM solution providers. Its solution is a good choice for both medium-size companies needing rapid deployment and enterprise-class companies looking for predictable ownership costs and easy upgrades.

Strong Performers Are Often Excellent Choices For Focused FPM Process Needs

- **Adaptive Planning makes planning and analysis quick and easy.** Adaptive Planning is a rapidly growing SaaS FPM vendor with strong financial backing. Its product offers intuitive capabilities for planning and performance analysis and a maturing offering for financial consolidations. Adaptive Planning won the highest praise from customers in our reference survey, citing ease of use and fast time-to-value.
- **Infor has renewed its commitment to financial performance.** Infor has made a concerted effort to refresh its solution portfolio, which includes products for planning and budgeting, consolidations, strategy management, and performance analytics. Infor has one of the most ambitious product road maps in the Forrester Wave peer group, leveraging technology assets from its broader enterprise resource management product lines — such as user experience, mobility, and social — and expanding its FPM product capabilities in areas like disclosure management.

- **SAS combines predictive power with planning and strategy.** SAS provides a flexible planning and budgeting solution along with strong capabilities in cost and profitability analysis, strategy management, and predictive forecasting. SAS is less competitive in financial compliance functions like consolidation and disclosure but is a good choice for advanced costing, predictive forecasting, and strategy management.
- **Longview Solutions handles complex planning and reporting jobs.** Longview Solutions has functional depth and scalability in its planning and consolidations solution; this is evident from several large customer deployments. Longview Solutions is a good choice for customers looking for mature financial planning and reporting functionality that will support a high volume of data throughput.
- **Tidemark Systems raises the bar on innovation.** A disruptive new entrant into the FPM space, Tidemark Systems delivers compelling usability and graphical insights in a platform that natively supports SaaS, mobile, social, and big data. Tidemark Systems will appeal to enterprises looking for consumable planning and operational performance reporting solutions, which we expect to rapidly gain more depth, maturity, and modeling configurability.
- **Prophix Software brings bang for the buck.** Prophix Software has a very flexible planning solution and well-rounded solution set overall. It is a good choice for medium-size companies looking for a cost-effective, on-premises deployment model using the Microsoft technology platform. Although focused on the midmarket, Prophix Software has several enterprise wins and is one of the better planning solutions we evaluated.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave Evaluation

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference surveys.** To validate product and vendor qualifications, Forrester also conducted online reference surveys with three to five of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave evaluation follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Integrity Policy

All of Forrester's research, including Forrester Wave evaluations, is conducted according to our integrity policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

ENDNOTES

- ¹ Financial performance management is also commonly referred to as enterprise performance management (EPM), corporate performance management (CPM), and other names. In prior research, Forrester has referred to this product category as business performance solutions (BPS). We believe that the financial descriptor is more aligned with the actual customer adoption and business process capabilities of the products.
- ² Interviews with SaaS FPM vendors indicate significant increases in sales pipelines in the past year, as well as accelerating revenues.
- ³ One-third (32%) of respondents to a Forrester survey on big data indicated that they are analyzing finance data; 47% of respondents indicated that they measure the overall success of big data initiatives using business performance metrics. See the September 20, 2011, "[How Forrester Clients Are Using Big Data](#)" report.
- ⁴ Proof points of SaaS momentum are clear from observing the rapid growth of pure-play SaaS FPM vendors like Adaptive Planning and Host Analytics, financial accounting systems vendors such as FinancialForce.com, Intacct, and NetSuite, and financial point solution specialists such as WebFilings (disclosure management) and BlackLine Systems (reconciliation).
- ⁵ Although Oracle chose not to participate in this Forrester Wave evaluation, we evaluated its FPM suite offering based on our knowledge from past analysis and publicly available information to provide a complete picture of the competitive landscape. For nonparticipants that we choose to include in Forrester Wave evaluations, we do not publish detailed scores or commentary.

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