

The Planning Survey 21

The voice of the planning software user community

This is a specially produced summary
by BARC of the headline results for

IDL - an insightsoftware company





KPI results

1 top ranking
and
6 leading positions

in 3 different peer groups.

THE PLANNING SURVEY 21



Implementer support

93%

of surveyed users rate IDL's **implementer support** as **excellent** or **good**.*

** Compared to 81% for the average planning tool.*

THE PLANNING SURVEY 21



Consolidation

93%

of surveyed users rate IDL's **legal consolidation** as **very good** or **good**.*

** Compared to 70% for the average planning tool.*

THE PLANNING SURVEY 21



Vendor support

90%

of surveyed users rate IDL's **vendor support** as **excellent** or **good**.*

** Compared to 75% for the average planning tool.*

THE PLANNING SURVEY 21



Satisfaction

90%

of surveyed users are **satisfied** with IDL.*

** Based on the aggregate of "Very satisfied" and "Somewhat satisfied".*

THE PLANNING SURVEY 21



Requirements

93%

of surveyed users rate IDL's **coverage of reporting/analysis requirements** as **very good** or **good**.*

** Compared to 84% for the average planning tool.*

THE PLANNING SURVEY 21



Peer Group
Midsize/Departmental Implementations

1. Top-ranked in
 Financial Consolidation

Leader in
 Workflow

Peer Group
Financial Performance Management Products

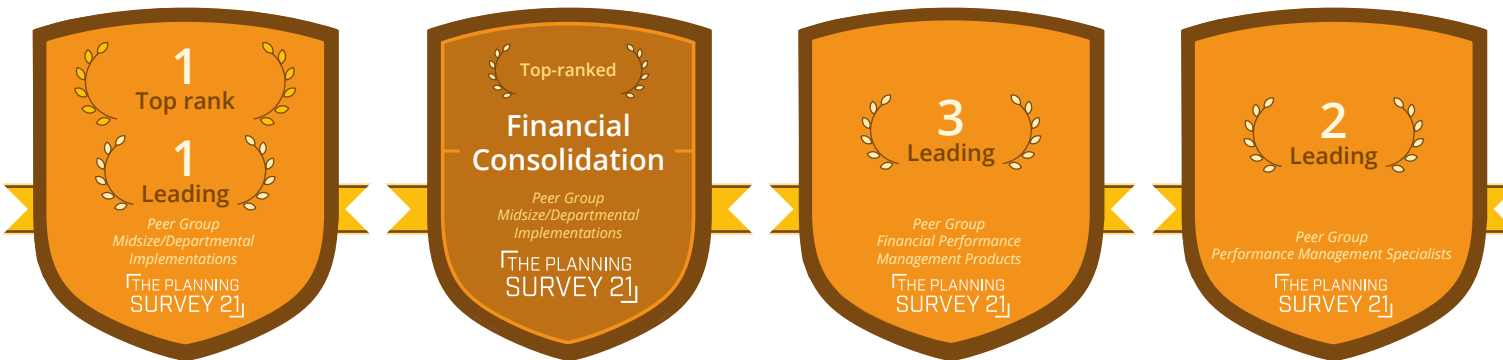
Leader in
 Workflow Reporting/Analysis
 Financial Consolidation

Peer Group
Performance Management Specialists

Leader in
 Workflow
 Financial Consolidation

Summary

With one top rank and six leading positions across three different peer groups, IDL - an insightsoftware company once again achieves a very good set of results in this year's Planning Survey. Convincing ratings - particularly in the functional KPIs - help to consolidate its position as a market leading FPM platform that delivers considerable benefits to its customers. Companies can benefit from using IDL in terms of increased transparency of planning, improved integration of planning with reporting/analysis and improved integration of different sub-budgets. Overall, these benefits lead to a better quality of planning results for many customers. 87 percent of IDL users say they would definitely or probably recommend their planning product to other organizations - a great result, which is a strong indicator of customer satisfaction with the vendor and its product.





Schnell und gut einzuführen.

THE PLANNING SURVEY 21

Consultant, IT, 100-2,500 employees

Gute, transparente, kontrollierbare Lösung.

THE PLANNING SURVEY 21

Line of business employee, media/publishing, 100-2,500 employees

Gutes, zeitgemäßes Produkt.

THE PLANNING SURVEY 21

Consultant, manufacturing, 100-2,500 employees

Ein sehr leistungsfähiges und von den Prozessen her durchdachtes Produkt. Hohe Integrationsmöglichkeit in Vorsysteme. Alle Zusagen wurden eingehalten.

THE PLANNING SURVEY 21

Consultant, consulting, >2,500 employees

Software und Mitarbeitern bieten zusammen ein hohes Level.

THE PLANNING SURVEY 21

Consultant, public sector, 100-2,500 employees



What Customers Like Most



Benutzeroberfläche, gutes Preis-/Leistungsverhältnis und schnelle Implementierung.

THE PLANNING SURVEY 21

Consultant, manufacturing, 100-2,500 employees

Die legale Konsolidierung und die einfache Bedienung der Planung.

THE PLANNING SURVEY 21

Consultant, IT, 100-2,500 employees

Integrierte Daten, regelbasierte Bilanz- und Finanzplanung, flexible Berichts- und Auswertungsmöglichkeiten, systemseitige Verprobungen.

THE PLANNING SURVEY 21

Line of business employee, media/publishing, 100-2,500 employees

Proven, mature, easy to use product, especially for legal consolidation. The reporting platform has grown very quickly in the last two years.

THE PLANNING SURVEY 21

Consultant, consulting, >2,500 employees

Sehr gute Abdeckung der fachlichen Prozesse, leichte Bedienung (weitestgehend selbsterklärend), Durchgängigkeit der Prozesse (Plattform).

THE PLANNING SURVEY 21

Consultant, consulting, >2,500 employees



“
Enge Abstimmung mit dem Hersteller und diesen in die Prozessdefinition miteinbeziehen. Der Hersteller hat eine sehr hohe Fachkompetenz. Diese sollte man als Unternehmen schon bei der Definition der Anforderungen nutzen.

THE PLANNING
SURVEY 21

” *Consultant, consulting, >2,500 employees*

“
Nutzen Sie VON ANFANG AN die IDL-spezifischen Schulungsangebote.

THE PLANNING
SURVEY 21

” *Person responsible/Project manager for BI from IT department, construction, 100-2,500 employees*



IDL - an insightsoftware company Overview

IDL - an insightsoftware company is a provider of software applications for financial performance management (FPM) offering professional expertise in all aspects of financial consolidation and close, planning, budgeting and forecasting, management and regulatory reporting and analysis. The company was founded in 1990 and currently employs about 150 people in its offices in Germany, Austria, Switzerland and France. In December 2020, IDL became part of insightsoftware, a global provider of finance software solutions for the office of the CFO. insightsoftware employs 900 people and has over 25,000 customers.

IDL's CPM suite is an integrated platform and includes modules for financial consolidation (IDL.KONSIS), financial planning (IDL.FORECAST), operational planning, reporting and analysis (IDL.DESIGNER). Furthermore, it offers complementary solutions for financial filings and prebuilt content for specific industries and use cases (e.g., for professional sports and the public sector). IDL solutions can either run on-premises, as cloud services (leveraging Microsoft Azure) or in hybrid scenarios (a combination of both cloud and on-premises). According to IDL, more than 1,100 corporate groups currently use its solutions. If required, third-party products can be used to enhance IDL's product portfolio (e.g., for ETL and operational planning). The vendor maintains a partnership with Cubeware (OEM products: IDL.IMPORTER, IDL.COCKPIT).

IDL supports planning scenarios with IDL.FORECAST for financial planning requirements and IDL.

DESIGNER for operational budgets. IDL.FORECAST is targeted at business departments, which often belong to a group of companies. Company-wide financial results plans (balance sheet, P&L, cash flow) at subsidiary or group level can be created. Therefore, IDL.FORECAST provides a predefined financial (planning) data model with intertwined business rules, based on relational data storage. Thanks to the tight integration of IDL.FORECAST with IDL.KONSIS, it is possible to immediately consolidate plan data (or actuals) also taking into account planned intercompany allocations. IDL.KONSIS offers comprehensive capabilities for legal consolidation (IDW PS 880 certified) including intercompany reconciliation as well as management consolidation. Extensive predefined business rules for financial management are available as standard in the solution.

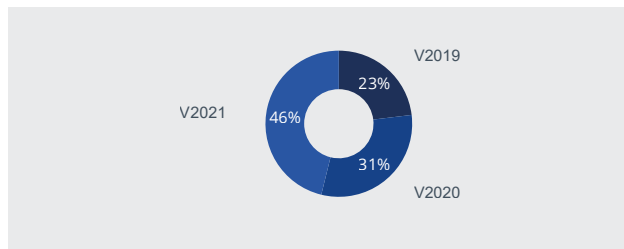
To address operational planning scenarios other than financial planning (e.g., sales or HR planning), IDL.FORECAST is complemented by IDL.DESIGNER. Operational plans, which are based on multidimensional databases (Microsoft SQL Server Analysis Services or IBM TM1), are integrated with financial plans at data level with predefined routines for data integration using ETL technologies that are available with the underlying databases (e.g., Microsoft SQL Server Integration Services, IBM TM1 Turbo Integrator). Besides its functionality for operational planning, IDL.DESIGNER is also the central component of IDL's reporting platform and rounds out the portfolio with user-friendly, web-based functions to create ad hoc and standard reports, OLAP analyses and dashboards. Its modern tile interface and Windows look and feel provide a user-friendly environment for designing individual reports and analyses with custom layouts that can be organized in a report catalog.

IDL - an insightsoftware company customer responses

This year we had 31 responses from IDL users. At the time of the survey, 46 percent of them were using version 2021, 31 percent version 2020 and 23 percent version 2019.

Versions used

n=31



THE PLANNING SURVEY 21

The Planning Survey 21 is based on findings from the world's largest and most comprehensive survey of planning software users, conducted from November 2020 to February 2021. In total, 1,422 people responded to the survey with 1,151 answering a series of detailed questions about their use of a named product. Altogether, 21 products (or groups of products) are analyzed in detail.

The Planning Survey 21 examines user feedback on planning product selection and usage across 29 criteria (KPIs) including Business Benefits, Project Success, Business Value, Recommendation, Customer Satisfaction, Customer Experience, Planning Functionality and Competitiveness.

This document contains just a selection of the headline findings for IDL - an insightsoftware company. It does not show all the KPI results and focuses mainly on the positive findings.

For more information on the survey, visit [The BI Survey website](#).



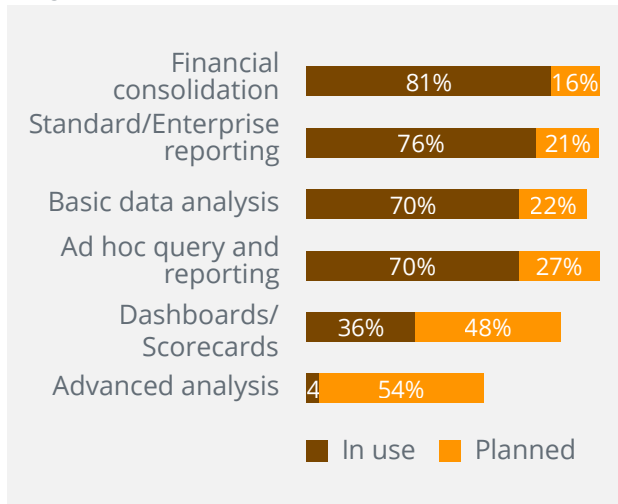
User and Use Case Demographics

BARC Comment

Besides planning, customers mainly use IDL for financial consolidation (81 percent), standard/enterprise reporting (76 percent), basic data analysis (70 percent) and ad hoc query and reporting (70 percent). 54 percent of respondents plan to use it for advanced analysis and 48 percent for dashboards/scorecards in the future. IDL targets mid-sized and large companies across all industries. 61 percent of our sample of IDL customers come from mid-sized companies (100-2,500 employees) with a median of 30 users (including 15 using planning functionality), but the mean of 61 users (34 for planning) indicates there are also some larger implementations. 57 percent of IDL users are planning users – just below the survey average of 66 percent – reflecting the fact that IDL is essentially a financial consolidation tool with complementary planning and analytics functionality.

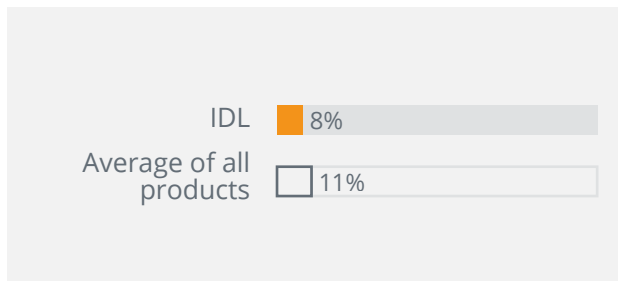
Current vs. planned use (besides planning)

n=29



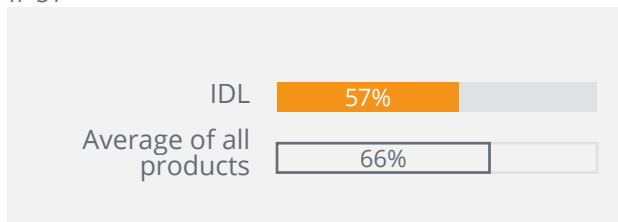
Percentage of employees using IDL

n=31



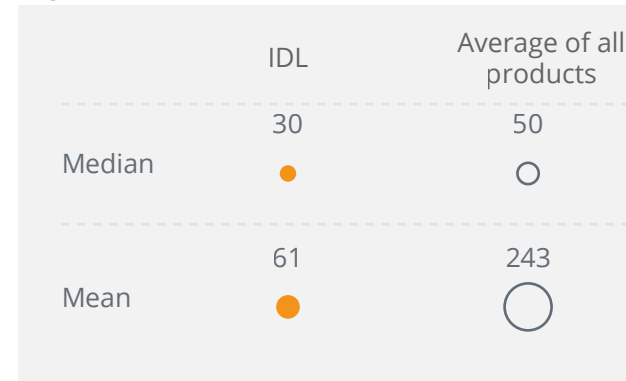
Planning users (as a percentage of all users)

n=31



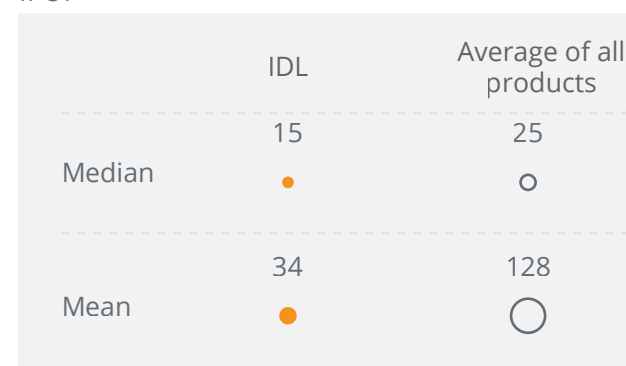
Total number of users per company

n=31



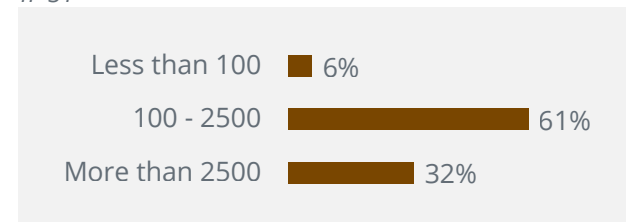
Planning users per company

n=31



Company size (employees)

n=31





Peer Groups and KPIs

The KPIs

The Planning Survey 21 provides the reader with well-designed KPI dashboards packed with concise information, which can be absorbed at a glance. The KPIs all follow these simple rules:

- Only measures that have a clear good/bad trend are used as the basis for KPIs.
- KPIs may be based on one or more measures from The Planning Survey.
- Only products with samples of at least 15 - 30 (depending on the KPI) for each of the questions that feed into the KPI are included.
- For quantitative data, KPIs are converted to a scale of 1 to 10 (worst to best).
- A linear min-max transformation is applied, which preserves the order of, and the relative distance between, products' scores.

The terms 'top-ranked' and 'leader' are used in the chart titles. 'Top-ranked' indicates first position. 'Leader' usually denotes a position in the top 25-35% of products listed in the chart.

Peer Group Classification

The Planning Survey 21 features a range of different types of planning, budgeting and forecasting products so we use peer groups to help identify competing products. The peer groups have been defined by BARC analysts using their experience and judgment, with segmentation based on the following key factors:

1. Focus – Is the product focused on and typically used for integrated corporate planning (including sales & operations planning as well as financial planning), financial performance management (including financial planning and financial consolidation) or business intelligence and analytics?
2. Specialization – Is the vendor a performance management/planning specialist or a business software generalist, offering a broader portfolio of enterprise software for a variety of business requirements?
3. Usage scenario – Is the product typically used in midsize/departmental implementations or large/enterprise-wide implementations?
4. Global presence – Does the vendor have a global reach and offer its products worldwide?

IDL - an insightsoftware company features in the following peer groups:

- Financial Performance Management Products
- Performance Management Specialists
- Midsize/Departmental Implementations

Peer Groups Overview

Integrated Corporate Planning Products: Integrated corporate planning products are focused on flexibly supporting a wide range of individual sub-plans in an integrated corporate planning approach. This not only includes sales and operations planning but also financial planning. Often, these products offer predefined planning solutions designed for particular applications (e.g., integrated financial planning, HR).

Financial Performance Management Products: Financial performance management products are often standardized applications that support use cases such as financial planning (P&L, balance sheet, cash flow) and financial consolidation. Typically, these products offer built-in financial intelligence with predefined business rules for financial management.

BI & Analytics Products: Besides planning and performance management, BI and analytics-focused products also target use cases such as reporting, dashboarding, (ad hoc) analysis and advanced analytics.

Business Software Generalists: Business software generalists have a broad product portfolio including most (or all) types of enterprise software for a variety of business requirements (e.g., ERP).

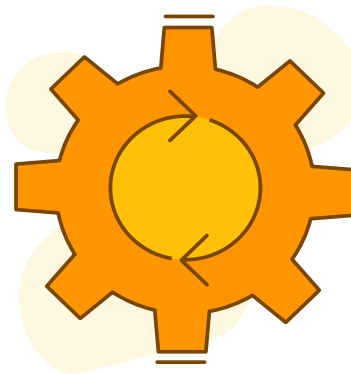
Performance Management Specialists: Performance management specialists are software vendors who focus solely on performance management and/or planning. Often, they have just one product in their portfolio.

Midsize/Departmental Implementations: Products in this peer group are typically (but not exclusively) used in small and midsize scenarios and/or departmental implementations with a moderate number of users.

Large/Enterprise-Wide Implementations: Products in this peer group are typically (but not exclusively) used in large scenarios and/or enterprise-wide implementations with a large number of users.

Global Vendors: Global vendors have a truly global sales and marketing reach. They are present worldwide, and their products are used all around the world.

Workflow

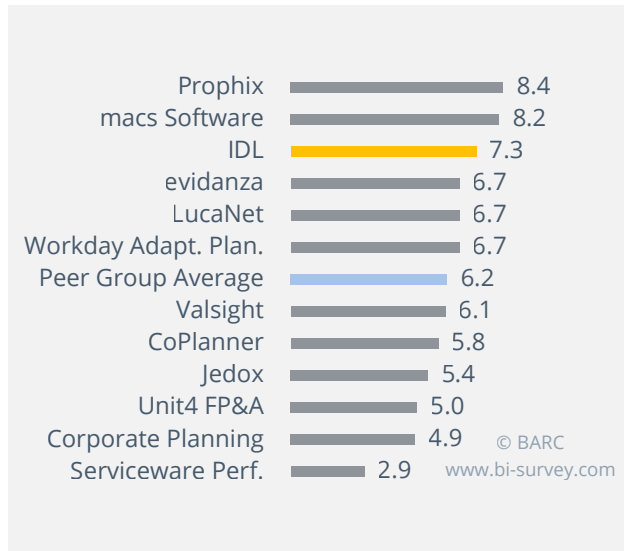


This KPI measures user ratings of the product's workflow functionality.

Workflow – Leader



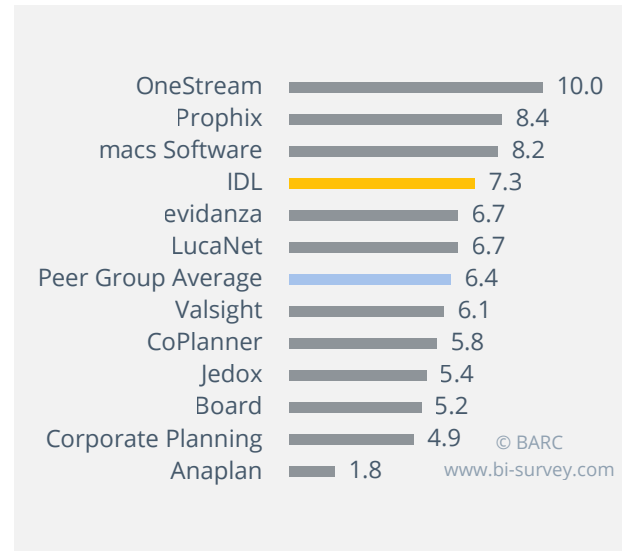
Peer Group: Midsize/Departmental Implementations



Workflow – Leader



Peer Group: Performance Management Specialists



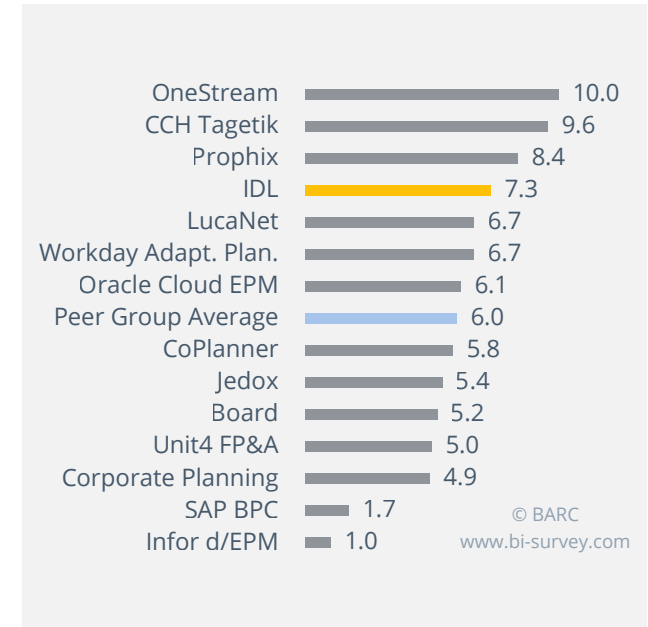
Workflow



Workflow – Leader

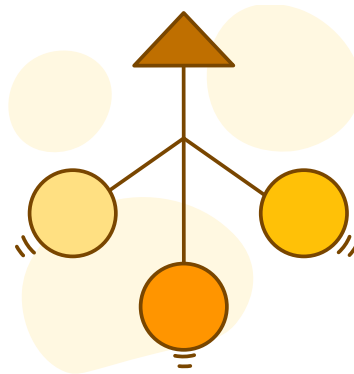


Peer Group: Financial Performance Management Products



Comprehensive workflow functionality is a core concept in IDL and – given the product’s leading ranks in all its peer groups – customers are highly satisfied with it. The platform includes all relevant workflow capabilities such as status monitoring, approval processes, notifications, commenting of workflow steps, locking and unlocking, etc. Functionality for workflow management can be helpful to control and coordinate consecutive planning activities, particularly for decentralized bottom-up planning processes with lots of planners involved (e.g., sales or costs). Workflow functionality in IDL has significantly improved in recent releases. For example, it now leverages a new UI-optimized workflow editor which enables users to describe or comment workflows, tasks and activities.

Financial Consolidation

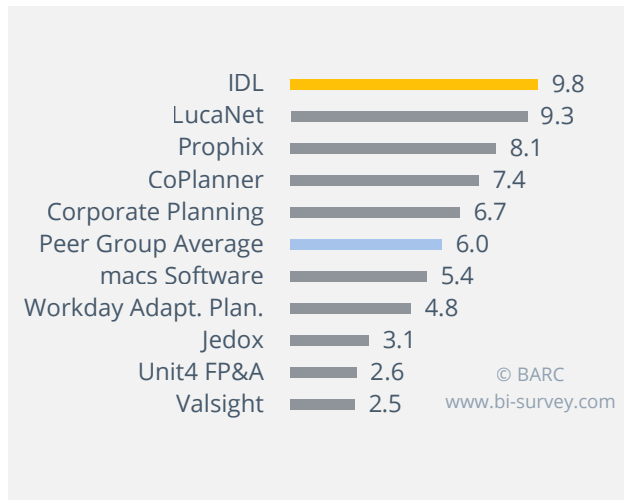


This KPI is based on how respondents rate the product's functionality to support legal consolidation (e.g., according to IFRS).

Financial Consolidation – Top-ranked



Peer Group: Midsize/Departmental Implementations



Two top ranks in the last two years for Financial Consolidation

Peer Group: Midsize/Departmental Implementations



Financial Consolidation



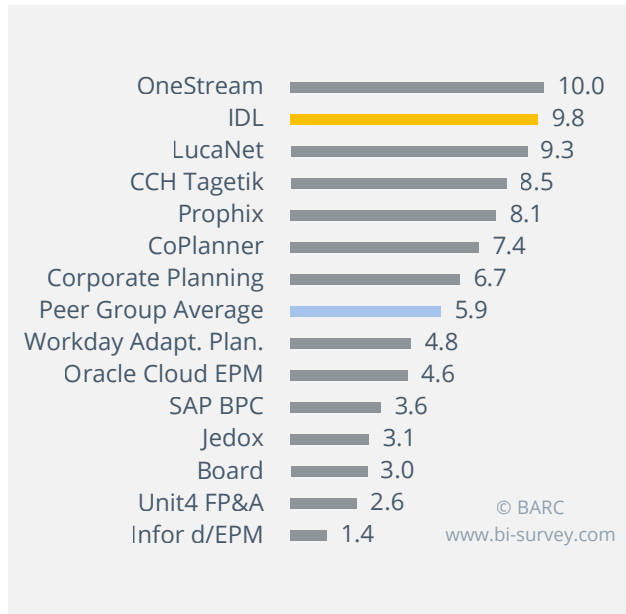
BARC Viewpoint

Functionality for financial consolidation is a core capability of IDL. 81 percent of customers in our sample use the platform for financial consolidation and 16 percent plan to do so in the future. IDL offers a business-user-friendly solution with comprehensive capabilities for legal consolidation (IDW PS 880 certified) as well as management consolidation. Extensive predefined business rules for financial management and consolidations of individual subsidiaries or at group level are available as standard in the solution. IDL provides a predefined data model with intertwined business rules for establishing a tight integration of financial consolidation and (financial) planning to create consolidated financial statements. Using the same logic, it is possible to compare planned versus actual data dynamically and also at group level. The Planning Survey results confirm that customers are highly satisfied with IDL's financial consolidation functionality, which is a key strength of the product. IDL is rated number one for *Financial Consolidation* in the *Midsize/Departmental Implementations* peer group and achieves leading ranks in its other peer groups.

Financial Consolidation – Leader



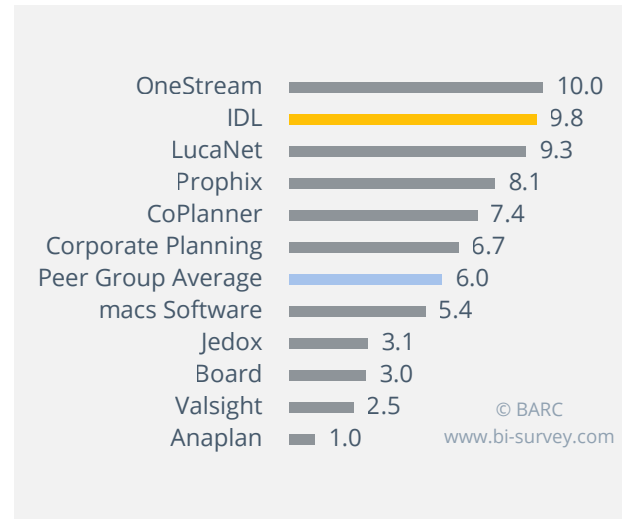
Peer Group: Financial Performance Management Products



Financial Consolidation – Leader



Peer Group: Performance Management Specialists



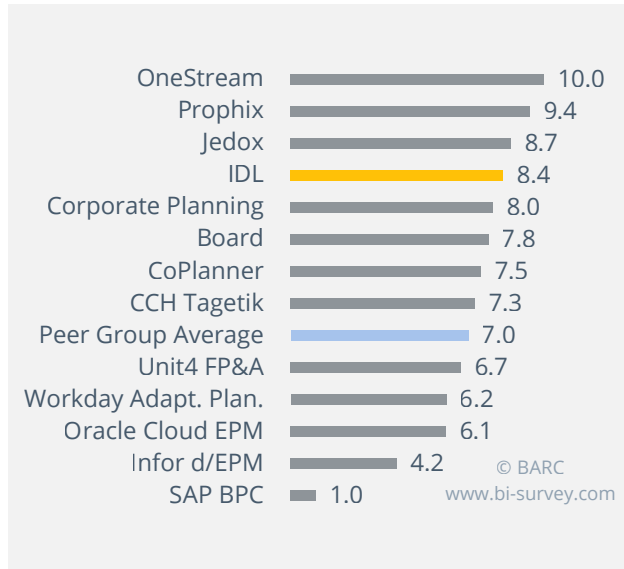
Financial Consolidation



Reporting/Analysis



This KPI measures user ratings of the product's coverage of reporting/analysis requirements.



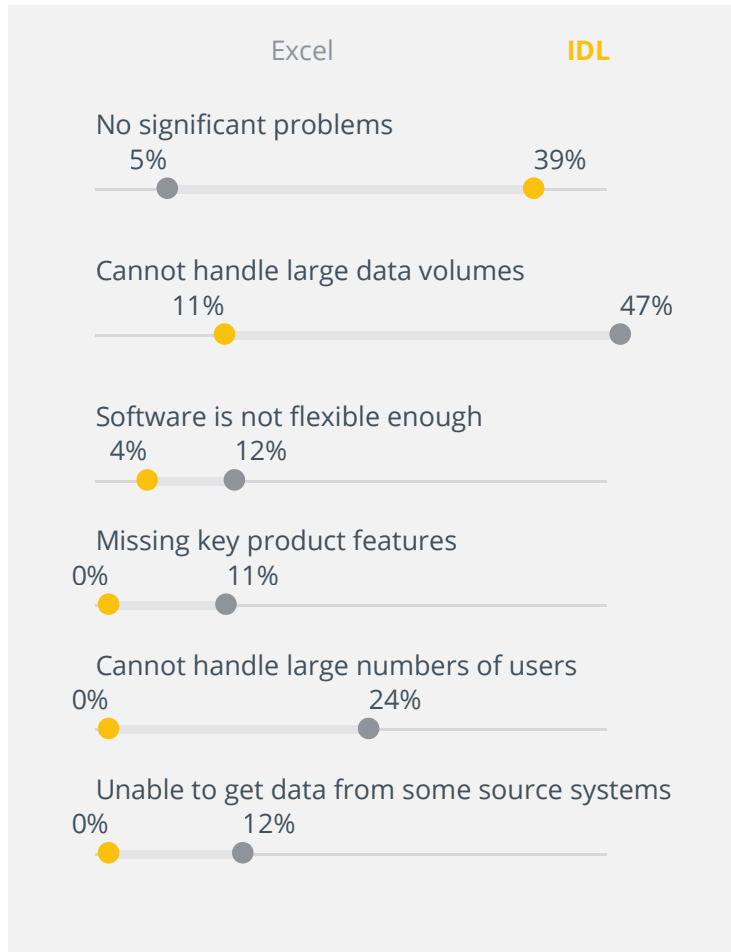
In this year’s Planning Survey, IDL is ranked as a leader for *Reporting/Analysis* in the *Financial Performance Management Products* peer group. IDL offers built-in reporting and analytics functionality for all internal and external reporting needs. IDL.DESIGNER is a user-friendly and web-based component for operational planning, ad hoc reports, OLAP analyses and dashboards. The product is a central component of the IDL reporting platform and complements the financial consolidation and financial planning modules with comprehensive functionality. Its modern tile interface and Windows look and feel provide a user-friendly environment for designing individual reports and analyses with custom layouts. Furthermore, IDL.PUBLISHER can be used to generate external business reports (disclosure management) as well as the corresponding management summaries. Additional applications for more specific reporting requirements are available such as country by country reporting (CbCR), financial reports in the European Single Electronic Format (ESEF) and e-balance filings according to the XBRL taxonomy.

IDL - an insightsoftware company vs. Excel



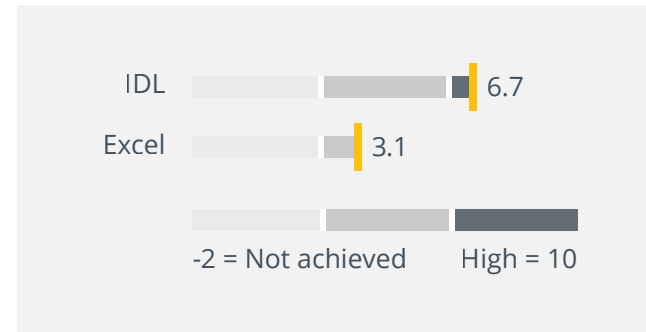
Problems encountered by IDL - an insightsoftware company and Excel users

n=28/129



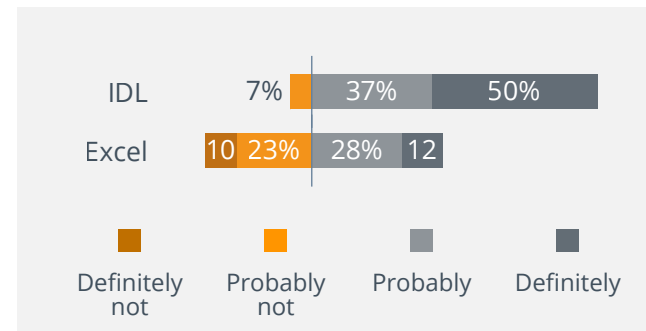
Business Benefits Index*

n=31/125



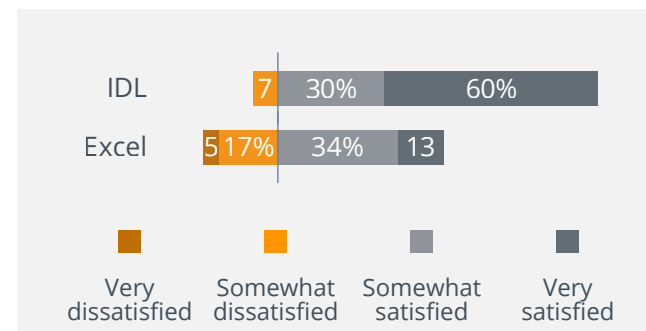
Recommendation**

n=31/126



Satisfaction level**

n=31/127



IDL vs. Excel



Year after year, BARC's Planning Survey reveals that Excel remains one of the world's most widely used products for planning and analytics. However, many users and companies are dissatisfied with it. IDL software users have far fewer complaints than Excel users. Common issues in planning projects such as missing key product features (e.g., for planning), inflexibility and handling of large numbers of users or data volumes do not seem to be a problem for IDL software users. 39 percent of customers even report having no significant problems at all with the product. Business benefits regularly achieved with IDL software (and achieved more frequently than with Excel) include increased transparency of planning, improved integration of planning with reporting/analysis, improved integration of different sub-budgets and better quality of planning results. 87 percent of IDL users say they would definitely or probably recommend their planning product to other organizations, while 90 percent of respondents are 'somewhat satisfied' or 'very satisfied' with IDL.

* For 12 potential benefits, respondents are asked to indicate the level of achievement, if any, with five levels. We use a weighted scoring system, from -2 to 10, to derive a composite score - the Business Benefits Index (BBI).

** Neutral category not shown

BARC (Business Application Research Center) is one of Europe's leading analyst firms for business software, focusing on the areas of data, business intelligence (BI) and analytics, enterprise content management (ECM), customer relationship management (CRM) and enterprise resource planning (ERP).

Our passion is to help organizations become digital companies of tomorrow. We do this by using technology to rethink the world, trusting data-based decisions and optimizing and digitalizing processes. It's about finding the right tools and using them in a way that gives your company the best possible advantage.

This unique blend of knowledge, exchange of information and independence distinguishes our services in the areas of research, events and consulting.

Research

Our BARC studies are based on internal market research, software tests and analyst comments, giving you the security to make the right decisions. Our independent research brings market developments into clear focus, puts software and vendors through their paces and gives users a place to express their opinions.

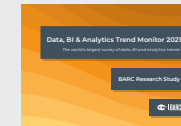
Events

Decision-makers and IT industry leaders come together at BARC events. BARC seminars in small groups, online webinars and conferences with more than 1,000 participants annually all offer inspiration and interactivity. Through exchange with peers and an overview of current trends and market developments, you will receive new impetus to drive your business forward.

Consulting

In confidential expert workshops, coaching and in-house consultations, we transform the needs of your company into future-proof decisions. We provide you with successful, holistic concepts that enable you to use the right information correctly. Our project support covers all stages of the successful use of software.

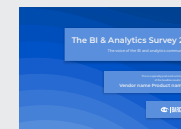
Other Surveys



The BARC [Data, BI and Analytics Trend Monitor 2021](#) reflects on the trends currently driving the BI and data management market from a user perspective. We asked close to 2,300 users, consultants and vendors for their views on the most important BI and analytics trends.



The BARC survey [The Future of Reporting](#) investigates how and why companies should modernize their reporting and is based on a survey of 600 participants from 58 countries across a range of industries. [Download here.](#)



[The BI & Analytics Survey 21](#) is the world's largest survey of business intelligence software users. Based on a sample of over 3,000 responses, it offers an unsurpassed level of user feedback on 33 leading products. Find out more at www.bi-survey.com

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