

# The Planning Survey 20

The voice of the planning software user community

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

**Jedox**





## KPI results

**6** top-rankings  
and  
**30** leading  
positions

*in 4 different  
peer groups.*

THE PLANNING  
SURVEY 20



## Project length

**80%**

of surveyed users have  
Jedox implemented  
in **less than 6 months**.

*\* Compared to 61% for the average  
planning tool.*

THE PLANNING  
SURVEY 20



## Self-service

**71%**

of surveyed users  
use Jedox for **self-service  
planning** in business  
departments.\*

*\* Compared to 56% for the average  
planning tool.*

THE PLANNING  
SURVEY 20



## Price-performance

**69%**

of surveyed users  
chose Jedox because  
of its **price-performance  
ratio**.\*

*\* Compared to 38% for the average  
planning tool.*

THE PLANNING  
SURVEY 20



## Data integration

**90%**

of surveyed users rate  
Jedox's functionality  
for **data integration** as  
**excellent** or **good**.\*

*\* Compared to 76% for the average  
planning tool.*

THE PLANNING  
SURVEY 20



## Flexibility

**50%**

of surveyed users  
chose Jedox because  
of its **flexibility**.\*

*\* Compared to 48% for the average  
planning tool.*

THE PLANNING  
SURVEY 20



## Peer Group Global Vendors

**1.** Top-ranked in

Project length  
Business value  
Data integration  
Self-service

.....

**Leader in**

Business benefits  
Project success  
Price-to-value  
Recommendation  
Planning functionality  
Reporting/analysis  
Flexibility  
Customer experience

## Peer Group BI-focused Products

**1.** Top-ranked in

Project length

.....

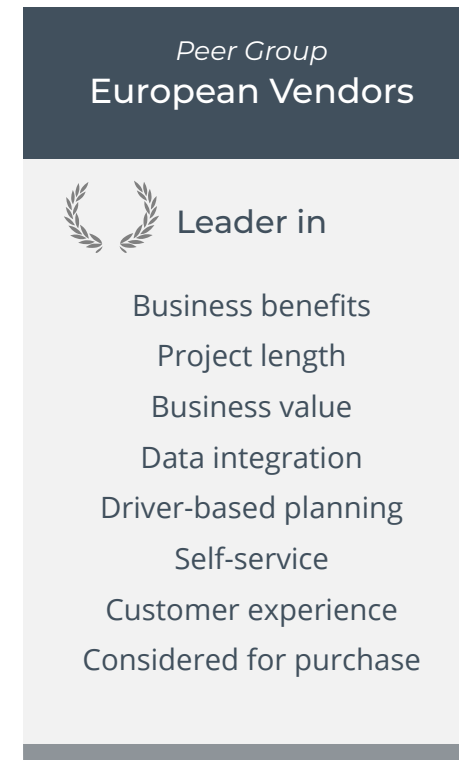
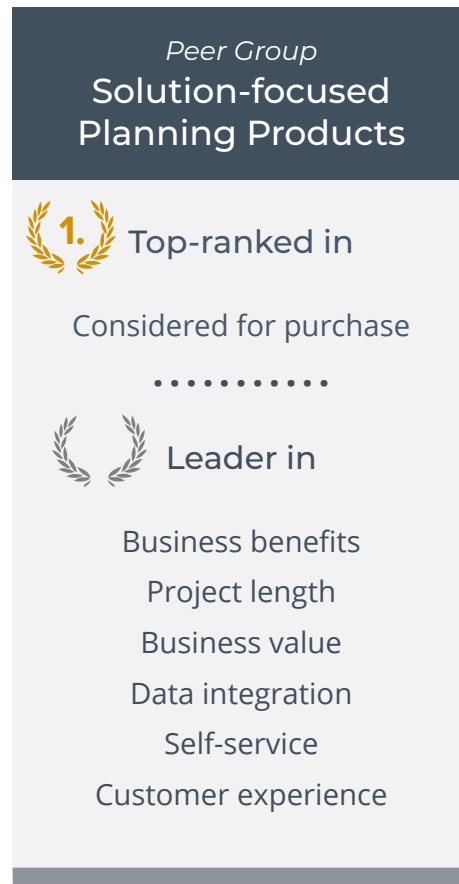
**Leader in**

Business benefits  
Business value  
Data integration  
Planning functionality  
Driver-based planning  
Self-service  
Customer experience  
Considered for purchase

## **Summary**

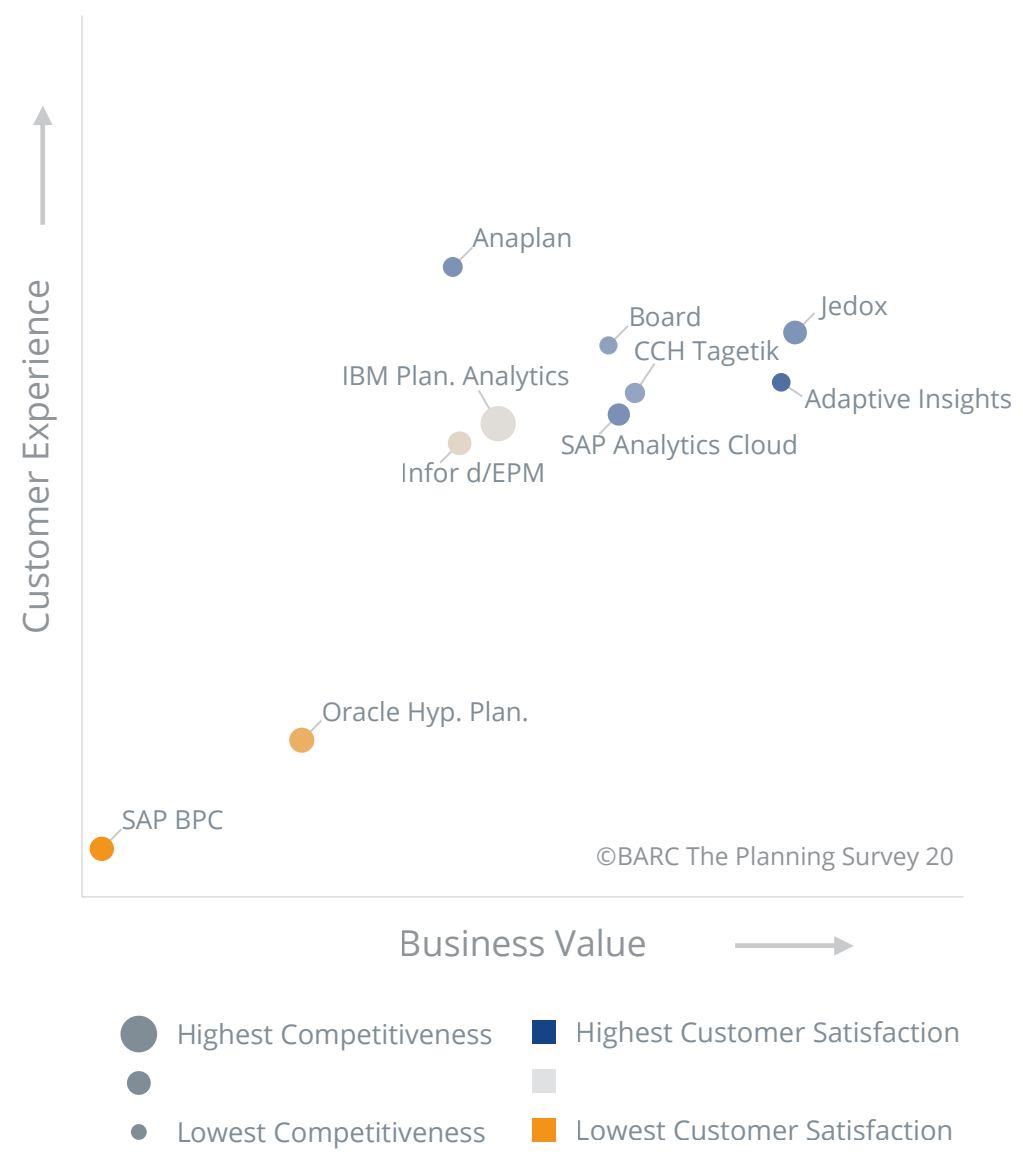
With six top ranks and 30 leading positions in four different peer groups, Jedox once again achieves an excellent set of results in this year's Planning Survey. Convincing ratings in numerous important KPIs help to consolidate its position as a market-leading planning and analytics vendor.

Companies can benefit from using Jedox in terms of improved integration of planning with reporting/analysis, increased transparency of planning and reduced resource requirements for planning. Overall, these benefits lead for many customers to a better quality of planning results. 88 percent of Jedox users say they would definitely or probably recommend their planning product to other organizations. This result is a great indicator of customer satisfaction with the vendor and its product.



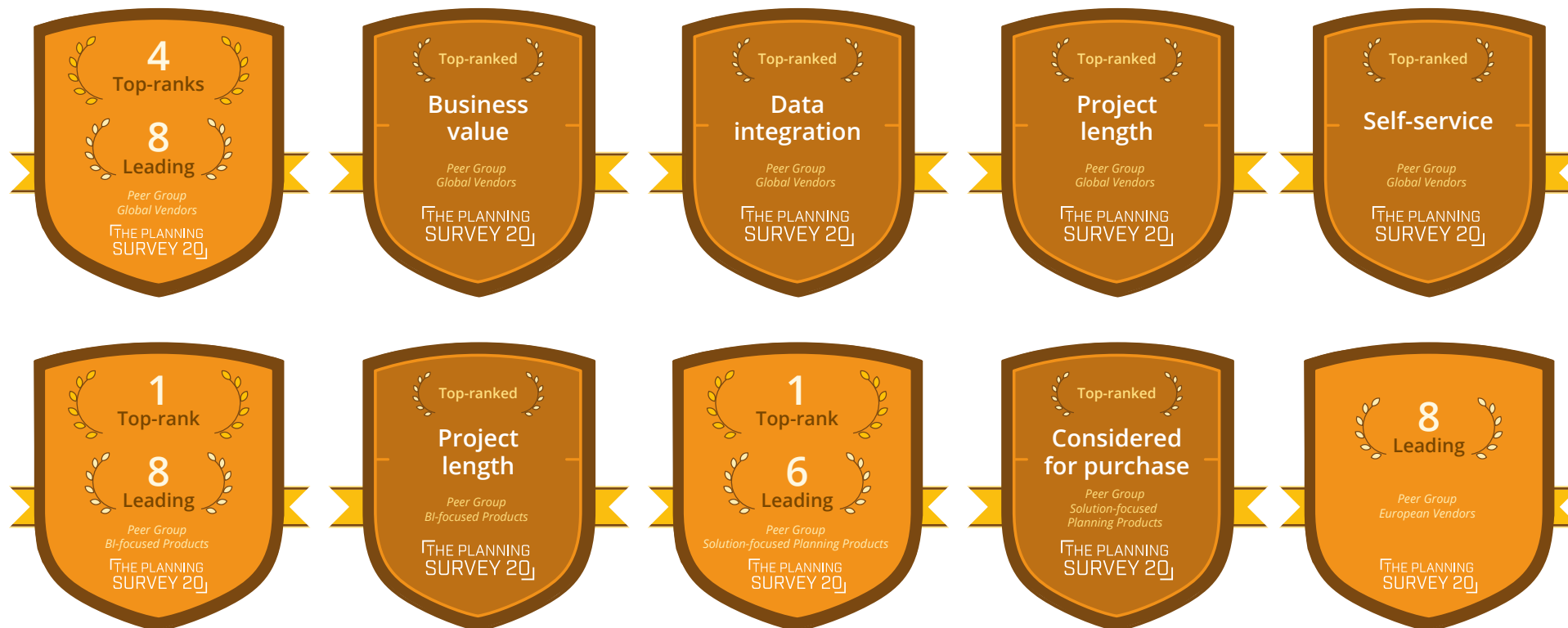


# The Planning Survey 20 *User Review Matrix* - Peer group: Global Vendors





## The Planning Survey 20 Jedox top ranks



## Customer Quotes

Excellent planning solution, very easy to use and implement.

THE PLANNING  
SURVEY 20

Member of a cross-departmental BI team,  
banking and finance, 100-2,500 employees

I'm an advocate of the product. It is an end-users tool rather than an IT program which gives it great advantages of agility and speed to adapt to changing environments. It is simplistic yet comprehensive.

THE PLANNING  
SURVEY 20

Line of business employee, retail/wholesale/  
trade, >2,500 employees

Jedox has made a real difference to the management of the company. The ability to manage stock across multiple warehouses is saving money. We have built most of the reporting ourselves but have used an indepent reseller to help develop the budget and complex ETL processes to enable us to report on stock.

THE PLANNING  
SURVEY 20

Consultant, retail/wholesale/trade, 100-2,500 employees

Excellent software that meets my needs, works well with other software. I'm very pleased.

THE PLANNING  
SURVEY 20

IT employee, IT, >2,500 employees

Tool provides a lot of flexibility. Provides the ability to start small and grow according to the necessities of the customer. Easy to use.

THE PLANNING  
SURVEY 20

Consultant, media/publishing, 100-2,500 employees



## Jedox overview

Established in 2002, Jedox has grown into a team of more than 270 employees. The vendor serves over 2,500 clients in 140 countries worldwide through its headquarters in Freiburg, Germany, its seven international offices, and a network of 250 partners and global alliances. Besides implementers, the vendor has extended its technology partner network to include Qlik, Microsoft (Azure, Office, Power BI) and Salesforce.

The company's flagship product is Jedox, a flexible CPM and analytics platform with planning, reporting, analysis and financial consolidation capabilities. The solution, which offers both an Excel client and web interface as front ends, was first launched in 2004. The Excel add-in is a classic spreadsheet interface combining well-known Excel functions with additional Jedox features. The web client has a browser-based spreadsheet interface – a type of Excel on the web – with additional functions. The underlying philosophy of Jedox Suite is to extend the familiar Excel environment with specific analytics functionality. The software can be run on-premises, in the cloud and also in hybrid scenarios (e.g., development on-premises and production in the cloud).

The product is aimed at business power users who create individual CPM applications. With the company's own in-memory database, users

have the advantage of a flexible multidimensional experience while staying in their familiar spreadsheet environment. However, tasks such as integrating data into Jedox OLAP Server using the vendor's web-based Jedox Integrator product may require IT support. Jedox applications can be published to large groups of users through Jedox Web and Jedox Mobile. Both centralized top-down and decentralized bottom-up planning scenarios can be implemented with Jedox. Furthermore, Jedox provides predefined content for different topics and industries created itself or by partners. This content is built on best practices and is available in Jedox's own marketplace, which is integrated in the product.

Besides CPM functionality, Jedox offers good ad hoc reporting and OLAP analysis capabilities for business users. Reporting generally takes place in Excel using Excel's own functionality, or in Jedox Web, which offers additional options for dynamic reporting and report distribution. Users can create reports, analyses and dashboards on the web from a spreadsheet interface closely resembling the functionality, look and feel of Excel.

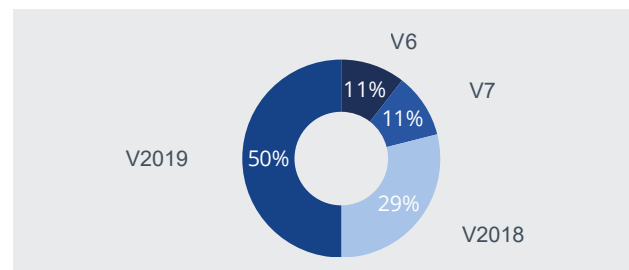
In recent releases, the vendor has strengthened its cloud offering and has introduced its first automated AI features (Alsissted™ Planning), which are a strategic initiative for Jedox. Alsissted™ Planning is technically leveraging machine learning functionality in Microsoft Azure as a web service using Jedox Integrator to support planners in tasks such as predictive forecasting and pattern recognition (e.g., for clustering and classification).

### Jedox customer responses

This year we had 49 responses from Jedox users. At the time of the survey, 50 percent of them were using version 2019, 29 percent version 2018, 11 percent version 7 and 11 percent were using version 6.

### Versions used

n=49



## Introduction



### THE PLANNING SURVEY 20

The Planning Survey 20 is based on findings from the world's largest and most comprehensive survey of planning software users, conducted from November 2019 to February 2020. In total, 1,406 people responded to the survey with 1,211 answering a series of detailed questions about their use of a named product. Altogether, 23 products (or groups of products) are analyzed in detail.

The Planning Survey 20 examines user feedback on planning product selection and usage across 30 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 **Jedox**. 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](#).





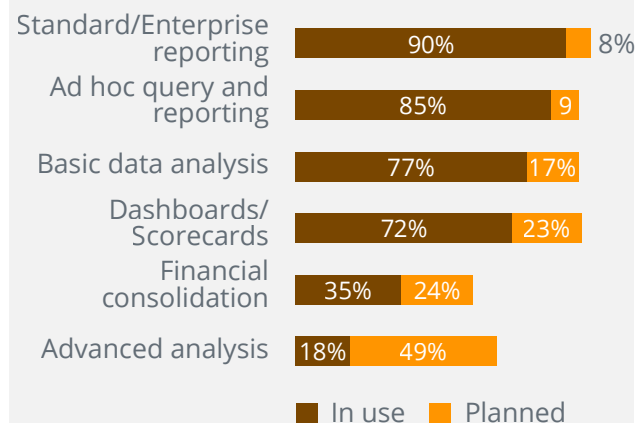
## User and Use Case Demographics

### BARC Comment

Besides planning, customers mainly use Jedox today for standard/enterprise reporting (90 percent), ad hoc query and reporting (85 percent), basic data analysis (77 percent) and dashboards/scorecards (72 percent). 49 percent of respondents plan to use it for advanced analysis in the future. Jedox targets companies of all sizes across all industries. 49 percent of our sample of Jedox customers come from mid-sized companies (100-2,500 employees) with a median of 48 users (including 25 using planning functionality), but the mean of 130 users (73 for planning) indicates there are also several larger implementations. 56 percent of Jedox users are planning users – just below the survey average of 65 percent – reflecting the fact that Jedox is essentially an integrated tool with strong planning as well as analytics functionality.

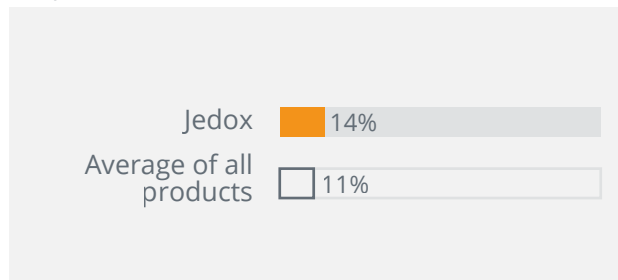
### Current vs. planned use (besides planning)

n=48



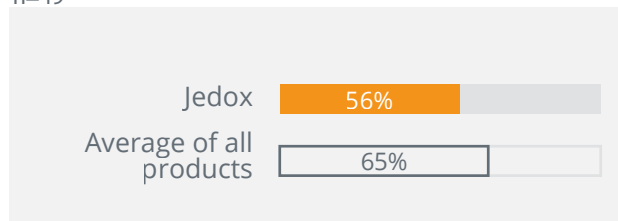
### Percentage of employees using Jedox

n=49



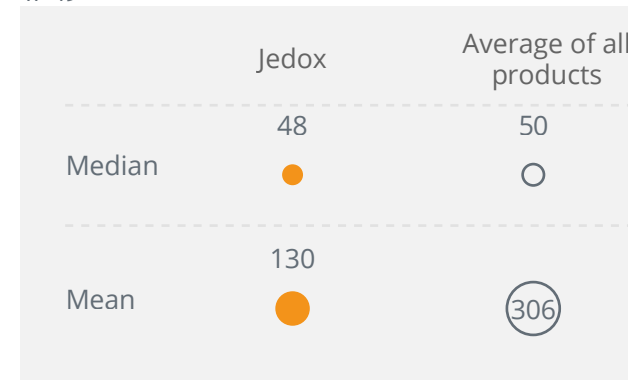
### Planning users (as a percentage of all users)

n=49



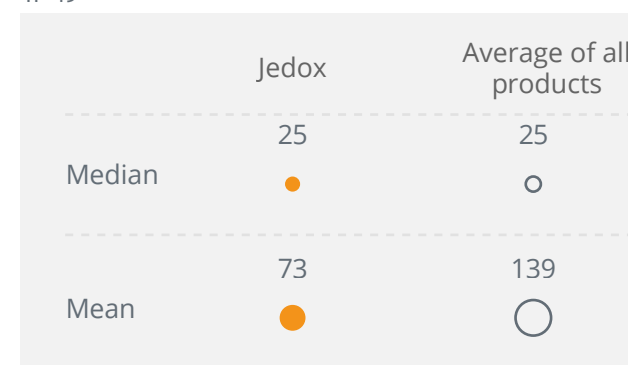
### Total number of users per company

n=49



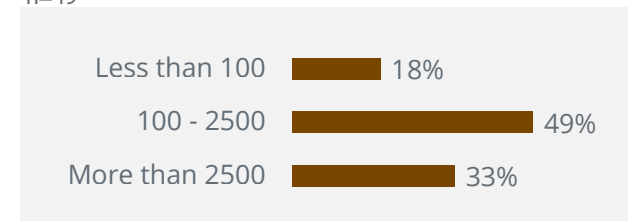
### Planning users per company

n=49



### Company size (employees)

n=49





## Peer Groups and KPIs

### The KPIs

The Planning Survey 20 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 20 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. Category of planning product – Is the product focused on flexibly implementing completely individual planning requirements, on predefined planning solutions for particular topics or industries, or on supporting financial corporate management within companies?
2. Specialization – Is the vendor a performance management/planning specialist or does it offer a broader portfolio of enterprise software for a variety of business requirements?
3. Geographical reach – Geographical reach – Does the vendor have a truly global reach or does it do the vast majority of its business in a particular region?
4. Focus – Is the product focused on planning and performance management only or also on business intelligence?

Jedox features in the following peer groups:

- Solution-focused Planning Products
- Global Vendors
- European Vendors
- BI-focused Products

### Peer Groups Overview

**Flexible Planning Platforms:** Flexible planning platforms are most suitable for developing and implementing bespoke planning solutions to meet a unique set of requirements. They usually offer limited predefined content.

**Solution-focused Planning Products:** Solution-focused planning products are usually based on, or supplemented by, predefined planning solutions designed for particular applications (e.g., integrated financial planning, HR) or industries (e.g., energy, manufacturing).

**Financial Performance Management Products:** Financial performance management products are standardized applications that support use cases such as financial planning (P&L, balance sheet, cash flow), consolidation and financial reporting.

**Enterprise Software Vendors:** Enterprise software vendors have a broad portfolio including most (or all) types of business software.

**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.

**European Vendors:** European vendors are headquartered in Europe and do the majority of their business there.

**BI-focused Products:** Besides planning and performance management, BI-focused products target use cases such as standard reporting, ad hoc reporting, analysis, advanced analytics and dashboarding.

**North American Vendors:** North American vendors are headquartered in North America and do the majority of their business there.

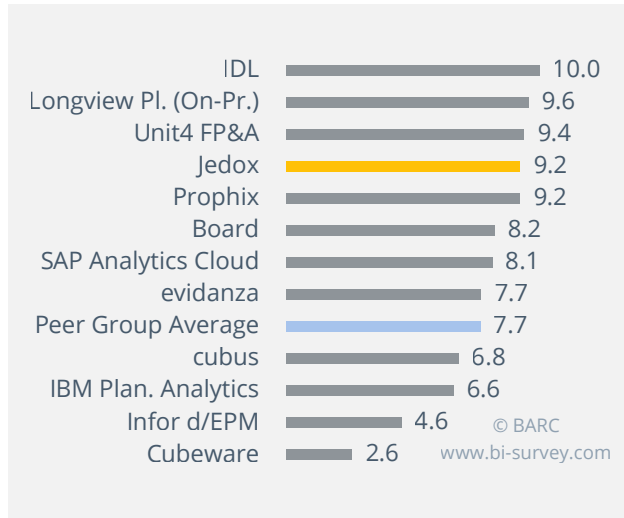
# Business benefits



This KPI is based on the achievement level of a variety of business benefits.

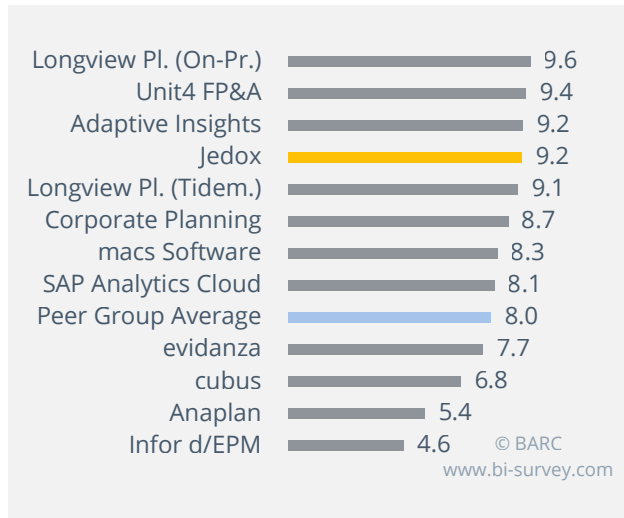
## Business benefits – Leader

Peer Group: BI-focused Products



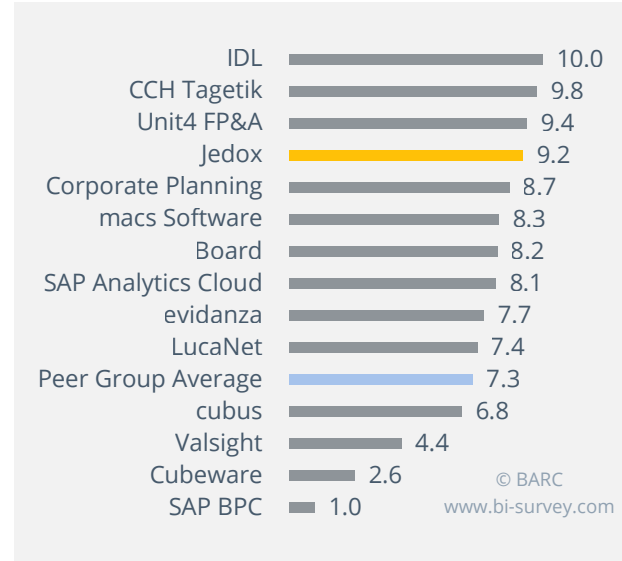
## Business benefits – Leader

Peer Group: Solution-focused Planning Products



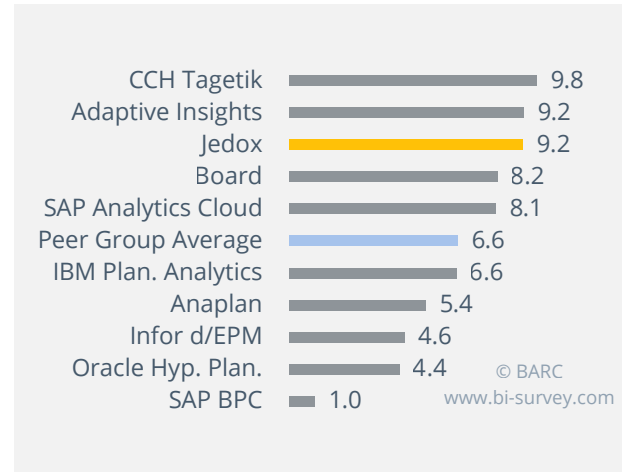
## Business benefits – Leader

Peer Group: European Vendors



## Business benefits – Leader

Peer Group: Global Vendors



## Business benefits



'Business benefits' measures the achievement level of a variety of business benefits through the use of a planning product. This year's Planning Survey results show that many customers have been able to achieve benefits from using Jedox's flexible, integrated planning and analytics product. Business benefits such as improved integration of planning with reporting/analysis, increased transparency of planning, reduced resource requirements for planning and reduced planning complexity are achieved by an above-average proportion of Jedox users compared to other planning products. Overall, these benefits lead for many customers to a better quality of planning results. Jedox is among the leaders for 'Business benefits' in all of its peer groups.

# Project success

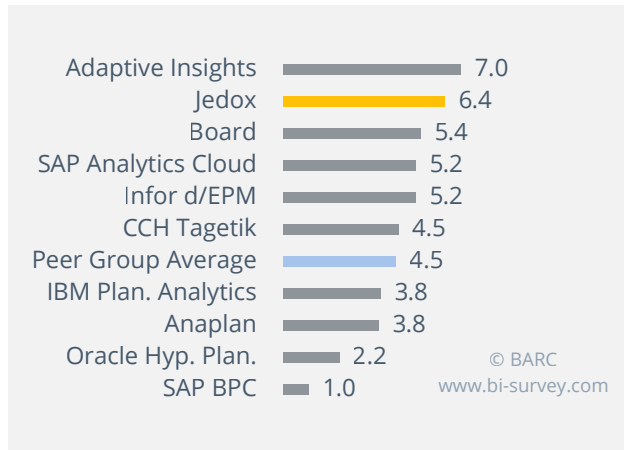


The 'Project success' KPI is based on the implementation satisfaction level and the frequency of projects completed on time and on budget.

## Project success – Leader



Peer Group: Global Vendors



BARC

Viewpoint

Project success



According to customers, projects with Jedox are often successful. The level of implementation satisfaction and the frequency of projects completed on time and on budget with Jedox are high. Project goals defined at the outset are often reached. Jedox is a leader for 'Project success' in the 'Global Vendors' peer group. Customers confirm that the availability of people skilled in implementing and using Jedox is a prominent reason why they choose the product. Successful projects are an important prerequisite for customer satisfaction and the business value a product can create.

# Project length

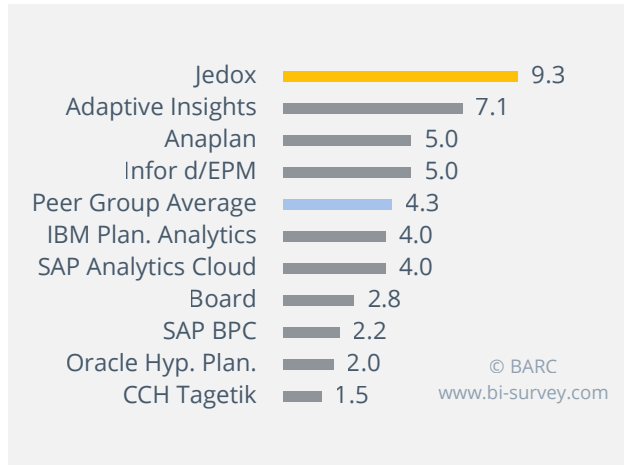


This KPI is based on how quickly the product is implemented.

## Project length – Top-ranked



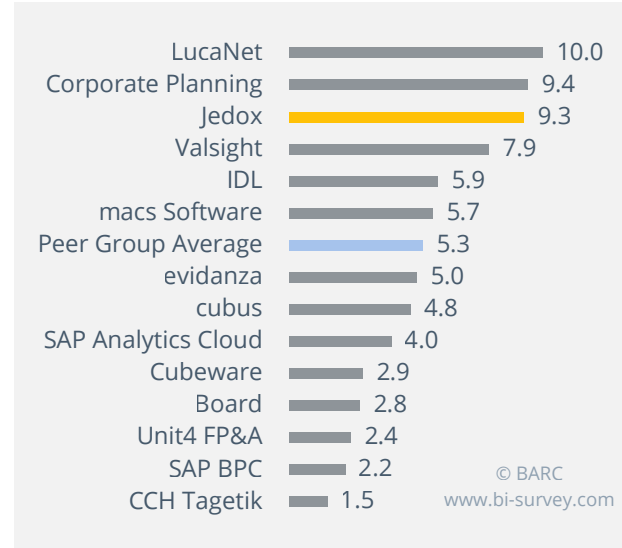
Peer Group: Global Vendors



## Project length – Leader



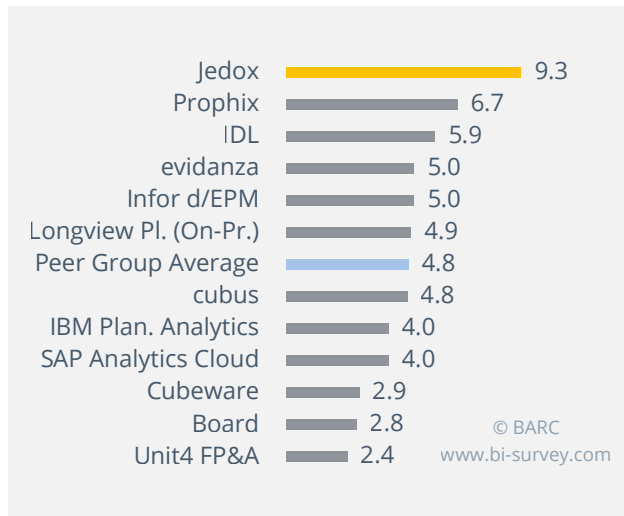
Peer Group: European Vendors



## Project length – Top-ranked



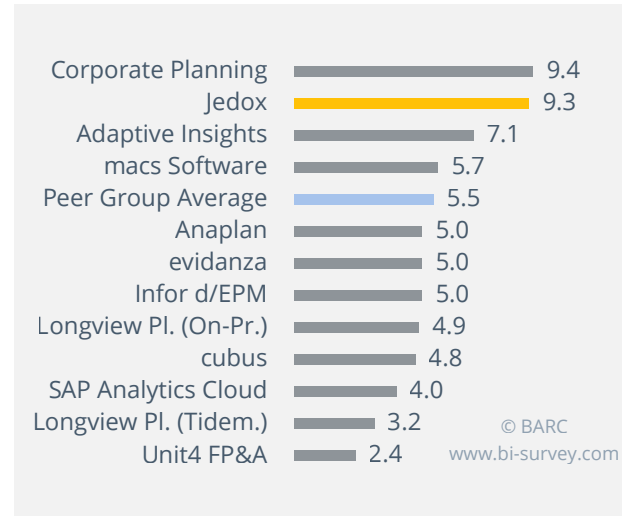
Peer Group: BI-focused Products



## Project length – Leader



Peer Group: Solution-focused Planning Products



## Project length



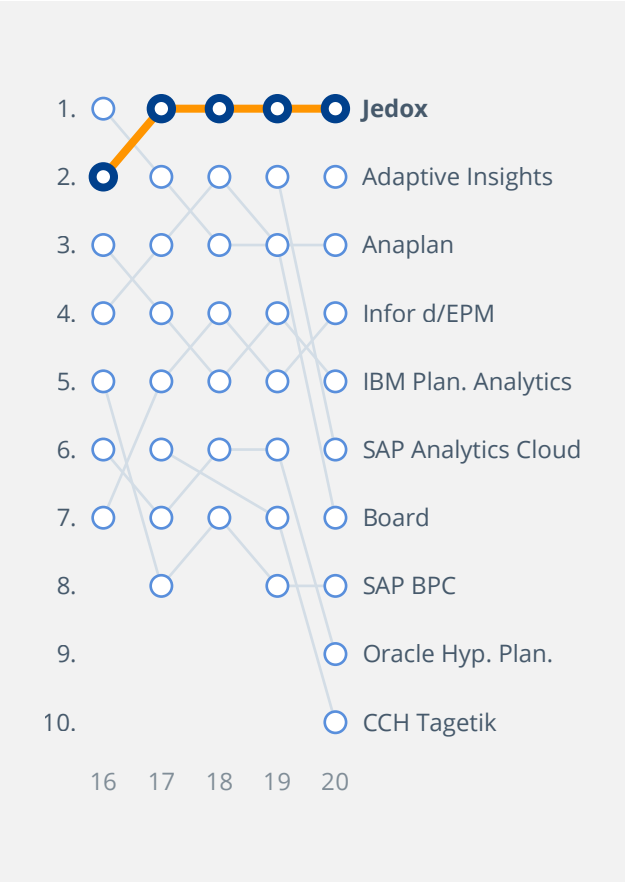
Viewpoint

Customers are very happy with the amount of time spent on their implementation projects. Consequently, Jedox is ranked top for 'Project length' in two of its peer groups, continuing its run of consistently outstanding results from previous years. Projects with Jedox are usually quick in comparison to many of its local and global competitors. Jedox targets companies of all sizes across all industries. However, the product is typically used in smaller, mid-sized and departmental scenarios where business requirements are often straightforward with relatively small data volumes and numbers of users involved. This might be one reason why projects with Jedox are usually quite short. Another reason is Jedox's marketplace offering with pre-built, adaptable software content, which has been extended in recent years. These predefined applications may also help customers to take advantage of proven best practices and speed up their projects, especially in the early stages.



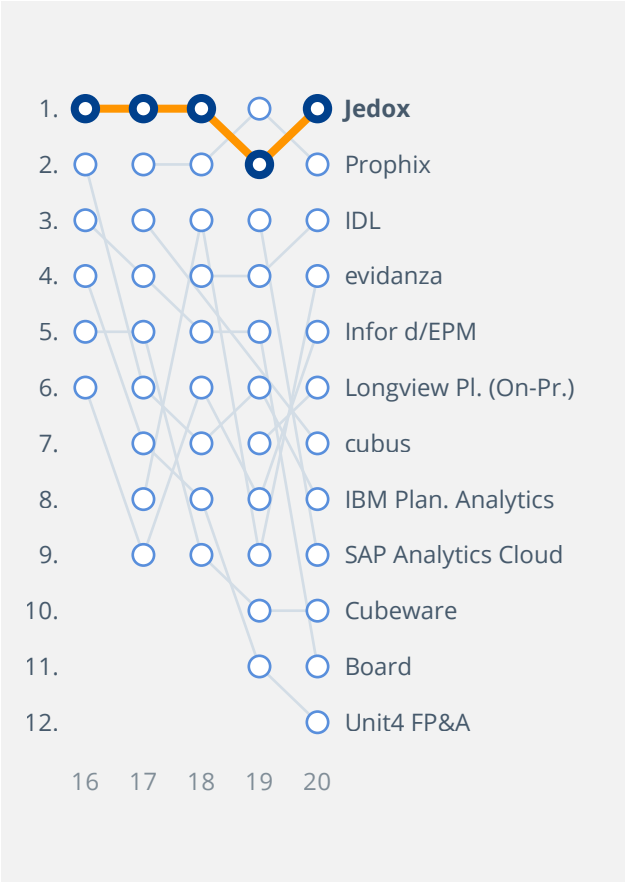
Consistently outstanding in project length

Peer Group: Global Vendors



Consistently outstanding in project length

Peer Group: BI-focused Products

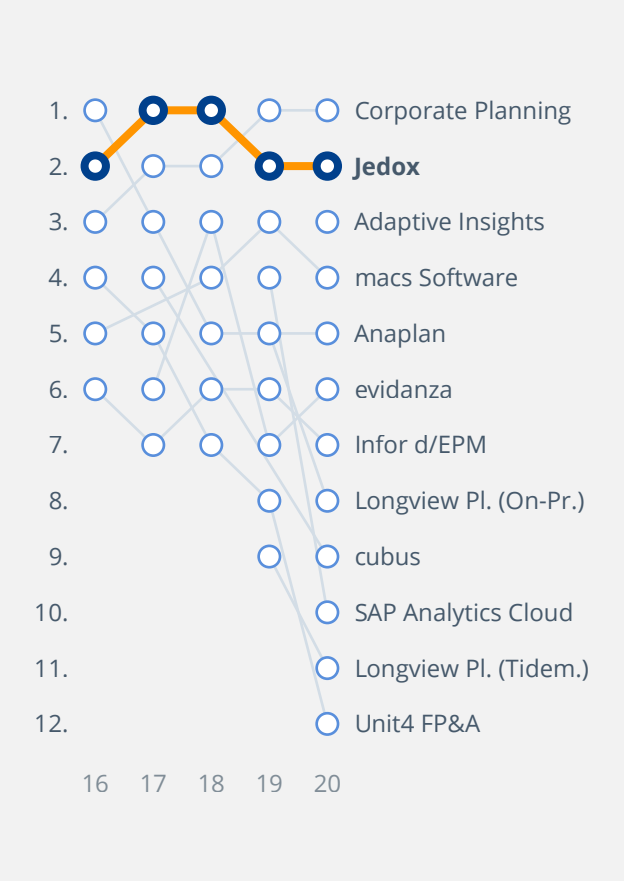


Project length

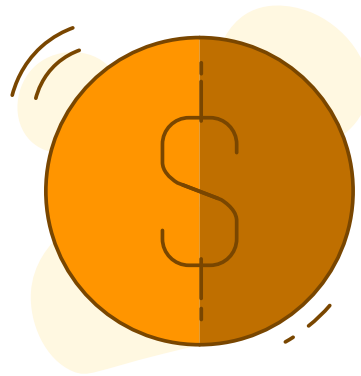


Consistently outstanding in project length

Peer Group: Solution-focused Planning Products



# Business value

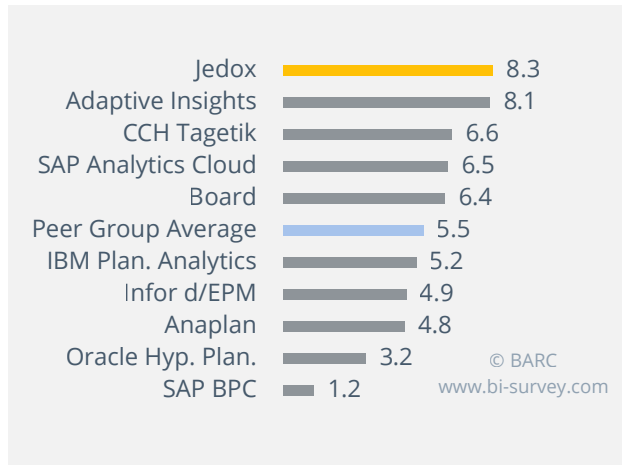


This KPI combines the 'Business benefits', 'Project success' and 'Project length' KPIs.

## Business value – Top-ranked



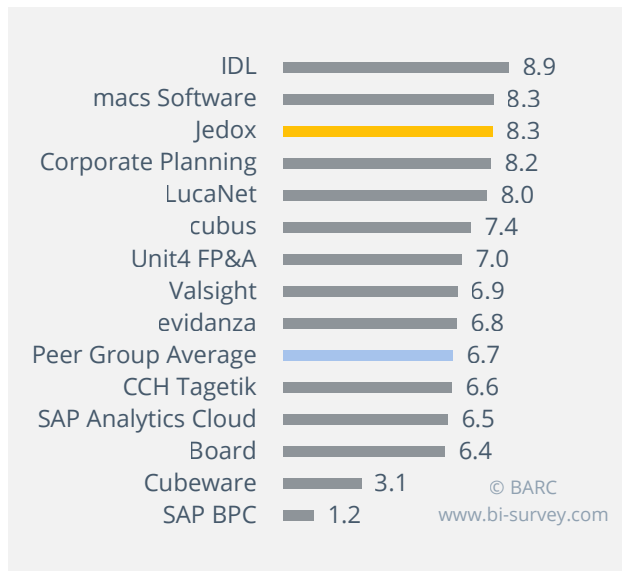
Peer Group: Global Vendors



## Business value – Leader



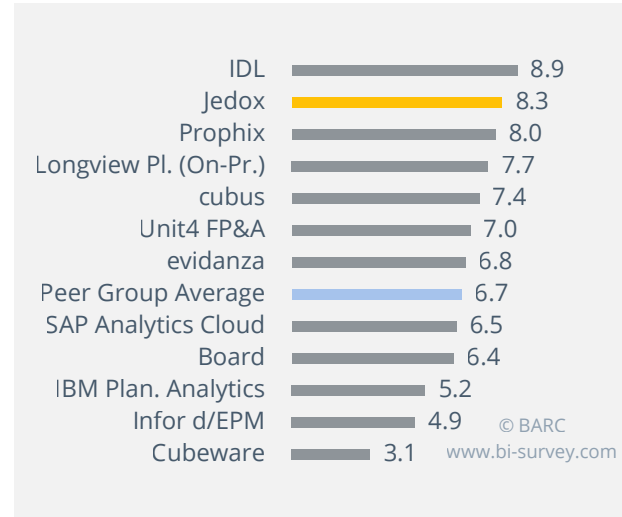
Peer Group: European Vendors



## Business value – Leader



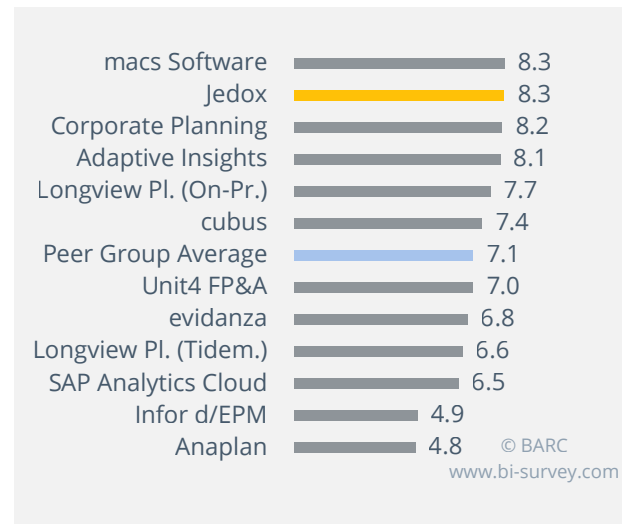
Peer Group: BI-focused Products



## Business value – Leader



Peer Group: Solution-focused Planning Products



## Business value

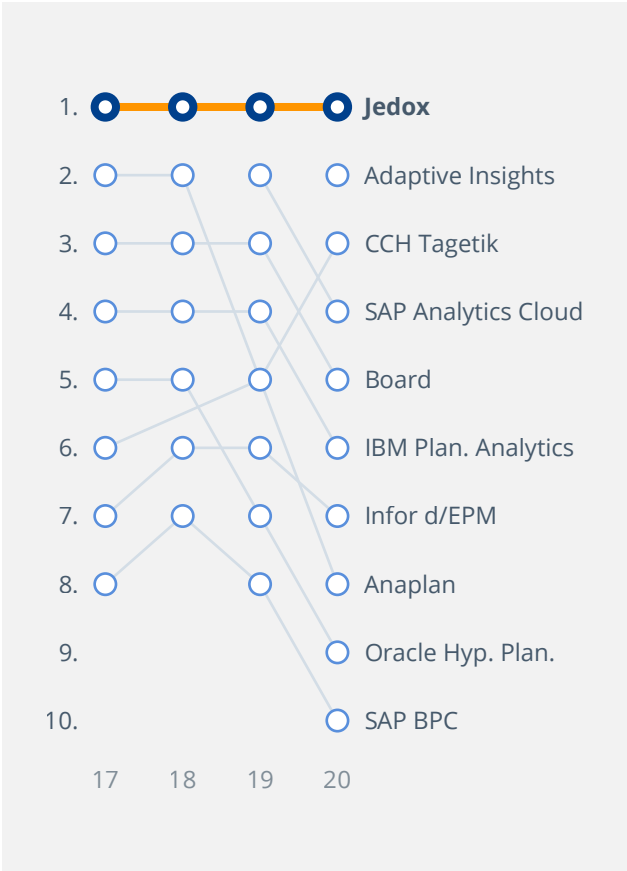


Viewpoint

'Business value' aggregates the 'Business benefits', 'Project success' and 'Project length' KPIs. Many companies say they benefit from using Jedox and its comprehensive corporate performance management functionality for planning, reporting, analysis and financial consolidation. Business benefits such as improved integration of planning with reporting/analysis, increased transparency of planning, reduced resource requirements for planning and reduced planning complexity are achieved by an above-average proportion of Jedox users compared to other planning products. Overall, these benefits lead for many customers to a better quality of planning results. Furthermore, the level of implementation satisfaction and the frequency of projects completed on time and on budget with Jedox are high. Project goals defined at the outset are often reached, and projects with Jedox are usually quick in comparison to many of its local and global competitors. Jedox is the highest ranked product for 'Business value' in the 'Global Vendors' peer group and achieves three leading positions in its other peer groups.

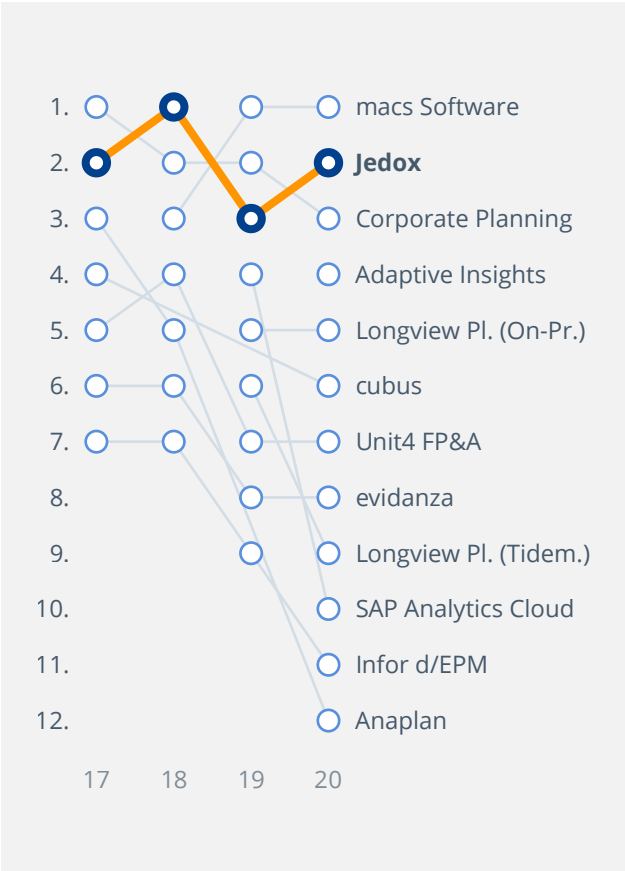
# Consistently top-ranked in business value

Peer Group: Global Vendors

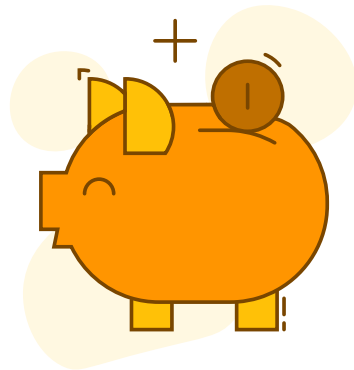


# Consistently outstanding in business value

Peer Group: Solution-focused Planning Products



# Price-to-value & Recommendation

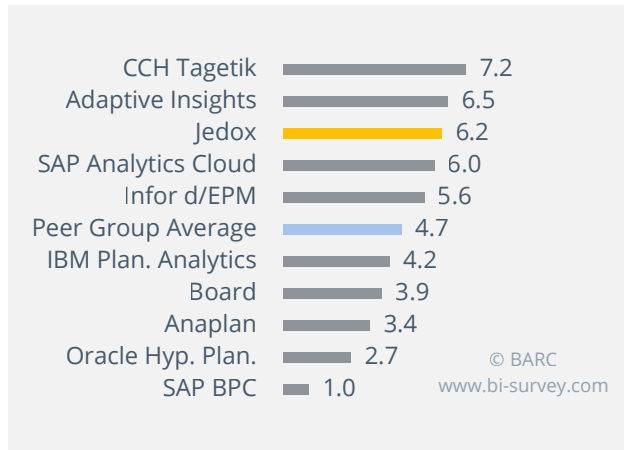


The 'Price-to-value' KPI is based on how users rate their BI tool in terms of price-to-value ratio.

The 'Recommendation' KPI is based on the proportion of users that say they would recommend the product to others.

## Price-to-value – Leader

Peer Group: Global Vendors



BARC

Viewpoint

## Price-to-value



For many companies, price-to-value ratio is an important factor in the decision to buy a planning product. Jedox is considered a leader in 'Price-to-value' in the 'Global Vendors' peer group. In fact, 'Price-performance ratio' has been the number one reason why customers buy Jedox for some years. The product is considered to be attractively priced, offering good value and comprehensive functionality to address a variety of planning and analytics use cases. When choosing Jedox, customers can opt to run it on-premises, in the cloud and also in hybrid scenarios (e.g., development on-premises and production in the cloud). Jedox is licensed using a subscription model based on the number of named users and user roles.



## Recommendation

88 percent of Jedox users say they would definitely or probably recommend their planning product to other organizations. This result is a great indicator of customer satisfaction with the vendor and its product. 88 percent of respondents are 'somewhat satisfied' or 'very satisfied' with Jedox, a major reason behind its high recommendation rate. Recommendation and success stories are tremendously important for vendors to gain visibility and to be considered for purchase in software selection processes more often. The results of this year's Planning Survey clearly show that customers are satisfied with Jedox as their planning tool and the vendor therefore achieves a leading rank for 'Recommendation' in the 'Global Vendors' peer group.

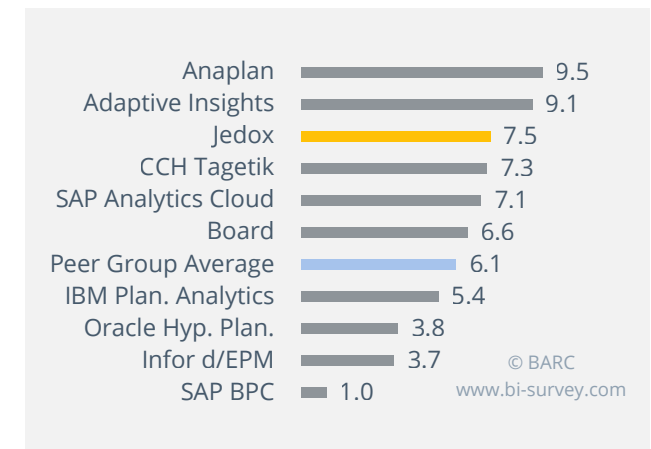


BARC

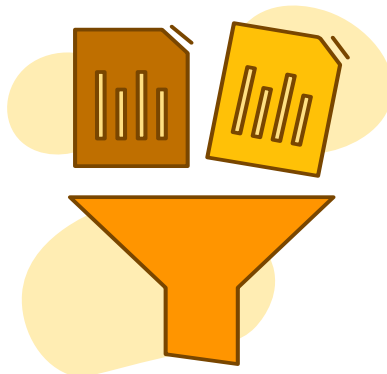
Viewpoint

## Recommendation – Leader

Peer Group: Global Vendors



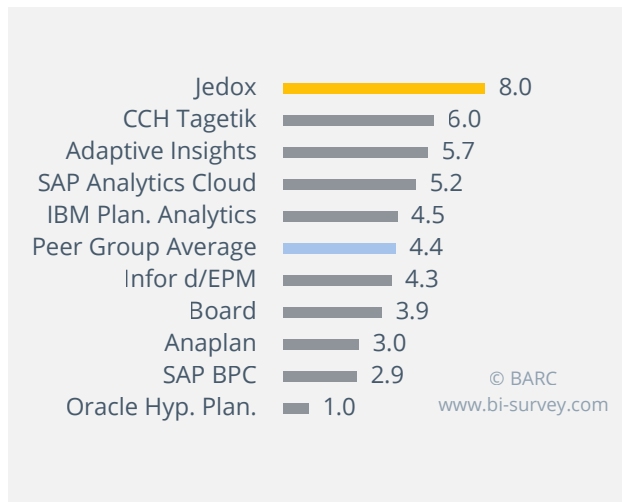
# Data integration



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

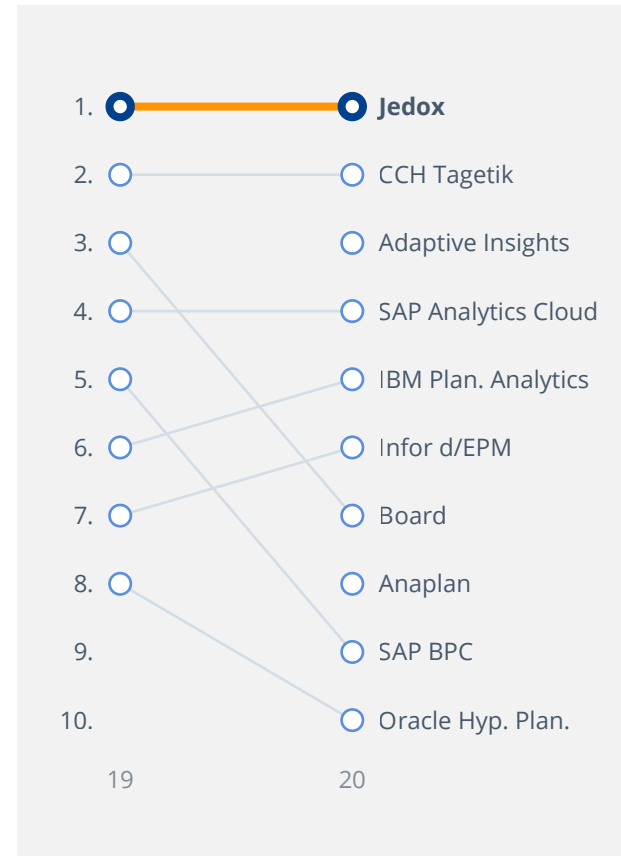
## Data integration – Top-ranked

Peer Group: Global Vendors



## Two top-ranks in the last two years for data integration

Peer Group: Global Vendors



## Data integration



Viewpoint

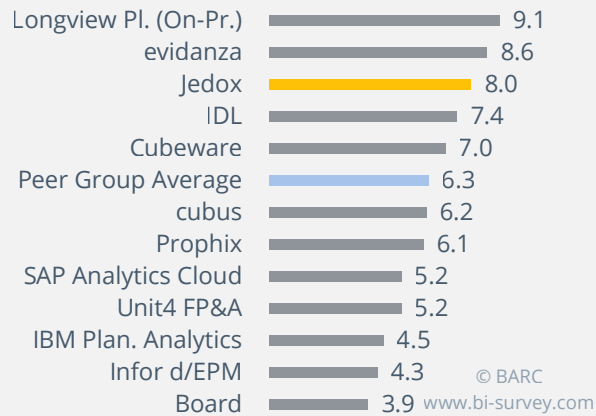
Continuous integration of data from operational source systems (e.g., ERP) in a defined data model is important. This is true when implementing planning products but it is also an ongoing requirement to ensure consistent views on data. Jedox has its own web-based ETL product called Jedox Integrator to access data in source systems and transfer it to Jedox OLAP Server, the vendor's multidimensional database. Jedox Integrator works with all common cloud and on-premises data sources and provides over 50 out-of-the-box connectors (e.g., SAP, Salesforce, popular third-party business intelligence and analytics tools) as well as full extract, transform and load (ETL) capabilities. Moreover, it supports a rich set of languages, such as the statistical language R, which is a basic functionality for using, for example, Jedox's Alsissted™ Planning feature, which technically leverages machine learning functionality in Microsoft Azure as a web service using Jedox Integrator. This year, Jedox is ranked top for 'Data integration' in the 'Global Vendors' peer group and achieves three additional leading positions in its other peer groups.



## Data integration – Leader



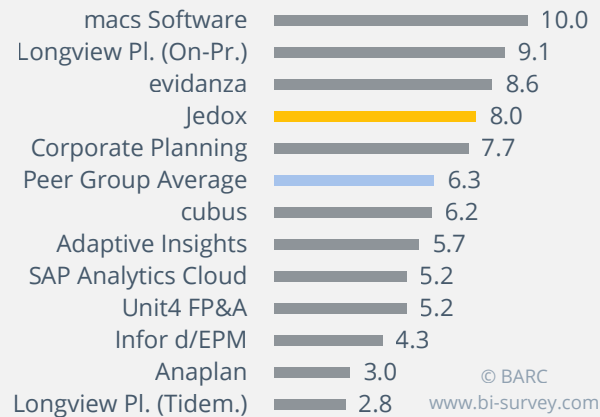
Peer Group: BI-focused Products



## Data integration – Leader



Peer Group: Solution-focused Planning Products



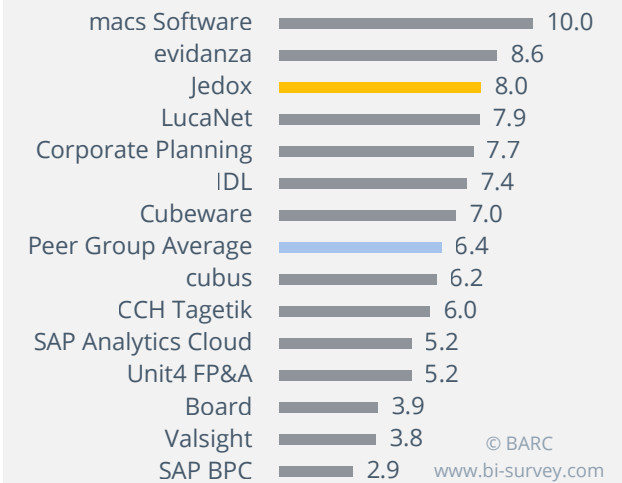
## Data integration



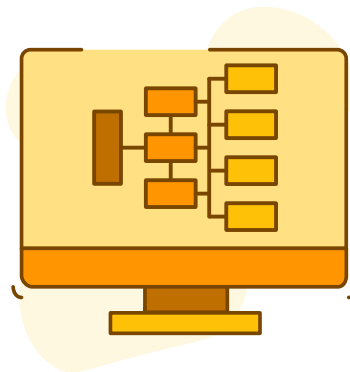
## Data integration – Leader



Peer Group: European Vendors



# Planning functionality

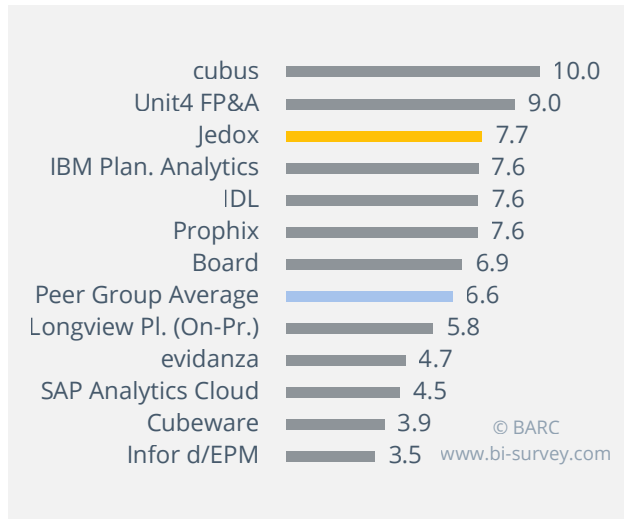


This KPI measures user ratings of the product's coverage of planning specific requirements.

## Planning functionality – Leader



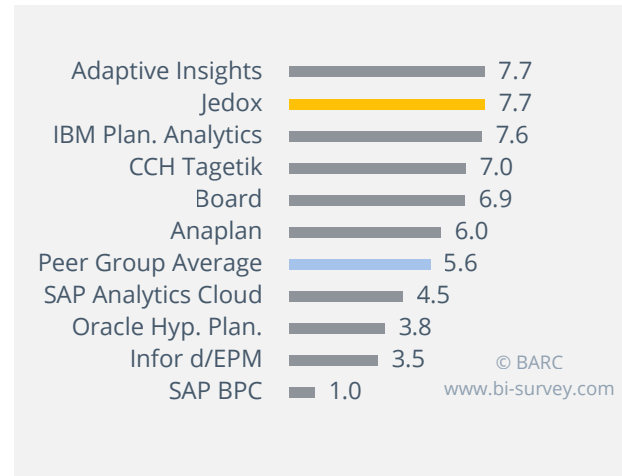
Peer Group: BI-focused Products



## Planning functionality – Leader



Peer Group: Global Vendors

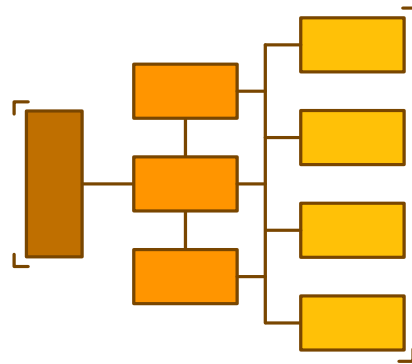


## Planning functionality



Planning, budgeting and forecasting functionality is at the core of Jedox's product offering. 'Good coverage of planning specific requirements' is therefore a prominent reason why companies choose Jedox. The product is essentially an integrated planning and analytics tool with strong planning and forecasting as well as reporting, analysis and financial consolidation functionality. Jedox is aimed at business power users, who create individual planning and analytics applications in a familiar spreadsheet environment based on the vendor's own multidimensional in-memory database. Using Jedox, customers can implement centralized top-down planning, decentralized bottom-up planning and a combination of both approaches in a flexible manner. The product's flexible development environment allows customers to address various planning topics on one common platform, with different aggregation levels (e.g., strategic as well as operational planning) for an integrated enterprise planning approach (including financial planning). In this year's Planning Survey, Jedox is among the leaders for 'Planning functionality' in the 'BI-focused Products' and 'Global Vendors' peer groups.

# Driver-based planning

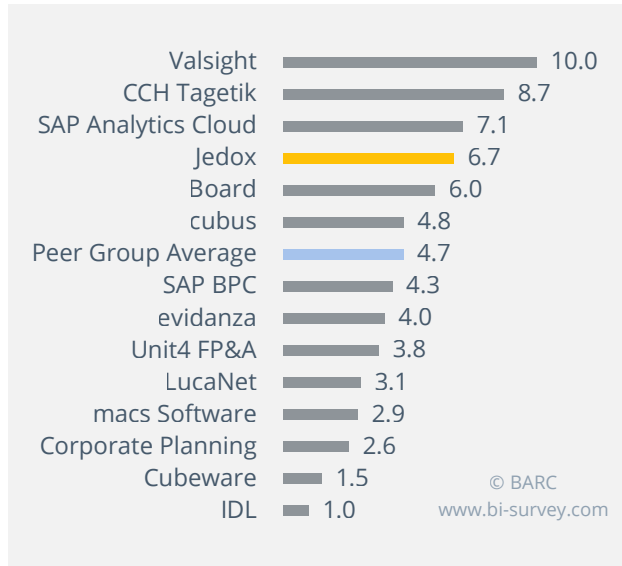


This KPI is based on the proportion of respondents' organizations currently performing driver-based planning with their product.

## Driver-based planning – Leader



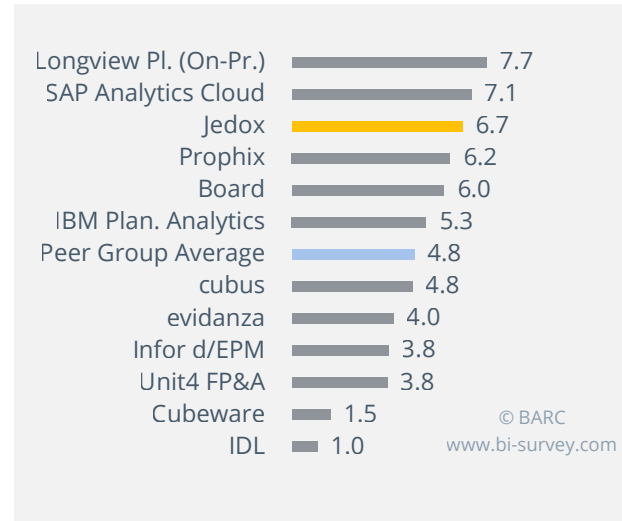
Peer Group: European Vendors



## Driver-based planning – Leader



Peer Group: BI-focused Products

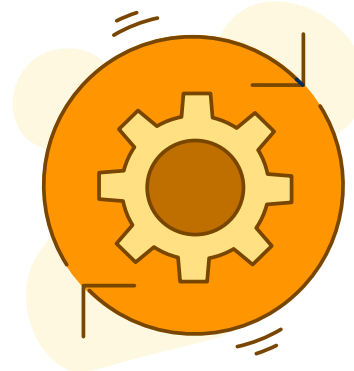


## Driver-based planning



Besides pre-built software content in the Jedox Marketplace, the product is essentially a flexible development environment for creating individual planning and forecasting applications in a business-user-friendly manner. According to the survey results, a high proportion of customers use the product for driver-based planning. Planning based on the key influencing factors of the business, considering cause-effect correlations in so-called value driver trees is clearly a frequent use case for the product. Consequently, Jedox achieves leading ranks for 'Driver-based planning' in the 'European Vendors' and 'BI-focused Products' peer groups. Jedox customers seem to be satisfied with the options and flexibility the product provides to implement concepts such as driver-based planning.

# Reporting/analysis & Flexibility

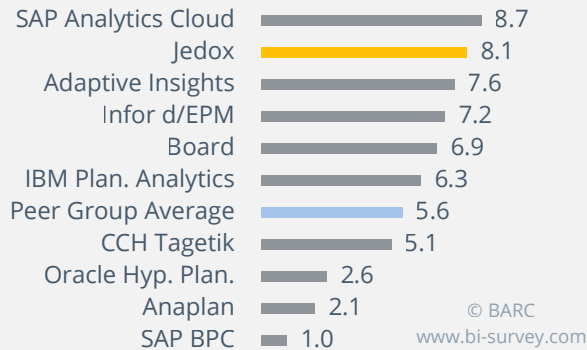


The 'Reporting/analysis' KPI measures user ratings of the product's coverage of reporting/analysis requirements.

The 'Flexibility' KPI is based on how often the product was chosen for its flexibility, and on the frequency of complaints about user flexibility post-implementation.

## Reporting/analysis – Leader

Peer Group: Global Vendors



BARC

Viewpoint

Reporting/analysis



The flexible integration of planning and budgeting capabilities with functionality for reporting, dashboarding and analysis is a core principle in Jedox. Good options for ad hoc reporting and OLAP analysis for end users are available in the product. Reporting and analysis generally take place in Excel using Excel's own functionality, or in Jedox Web, which offers additional options, for example, for dynamic reporting and report distribution. Users can create reports, analyses and dashboards on the web from a spreadsheet interface closely resembling the functionality, look and feel of Excel. Both clients offer standard Excel charts for visualizing information as well as SUCCESS charts, which are compliant with the International Business Communication Standards (HICHERT®/IBCS) for reporting. Jedox achieves a leading rank for 'Reporting/analysis' in the 'Global Vendors' peer group in this year's Planning Survey.



## Flexibility



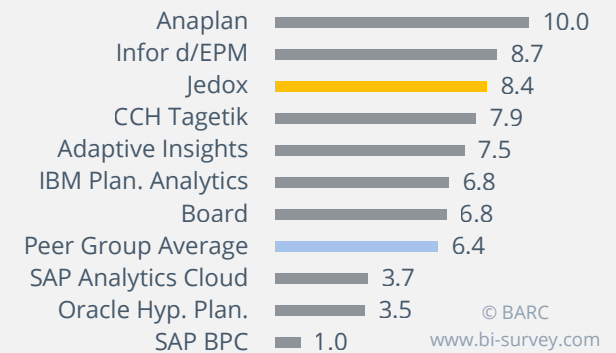
BARC

Viewpoint

Flexibility for different planning approaches (top-down, bottom-up, combination of both), planning topics (e.g., sales, production, resources, financials) and aggregation levels (e.g., strategic as well as operational planning) is a key strength of Jedox. Rightly, 'Flexibility of the software' is one of the main reasons why companies choose the spreadsheet-based development environment as their planning and forecasting tool. Jedox achieves a leading rank for 'Flexibility' in the 'Global Vendors' peer group. The product and its multidimensional database allow for a highly individual modeling of the underlying planning model and calculations. Combined with the vendor's new solution-focused positioning and marketplace with predefined planning and CPM applications, companies get the best of both worlds: a flexible development environment to implement tailor-made applications as well as predefined solutions, which can be used as a starting point when implementing individual use cases.

## Flexibility – Leader

Peer Group: Global Vendors



# Self-service

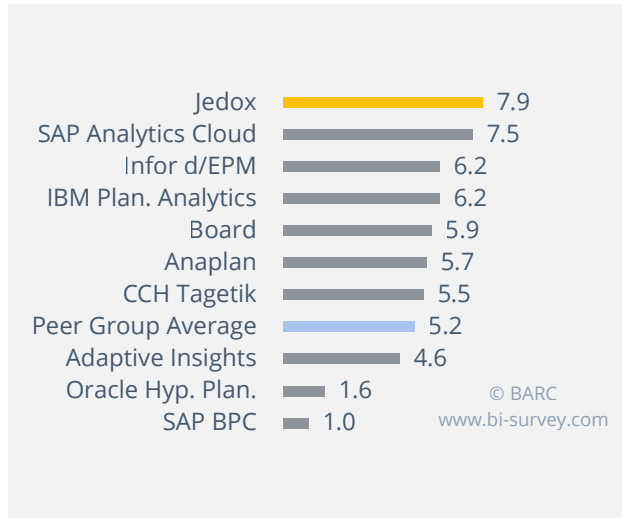


This KPI is based on the proportion of respondents' organizations currently using self-service planning features with their product.



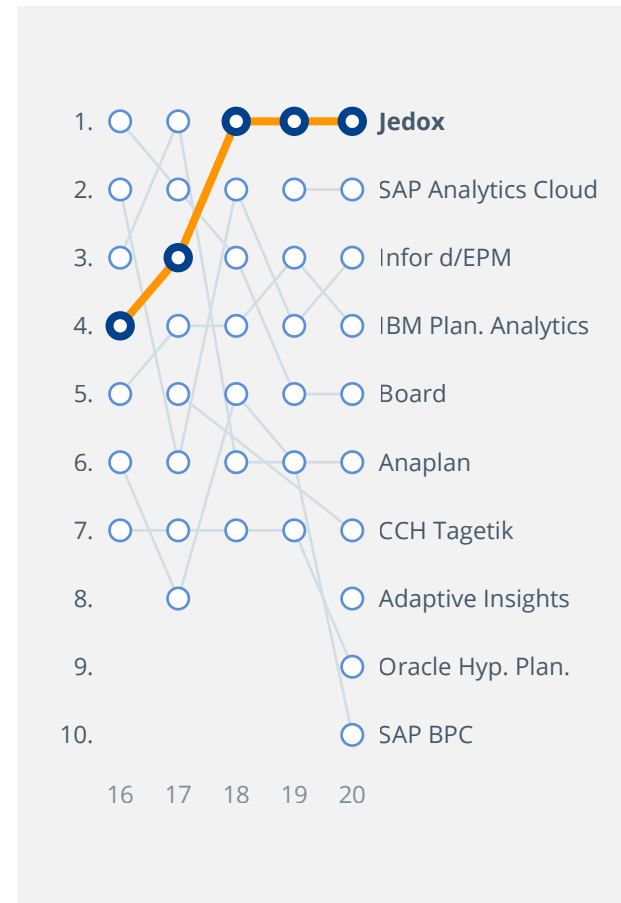
## Self-service – Top-ranked

Peer Group: Global Vendors



## Three top-ranks in the last five years for self-service

Peer Group: Global Vendors



## Self-service



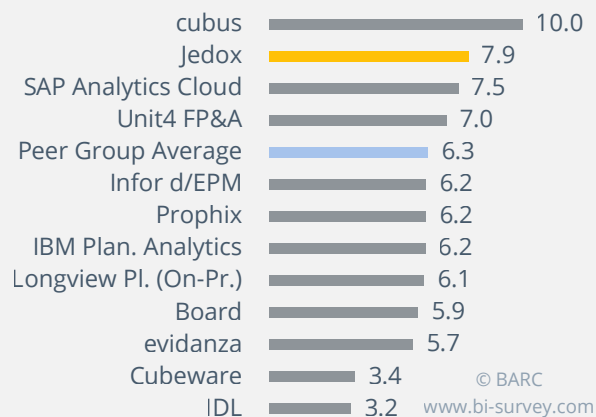
## Viewpoint

Jedox targets business departments in companies of all sizes across all industries. Many of its customers use the product in a self-service approach in business departments (typically the finance and controlling departments). The product is frequently considered to be easy to use and therefore self-service planning appears to be a frequent use case for the flexible development environment. Since users in finance and controlling are often familiar with Excel, the initial barrier to working with the product is extremely low. Furthermore, with Jedox's cloud offering and Cloud Onboarding support, the implementation of self-service planning in business departments is even easier, requiring minimal IT resources to work with the product. Jedox consequently ranks top in the 'Global Vendors' peer group for the third year in a row in the 'Self-service' KPI. Moreover, the vendor achieves leading ranks in all its other peer groups.

## Self-service – Leader



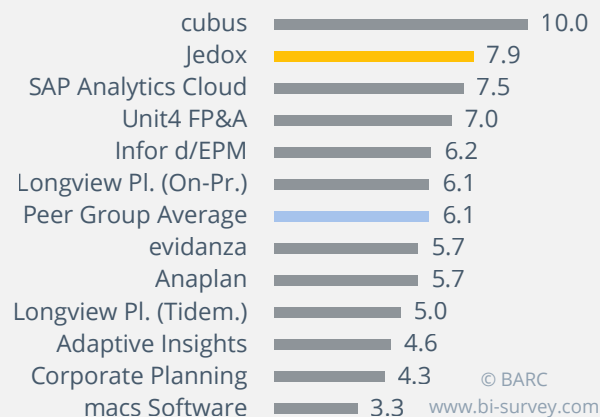
Peer Group: BI-focused Products



## Self-service – Leader



Peer Group: Solution-focused Planning Products



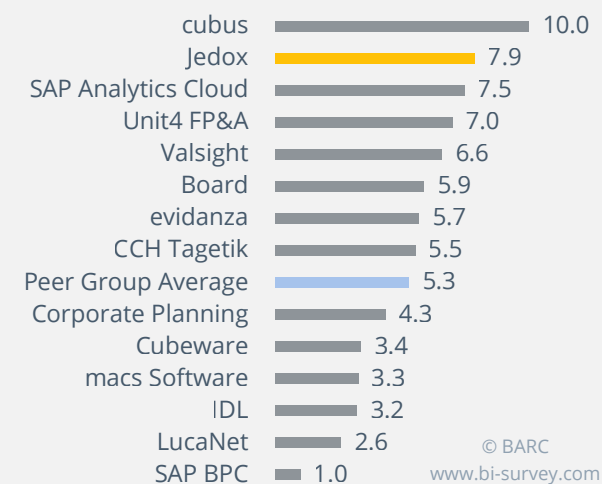
## Self-service



## Self-service – Leader



Peer Group: European Vendors



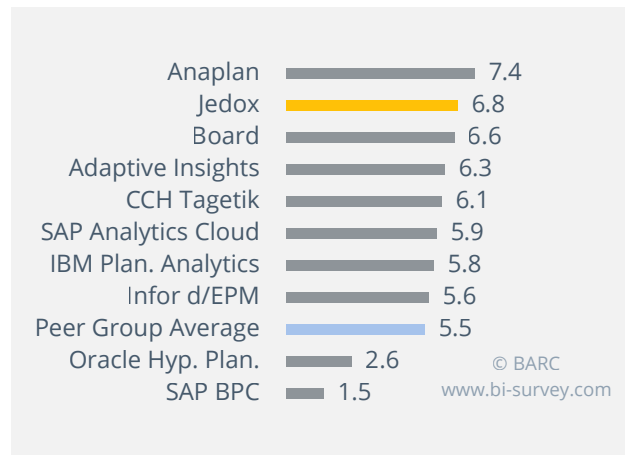
# Customer experience



Combines the 'Self-service', 'Flexibility', 'Ease of use', 'Sales experience' and 'Performance satisfaction' KPIs.

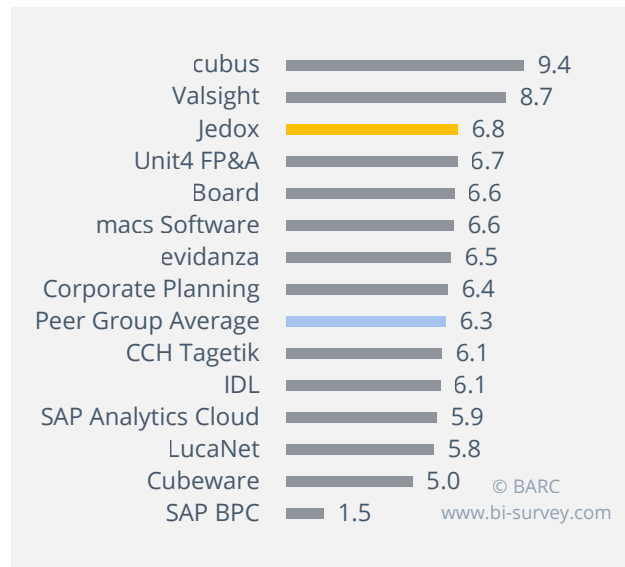
## Customer experience – Leader

Peer Group: Global Vendors



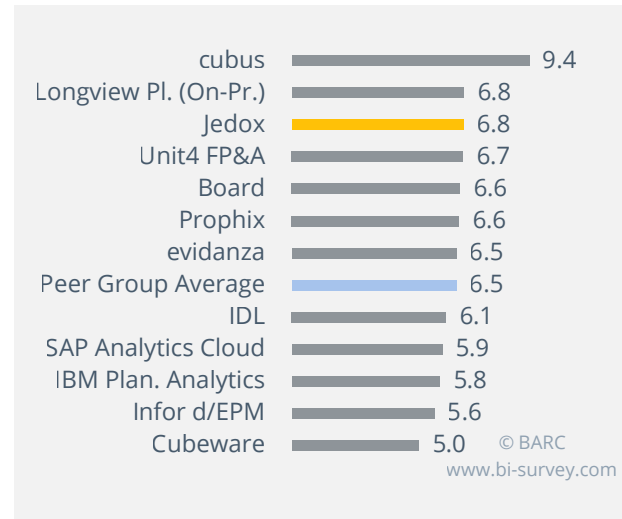
## Customer experience – Leader

Peer Group: European Vendors



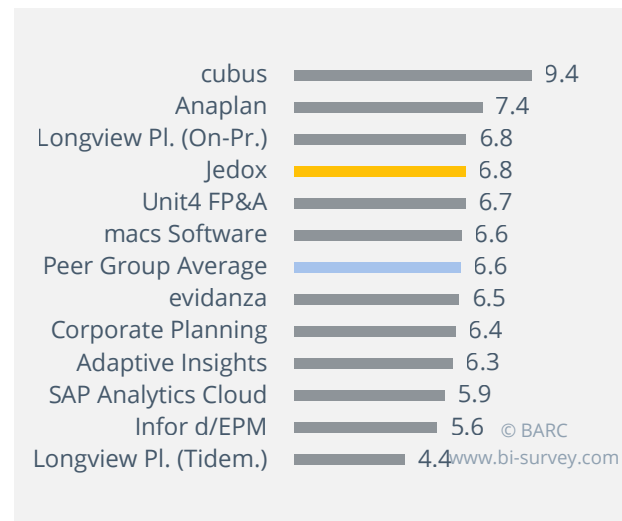
## Customer experience – Leader

Peer Group: BI-focused Products



## Customer experience – Leader

Peer Group: Solution-focused Planning Products



## Customer experience



Viewpoint

'Customer experience' combines the 'Self-service', 'Flexibility', 'Ease of use', 'Sales experience' and 'Performance satisfaction' KPIs. Strong results in some of these KPIs place Jedox comfortably among the leaders in all of its peer groups. The results in this year's Planning Survey confirm that Jedox customers are particularly satisfied with the flexibility of the product. Many customers feel they can roll out Jedox for self-service planning in business departments. The product typically requires a minimum of IT resources to work with it. Problems encountered by Jedox users are rare. Indeed, 47 percent of respondents say they have no significant problems at all when using it.

# Considered for purchase

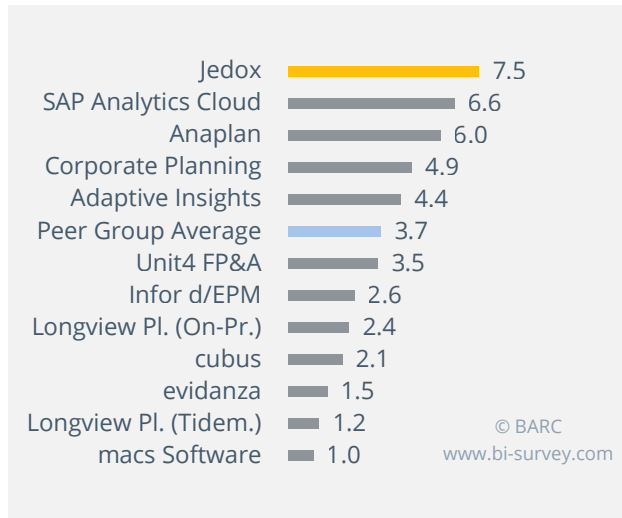


This KPI is based on whether respondents considered purchasing the product.

## Considered for purchase – Top-ranked

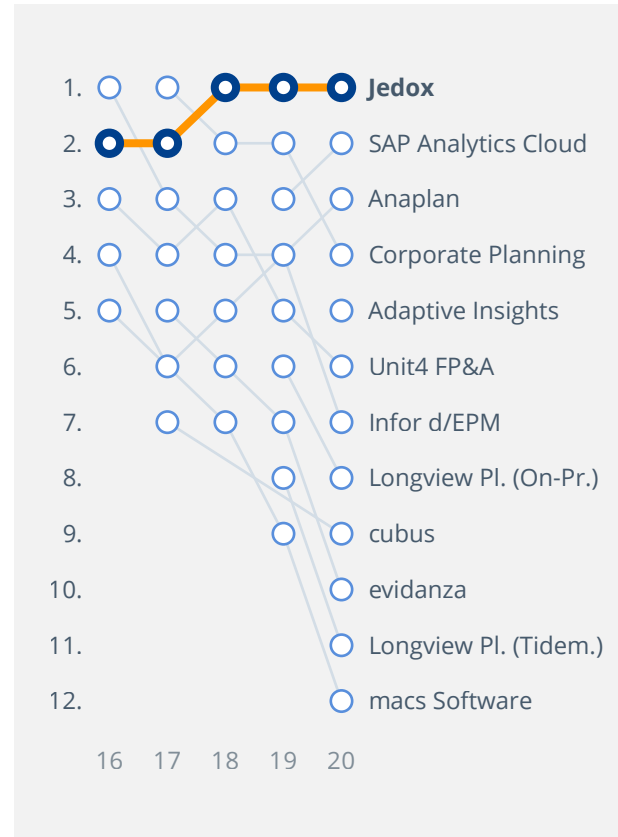


Peer Group: Solution-focused Planning Products



## Three top-ranks in the last five years for considered for purchase

Peer Group: Solution-focused Planning Products



## Considered for purchase



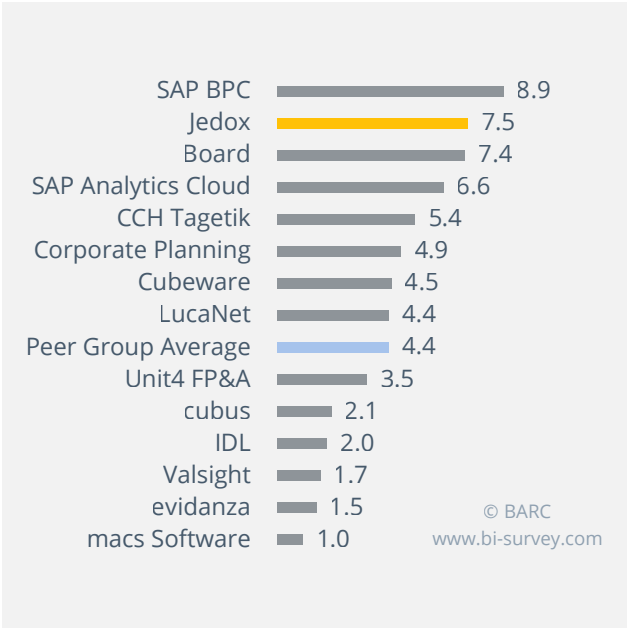
Viewpoint

In recent years, Jedox has worked hard to improve its market presence and global visibility. The vendor is very active with content marketing, social media marketing, different event formats and other marketing measures. As a result, the product is frequently considered for purchase by companies when selecting an integrated planning and analytics tool. Today, the vendor is active with nine offices worldwide in Germany (HQ), France, the United States, Australia and Singapore. It also maintains a large partner network. In this year's Planning Survey, Jedox is ranked top for 'Considered for purchase' in the 'Solution-focused Planning Products' peer group and achieves two leading ranks in its other peer groups.

# Considered for purchase – Leader



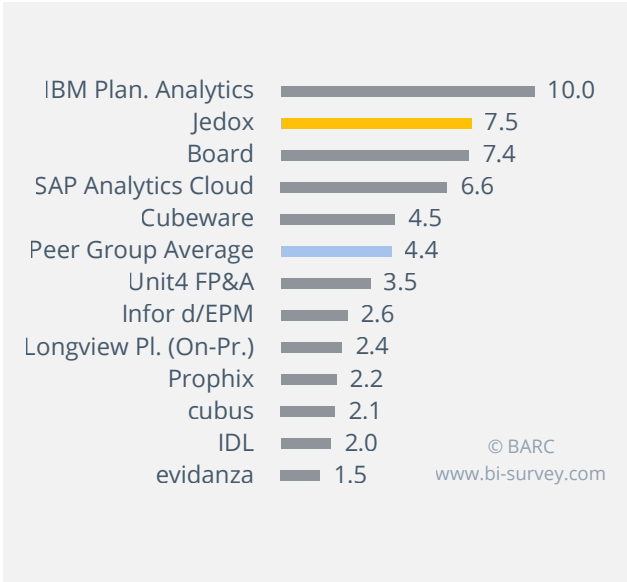
Peer Group: European Vendors



# Considered for purchase – Leader



Peer Group: BI-focused Products



# Considered for purchase



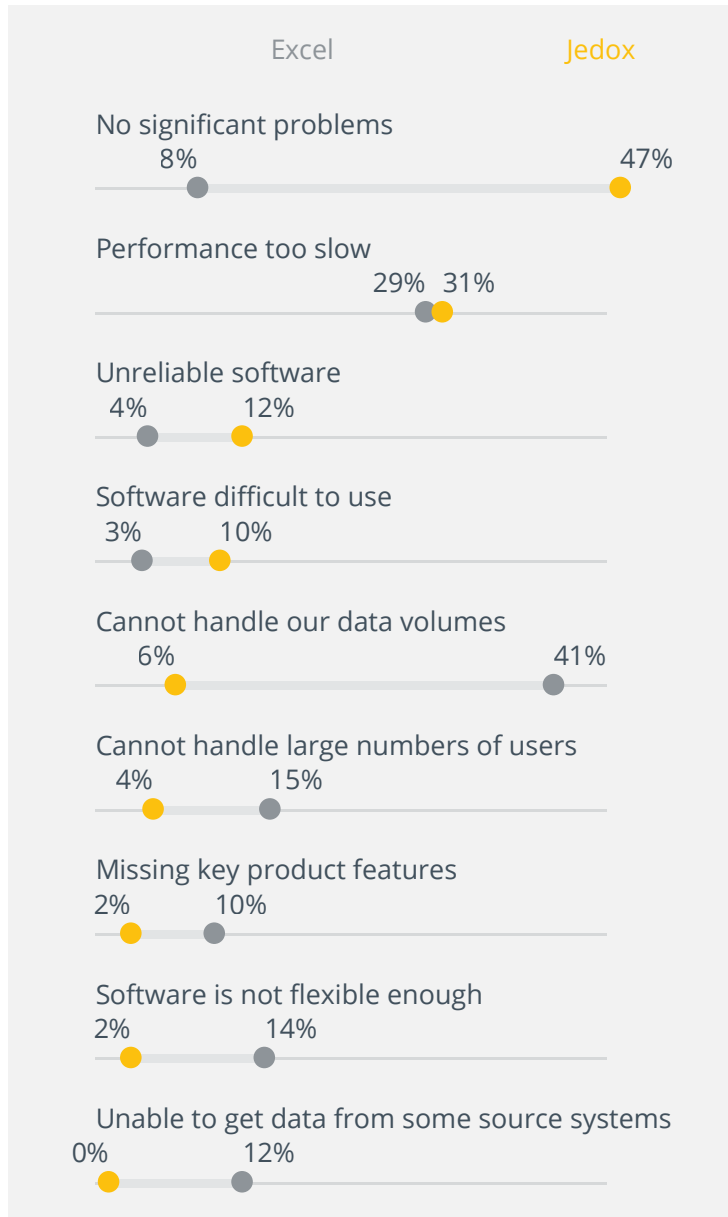
# Jedox vs. Excel





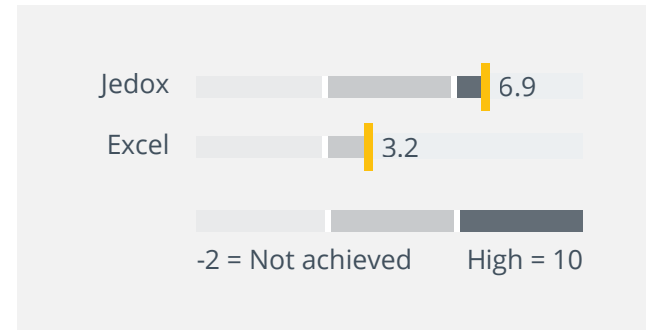
## Problems encountered by Jedox and Excel users

n=49/196



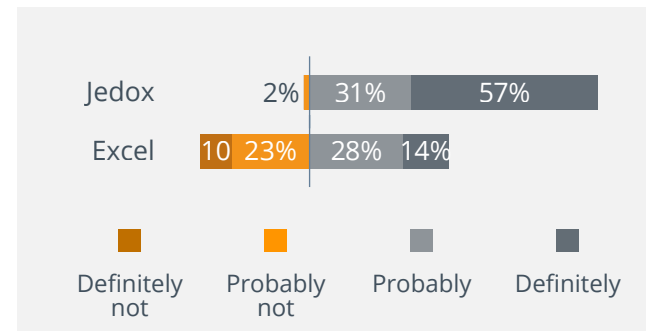
## Business Benefits Index\*

n=49/187



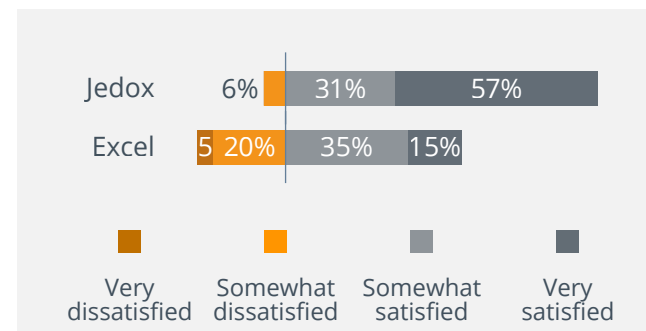
## Recommendation\*\*

n=49/188



## Satisfaction level\*\*

n=49/191



## Jedox vs. Excel



Excel remains one of the most widely used planning and analytics products in the world. However, many users and companies are dissatisfied with it. Jedox 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 Jedox software users. 47 percent of customers even report having no significant problems at all with the product. Business benefits regularly achieved with Jedox software (and achieved more often than with Excel) include improved integration of planning with reporting/analysis, increased transparency of planning and better quality of planning results. 88 percent of Jedox software users say they would definitely or probably recommend their planning product to other organizations, while 88 percent of respondents are 'somewhat satisfied' or 'very satisfied' with Jedox software.

\* 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 is a leading enterprise software industry analyst and consulting firm delivering information to more than 1,000 customers each year. Major companies, government agencies and financial institutions rely on BARC's expertise in software selection, consulting and IT strategy projects.

For over twenty years, BARC has specialized in core research areas including Data Management (DM), Business Intelligence (BI), Customer Relationship Management (CRM) and Enterprise Content Management (ECM).

BARC's expertise is underpinned by a continuous program of market research, analysis and a series of product comparison studies to maintain a detailed and up-to-date understanding of the most important software vendors and products, as well as the latest market trends and developments.

BARC research focuses on helping companies find the right software solutions to align with their business goals. It includes evaluations of the leading vendors and products using methodologies that enable our clients to easily draw comparisons and reach a software selection decision with confidence. BARC also publishes insights into market trends and

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BARC consulting can help you find the most reliable and cost effective products to meet your specific requirements, guaranteeing a fast return on your investment. Neutrality and competency are the two cornerstones of BARC's approach to consulting. BARC also offers technical architecture reviews and coaching and advice on developing a software strategy for your organization, as well as helping software vendors with their product and market strategy.

BARC organizes regular conferences and seminars on Business Intelligence, Enterprise Content Management and Customer Relationship Management software. Vendors and IT decision-makers meet to discuss the latest product updates and market trends, and take advantage of valuable networking opportunities.

For further information see:

[www.barc-research.com](http://www.barc-research.com)

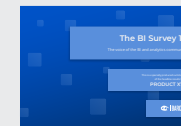
## Other Surveys



The BARC **BI Trend Monitor 2020** reflects on the trends currently driving the BI and data management market from a user perspective. We asked close to 2,900 users, consultants and vendors for their views on the most important BI 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 Survey 19** 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 36 leading BI products. Find out more at [www.bi-survey.com](http://www.bi-survey.com)

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