

The Planning Survey 24

The voice of the planning software user community

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

IBM Planning Analytics

BARC
The Planning Survey 24

7 **16**
Top ranks Leading
in 4 peer groups

BARC #1
Business Benefits

Peer Group Integrated Products for Planning and BI & Analytics
The Planning Survey 24

BARC #1
Planning Functionality

Peer Group Integrated Products for Planning and BI & Analytics
The Planning Survey 24

BARC #1
Performance Satisfaction

Peer Group Integrated Products for Planning and BI & Analytics
The Planning Survey 24

“ *I would strongly recommend this product. It is a great tool, as evidenced by its flexibility, ease of use, and strong integration with Excel.*

Head of business department, Utilities,
> 2,500 employees

BARC The Planning Survey 24

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About The Planning Survey 24

More information:
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The Planning Survey 24

The Planning Survey 24 is based on the world's largest survey of planning software users conducted from November 2023 to February 2024, with 1,272 respondents and analysis of 21 products. It evaluates user feedback on 33 criteria (KPIs), such as *Business Benefits*, *Project Success* and *Customer Satisfaction*.

This summary highlights key findings for IBM Planning Analytics, emphasizing positive results without displaying all KPI outcomes.

The KPIs

The Planning Survey 24 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:

1. Only measures that have a clear good/bad trend are used as the basis for KPIs.
2. KPIs may be based on one or more measures from The Planning Survey.
3. Only products with samples of at least 15 - 20 (depending on the KPI) for each of the questions.
4. For quantitative data, KPIs are converted to a scale of 1 to 10 (worst to best).

5. 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 22-33% or (in peer groups of five vendors) the top 2 products listed in the chart.

Peer Group Classification

The Planning Survey 24 categorizes the different planning, budgeting and forecasting products into peer groups, based on three criteria (specialization, usage scenario and global presence) and defined by BARC analysts' expertise and judgment:

- **Products for Planning, Budgeting and Forecasting:** Designed for planning, budgeting and forecasting, these products cater to various sub-plans, offering flexibility and predefined planning solutions for specific applications. Since The Planning Survey is focused on exactly this use case, this peer group includes all the products featured in the survey.
- **Integrated Products for Planning & Financial Consolidation:** With a strong emphasis on financial performance management, these products provide built-in financial intelligence and predefined business rules for an integrated approach to (financial) planning and financial

consolidation.

- **Integrated Products for Planning and BI & Analytics:** Beyond planning and performance management, these products integrate comprehensive reporting, dashboarding, ad hoc query and analysis capabilities, expanding their scope beyond pure planning functionality.
- **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 many users.
- **Worldwide Implementations:** These vendors have a truly global sales and marketing reach. They are present worldwide, and their products are used all around the world.

IBM Planning Analytics features in the following peer groups:

- Products for Planning, Budgeting & Forecasting
- Integrated Products for Planning and BI & Analytics
- Large/Enterprise-Wide Implementations
- Worldwide Implementations



About IBM Planning Analytics

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IBM Planning Analytics overview

IBM is one of the world's largest vendors of IT hardware, software and services. The company has a global workforce of approximately 300,000 employees and is active in over 170 countries.

IBM offers a comprehensive portfolio of analytics, performance management (especially for planning, budgeting and forecasting, and financial consolidation and close) and advanced analytics solutions. Major offerings include IBM Cognos Analytics and IBM Planning Analytics. For financial consolidation and regulatory reporting, IBM Controller is part of the performance management portfolio. IBM supports a wide range of deployment requirements by offering both cloud and on-premises options as well as containerized applications.

IBM Planning Analytics – the vendor's strategic enterprise planning product – is a core element in IBM's performance management portfolio and has been on the market since the 1980s. Due to its rich functionality for planning and OLAP analysis, and its underlying in-memory TM1 technology, the product plays a strategic role for IBM and thousands of solutions have been implemented worldwide. Planning Analytics is available in both cloud and classical on-premises versions. Essentially, it is a high-performance, multidimensional, in-memory database for budgeting, planning and forecasting with Excel and web front ends. The product is targeted at business power users for building all kinds of applications (planning, analytics, strategy management etc.). Therefore, it has no dominant focus on any one topic (financials, sales, HR, etc.) or industry. While Planning Analytics' strength is its rich flexibility to implement tailored solutions for

specific use cases, IBM and particularly its extensive partner network also offer prebuilt business content for certain use cases and industries. In the latest versions of Planning Analytics, IBM has improved the web client with a modernized user interface and user experience, extended charting options and visualizations, a web-based data modeling environment and strengthened workflow capabilities. To control planning processes, a web-based visual workflow designer helps in the development of individual workflows (e.g., task management and due dates, status monitoring, approval, email notifications etc.). Built-in AI and ML capabilities can be used to recognize anomalies or potential data entry errors and offer functionality to generate forecasts. Planning Analytics can also harness the services of advanced IBM AI capabilities such as IBM watsonx.ai.



About IBM Planning Analytics

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IBM Planning Analytics overview

IBM Cognos Analytics, the vendor's enterprise BI and analytics platform, provides functionality for dashboards, pixel-perfect reports, data stories, data modeling and analysis in a unified web-based user experience. It combines ease of use with elaborate governance features in an end-to-end platform. The product can be used in large-scale scenarios supporting the needs of many concurrent users as well as large data volumes. IBM wants Cognos Analytics to be every user's analytics copilot when navigating data. The vendor has incorporated NLQ, automated insights and intent-driven modeling and has invested in automation and ML capabilities across data modeling, dashboards, data exploration and an analytics chat assistant. The AI assistant allows users to explore data by asking natural language

questions and by receiving insightful answers with a presentation-ready dashboard or report. Cognos Analytics' AI capabilities can also identify trends and forecast results, helping companies to identify relevant influencers and correlations and calculate quick predictions.

IBM Controller is a purpose-built financial consolidation and close product for statutory and management consolidation use cases with predefined dimensions, consolidation computations and a library of pre-packaged reports for data review, system configuration and audit trail. Controller is agnostic in terms of industry and organization size and is available in the cloud and on premises. Standard functionality includes currency translation, intercompany reconciliation/elimination, complex ownership handling, multi-GAAP capabilities and options for custom calculations and flexible reporting.

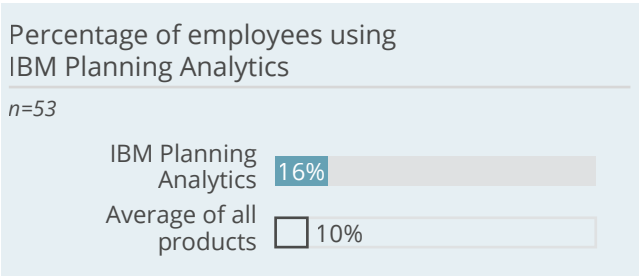
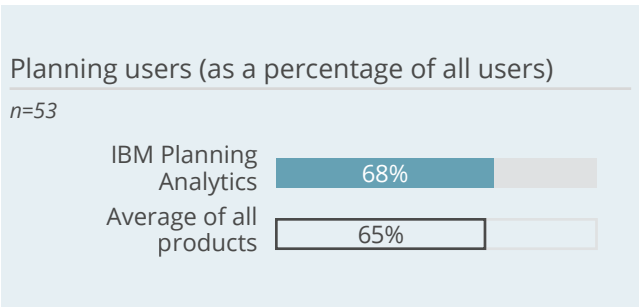
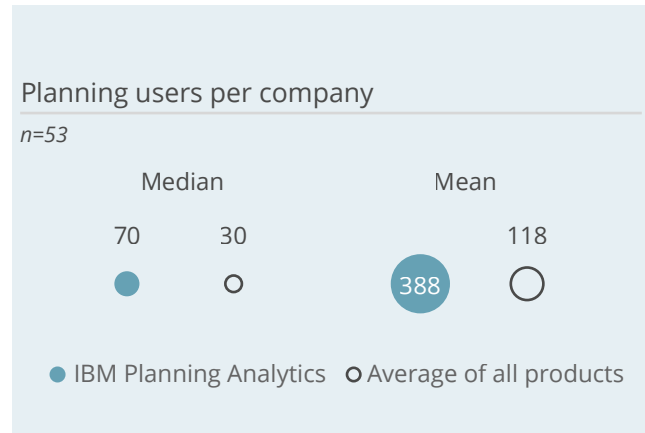
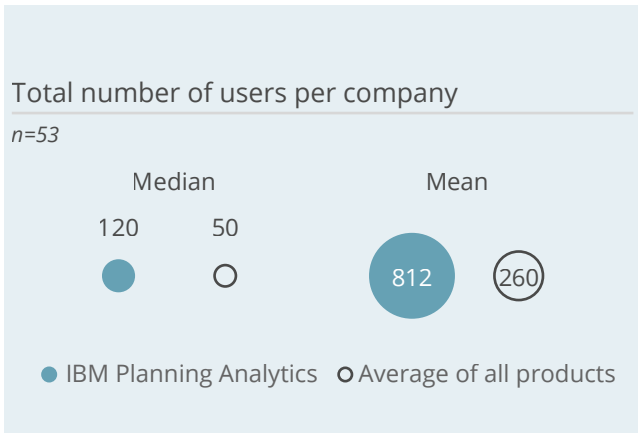
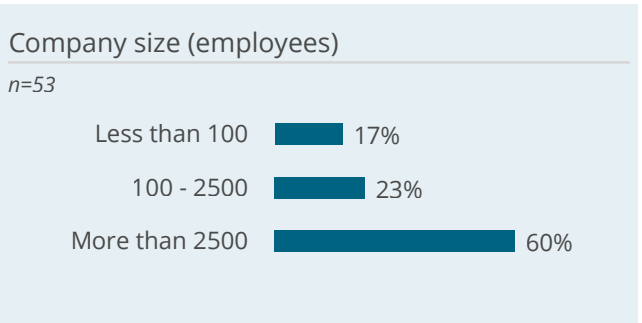
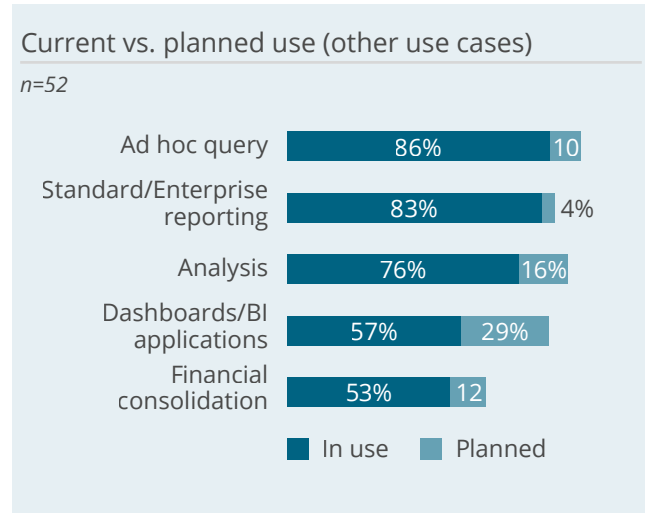
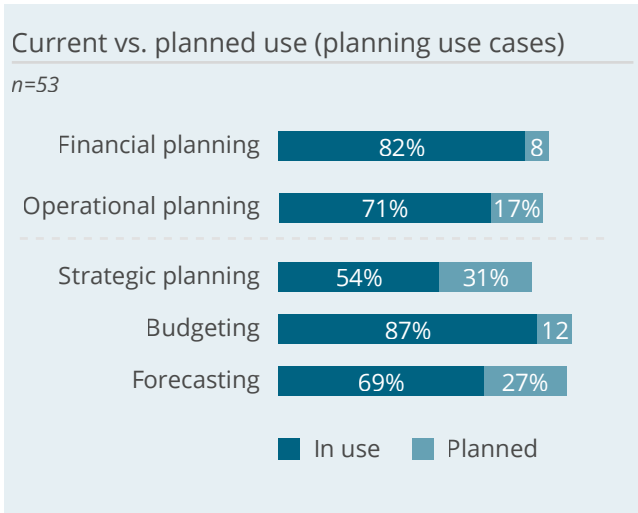


User and Use Case Demographics



This year we had **53 responses** from IBM Planning Analytics users. At the time of the survey, 73 percent of them were using version PA 2.0, 21 percent

version 11, 3 percent version 10 and 3 percent were using version 12.





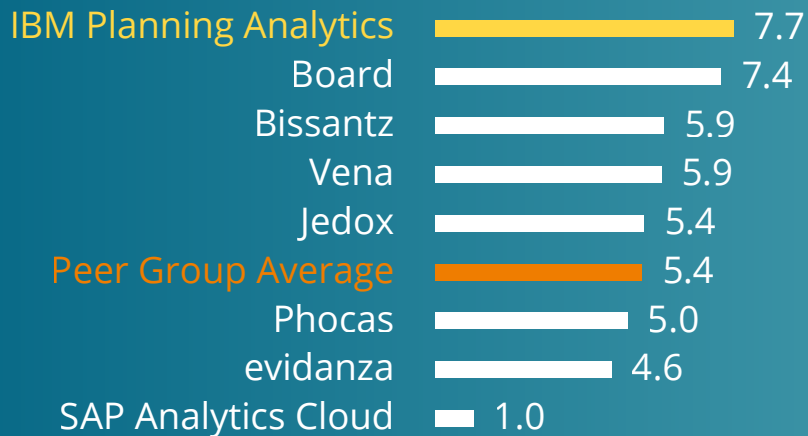
Business Benefits



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

Business Benefits – Top-ranked

Peer Group: Integrated Products for Planning and BI & Analytics



© BARC Planning Survey 24

This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

96%

of surveyed users achieved better quality of planning results with IBM Planning Analytics.



A great tool that offers a lot of flexibility and is indispensable.

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Line of business employee, Banking and finance, > 2,500 employees

The Planning Survey 24



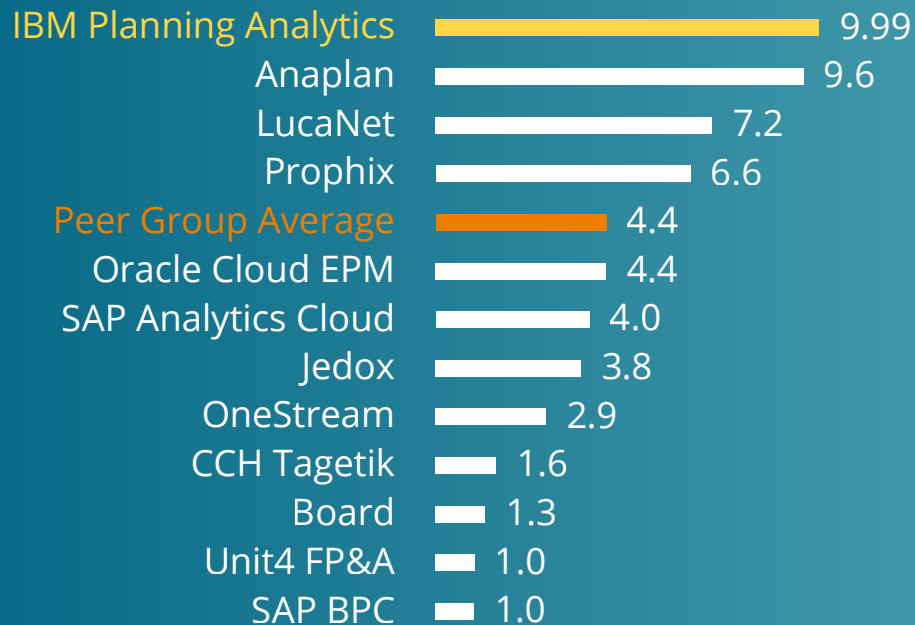
Project Length

This KPI is based on how quickly the product was implemented, taking into account project complexity and number of users.



Project Length – Top-ranked

Peer Group: Worldwide Implementations

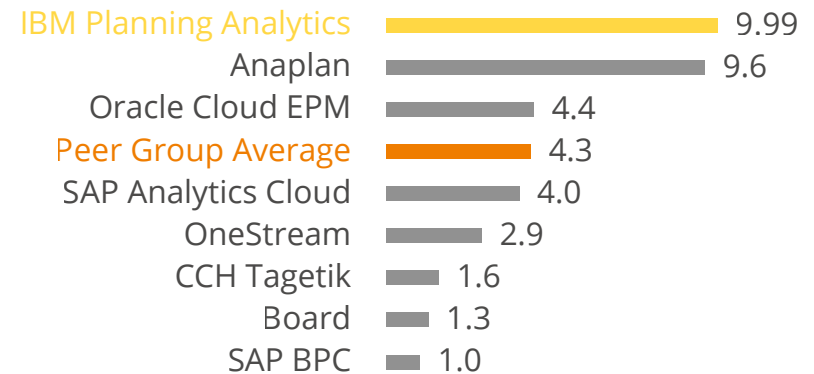


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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

Project Length – Top-ranked

Peer Group: Large/Enterprise-Wide Implementations



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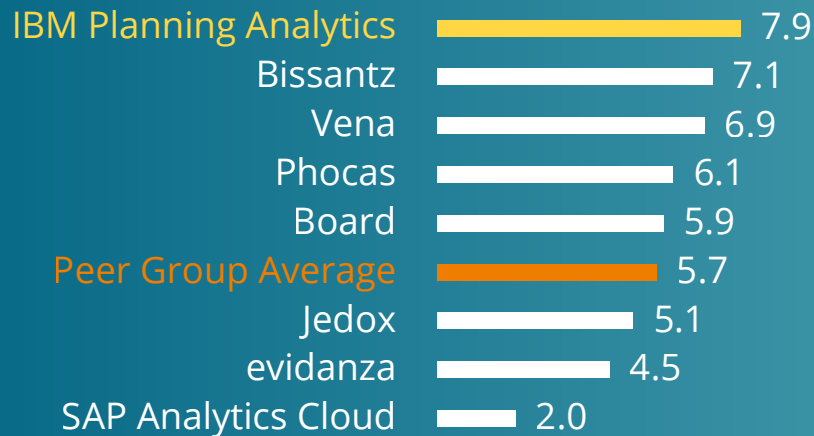
Business Value

This KPI combines the *Business Benefits*, *Project Success* and *Project Length* KPIs to measure the product's business value.



Business Value – Top-ranked

Peer Group: *Integrated Products for Planning and BI & Analytics*



© BARC Planning Survey 24

This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

79%

of surveyed users achieved an **increased competitive advantage** with IBM Planning Analytics.

“ *Very satisfied for many years now.* ”

Person responsible for planning from IT department, Insurance, > 2,500 employees

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“ *Very positive. We been able to accommodate many types of applications with the tool kit even outside standard financial planning and budgeting.* ”

Consultant, Consulting, > 2,500 employees

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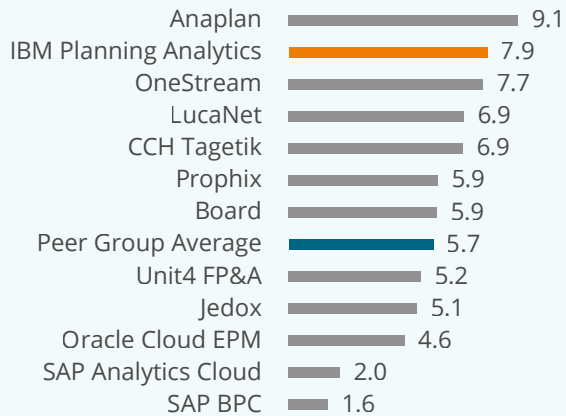


Business Value

This KPI combines the *Business Benefits*, *Project Success* and *Project Length* KPIs to measure the product's business value.

Business Value – Leader

Peer Group: Worldwide Implementations

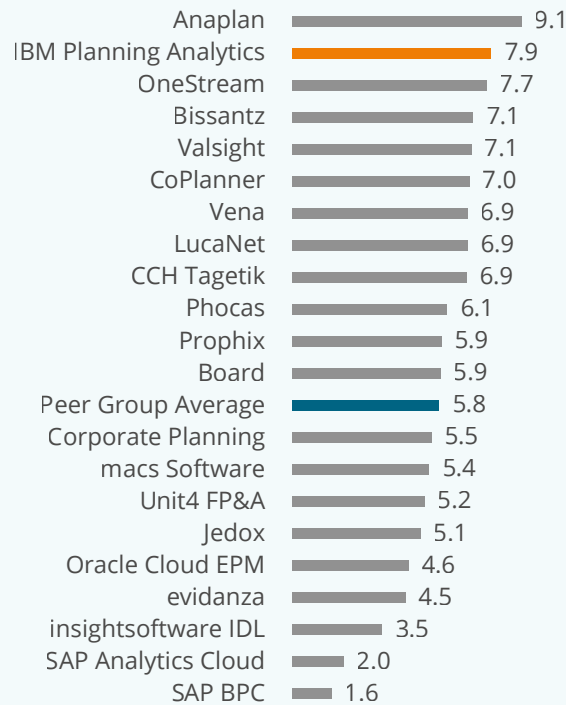


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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

Business Value – Leader

Peer Group: Products for Planning, Budgeting & Forecasting

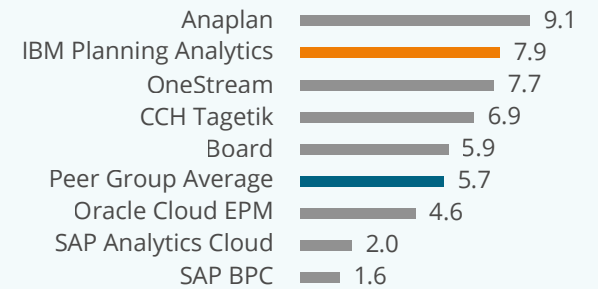


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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

Business Value – Leader

Peer Group: Large/Enterprise-Wide Implementations



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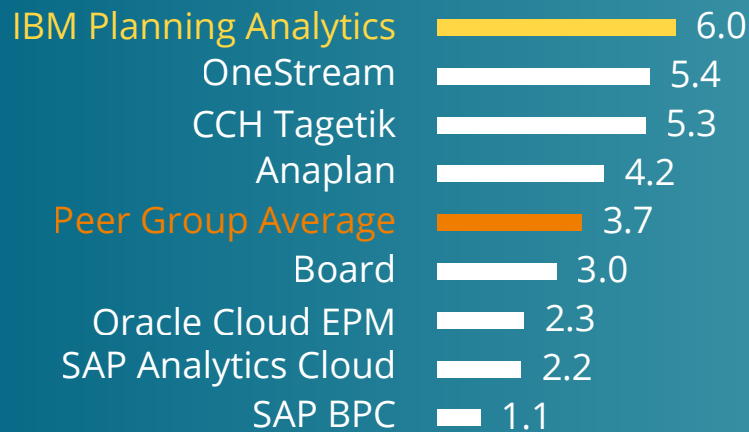
Implementer Support



This KPI is based on how respondents rate the implementer's support for the product.

Implementer Support – Top-ranked

Peer Group: Large/Enterprise-Wide Implementations



© BARC Planning Survey 24

This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

75%

of surveyed users rate IBM Planning Analytics's **implementer support** as **excellent** or **good**.

“ I haven't come across a data/analytics problem that I couldn't solve using IBM Planning Analytics/TM1.

Manager Resource Management Systems, Manufacturing, > 2,500 employees

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Planning Functionality

This KPI is based on how respondents rate the product's coverage of planning-specific requirements.

BARC
Planning
Functionality

Top-ranked

The Planning Survey 24
Integrated Products for Planning
and BI & Analytics

BARC
Planning
Functionality

Leader

The Planning Survey 24
Worldwide
Implementations

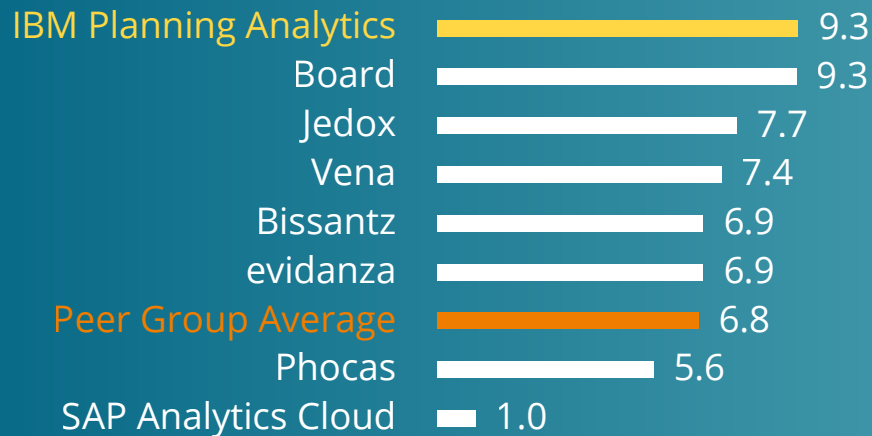
BARC
Planning
Functionality

Leader

The Planning Survey 24
Products for Planning, Budgeting
& Forecasting

Planning Functionality – Top-ranked

Peer Group: Integrated Products for Planning and BI & Analytics



© BARC Planning Survey 24

This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

94%

of surveyed users rate IBM Planning Analytics's coverage of planning-specific requirements as very good or good.

“

Great tool for planning and consolidation of planning across the enterprise.

Person responsible for planning from IT department, Healthcare, > 2,500 employees

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The Planning Survey 24

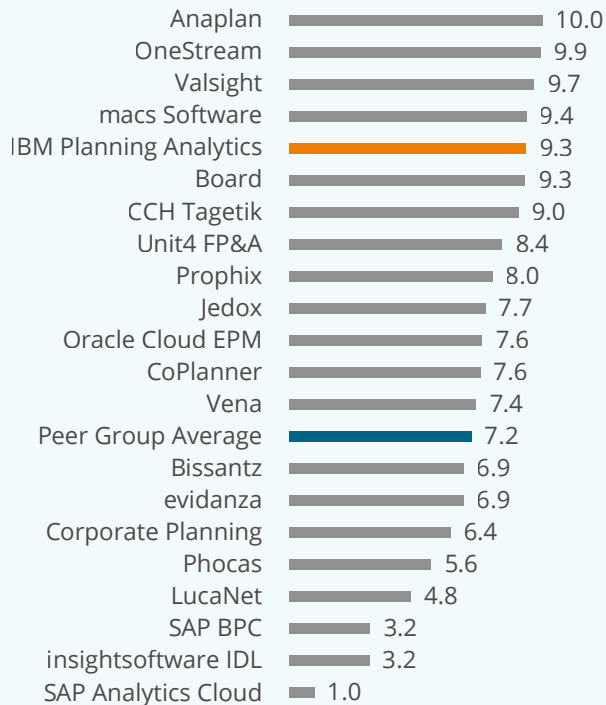


Planning Functionality

This KPI is based on how respondents rate the product's coverage of planning-specific requirements.

Planning Functionality - Leader

Peer Group: Products for Planning, Budgeting & Forecasting

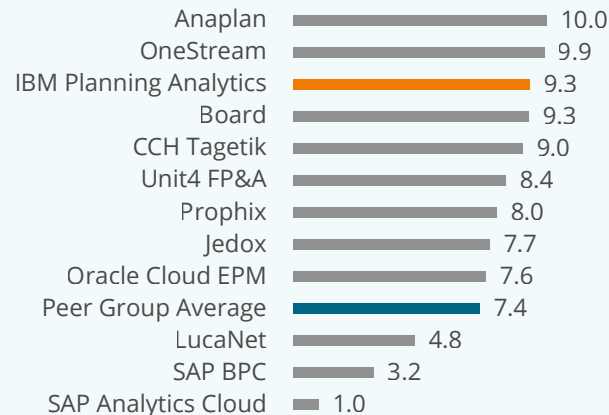


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Planning Functionality - Leader

Peer Group: Worldwide Implementations



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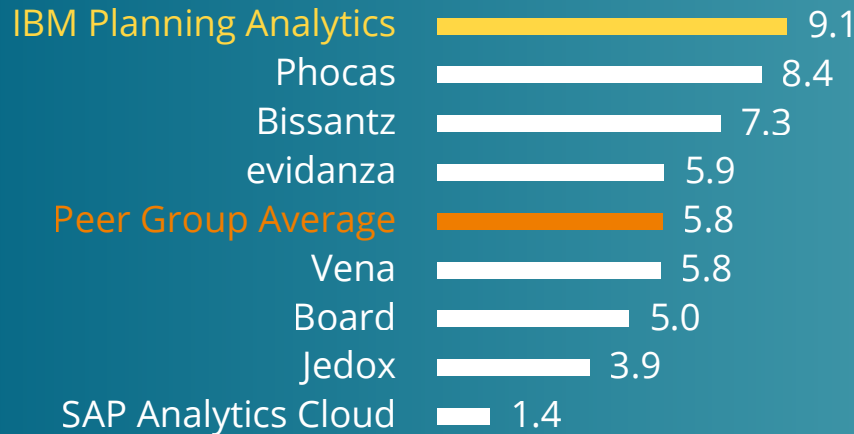
Performance Satisfaction

This KPI is based on how often the product was chosen for performance, and on the frequency of complaints about the system's performance.



Performance Satisfaction – Top-ranked

Peer Group: Integrated Products for Planning and BI & Analytics



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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.



High performance, high flexibility in the creation of planning content.

Consultant, Services, 100 - 2,500 employees

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The Planning Survey 24



Speed, scalability, and flexibility to handle any type of planning and forecasting situation.

Consultant, Consulting, > 2,500 employees

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Serves planning at the lowest level and the ability to consolidate at different levels and the ability to report at the planned level - flexible to customize and use, low learning curve.

Person responsible for planning from IT department, Healthcare, > 2,500 employees

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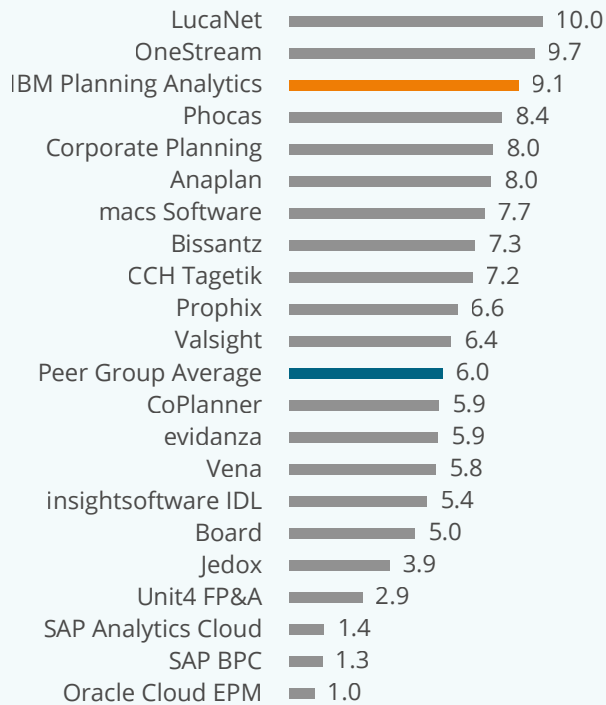


Performance Satisfaction

This KPI is based on how often the product was chosen for performance, and on the frequency of complaints about the system's performance.

Performance Satisfaction – Leader

Peer Group: Products for Planning, Budgeting & Forecasting

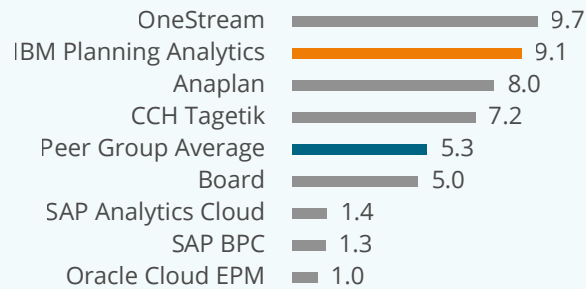


© BARC Planning Survey 24

This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

Performance Satisfaction – Leader

Peer Group: Large/Enterprise-Wide Implementations



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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.



Self-Service & Predictive Planning

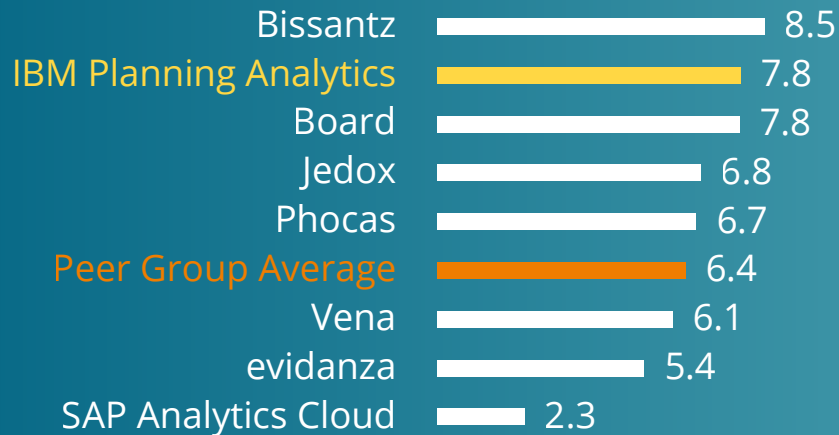


The *Self-Service* KPI is based on the proportion of respondents' organizations currently using the product in a self-service manner in business departments and how respondents rate the product's ease of use for planners and developers.

The *Predictive Planning* KPI is based on the proportion of survey respondents that currently use their product for predictive planning and forecasting.

Self-Service – Leader

Peer Group: Integrated Products for Planning and BI & Analytics

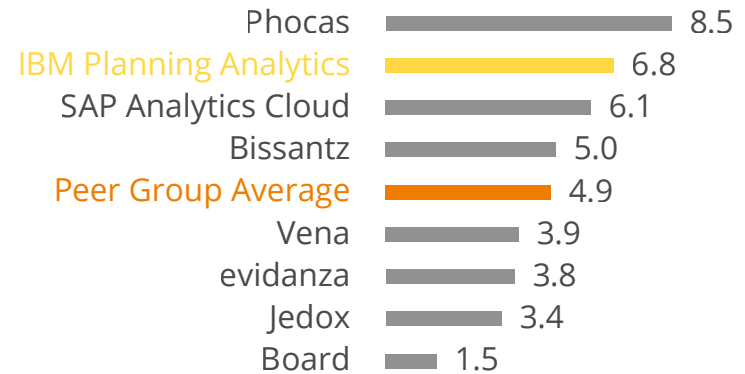


© BARC Planning Survey 24

This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

Predictive Planning – Leader

Peer Group: Integrated Products for Planning and BI & Analytics



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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.



The Planning Survey 24: IBM Planning Analytics Highlights

	Peer Group Products for Planning, Budgeting & Forecasting	Peer Group Integrated Products for Planning and BI & Analytics	Peer Group Large/Enterprise-Wide Implementations
		Business Benefits Business Value Planning Functionality Performance Satisfaction	Project Length Implementer Support
	Business Benefits Project Length Business Value Planning Functionality Performance Satisfaction Predictive Planning	Project Length Data Integration Self-Service Predictive Planning	Business Value Performance Satisfaction
	Peer Group Worldwide Implementations		
		Project Length	
	Business Value Implementer Support Planning Functionality Performance Satisfaction		

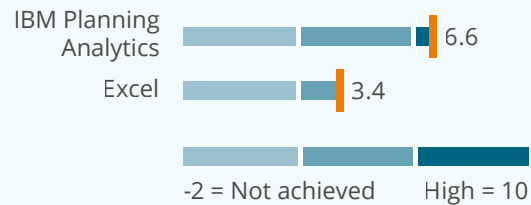
BARC Comment

With 7 top ranks and 16 leading positions, IBM Planning Analytics achieves an excellent set of results in this year's Planning Survey. Impressive ratings in KPIs such as *Project Length*, *Implementer Support*, *Self-Service* and *Performance Satisfaction* underline IBM Planning Analytics' leading position in the planning software market. Companies can benefit from using IBM Planning Analytics in terms of better integration of planning with BI/analytics, better integration of financial planning with operational planning and increased planning frequency. 91 percent of IBM Planning Analytics users say they would "definitely" or "probably" recommend their planning product to other organizations – a strong result and a great indicator of customer satisfaction with the vendor and its product.

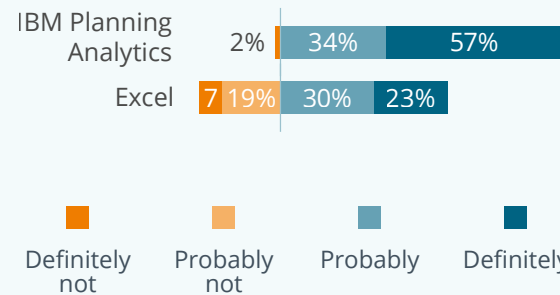


The Planning Survey 24: IBM Planning Analytics vs. Excel

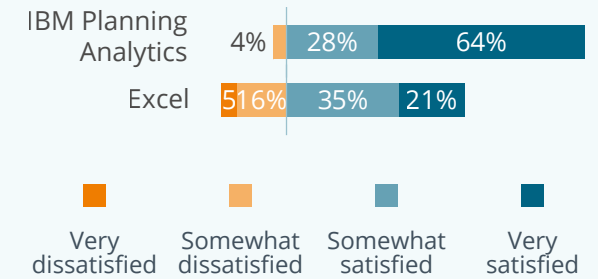
Business Benefits Index*



Recommendation**



Satisfaction level**



* 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

Data Decisions. Built on BARC.



BARC

BARC

BARC is one of Europe's leading analyst firms for business software, focusing on the areas of data, business intelligence (BI) and analytics. The company was founded in 1999 as a spin-off of the chair of Business Administration and Information Systems at the University of Würzburg, Germany. Today, BARC combines empirical and theoretical research, technical expertise and practical experience, and a constant exchange with all market participants to provide market-leading research publications, events and advisory.

Research

BARC user surveys, software tests and analyst assessments in blogs and research notes give you

the confidence to make the right decisions. Our independent research gets to the heart of market developments, evaluates software and providers thoroughly and gives you valuable ideas on how to turn data, analytics and AI into added value and successfully transform your business.

Consulting

The BARC Advisory practice is entirely focused on translating your company's requirements into future-proof decisions. The holistic advice we provide will help you successfully implement your data & analytics strategy and culture as well as your architecture and technology. Our goal is not to stay for the long haul. BARC's research and

experience-founded expert input sets organizations on the road to the successful use of data & analytics, from strategy to optimized data-driven business processes.

Events

Leading minds and companies come together at our events. BARC conferences, seminars, round-table meetups and online webinars provide more than 10,000 participants each year with information, inspiration and interactivity. By exchanging ideas with peers and learning about trends and market developments, you gain new impetus for your business.

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