

2021

CLASH OF THE TITANS

An Independent Comparison of SAP, Oracle,
Microsoft and Infor

TABLE OF CONTENTS

INTRODUCTION	3
VENDOR OVERVIEW	4
SINGLE ERP SYSTEM VS. BEST-OF-BREED	5
DIGITAL BUSINESS TRANSFORMATION	7
BUSINESS INITIATIVES INCLUDED IN DIGITAL STRATEGY	8
INTERNAL VS. EXTERNAL RESOURCES	10
PROJECT COST	11
CONCLUSION	13

About Clash of the Titans

INTRODUCTION



Panorama Consulting Group developed its annual Clash of the Titans analysis to compare the “titans” of the enterprise software industry: SAP, Oracle, Microsoft and Infor.

Clash of the Titans 2021 analyzes responses collected from Panorama’s ERP Benchmark Survey between October 2019 and September 2020. The dataset includes 116 respondents who have selected or implemented SAP, Oracle, Microsoft or Infor ERP solutions for their organizations. The analysis is based on a variety of solutions offered by the four vendors.

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



The Lineup

VENDOR OVERVIEW

The battle between SAP, Oracle, Microsoft and Infor isn't likely to be settled any time soon. The good news is that this gives organizations a variety of choices when it comes to Tier 1 ERP systems.

While Infor and Microsoft have not always targeted large enterprises, these emerging Tier 1 vendors are now well-established in this space and have a strong understanding of the top-down sales process required for large companies.

These vendors also have just as strong of a focus on cloud technology, as SAP and Oracle do. The cloud focus of each of these four vendors is discussed below:



SAP'S CUSTOMERS BENEFIT FROM THE VENDOR'S HEAVY INVESTMENT IN RESEARCH AND DEVELOPMENT, ESPECIALLY IN CLOUD TECHNOLOGY. FOR EXAMPLE, SAP HAS DEVELOPED IOT AND MACHINE LEARNING CAPABILITIES THROUGHOUT THEIR ENTIRE PORTFOLIO. EVEN MIDMARKET COMPANIES ARE ABLE TO BENEFIT FROM THESE FEATURES AS SAP ALLOWS CUSTOMERS TO GRADUALLY IMPLEMENT FUNCTIONALITY OVER TIME.



ORACLE PROVIDES A FULL STACK OF CLOUD OPTIONS, INCLUDING SAAS APPLICATIONS FOR EVERY BUSINESS FUNCTION, MARKET SEGMENT AND INDUSTRY VERTICAL. ORACLE'S CLOUD STRATEGY ALSO INCLUDES A SUITE OF ANALYTICS AND DATA MANAGEMENT SOLUTIONS.

ALL THESE APPLICATIONS RUN ON TOP OF THE ORACLE CLOUD INFRASTRUCTURE, WHICH IS AVAILABLE IN NEARLY EVERY CORNER OF THE GLOBE.



EVERY YEAR, MICROSOFT INVESTS HEAVILY IN DEVELOPING NEW DATA CENTERS TO SUPPORT ITS CLOUD CAPABILITIES. CLOUD CUSTOMERS ARE ABLE TO LEVERAGE THEIR EXISTING MICROSOFT INVESTMENTS TO TAKE ADVANTAGE OF THE VENDOR'S ENTIRE PLATFORM OF ADDITIONAL FUNCTIONALITY. MICROSOFT'S CLOUD SOLUTIONS FOR CRM AND ERP HAVE BEEN GROWING QUICKLY IN TERMS OF ADOPTION.



INSTEAD OF ONE PRODUCT TO SERVE ALL INDUSTRIES, INFOR HAS INVESTED IN CREATING INDUSTRY SPECIFIC CLOUDSUITES FOR A VARIETY OF SUBVERTICALS. EACH OF THESE PRODUCTS IS A FULL SUITE THAT GOES BEYOND ERP TO INCLUDE CRM, HCM AND MORE.

INFOR HAS A FLEXIBLE APPROACH FOR CUSTOMERS THAT MOVE TO THE CLOUD – CUSTOMERS CAN TRANSITION EACH OF THEIR APPLICATIONS OVER TIME.

Types of Systems

SINGLE ERP SYSTEM VS. BEST-OF-BREED

Implementing different systems for different business functions is known as a best-of-breed strategy. While this used to have negative connotations, integration tools have evolved to the point that many of the historic risks of best-of-breed solutions aren't as big of a threat as they used to be.

INFOR CUSTOMERS PREFER SINGLE ERP SYSTEMS.

Infor provides industry-specific solutions offering broad and deep functionality, which gives customers little reason to look elsewhere. In addition Infor has a wide range of integrated add-ons for specific functionality within its CloudSuite product, which some customers say still takes some configuration, set up and training effort.



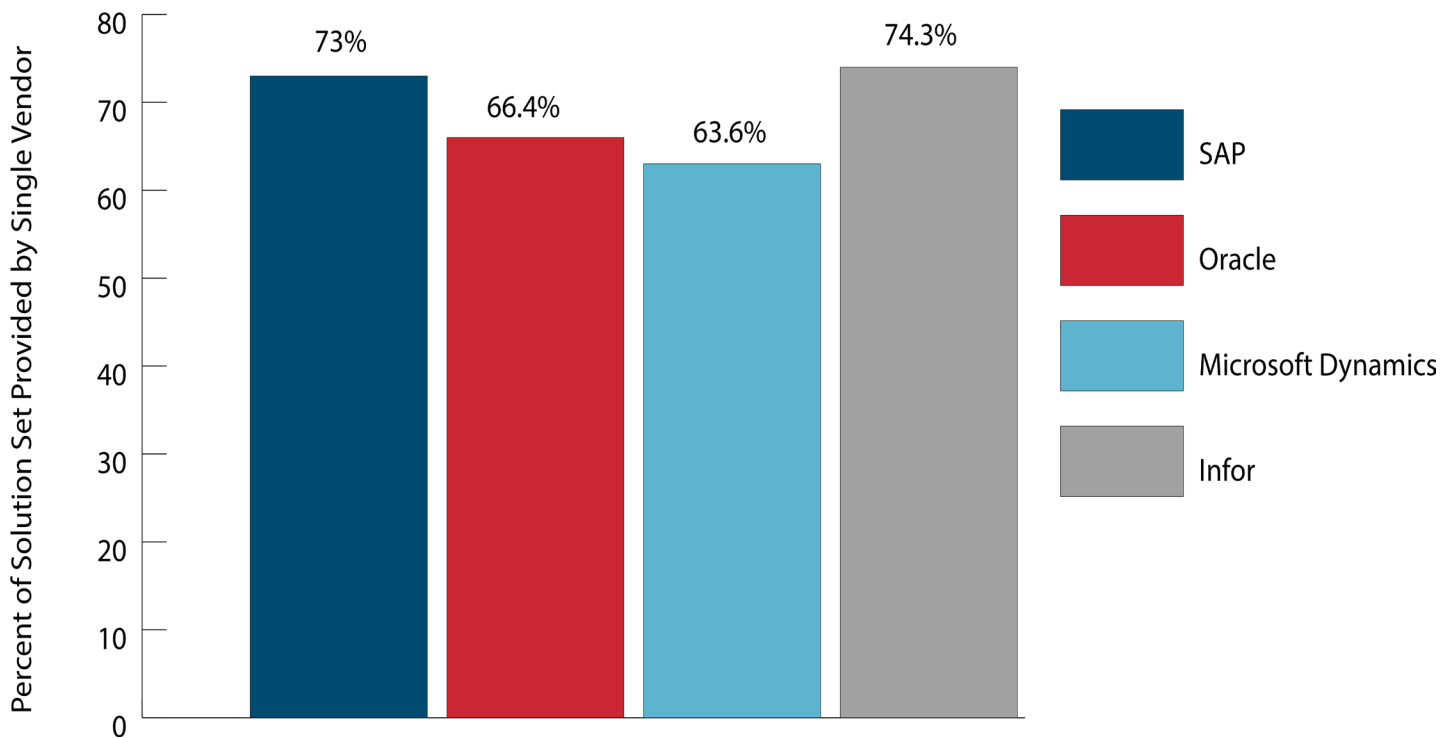
Types of Systems

SINGLE ERP SYSTEM VS. BEST-OF-BREED

MICROSOFT CUSTOMERS PREFER SINGLE ERP SYSTEMS, BUT OFTEN OPT FOR BEST-OF-BREED.

Microsoft supports an extensive ecosystem of partners, products and services that enhance Microsoft's own systems. For example, LogMeIn, a provider of remote work tools, recently announced that its co-browsing solution is now certified and available for Dynamics 365 Omnichannel for Customer Service.

SINGLE ERP VS. BEST-OF-BREED



Transformation Measures

DIGITAL BUSINESS TRANSFORMATION

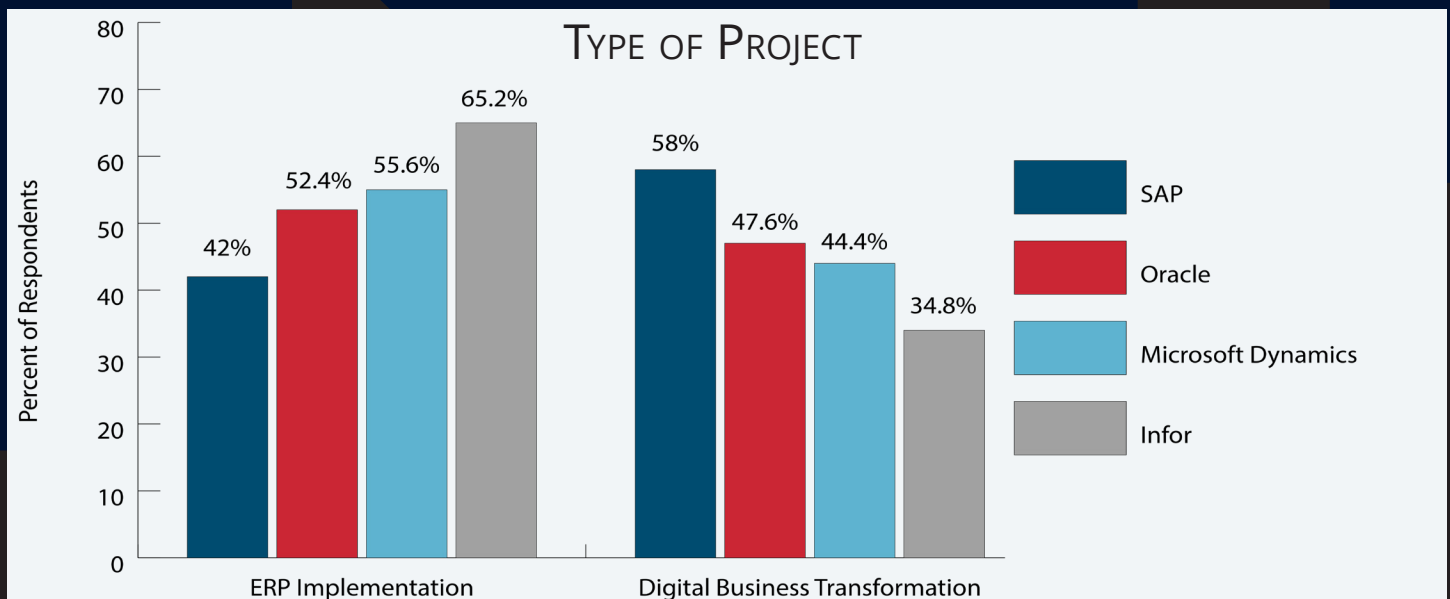
According to Gartner, digital business transformation is “the process of exploiting digital technologies and supporting capabilities to create a robust new digital business model.” Respondents were asked to describe their initiative as either a digital business transformation (according to Gartner’s definition) or an ERP implementation.

DIGITAL BUSINESS TRANSFORMATION IS MOST COMMON AMONG SAP CUSTOMERS.

SAP offers a large number of cloud-based products and services and maintains a large cloud ecosystem. The cloud is important to digital transformation because of the opportunity it presents to modernize processes and business models.

DIGITAL BUSINESS TRANSFORMATION IS LEAST COMMON AMONG INFOR CUSTOMERS.

While Infor customers were less likely to do digital transformations compared to other vendor customers surveyed, the percentage of Infor projects that were digital transformations increased since last year. This could be due to the increased number of Infor customers using cloud solutions.



Business Initiatives

INCLUDED IN DIGITAL STRATEGY

Regardless of your digital strategy, it's important that it aligns with your business strategy and that all stakeholders are aligned around both.

A FOCUS ON ECOMMERCE FUNCTIONALITY IS MOST COMMON AMONG MICROSOFT CUSTOMERS.

A large portion of Microsoft's customer base is heavily focused on eCommerce as they're using platforms like Amazon to get products to market. In addition, many Microsoft customers are small to midmarket companies looking to diversify their channel to market.

A FOCUS ON EAM FUNCTIONALITY IS MOST COMMON AMONG INFOR CUSTOMERS.

Infor has a strong EAM offering that includes mobile applications. The vendor also has a strong base of industrial clients, including heavily capitalized companies.



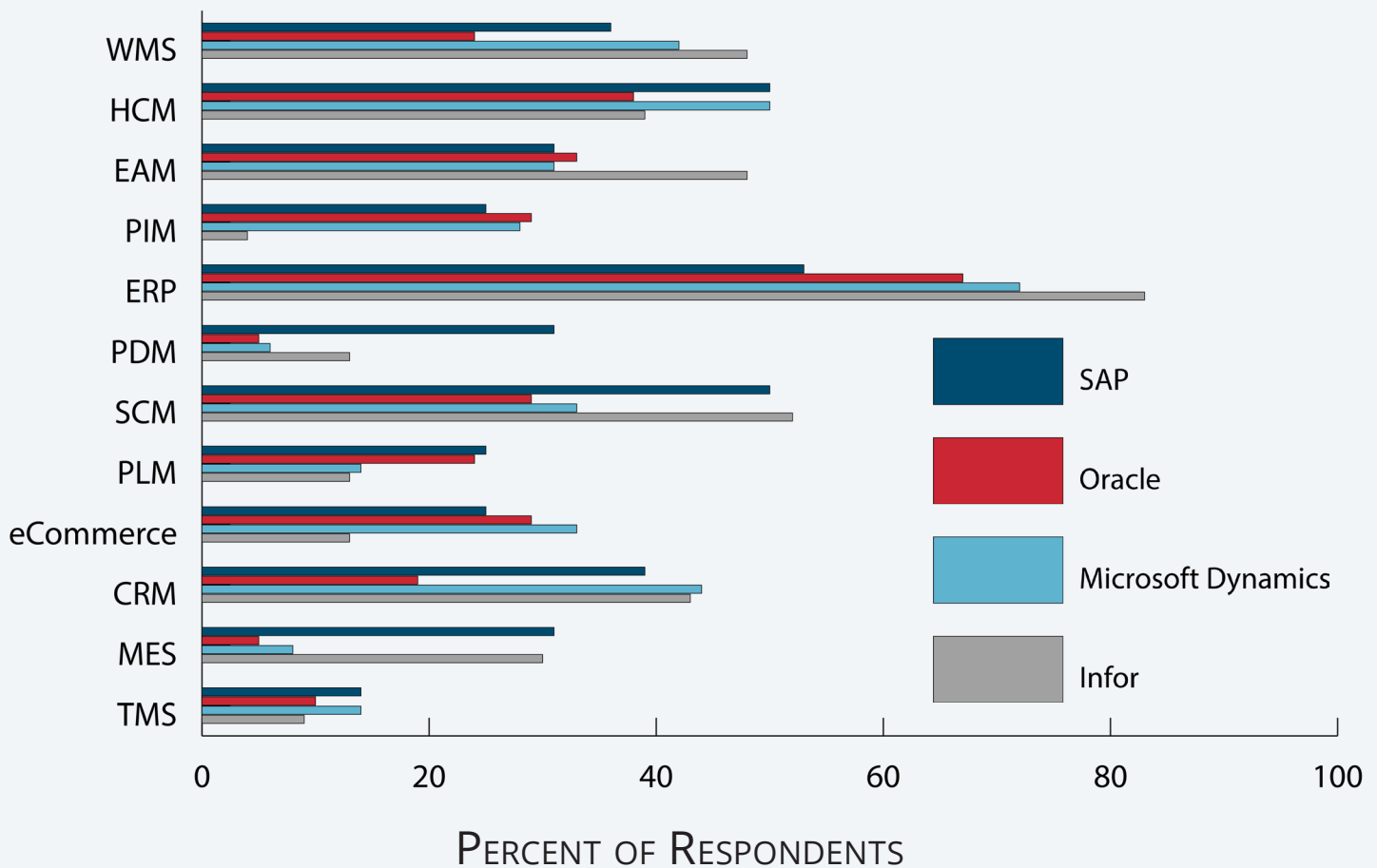
Business Initiatives

INCLUDED IN DIGITAL STRATEGY

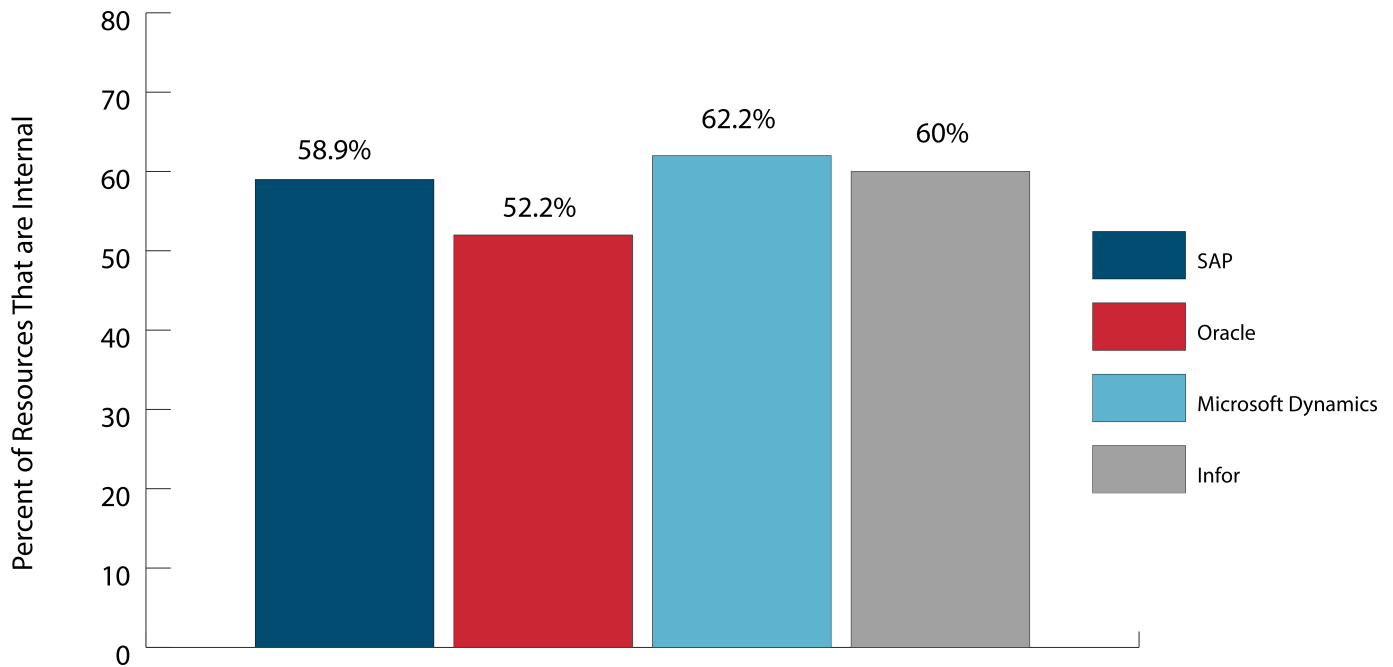
A FOCUS ON PRODUCT DATA MANAGEMENT FUNCTIONALITY IS MOST COMMON AMONG SAP CUSTOMERS.

Many SAP customers are extremely large and mature. As a result, they see opportunity in the large amount of data they maintain.

INITIATIVES INCLUDED IN DIGITAL STRATEGY



RESOURCE ALLOCATION



Resource Showdown

INTERNAL VS. EXTERNAL RESOURCES

During implementation, the project may become a full-time job for your internal core team. Based on the size of your company, this team may still be doing their day job, as well. If at all possible, you should try to take your core team off of their day job.

MICROSOFT CUSTOMERS USE THE MOST INTERNAL RESOURCES.

Microsoft customers use the standard Microsoft technology stack, which is prevalent in the market and allows for more self-service development and deployment.

ORACLE CUSTOMERS USE THE MOST EXTERNAL RESOURCES.

Oracle offers a large number of diverse products that require deep product knowledge. This requires external expertise.

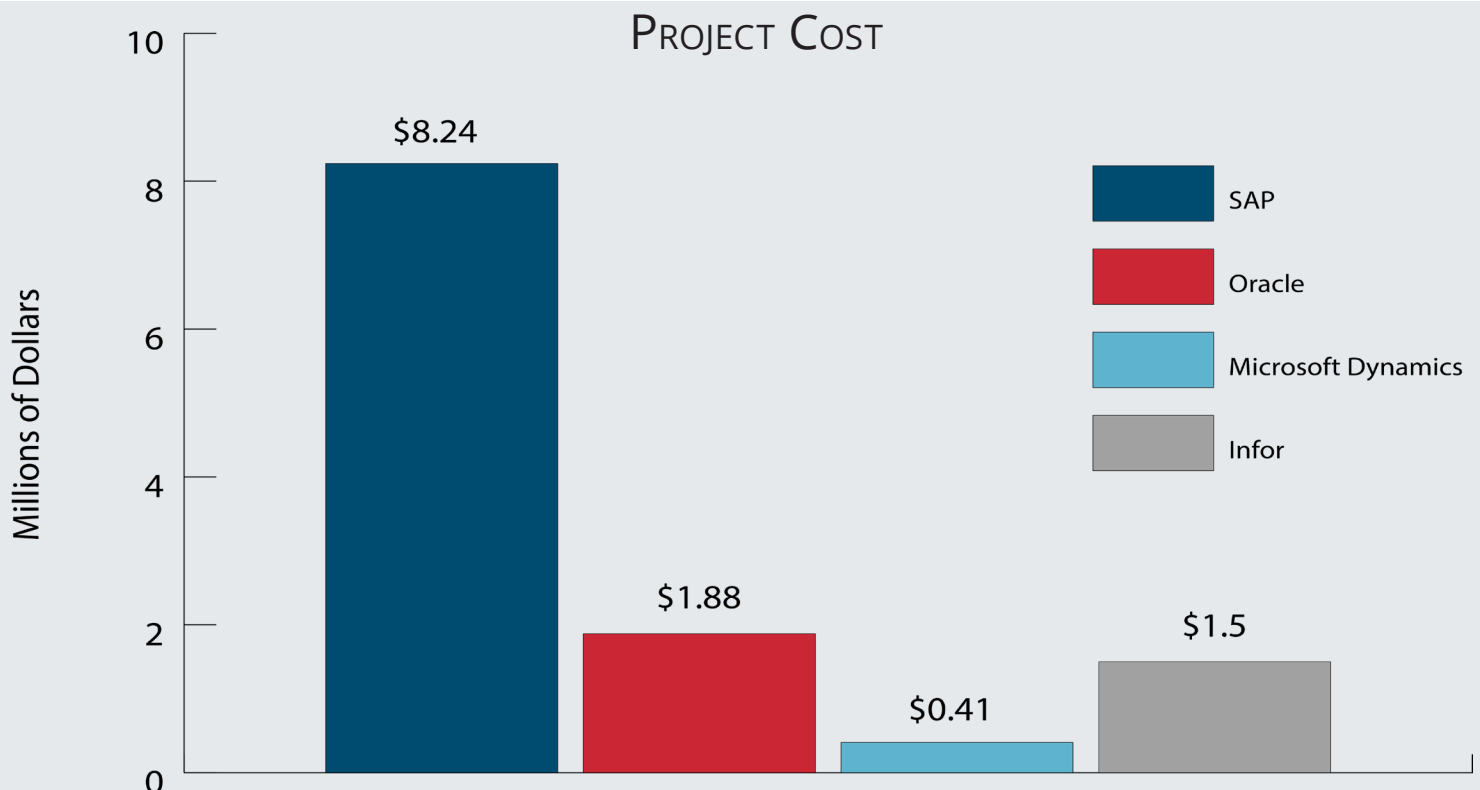
The Investment PROJECT COST

Setting realistic expectations requires a big picture view – you need to consider not just the cost of a system but the total cost of ownership. In other words, how much will the implementation cost in addition to the cost of the technology itself?

ORGANIZATIONS THAT COMPLETED IMPLEMENTATION OF AN SAP PRODUCT SPENT THE MOST ON THEIR PROJECTS.

SAP has diverse products and technologies, which can be difficult and/or expensive to implement. In addition, the vendor's customers include organizations from a wide range of industries, many of which are large, complex enterprises.

The SAP products that were implemented included ECC, S/4HANA, Business ByDesign and SuccessFactors. Organizations implementing these products purchased an average of 655 licenses - significantly more than customers of other vendors.



Wrap-up

CONCLUSION

Is one of these Tier 1 vendors right for your organization? While you may want to select a well-known ERP system, the best solution depends on your unique business needs. A better question is, “What are the best ERP systems for your future-state processes and organizational goals?”

In other words, before beginning ERP selection, you should define a digital strategy. Consider the pain points of your current IT infrastructure and determine what needs to change to support your objectives.

This will help you develop a business case that convinces executives to make the investment. Be sure to highlight not only the benefits of ERP software but also the costs and risks.

While an ERP implementation can bring many business benefits, they entail significant risk. Fortunately, you can mitigate risk by focusing on business process reengineering and organizational change management.

Panorama’s ERP consultants help organizations evaluate ERP systems and prepare their people and processes for organizational changes.

LEARN HOW YOU CAN ENSURE A SUCCESSFUL SOFTWARE SELECTION

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