Business Planning

Value Index

2022 Vendor and Product Assessment

VENDOR
REPORT

Bend, Oregon
December 2021

Ventana Research performed this research and analysis independently. Our goals were to determine the Value Index for Business Planning and to evaluate vendors and products in accordance with the Ventana Research methodology and blueprint. We charged no fees for this research and invited to participate all vendors that are delivering relevant applications to enable business planning. This report includes products generally available as of September 30, 2021.

Our purpose in conducting this research was to evaluate the maturity of software vendors and products and their value for enterprise use in business planning. Nothing in this report of our research is intended to imply that one vendor or product is the right choice for any particular organization. Rather, it provides a baseline of knowledge that organizations can use to evaluate vendors and products to manage and improve business planning. The evaluations are price-independent and therefore do not consider budget and other constraints that can be key factors in an organization's evaluation. Unlike IT analyst firm reports that use subjective factors to rate vendors, our findings are drawn from thorough, research-based analysis of customer assurance and product categories that best represent how an organization should evaluate its technology supplier.

The complete Value Index report with detailed analysis is available for purchase. We can provide additional insights on this Value Index and advice on its relevance to an organization through the Ventana On-Demand research and advisory service. Assessment services based on this research also are available.

We certify that Ventana Research performed the research to the best of our ability, that the analysis is a faithful representation of our knowledge of vendors and products, and that the analysis and scoring are our own.

Ventana Research

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Business Planning

The purpose of business planning is not simply to create a plan — it is to make better decisions. Planning and budgeting software should make the process faster, more agile, less burdensome and more intelligent so that managers can make better decisions more consistently. Since the early 2000s, Ventana Research has advocated using a dedicated application to increase the business value of planning and budgeting. In 2008, we first articulated a new vision of using a planning software platform to improve the business value of corporate budgeting. This approach allows business units to plan the way that best serves their needs while enabling the financial planning and analysis (FP&A) group to integrate their plans to construct a unified operating plan and budget. This idea has since been widely embraced by software vendors and increasingly adopted by organizations. Our Value Index assesses the ability of specific applications to achieve this vision.

Organizations do a lot of planning — some formal, but in practice, much of it informal and almost always in business silos. People plan sales, they plan how to produce products and deliver services. They plan for the headcount they'll need and how to organize distribution and their supply chain. They also produce a budget, which is a financial plan. When business managers are asked to prepare a budget, they first create a business plan (often informally) and then translate that into financial terms.

Although planning and budgeting are similar and connected, they have different aims. Budgeting sets limits while planning seeks opportunities. Planning is about determining the best path to success while budgeting imposes financial controls to prevent an organization from failing. Not failing is not the same as succeeding. Planning is about the things that departments do and the things they need to do them. Budgeting summarizes the monetary consequences of a plan in income statements, pro-forma balance sheets and cash flow projections. Successful organizations understand that planning for success while respecting financial objectives and constraints is more productive and strategic than just budgeting. Planning software enables organizations to do both faster and more effectively than using stand-alone spreadsheets, which still remains the most popular software for planning and budgeting.

The enduring popularity of stand-alone spreadsheets is understandable and many organizations are in a planning rut, the result of inertia, the power of vested interests and the perceived risk of change. Although the annual budget provokes grumbling, there is little impetus for change, especially from the top. For those in FP&A who manage the budgeting process, it is easy to lose sight of an objective when a job is wrapped up in a complex business process, especially if the individual in charge of that job is spending a

considerable amount of time handling its mechanics and dealing with the inefficiencies of stand-alone spreadsheets. Technology allows organizations to streamline and redefine the process so that those doing the planning and budgeting can concentrate on its essential purpose.

Planning should be a structured dialog between executives and managers about objectives and the resources and tactics that people need to achieve them, not just a financial plan. Dialog is considered "structured" when it is grounded in measurable objectives rather than vague goals. For example, "Our objective is to grow sales by 8%," not "We plan to increase sales."

In practice, planning is an inconsistent, fragmented and siloed process. Mostly, this stems from using legacy technologies. Stand-alone spreadsheet-based planning reinforces silos because they compartmentalize plans. Each department plans their part of the business differently because they have different needs. Creating an integrated or connected business plan with spreadsheets is difficult because, while spreadsheets can handle the financial aspects of planning an organization, they are not good at simultaneously handling monetary elements and "things" like headcount, hours, or supplies or materials needed to fulfill sales orders or contracts.

> **Technology is essential to making planning and budgeting more strategic, more productive, and more consequential to an organization's success.**

For years, people have been talking about finance transformation — that is, the remaking of the finance department into an organization that functions as a strategic asset to the corporation. Such a department is strategic because it provides greater visibility and insight into how the company and each of its business units is performing and how to optimize that performance going forward. Its focus is on what happens next and not merely on what just happened. It does not only explain past results but uses that context to provide insight into choices among next-step options and their ramifications. A strategic finance organization has the capability to provide data-driven advice to executives. Building technology competence does not just benefit planning and budgeting — it raises the performance of every facet of the department.

Technology is essential to making planning and budgeting more strategic, more productive, and more consequential to an organization's success. Planning software increases the business value of planning and budgeting because it serves the needs of the senior

leadership team, business managers and the office of finance, thereby increasing an organization's agility.

This report evaluates the following vendors that offer planning and budgeting software as we define it: Anaplan, Board International, IBM, Infor, insightsoftware, OneStream Software, Oracle, Planful (formerly Host Analytics), Prophix, SAP, Unit4, Vena Solutions, Wolters Kluwer and Workday.

Value Index Overview

For almost two decades, Ventana Research has conducted market research related to business planning with the objective of increasing its strategic value to organizations. This report on the Business Planning Value Index is the distillation of a year of market and product research efforts by Ventana Research. It is an assessment of how well vendors' offerings will address buyers' requirements for business planning software. The index is structured to replicate an RFI/RFP process by incorporating all criteria needed to evaluate, select, utilize and maintain technology, and maintain relationships with vendors.

> **Ventana Research has designed the Value Index to provide a balanced perspective of vendors and products that is rooted in an understanding of business drivers and needs.**

In this Value Index, Ventana Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Usability, Manageability, Reliability, Capability and Adaptability. In addition, we consider two customer-experience categories: Vendor Validation, and Total Cost of Ownership and Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the Ventana Research Value Index methodology and blueprint, which links the personas and processes for business planning to an organization's requirements.

Unlike many IT analyst firms that rank vendors from an IT-only perspective or consider futures or vision over what is available in the products today, Ventana Research has designed the Value Index to provide a balanced perspective of vendors and products that is rooted in an understanding of business drivers and needs. This approach not only reduces cost and time but also minimizes the risk of making a decision that is bad for the business. Using the Value Index will enable your organization to achieve the levels of efficiency and effectiveness needed to use business planning software.

We use our research-based analytics and methodology to generate the Value Index ratings. We then build them into a set of indicators that we present in both analytic and graphic form, each depicting the value of a specific vendor's offering in terms of what it can deliver relevant to your business planning needs.

The Value Index is not an abstraction; we use a carefully crafted best practices-based methodology to represent how organizations assess vendors and products. We have designed the Value Index to ensure that it provides objective research and guidance to organizations looking to assess and evaluate their applications for business and IT needs.

> **The Value Index is not an abstraction; we use a carefully crafted best practices-based methodology to represent how organizations assess vendors and products.**

The structure of the Value Index reflects our understanding that the effective evaluation of vendors and products involves far more than just examining product features, potential revenue or customers generated from marketing and sales. We believe it is important to take this comprehensive research-based approach, since making the wrong choice when selecting business planning technology can raise the total cost of ownership, lower the return on investment and hamper an organization's ability to reach its performance potential. In addition, this approach can reduce the project's development and deployment time and eliminate the risk of relying on a short list of vendors that does not represent a best fit for your organization.

To ensure the accuracy of the information we collected, we asked participating vendors to provide product and company information across the seven categories that taken together reflect the concerns of a well-crafted RFP. Ventana Research then validated the information, first independently through our database of product information and extensive web-based research, and then in consultation with the vendors. Most selected vendors also participated in one-on-one consultative sessions, after which we requested them to provide additional documentation to support any new input.

Ventana Research believes that an objective review of specific vendors and products is critical to the establishment of business planning software and applications. An organization's review should include a thorough analysis of both what is possible and what is relevant. One caveat must be noted: Our assessments are price-independent because of the broad and complex set of factors that affect these calculations. However, cost considerations are a primary factor for all organizations in their vendor selection.

The business planning software category is well established, but Ventana Research expects the category to evolve significantly over the next five years. As they are not verifiable, we do not include future plans in this assessment. We advise buyers to pay close attention to vendors' development roadmap and their proven ability to incorporate advances on time

and in scope. For example, AI-driven improvements are being introduced that can enhance the user-experience and facilitate rapid operational and financial planning cycles. Buyers should assess the vendor's ability to deliver these sorts of advances in the context of importance to their organization's process. The future architecture and capabilities of the vendor's data platform also should be investigated. As organizations increasingly utilize operational data in forecasting, planning and budgeting, the data platforms used by the application must demonstrate the ability to scale while providing easy use by business planners.

We urge organizations to do a thorough job of evaluating business planning systems and tools and offer this Value Index as both the results of our in-depth analysis of these vendors and as an evaluation methodology.

How To Use This Value Index

Evaluating Vendors: The Process

In our view, business improvement efforts should be based on best practices that research indicates deliver value quickly. Our Value Index evaluates business planning systems and tools in accordance with that belief.

We advocate using the Value Index as part of a structured approach that begins by incorporating these steps into a program document that will both summarize and detail your initiative or project. Then consult the Value Index to ensure you make choices that will yield the results you want.

The steps listed below provide a framework for a technology-driven business improvement project.

1. Define the business case and goals.

   Develop the business case for investment. Define the mission of the business project: What is the purpose, why is it important, what outcome do you want to achieve and how will you measure the project's success? The goals should be grounded in your organization's strategy and plans and should make clear the expected outcomes.

2. Specify the project's business requirements.

   What must be done to achieve these goals? Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.

3. Assess the required roles and responsibilities.

   Identify the individuals required for the project at every level of the organization from executives to front line workers, and determine what each will contribute.

4. Outline the project's critical path.

   What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.

5. Develop the technology approach.

   Determine the technology approach that most closely aligns to your organization's requirements. Then develop a comprehensive list of potential vendors and products that best fit your needs.

6. <u>Establish technology evaluation criteria.</u>

   Define the business and technology criteria that you will use to evaluate vendors. We recommend using the criteria we have developed based on our Benchmark Research and use to build the Value Index: Usability, Manageability, Reliability, Capability, Adaptability, Validation, and TCO and ROI. This step will provide the tools necessary to move from a long list to a short list of vendors and products that you will then evaluate for final selection.

7. <u>Evaluate and select the technology properly.</u>

   Weight the seven categories of technology evaluation criteria to reflect the organization's priorities. Then evaluate the short list of vendors and products based on your business case, requirements and the technology evaluation criteria for your project.

8. <u>Establish the business initiative team to start the project.</u>

   Identify who will lead the project and the members of the team needed to plan and execute it. Have them begin by establishing a timeline and allocating resources.

In addition to evaluating existing suppliers, the Value Index can be used to provide evaluation criteria for new projects. Applying our research can shorten the cycle time when creating an RFP.

Products Evaluated

Vendor	Product Names	Version	Release Month	Release Year
Anaplan	The Anaplan Platform	-	September	2021
Board International	Board	Board 2021 Summer Release	September	2021
IBM	IBM Planning Analytics with Watson	2.x	September	2021
Infor	Infor Dynamic Enterprise Performance Management (d/EPM)	Cloud	September	2021
insightsoftware	Longview Plan	-	September	2021
OneStream Software	OneStream	6.6	September	2021
Oracle	Oracle Fusion Cloud EPM	21.09	September	2021
Planful	Continuous Planning platform	-	September	2021
Prophix	Prophix	Summer 2021	August	2021
SAP	SAP Analytics Cloud	Q3 Release	September	2021
Unit4	Unit4 FP&A	31.3	September	2021
Vena Solutions	Vena	Summer 2021	August	2021
Wolters Kluwer	CCH Tagetik	5.3 SP 17	August	2021
Workday	Workday Adaptive Planning	2021 R2	September	2021

The Findings

All of the products we evaluated are feature-rich, but not all the capabilities they offer are equally valuable to users or support everything needed across the entire lifecycle of use. Paradoxically, the existence of too many features and capabilities may be a negative factor for an organization if it introduces unnecessary costs and complexity. That noted, many organizations will decide that a larger number of functions is a plus, especially if some of them match your organization's established practices or better support a new initiative that is driving the purchase of new software.

Considerations beyond features and functions or vendor assessments may turn out to be a deciding factor. For example, an organization may face budget constraints such that the TCO evaluation can tip the balance to one vendor or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of vendors and products to your specific needs.

Overall Scoring of Vendors Across Categories

The Value Index for Business Planning in 2021 demonstrates the maturity of the business planning software category. The top finishers are tightly clustered and even those at the bottom of the list have well-developed capabilities far beyond what was available a decade ago. The Index has IBM first on the list with SAP in second place and Oracle in third. Companies that place in the top three in any category earn the designation Value Index Leader, and eight of the vendors evaluated qualify in this respect. Although it finished in second place overall, SAP ranked as a Value Index Leader in five of the seven categories; Oracle in four; IBM and Anaplan in three; Board International and OneStream in two; and Vena Solutions and Workday in one.

Ventana Research Value Index
Business Planning: Overall

Vendors		Performance
IBM	1	94.3%
SAP	2	94.1%
Oracle	3	93.3%
Board International	4	92.7%
Anaplan	5	92.3%
OneStream Software	6	91.1%
Wolters Kluwer	7	89.7%
Workday	8	89.3%
Vena Solutions	9	87.9%
insightsoftware	10	87.8%
Prophix	11	87.5%
Planful	12	86.9%
Unit4	13	84.4%
Infor	14	83.9%

Source: Ventana Research Value Index
Business Planning
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The overall representation of the Value Index below places the rating of the product experience and customer experience on the X and Y axes respectively to provide a visual representation and classification of the vendors. Those vendors whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines their placement on

the vertical axis. In short, vendors that place closer to the upper-right on this chart performed higher than those closer to the lower-left.

The results from our research have placed vendors into one of four overall categories: Assurance, Exemplary, Merit or Innovative. The vendors that did well in both Product and Customer Experience were placed as Exemplary. Those vendors that perform quite well in Customer Experience but did not perform as well in Product Experience, such as Wolters Kluwer and Workday, are those providing Assurance. The opposite is for those vendors with good performance in Product Experience but did not perform as well in Customer Experience, in this case Oracle and Infor, are classified as Innovative. This representation of the Value Index helps organizations better classify vendors to how they could use them in the organization.
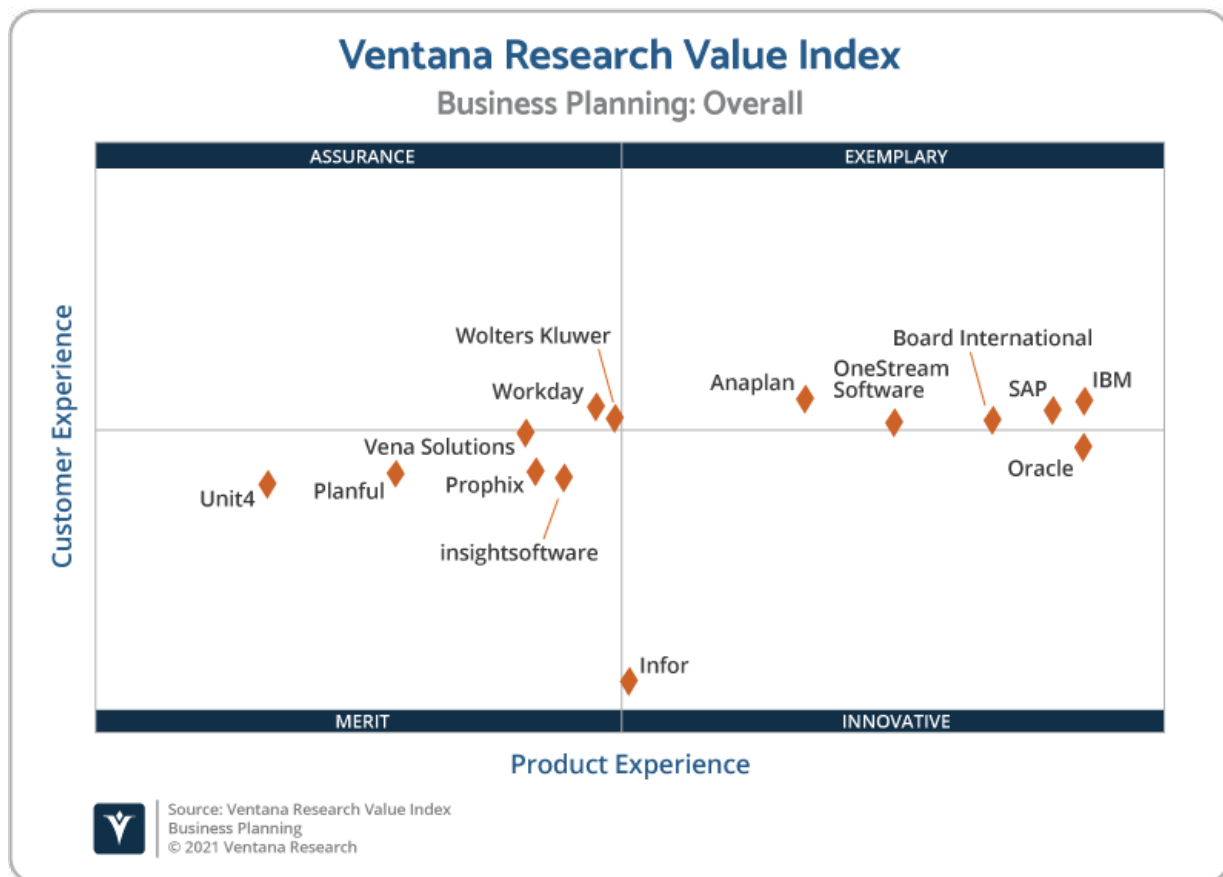
Exemplary: The categorization and placement of vendors in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The vendors awarded Exemplary are: Anaplan, Board, IBM, OneStream and SAP.

Innovative: The categorization and placement of vendors in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements, but fell short of achieving the highest level of Customer Experience. The vendors awarded Innovative are: Infor and Oracle.

Assurance: The categorization and placement of vendors in Assurance (upper left) represent those that performed the best in meeting the overall Customer Experience requirements, but fell short of achieving the highest level of Product Experience. The vendors awarded Assurance are: Wolters Kluwer and Workday.

Merit: The categorization for vendors in Merit (lower left) represent those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The vendors awarded Merit are: insightsoftware, Planful, Prophix, Unit4 and Vena.

We warn that close vendor placement should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every organization or for a specific process. Although there is a high degree of commonality in how organizations handle business planning, there are many idiosyncrasies and differences in how they do these functions that can make one vendor's offering a better fit than another's for a particular organization's needs. Moreover, the evaluations are independent of ongoing cost and resource requirements.

Product Experience

The process of researching products to address an organization's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an organization's lifecycle of onboarding, configuration, operations, usage and maintenance. Too often vendors are not evaluated for the entirety of the products; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an organization's requirements but how the vendor operates. As more vendors establish a Chief Products Officer role, it is essential for them to be more engaged in the product experience that they and their organization represent.

The Business Planning Value Index based on the methodology of expertise and research identified the weighting of Product Experience to 80% or four-fifths of the total evaluation. Importance was placed on the categories of Usability (20%), Capability (20%) and Reliability (15%), while Adaptability (15%) and Manageability (10%) were weighted with lower percentages.

This weighting impacted vendor rankings in Product Experience and the resulting overall rankings in this Value Index. The ranking of the vendors with Oracle, IBM and SAP being Value Index Leaders is a result of their decades-long commitment to business planning technology. Additionally, vendor rankings for Board, OneStream and Anaplan show how they also continue to meet a broader range of enterprise requirements. The research found that vendors' commitment to Usability matters significantly, with IBM, Board and Oracle having higher placement through continued focused on broader needs across the enterprise. IBM, SAP, Oracle and Board led in Capability with the highest rating for support of business planning processes and technologies and the individuals tasked with managing the process. Oracle, Anaplan, SAP, OneStream and Board led in Manageability, reflecting their excellence in business and technology administration, support for security and privacy, while Oracle, OneStream and IBM were at the top of the Reliability assessment because of their architecture, performance and scalability.

Ventana Research Value Index
Business Planning: Product Experience

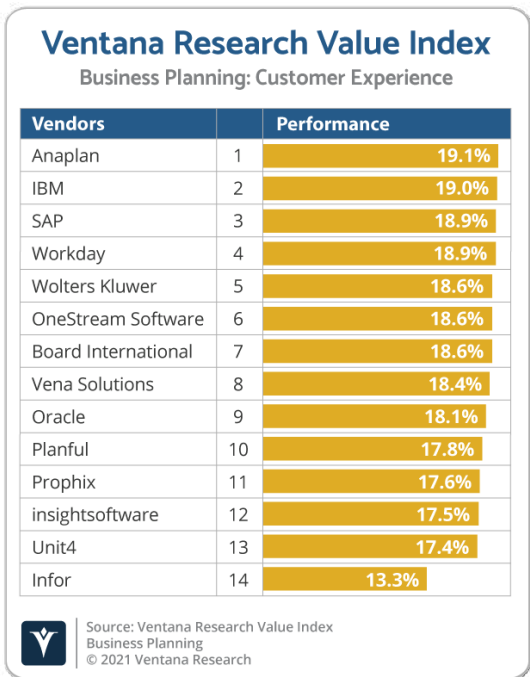| Vendors		Performance
Oracle	1	75.2%
IBM	2	75.2%
SAP	3	74.9%
Board International	4	74.3%
OneStream Software	5	73.3%
Anaplan	6	72.4%
Infor	7	70.6%
Wolters Kluwer	8	70.5%
Workday	9	70.3%
insightsoftware	10	70.0%
Prophix	11	69.7%
Vena Solutions	12	69.6%
Planful	13	68.3%
Unit4	14	67.0%

Source: Ventana Research Value Index
Business Planning
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Customer Experience

The importance of a customer relationship with a vendor is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entirety of the journey an organization has with its vendor is critical for ensuring inevitable satisfaction in working with that vendor. Thus, a vendor's offering is not just about technology and should be evaluated using a lens that ensures the proper assessment and selection of a vendor. Technology providers that have Chief Customer Officers are most likely to have greater investments in the customer relationship and to be focused on customer success. These leaders also need to take responsibility for ensuring the marketing of their commitment is made abundantly clear throughout the buying process and customer journey. Our Value Index methodology examines Customer Experience to represent the framework of commitment to the relationship and the value that can be derived from it. The two evaluation categories are Validation (10%) and TCO/ROI (10%) and are weighted to represent their importance to the overall Value Index, balanced with the Product Experience.

The vendors that rank the highest overall in the aggregated and weighted Customer Experience categories are Value Index Leaders Anaplan, IBM and SAP. The category leaders in Customer Experience provided an impressive level of information to communicate their commitment to business planning. Here, as in other areas of the index, differences in scoring were minimal. The results reflect the degree to which vendors make this category a priority and devote resources to providing information through their website, presentations and evaluation responses. This information improves an organization's ability to evaluate vendors on the merits of their commitment to customer success. Infor scored poorly in this respect because it declined to participate in the process. While we were able to assess many aspects of its commitment on our own, there was some information necessary for our validation that was otherwise unavailable.

Ventana Research Value Index
Business Planning: Customer Experience

Vendors		Performance
Anaplan	1	19.1%
IBM	2	19.0%
SAP	3	18.9%
Workday	4	18.9%
Wolters Kluwer	5	18.6%
OneStream Software	6	18.6%
Board International	7	18.6%
Vena Solutions	8	18.4%
Oracle	9	18.1%
Planful	10	17.8%
Prophix	11	17.6%
insightsoftware	12	17.5%
Unit4	13	17.4%
Infor	14	13.3%

Source: Ventana Research Value Index
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IBM

Company and Product Profile

"IBM Planning Analytics with Watson is an AI-infused, continuous integrated planning solution that allows you to transcend the limits of manual planning. This solution breaks down business unit silos so you can quickly create more accurate plans and forecasts for FP&A, sales, supply chain and beyond — all on one platform. Pivot in real-time, accelerate decision making and drive higher performance, all at the speed of modern business."
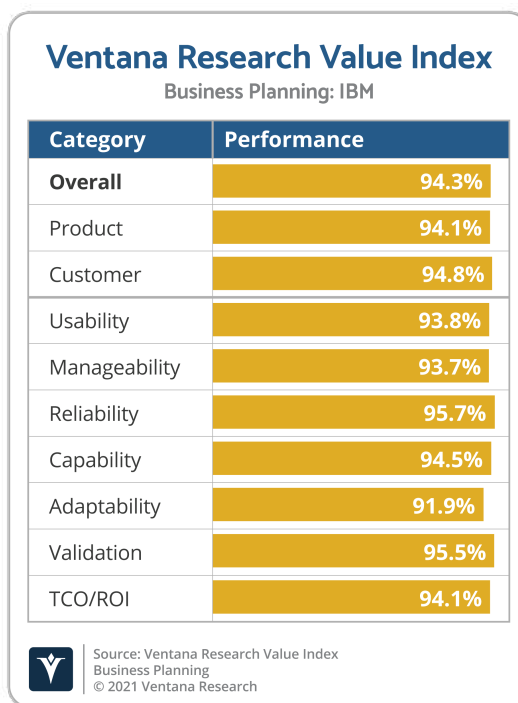
"IBM Planning Analytics with Watson accelerates the planning process. FP&A teams can now focus on higher-value work by providing deep insights into business drivers, forecasting multiple scenarios and generating predictive insights to adjust plans and forecasts easily. With IBM Planning Analytics with Watson, planning and analysis can be easily extended across all lines of business to ensure operational activities are aligned with financial plans and corporate strategies and organizational goals."

Ventana Research Evaluation

IBM Planning Analytics, available as a cloud application, is designed to support a high-participation collaborative approach to managing all the forward-looking activities in which companies routinely engage, bringing together operational and financial budgeting and planning.

IBM was categorized as an Exemplary Vendor, ranking first overall in this Value Index evaluation. It ranked second in Product Experience where it was designated as a Value Index Leader in Capability and Usability. It ranked second in Customer Experience and was a Value Index Leader in TCO/ROI. IBM's overall performance was impacted by its lower ranking in Adaptability, which represents 15% of the weighting in the overall Value Index.

Our assessment finds that IBM could perform better in Adaptability, where it ranked sixth, by improving the depth of its user-specific integration with mobile devices and application integration for sharing information.

Ventana Research Value Index
Business Planning: IBM

Category	Performance
Overall	94.3%
Product	94.1%
Customer	94.8%
Usability	93.8%
Manageability	93.7%
Reliability	95.7%
Capability	94.5%
Adaptability	91.9%
Validation	95.5%
TCO/ROI	94.1%

Source: Ventana Research Value Index
Business Planning
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Appendix: Vendor Inclusion

All vendors that offer relevant business planning products and meet the inclusion requirements were invited to actively participate in the Value Index evaluation process at no cost to them. If a vendor did not respond to or declined the invitation, a determination was made whether to include it in our analysis based on our inclusion criteria. These criteria are designed to ensure we include all vendors with geographic operations, customer base and revenue, as well as all relevant aspects of the products' fit for the particular category being evaluated.

For inclusion in the Ventana Research Business Planning Value Index for 2021, a vendor must be in good standing financially and ethically, have at least $25 million in annual or projected revenue, more than 50 employees, sell products and provide support on at least two continents, and have at least 25 customers. The principal source of the relevant business unit's revenue must be software-related and there must have been at least one major software release in the last 18 months. The product must be capable of accessing data from a variety of sources, modelling the data for analysis, analyzing the data using a variety of techniques, communicating the results in a variety of ways and supporting the data and analytics processes within an organization.

If a vendor is actively marketing, selling and developing a product as reflected on its website that is within the scope of the Value Index, it is automatically evaluated for inclusion. We have adopted this approach because we view it as our responsibility to assess all relevant vendors whether or not they choose to actively participate.

Twelve of the 14 suppliers responded positively to our requests for information and provided completed questionnaires and demonstrations to help in our analysis of their business planning products. The following vendors declined to fully participate or did not respond to our invitation: Infor and insightsoftware. To organizations evaluating these vendors, we recommend extra scrutiny as part of the software assessment because they did not make their technology or complete information available for the evaluation process. Online material that was generally available was also used for the analysis, along with briefings and any information the vendor provided.

We did not include vendors that did not satisfy the criteria that our methodology for this research requires.

About Ventana Research

Ventana Research is the most authoritative and respected benchmark business technology research and advisory services firm. We provide insight and expert guidance on mainstream and disruptive technologies through a unique set of research-based offerings including Benchmark Research and technology evaluation assessments, education workshops and our research and advisory services, Ventana On-Demand. Our unparalleled understanding of the role of technology in optimizing business processes and performance and our best practices guidance are rooted in our rigorous research-based benchmarking of people, processes, information and technology across business and IT functions in every industry. This Benchmark Research plus our market coverage and in-depth knowledge of hundreds of technology providers means we can deliver education and expertise to our clients to increase the value they derive from technology investments while reducing time, cost and risk.

Ventana Research provides the most comprehensive analyst and research coverage in the industry; business and IT professionals worldwide are members of our community and benefit from Ventana Research's insights, as do highly regarded media and association partners around the globe. Our views and analyses are distributed daily through blogs and social media channels including Twitter, Facebook and LinkedIn.

To learn how Ventana Research advances the maturity of organizations' use of information and technology through benchmark research, education and advisory services, visit www.ventanaresearch.com.

What We Offer

Ventana Research provides a variety of customizable services to meet your specific needs including workshops, assessments and advisory services. Our education service, led by analysts with more than 20 years of experience, provides a great starting point to learn about important business and technology topics from compliance to BI to building a strategy and driving adoption of best practices. We also offer tailored Value Index Assessment Services to help you define your strategy, build a business case and connect the business and technology phases of your project. And we provide Ventana On-Demand (VOD) access to our analysts on an as-needed basis to help you keep up with market trends, technologies and best practices.

Everything at Ventana Research begins with our focused research, of which this Value Index is a part. We work with thousands of organizations worldwide, conducting research and analyzing market trends, best practices and technologies to help our clients improve the efficiency and effectiveness of their organizations. Through the Ventana Research community we also provide opportunities for professionals to share challenges, best practices and methodologies. Sign up for Individual membership at https://www.ventanaresearch.com/ to gain access to our weekly insights and learn about upcoming educational and collaboration events, including webinars, conferences and opportunities for social collaboration on the Internet.

We offer the following membership levels for business and IT professionals:

Individual membership: For business and IT professionals interested in full access to our website and analysts for themselves. The membership includes access to our library of hundreds of white papers and research notes, briefings, and telephone or email consulting sessions to provide input and feedback.

Team membership: For business and IT professionals interested in full access to our website and analysts for a five-member team. The membership includes access to our library of hundreds of white papers and research notes, briefings, telephone or email consulting sessions to provide input and feedback, and use of Ventana Research materials for business purposes.

Business membership: For business and IT professionals interested in full access to our website and analysts for their larger team or small business unit. The membership includes access to our library of hundreds of white papers and research notes, briefings, telephone or email consulting sessions to provide input and feedback, use of Ventana Research materials for business purposes, and additional analyst availability.

Business Plus membership: For business and IT professionals interested in full access to our website and analysts for larger numbers of company employees. The membership includes access to our library of hundreds of white papers and research notes, briefings, telephone or email consulting sessions to provide input and feedback, quotes and validation for media, use of Ventana Research materials for business purposes, additional analyst availability, and access to our team for scheduled strategy consulting sessions.

[Additional services](#) are available for solution providers, software vendors, consultants and systems integrators.

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