

# 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*

## Phocas



**“** *A very good product that value adds to the overall business.*

Head of business department, Construction,  
100 - 2,500 employees

**BARC** The Planning Survey 24

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# About The Planning Survey 24

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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 Phocas, 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 - 30 (depending on the KPI) for each of the questions that feed into the KPI are included.
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.

Phocas features in the following peer groups:

- Products for Planning, Budgeting & Forecasting
- Integrated Products for Planning and BI & Analytics
- Midsize/Departmental Implementations



# About Phocas

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## Phocas overview

Phocas was founded in 2001 and started as a business intelligence (BI) company offering software and professional services. The vendor is headquartered in Sydney, Australia and has additional offices in Australia, New Zealand, the United States and the United Kingdom. Phocas has a workforce of 300 employees and serves more than 2,700 customers worldwide (predominately in the United States, the United Kingdom and the Asia-Pacific region).

The Phocas platform is focused on mid-market organizations, typically in manufacturing, wholesale distribution and retail. It provides comprehensive capabilities for BI and analytics, budgeting and forecasting, financial reporting and analysis. The product portfolio includes four main products: Analytics, Budgets and Forecasts, Financial Statements and Rebates. Phocas Analytics is the core product and foundation layer of the platform focused on comprehensive ad hoc query, reporting and dashboards.

Budgets and Forecasts is a planning, budgeting and forecasting platform for business users. Budgets and actuals are published with a click into Phocas Analytics for analysis. Financial Statements helps finance teams to prepare financial statements and reports. Rebates is built on top of Phocas Analytics for analyzing performance, profit and margin. All these products are integrated with each other and can be used in different combinations. They are directly and indirectly sold in their target markets through various channels.

Budgets and Forecasts was launched in 2020 and is used by approximately 15 percent of Phocas customers. Users can create both financial and operational planning applications including sales planning, demand planning, headcount planning and financial planning. The product is essentially a flexible development environment for business users to create individual planning applications, which are typically used in addition to Phocas' BI and analytics capabilities. Budgets and Forecasts does not contain prebuilt planning solutions or content. Templates

are created during the implementation project together with the customer and can be customized by business users to suit their needs. Forecasts can be created from budget models with a configurable mix of actual and forecast periods. Within the planning process, workflow features allow users to collaborate simultaneously on various parts of the budget or forecast. Commenting functionality is available, to add comments to individual cells.

Phocas is a SaaS cloud offering hosted through Amazon Web Services that can be accessed via popular HTML5-compliant web browsers. Data is stored in relational and multidimensional databases. Databases technologies are selected for performance, security and functionality by Phocas. Data integration functionality is provided by the vendor itself with a library of over 150 predefined connectors. Phocas' consulting teams can help customers to set up data integration from source systems.



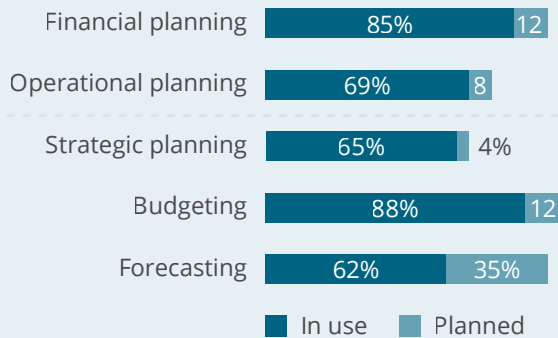
# User and Use Case Demographics

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This year we had **26 responses** from Phocas users. At the time of the survey, 29 percent of them were using version 23 and 71 percent version 24.

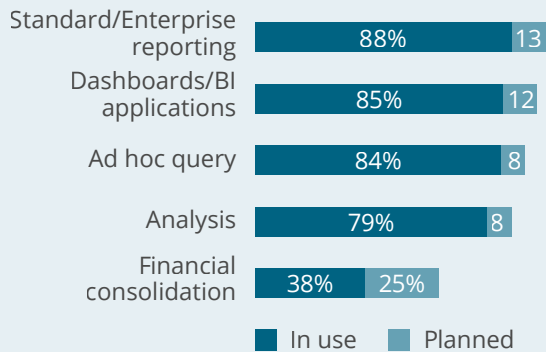
## Current vs. planned use (planning use cases)

n=26



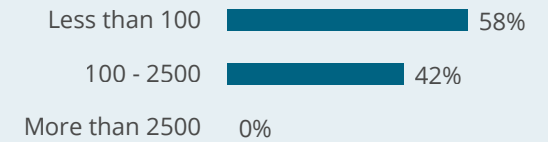
## Current vs. planned use (other use cases)

n=26



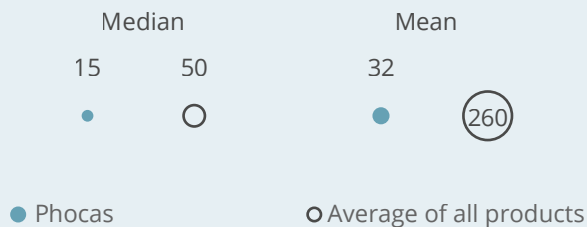
## Company size (employees)

n=26



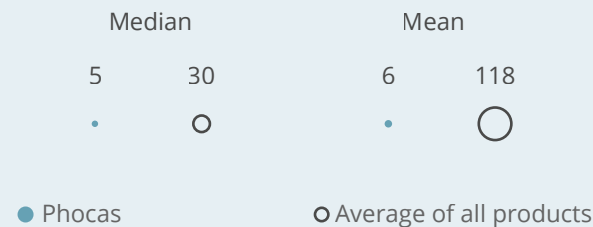
## Total number of users per company

n=26



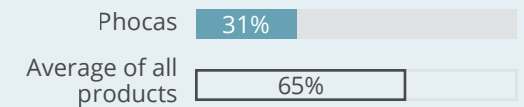
## Planning users per company

n=26



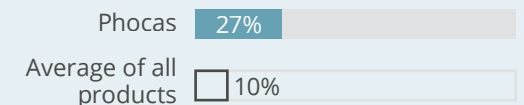
## Planning users (as a percentage of all users)

n=26



## Percentage of employees using Phocas

n=26



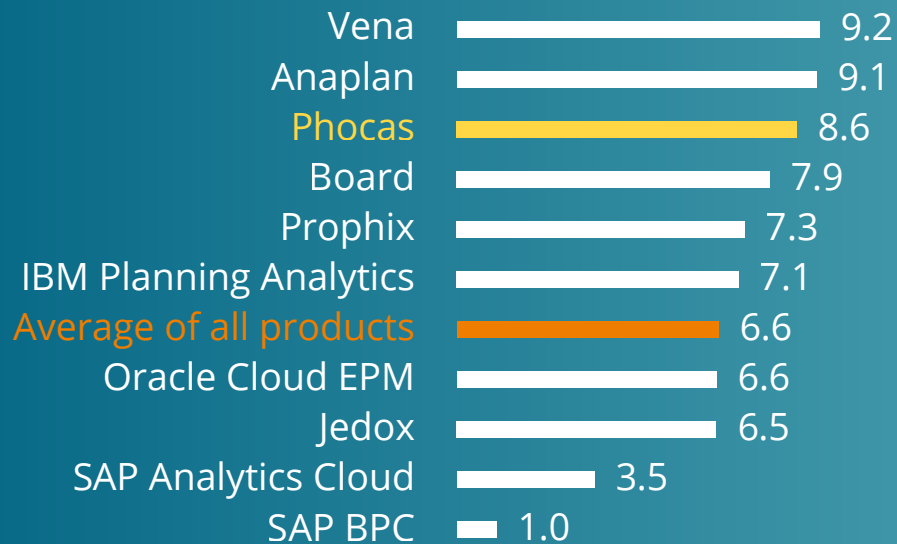


# Recommendation

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



## Recommendation



© BARC Planning Survey 24

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

# 88%

of surveyed users say they would **recommend** Phocas.

# “

Overall it is a great tool, at a very good price point. Effective for SME market.

CIO/Head of IT, Process industry, 100 - 2,500 employees

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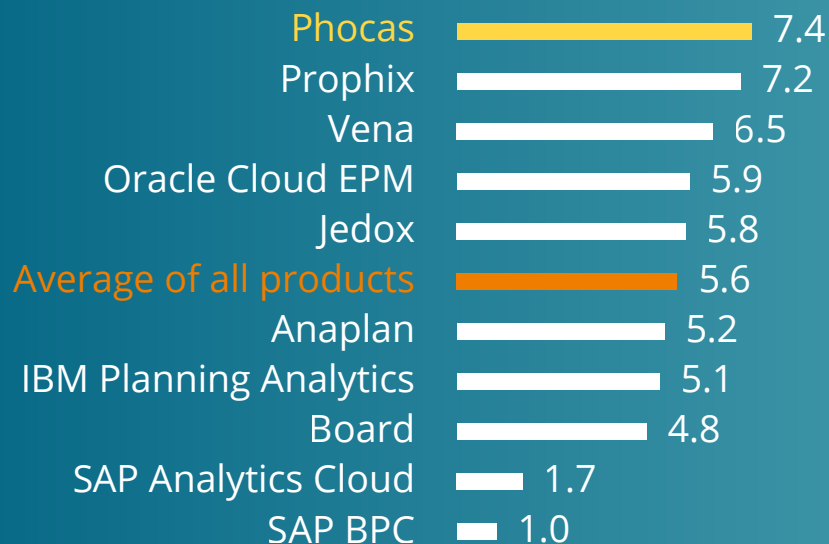


# Vendor Support

This KPI is based on how respondents rate the vendor support provided for the product.



## Vendor Support



© BARC Planning Survey 24

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

# 88%

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



**“** The finance, budgeting and planning support team at Phocas have all been incredible to work with. Just about every request I made from the first year has since been implemented into the updated versions of Phocas B&F.

Head of business department, Retail/wholesale/trade, 100 - 2,500 employees

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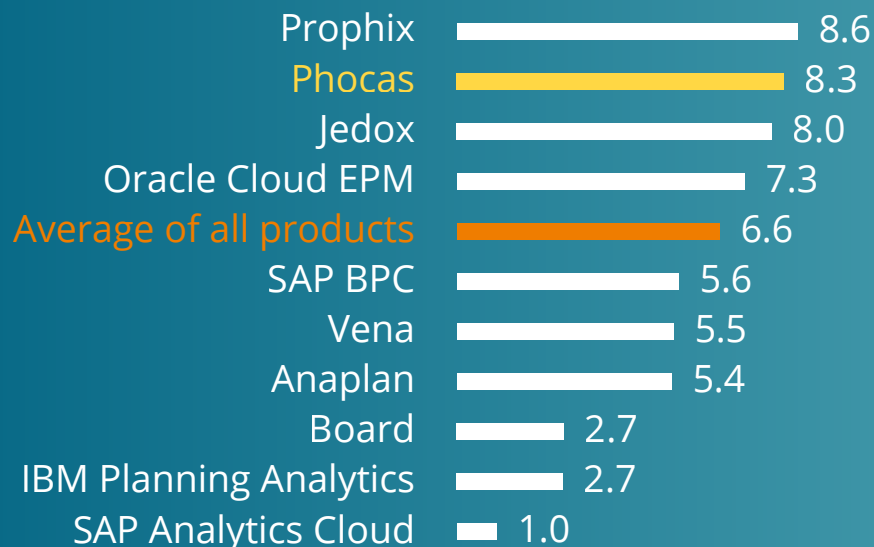


# Planning Content

This KPI is based on how respondents rate the predefined planning content available with the product.



## Planning Content



© BARC Planning Survey 24

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

# 74%

of surveyed users rate Phocas' predefined planning content as very good or good.

# “

Love it. Sales, purchasing and financials used every day. Still learning budgeting and forecasting.

Head of business department, Retail/wholesale/trade, < 100 employees

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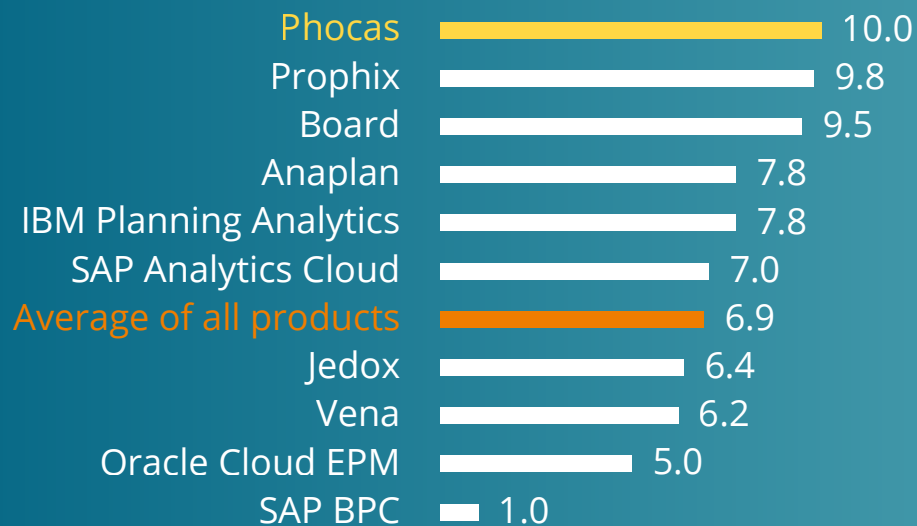


# Reporting/Analysis

This KPI is based on how respondents rate the product's coverage of reporting/analysis requirements.



## Reporting/Analysis



© BARC Planning Survey 24

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

# 92%

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

# “

*Great program that has saved us a lot of time and provided great analytical tools that would have taken us hours or even days to produce.*

Head of business department, Manufacturing, 100 - 2,500 employees

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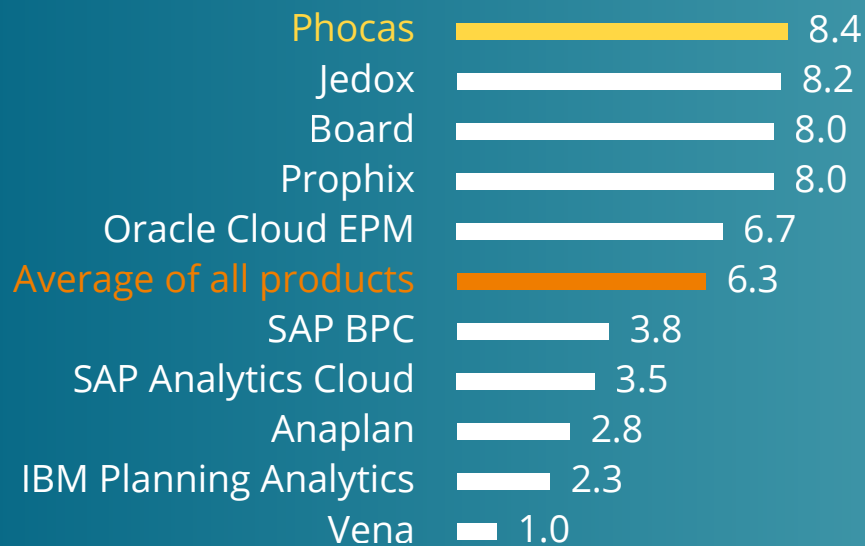


# Predefined Connectors

This KPI is based on how respondents rate the product's predefined standard interfaces to data sources and connectors.



## Predefined Connectors



© BARC Planning Survey 24

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

# 77%

of surveyed users rate Phocas' predefined standard interfaces to data sources as very good or good.

“

Product is evolving and improving. Ability to interface with ERP and financial DBs. Support specialists are knowledgeable and enthusiastic.

Head of business department, Retail/wholesale/trade, < 100 employees

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# The Planning Survey 24: Phocas Highlights

Top-ranked in

Leader in

Peer Group  
**Products for Planning,  
Budgeting &  
Forecasting**

**Reporting/Analysis**

Project Success  
Project Length  
Recommendation  
Vendor Support  
Implementer Support  
Predefined Connectors  
Planning Content  
Performance Satisfaction  
Predictive Planning  
Innovation

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

**Planning Content  
Reporting/Analysis  
Predictive Planning  
Innovation**

Project Success  
Recommendation  
Vendor Support  
Implementer Support  
Predefined Connectors  
Ease of Use  
Performance Satisfaction  
Driver-Based Planning

Peer Group  
**Midsize/Departmental  
Implementations**

**Reporting/Analysis  
Predictive Planning  
Innovation**

Project Length  
Recommendation  
Vendor Support  
Product Satisfaction  
Predefined Connectors  
Planning Content  
Performance Satisfaction  
Driver-Based Planning

## BARC Comment

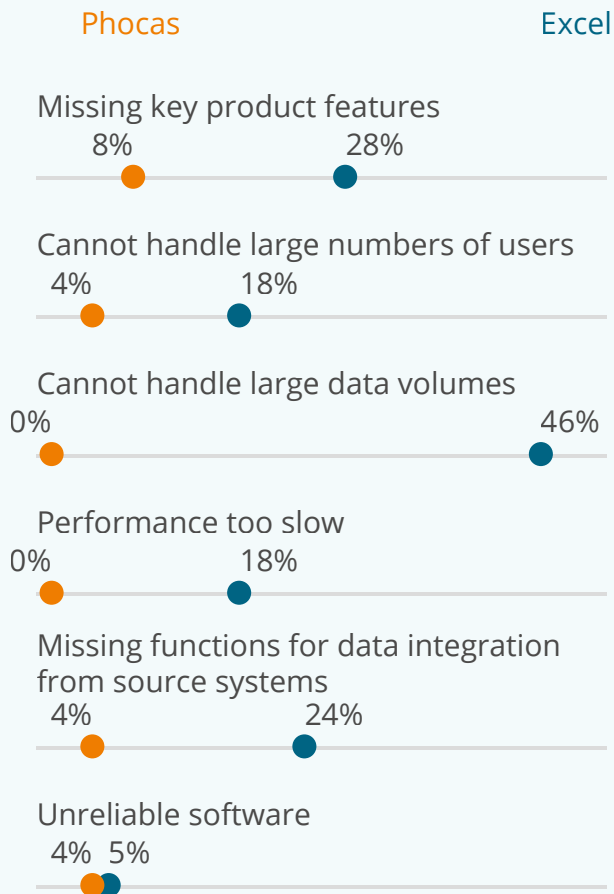
With eight top ranks and 26 leading positions, Phocas achieves an excellent set of results in this year's Planning Survey. Leading ratings in KPIs such as *Project Success*, *Project Length*, *Vendor Support*, *Implementer Support*, *Ease of Use* and *Performance Satisfaction* underline Phocas' solid position in the BI, analytics and planning software market. Its predefined connectors, planning content and reporting/analysis features are highly rated. These are essential for organizations seeking streamlined planning processes and effective management of planning, budgeting and forecasting operations.

88 percent of Phocas 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.

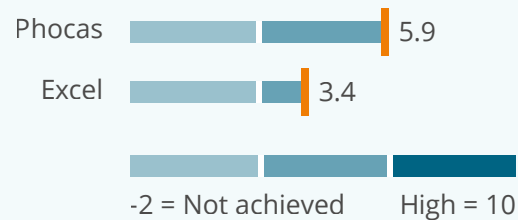


# The Planning Survey 24: Phocas vs. Excel

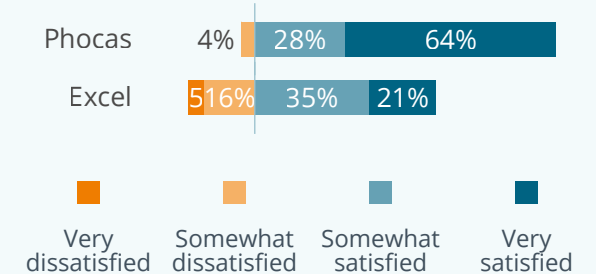
## Problems encountered by Phocas and Excel users



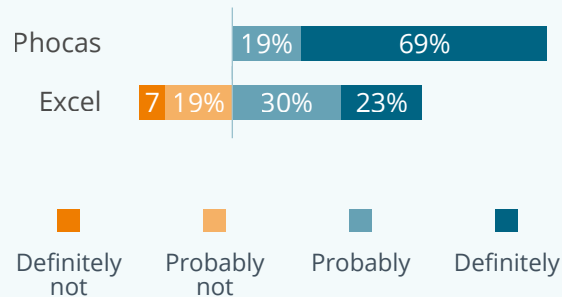
## Business Benefits Index\*



## Satisfaction level\*\*



## Recommendation\*\*



\* 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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