



## **Enterprise Solutions Survey**

### **Data Report**

- 1 How easy to use are your enterprise applications - ERP, CRM (Customer Relationship Management), BI (Business Intelligence), financials etc?
- 2 Are there any tasks or functions that you consider time wasters when using your business application?
- 3 In your opinion, which of the following is the top time waster when using business applications?
- 4 In the past what priority did you place on application usability when looking to purchase a new system?
- 5 Which of these usability features would you find valuable?
- 6 Which of these usability features would you find most valuable?
- 7 Are there other features that you feel would be valuable?
- 8 What do you think are the root causes of the usability challenges with your enterprise application?
- 9 What do you think is the single most significant cause of the usability challenges with your enterprise application?
- 10 Do you expect your business will be making changes in the next 12-24 months such as entering a new geographic market, launching a new product or service, building a capital asset, entering a new industry, starting a new division, etc?
- 11 What changes do you anticipate your business will be making in the next 12 to 24 months?
- 12 How well do you think your enterprise application will handle these anticipated changes?
- 13 How do you think your enterprise software vendor can help you best deal with ongoing business change?
- 14 Which is the single most important way your enterprise software vendor can help you best deal with ongoing business change?
- 15 In some cases, does your enterprise software actually prevent you from taking advantage of new opportunities or slow you down as you try to change the way you do business?
- 16 What are the ways that your enterprise software slows you down or makes change more difficult?
- 17 What is the single most significant way that your enterprise software slows you down or makes change more difficult?
- 18 How many employees are there within your organisation?
- 19 What do you estimate your company's revenues in 2010 were?
- 20 Which of the following best describes the industry in which you are employed?
- 21 What is your job title/function?

Source: Vanson Bourne



**How easy to use are your enterprise applications - ERP, CRM (Customer Relationship Management), BI (Business Intelligence), financials etc?**

Base: All respondents

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
<b>1 - Very easy and intuitive to use given that they deal with complex business processes</b>	<b>15 %</b>	26 %	0 %	14 %	19 %	12 %	16 %
<b>2 - Somewhat easy to use for straightforward tasks, but advanced use is more difficult</b>	<b>45 %</b>	44 %	52 %	50 %	39 %	56 %	35 %
<b>3 - Somewhat difficult to use, requiring a basic level of training</b>	<b>31 %</b>	30 %	43 %	22 %	35 %	24 %	33 %
<b>4 - Very difficult to use and require an extensive training program</b>	<b>8 %</b>	0 %	0 %	14 %	6 %	6 %	12 %
<b>5 - Extremely difficult, almost impossible to use, reducing my ability to do my job</b>	<b>2 %</b>	0 %	5 %	0 %	0 %	3 %	4 %
<b>Average</b>	<b>2.37</b>	2.04	2.57	2.36	2.29	2.32	2.53
<b>Base</b>	<b>200</b>	27	21	36	31	34	51

Base: All respondents

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
<b>1 - Very easy and intuitive to use given that they deal with complex business processes</b>	<b>15 %</b>	10 %	15 %	20 %	8 %	17 %
<b>2 - Somewhat easy to use for straightforward tasks, but advanced use is more difficult</b>	<b>45 %</b>	70 %	40 %	45 %	50 %	33 %
<b>3 - Somewhat difficult to use, requiring a basic level of training</b>	<b>31 %</b>	15 %	28 %	33 %	33 %	40 %
<b>4 - Very difficult to use and require an extensive training program</b>	<b>8 %</b>	5 %	14 %	2 %	6 %	7 %
<b>5 - Extremely difficult, almost impossible to use, reducing my ability to do my job</b>	<b>2 %</b>	0 %	3 %	0 %	3 %	3 %
<b>Average</b>	<b>2.37</b>	2.15	2.49	2.16	2.44	2.47
<b>Base</b>	<b>200</b>	20	65	49	36	30



**Are there any tasks or functions that you consider time wasters when using your business application?**

Base: All respondents

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
<b>Yes</b>	<b>42 %</b>	33 %	48 %	28 %	55 %	56 %	35 %
<b>No</b>	<b>59 %</b>	67 %	52 %	72 %	45 %	44 %	65 %
<b>Base</b>	<b>200</b>	27	21	36	31	34	51

Base: All respondents

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
<b>Yes</b>	<b>42 %</b>	25 %	46 %	41 %	44 %	40 %
<b>No</b>	<b>59 %</b>	75 %	54 %	59 %	56 %	60 %
<b>Base</b>	<b>200</b>	20	65	49	36	30

Source: Vanson Bourne



**In your opinion, which of the following is the top time waster when using business applications?**

Base: Only asked of those who believe there are functions that are time wasters when using business applications

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Navigating around and between different enterprise software products that are not fully integrated	23 %	33 %	10 %	30 %	29 %	26 %	11 %
Searching for information I need through a complex navigation structure	19 %	11 %	30 %	20 %	18 %	16 %	22 %
Learning different modules that have different structures, commands and work in different ways	19 %	22 %	0 %	10 %	24 %	32 %	17 %
Progressing through functions or business process steps that are not grouped together or ordered in a logical way	14 %	22 %	10 %	10 %	0 %	16 %	28 %
Transferring data from one application to another	10 %	0 %	30 %	10 %	12 %	0 %	11 %
Waiting for the applications that have slow to start up and poor system response times	8 %	11 %	20 %	0 %	6 %	11 %	6 %
The application just doesn't work in the way that I want to work	6 %	0 %	0 %	20 %	12 %	0 %	6 %
Other, please specify	0 %	0 %	0 %	0 %	0 %	0 %	0 %
<b>Base</b>	<b>83</b>	<b>9</b>	<b>10</b>	<b>10</b>	<b>17</b>	<b>19</b>	<b>18</b>

Base: Only asked of those who believe there are functions that are time wasters when using business applications

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Navigating around and between different enterprise software products that are not fully integrated	23 %	40 %	13 %	35 %	25 %	17 %
Searching for information I need through a complex navigation structure	19 %	20 %	10 %	25 %	31 %	17 %
Learning different modules that have different structures, commands and work in different ways	19 %	0 %	30 %	15 %	6 %	25 %
Progressing through functions or business process steps that are not grouped together or ordered in a logical way	14 %	40 %	13 %	5 %	25 %	8 %
Transferring data from one application to another	10 %	0 %	10 %	10 %	6 %	17 %
Waiting for the applications that have slow to start up and poor system response times	8 %	0 %	13 %	5 %	0 %	17 %
The application just doesn't work in the way that I want to work	6 %	0 %	10 %	5 %	6 %	0 %
Other, please specify	0 %	0 %	0 %	0 %	0 %	0 %
<b>Base</b>	<b>83</b>	<b>5</b>	<b>30</b>	<b>20</b>	<b>16</b>	<b>12</b>



**In the past what priority did you place on application usability when looking to purchase a new system?**

Base: All respondents

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Usability was the most important consideration	20 %	15 %	14 %	14 %	35 %	12 %	25 %
Usability was considered as important as several other features	46 %	52 %	52 %	58 %	29 %	59 %	33 %
We can train people to use the system, so usability was not a top priority	18 %	26 %	19 %	11 %	16 %	9 %	24 %
We concentrated strictly on other factors such as functionality and price	16 %	7 %	14 %	14 %	16 %	21 %	18 %
*Other, please specify	1 %	0 %	0 %	3 %	3 %	0 %	0 %
<b>Base</b>	<b>200</b>	<b>27</b>	<b>21</b>	<b>36</b>	<b>31</b>	<b>34</b>	<b>51</b>

\*Other, please specify: "Best of breed", "The system was dictated by our previous parent company".

Base: All respondents

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Usability was the most important consideration	20 %	20 %	17 %	31 %	17 %	13 %
Usability was considered as important as several other features	46 %	50 %	46 %	45 %	44 %	47 %
We can train people to use the system, so usability was not a top priority	18 %	15 %	18 %	16 %	17 %	20 %
We concentrated strictly on other factors such as functionality and price	16 %	15 %	17 %	6 %	22 %	20 %
Other, please specify	1 %	0 %	2 %	2 %	0 %	0 %
<b>Base</b>	<b>200</b>	<b>20</b>	<b>65</b>	<b>49</b>	<b>36</b>	<b>30</b>



### Which of these usability features would you find valuable?

Base: All respondents

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Interface that mimics the intuitive usability of Web-based applications	67 %	67 %	62 %	53 %	71 %	76 %	71 %
Embedded search tool to allow you to find data or correct part of the application suite to perform a particular function	59 %	41 %	48 %	56 %	61 %	74 %	63 %
Embedded wikis and discussion boards to allow you to reach out to others within your organization for help on how to use specific screens or ask questions about business processes	33 %	26 %	43 %	42 %	23 %	35 %	31 %
*Other, please specify	2 %	4 %	0 %	3 %	3 %	0 %	2 %
<b>Base</b>	<b>200</b>	<b>27</b>	<b>21</b>	<b>36</b>	<b>31</b>	<b>34</b>	<b>51</b>

\*Other, please specify: "Fast", "Integration with other systems", "Logical processes or guided procedures", "MS Office based GUI".

Base: All respondents

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Interface that mimics the intuitive usability of Web-based applications	67 %	60 %	71 %	67 %	61 %	70 %
Embedded search tool to allow you to find data or correct part of the application suite to perform a particular function	59 %	60 %	68 %	57 %	53 %	47 %
Embedded wikis and discussion boards to allow you to reach out to others within your organization for help on how to use specific screens or ask questions about business processes	33 %	40 %	32 %	29 %	39 %	30 %
Other, please specify	2 %	5 %	5 %	0 %	0 %	0 %
<b>Base</b>	<b>200</b>	<b>20</b>	<b>65</b>	<b>49</b>	<b>36</b>	<b>30</b>



## Which of these usability features would you find most valuable?

NB: Respondents were only shown the answers that they selected as being valuable on sheet 6

Base: All respondents

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Interface that mimics the intuitive usability of Web-based applications	46 %	52 %	52 %	44 %	39 %	50 %	41 %
Embedded search tool to allow you to find data or correct part of the application suite to perform a particular function	41 %	30 %	29 %	31 %	52 %	41 %	51 %
Embedded wikis and discussion boards to allow you to reach out to others within your organisation for help on how to use specific screens or ask questions about business processes	13 %	15 %	19 %	25 %	6 %	9 %	8 %
*Other, please specify	1 %	4 %	0 %	0 %	3 %	0 %	0 %
<b>Base</b>	<b>200</b>	<b>27</b>	<b>21</b>	<b>36</b>	<b>31</b>	<b>34</b>	<b>51</b>

\*Other, please specify: "Fast", "MS Office based GUI".

Base: All respondents

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Interface that mimics the intuitive usability of Web-based applications	46 %	45 %	35 %	53 %	50 %	50 %
Embedded search tool to allow you to find data or correct part of the application suite to perform a particular function	41 %	40 %	49 %	37 %	31 %	40 %
Embedded wikis and discussion boards to allow you to reach out to others within your organisation for help on how to use specific screens or ask questions about business processes	13 %	15 %	12 %	10 %	19 %	10 %
Other, please specify	1 %	0 %	3 %	0 %	0 %	0 %
<b>Base</b>	<b>200</b>	<b>20</b>	<b>65</b>	<b>49</b>	<b>36</b>	<b>30</b>



## Do you have any usability challenges with your enterprise applications?

Base: All respondents

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
<b>Yes</b>	<b>48 %</b>	48 %	48 %	33 %	55 %	65 %	43 %
<b>No</b>	<b>52 %</b>	52 %	52 %	67 %	45 %	35 %	57 %
<b>Base</b>	<b>200</b>	27	21	36	31	34	51

Base: All respondents

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
<b>Yes</b>	<b>48 %</b>	45 %	51 %	47 %	50 %	43 %
<b>No</b>	<b>52 %</b>	55 %	49 %	53 %	50 %	57 %
<b>Base</b>	<b>200</b>	20	65	49	36	30

Source: Vanson Bourne



### What do you think are the root causes of the usability challenges with your enterprise application?

Base: Only asked of those who think there are usability challenges with their enterprise applications

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
After we implemented the application, our business processes changed and the software did not change with us. Now we have to go through a number of awkward workarounds to make it fit our processes	49 %	8 %	40 %	42 %	71 %	64 %	50 %
The software was just not designed with intuitive usability in mind	45 %	46 %	40 %	50 %	24 %	50 %	55 %
Our application was never a very good fit for us, and we have always had to use a number of workarounds and extra steps to make it fit our processes	36 %	69 %	30 %	42 %	35 %	32 %	23 %
The software has been modified over time so much that it is hard to use or understand	31 %	31 %	20 %	25 %	35 %	27 %	41 %
*Other, please specify	6 %	8 %	10 %	0 %	6 %	9 %	5 %
<b>Base</b>	<b>96</b>	<b>13</b>	<b>10</b>	<b>12</b>	<b>17</b>	<b>22</b>	<b>22</b>

\*Other, please specify: "Its 40 years old", "Not designed with user in mind", "Ongoing training and understanding", "Operational performance of software has not lived up expectations", "Speed of web interface", "Unofficial business process workarounds".

Base: Only asked of those who think there are usability challenges with their enterprise applications

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
After we implemented the application, our business processes changed and the software did not change with us. Now we have to go through a number of awkward workarounds to make it fit our processes	49 %	22 %	52 %	57 %	56 %	38 %
The software was just not designed with intuitive usability in mind	45 %	0 %	55 %	43 %	39 %	62 %
Our application was never a very good fit for us, and we have always had to use a number of workarounds and extra steps to make it fit our processes	36 %	56 %	45 %	35 %	17 %	31 %
The software has been modified over time so much that it is hard to use or understand	31 %	67 %	27 %	39 %	22 %	15 %
Other, please specify	6 %	0 %	6 %	4 %	6 %	15 %
<b>Base</b>	<b>96</b>	<b>9</b>	<b>33</b>	<b>23</b>	<b>18</b>	<b>13</b>



## What do you think is the single most significant cause of the usability challenges with your enterprise application?

NB: Respondents were only shown the answers that they selected as being significant on sheet 10

Base: Only asked of those who think there are usability challenges with their enterprise applications

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
After we implemented the application, our business processes changed and the software did not change with us. Now we have to go through a number of awkward workarounds to make it fit our processes	33 %	0 %	30 %	25 %	59 %	50 %	23 %
Our application was never a very good fit for us, and we have always had to use a number of workarounds and extra steps to make it fit our processes	24 %	62 %	30 %	25 %	18 %	18 %	9 %
The software was just not designed with intuitive usability in mind	23 %	23 %	20 %	33 %	6 %	18 %	36 %
The software has been modified over time so much that it is hard to use or understand	15 %	15 %	10 %	17 %	12 %	5 %	27 %
*Other, please specify	5 %	0 %	10 %	0 %	6 %	9 %	5 %
<b>Base</b>	<b>96</b>	<b>13</b>	<b>10</b>	<b>12</b>	<b>17</b>	<b>22</b>	<b>22</b>

\*Other, please specify: "It's 40 years old", "Ongoing training and understanding", "Operational performance of software has not lived up expectations", "Speed of web interface", "Unofficial business process workarounds".

Base: Only asked of those who think there are usability challenges with their enterprise applications

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
After we implemented the application, our business processes changed and the software did not change with us. Now we have to go through a number of awkward workarounds to make it fit our processes	33 %	22 %	30 %	48 %	39 %	15 %
Our application was never a very good fit for us, and we have always had to use a number of workarounds and extra steps to make it fit our processes	24 %	56 %	27 %	17 %	11 %	23 %
The software was just not designed with intuitive usability in mind	23 %	0 %	21 %	22 %	28 %	38 %
The software has been modified over time so much that it is hard to use or understand	15 %	22 %	18 %	9 %	17 %	8 %
Other, please specify	5 %	0 %	3 %	4 %	6 %	15 %
<b>Base</b>	<b>96</b>	<b>9</b>	<b>33</b>	<b>23</b>	<b>18</b>	<b>13</b>



**Do you expect your business will be making changes in the next 12-24 months such as entering a new geographic market, launching a new product or service, building a capital asset, entering a new industry, starting a new division, etc?**

Base: All respondents

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
<b>Yes</b>	<b>64 %</b>	44 %	67 %	44 %	65 %	82 %	75 %
<b>No</b>	<b>36 %</b>	56 %	33 %	56 %	35 %	18 %	25 %
<b>Base</b>	<b>200</b>	27	21	36	31	34	51

Base: All respondents

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
<b>Yes</b>	<b>64 %</b>	55 %	72 %	63 %	61 %	57 %
<b>No</b>	<b>36 %</b>	45 %	28 %	37 %	39 %	43 %
<b>Base</b>	<b>200</b>	20	65	49	36	30

Source: Vanson Bourne



## What changes do you anticipate your business will be making in the next 12 to 24 months?

Base: Only asked of respondents who think their business will be making changes in the next 12-24 months.

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Launch new product or service line	67 %	92 %	50 %	63 %	60 %	75 %	66 %
Enter new geographic market	39 %	50 %	29 %	44 %	40 %	43 %	34 %
Re-engineering processes	39 %	25 %	29 %	25 %	30 %	50 %	50 %
Purchase another company	32 %	25 %	36 %	38 %	20 %	29 %	39 %
Enter a new vertical market or industry	26 %	0 %	29 %	25 %	30 %	21 %	34 %
Start a new division	23 %	25 %	7 %	13 %	25 %	29 %	26 %
Construct or commission new assets like capital equipment, production facilities, etc	19 %	25 %	14 %	13 %	25 %	18 %	18 %
*Other, please specify	2 %	0 %	7 %	0 %	0 %	4 %	0 %
<b>Base</b>	<b>128</b>	<b>12</b>	<b>14</b>	<b>16</b>	<b>20</b>	<b>28</b>	<b>38</b>

\*Other, please specify: "Merger", "Migrate to a new ERP (SAP)".

Base: Only asked of respondents who think their business will be making changes in the next 12-24 months.

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Launch new product or service line	67 %	64 %	74 %	65 %	68 %	53 %
Enter new geographic market	39 %	64 %	34 %	55 %	18 %	35 %
Re-engineering processes	39 %	45 %	40 %	23 %	59 %	35 %
Purchase another company	32 %	55 %	45 %	23 %	27 %	6 %
Enter a new vertical market or industry	26 %	27 %	23 %	26 %	27 %	29 %
Start a new division	23 %	27 %	32 %	16 %	18 %	12 %
Construct or commission new assets like capital equipment, production facilities, etc	19 %	9 %	26 %	10 %	32 %	6 %
Other, please specify	2 %	0 %	2 %	0 %	5 %	0 %
<b>Base</b>	<b>128</b>	<b>11</b>	<b>47</b>	<b>31</b>	<b>22</b>	<b>17</b>



## How well do you think your enterprise application will handle these anticipated changes?

Base: Only asked of respondents who think their business will be making changes in the next 12-24 months.

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Extremely well and with minimal added expense or business disruption	8 %	0 %	0 %	6 %	15 %	4 %	13 %
Reasonably well. Our enterprise software can be made to fit these new business processes, but it will require extensive systems integration and modification	59 %	42 %	64 %	69 %	55 %	68 %	55 %
Not too well. We will have to perform substantial business functions outside of the existing enterprise application, splitting up the business into two systems that might not talk to each other very well	23 %	42 %	21 %	13 %	25 %	21 %	21 %
We have not really thought about it	7 %	17 %	7 %	6 %	5 %	4 %	8 %
We will have to completely re-implement our enterprise software in a different way to truly handle this	1 %	0 %	0 %	0 %	0 %	0 %	3 %
*Other, please specify	2 %	0 %	7 %	6 %	0 %	4 %	0 %
<b>Base</b>	<b>128</b>	<b>12</b>	<b>14</b>	<b>16</b>	<b>20</b>	<b>28</b>	<b>38</b>

\*Other, please specify: "Hopefully the new system we are about to implement will meet these needs", "Main problem will be internal resource after much outsourcing", "We will be implementing Dynamics AX within the next 6 months to enable the organisation to cope with the changes that our organisation is currently undertaking."

Base: Only asked of respondents who think their business will be making changes in the next 12-24 months.

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Extremely well and with minimal added expense or business disruption	8 %	0 %	11 %	10 %	5 %	6 %
Reasonably well. Our enterprise software can be made to fit these new business processes, but it will require extensive systems integration and modification	59 %	82 %	68 %	52 %	55 %	41 %
Not too well. We will have to perform substantial business functions outside of the existing enterprise application, splitting up the business into two systems that might not talk to each other very well	23 %	18 %	13 %	29 %	23 %	41 %
We have not really thought about it	7 %	0 %	0 %	10 %	18 %	12 %
We will have to completely re-implement our enterprise software in a different way to truly handle this	1 %	0 %	2 %	0 %	0 %	0 %
Other, please specify	2 %	0 %	6 %	0 %	0 %	0 %
<b>Base</b>	<b>128</b>	<b>11</b>	<b>47</b>	<b>31</b>	<b>22</b>	<b>17</b>



## How do you think your enterprise software vendor can help you best deal with ongoing business change?

Base: Only asked of respondents who think their business will be making changes in the next 12-24 months.

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Make it easy for us to change the way the software is configured without consultants and system integrators	66 %	67 %	79 %	56 %	60 %	68 %	68 %
Listen to us and take an interest in what is happening in our business	39 %	33 %	50 %	56 %	40 %	46 %	24 %
Design enterprise software so that it can be implemented and reconfigured quickly and easily	38 %	42 %	50 %	44 %	35 %	32 %	37 %
Anticipate changes in technology, bringing new and innovative technology into the application	28 %	25 %	36 %	38 %	20 %	29 %	26 %
Focus on our industry so that as our needs expand, the right vertical industry functionality is already available in the application	19 %	25 %	36 %	25 %	20 %	11 %	13 %
*Other, please specify	2 %	0 %	0 %	0 %	0 %	4 %	3 %
<b>Base</b>	<b>128</b>	<b>12</b>	<b>14</b>	<b>16</b>	<b>20</b>	<b>28</b>	<b>38</b>

\*Other, please specify: "Its a bespoke solution from the 70's", "Not expecting that much from the vendor".

Base: Only asked of respondents who think their business will be making changes in the next 12-24 months.

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Make it easy for us to change the way the software is configured without consultants and system integrators	66 %	45 %	74 %	65 %	55 %	76 %
Listen to us and take an interest in what is happening in our business	39 %	64 %	45 %	32 %	36 %	24 %
Design enterprise software so that it can be implemented and reconfigured quickly and easily	38 %	36 %	47 %	48 %	23 %	18 %
Anticipate changes in technology, bringing new and innovative technology into the application	28 %	36 %	28 %	29 %	27 %	24 %
Focus on our industry so that as our needs expand, the right vertical industry functionality is already available in the application	19 %	18 %	21 %	13 %	23 %	18 %
Other, please specify	2 %	0 %	0 %	3 %	5 %	0 %
<b>Base</b>	<b>128</b>	<b>11</b>	<b>47</b>	<b>31</b>	<b>22</b>	<b>17</b>



## Which is the single most important way your enterprise software vendor can help you best deal with ongoing business change?

NB: Respondents were only shown the answers that they selected as being significant on sheet 15

Base: Only asked of respondents who think their business will be making changes in the next 12-24 months.

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Make it easy for us to change the way the software is configured without consultants and system integrators	48 %	33 %	57 %	38 %	35 %	50 %	58 %
Design enterprise software so that it can be implemented and reconfigured quickly and easily	23 %	33 %	36 %	31 %	25 %	18 %	16 %
Listen to us and take an interest in what is happening in our business	16 %	8 %	0 %	25 %	25 %	21 %	11 %
Anticipate changes in technology, bringing new and innovative technology into the application	8 %	17 %	0 %	0 %	10 %	4 %	13 %
Focus on our industry so that as our needs expand, the right vertical industry functionality is already available in the application	4 %	8 %	7 %	6 %	5 %	4 %	0 %
*Other, please specify	2 %	0 %	0 %	0 %	0 %	4 %	3 %
<b>Base</b>	<b>128</b>	<b>12</b>	<b>14</b>	<b>16</b>	<b>20</b>	<b>28</b>	<b>38</b>

\*Other, please specify: "Each update always has a specific bug, that is only then fixed by the 'next' required update", "Lack of re-use in developments, launching new products is more costly than I would want".

Base: Only asked of respondents who think their business will be making changes in the next 12-24 months.

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Make it easy for us to change the way the software is configured without consultants and system integrators	48 %	27 %	55 %	39 %	36 %	71 %
Design enterprise software so that it can be implemented and reconfigured quickly and easily	23 %	36 %	23 %	32 %	18 %	6 %
Listen to us and take an interest in what is happening in our business	16 %	27 %	13 %	16 %	23 %	6 %
Anticipate changes in technology, bringing new and innovative technology into the application	8 %	9 %	4 %	6 %	9 %	18 %
Focus on our industry so that as our needs expand, the right vertical industry functionality is already available in the application	4 %	0 %	4 %	3 %	9 %	0 %
Other, please specify	2 %	0 %	0 %	3 %	5 %	0 %
<b>Base</b>	<b>128</b>	<b>11</b>	<b>47</b>	<b>31</b>	<b>22</b>	<b>17</b>



**In some cases, does your enterprise software actually prevent you from taking advantage of new opportunities or slow you down as you try to change the way you do business?**

Base: Only asked of respondents who think their business will be making changes in the next 12-24 months.

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
<b>Yes</b>	<b>50 %</b>	58 %	36 %	56 %	50 %	46 %	53 %
<b>No</b>	<b>50 %</b>	42 %	64 %	44 %	50 %	54 %	47 %
<b>Base</b>	<b>128</b>	12	14	16	20	28	38

Base: Only asked of respondents who think their business will be making changes in the next 12-24 months.

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
<b>Yes</b>	<b>50 %</b>	45 %	51 %	58 %	50 %	35 %
<b>No</b>	<b>50 %</b>	55 %	49 %	42 %	50 %	65 %
<b>Base</b>	<b>128</b>	11	47	31	22	17

Source: Vanson Bourne



**What are the ways that your enterprise software slows you down or makes change more difficult?**

Base: Only asked of those whose enterprise software prevent them from taking advantage of new opportunities or slows down attempts to change the way they do business

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Once in place, it is very difficult to reconfigure our enterprise software, as if it were "dipped in concrete."	52 %	29 %	20 %	78 %	60 %	54 %	50 %
In order to gain the new functionality we need to accommodate change, we need to move to a completely different, more advanced enterprise software product offered by our vendor	50 %	43 %	60 %	44 %	70 %	46 %	45 %
Our software application does not offer the functionality necessary to manage the new business processes we need to implement	42 %	43 %	80 %	33 %	30 %	38 %	45 %
The software application really forces us to do things in a proscribed way, and is not designed to be configured to accommodate different business process flows	33 %	43 %	60 %	33 %	10 %	31 %	35 %
We want to extend our enterprise application to new divisions, but it is too complicated and hard to run for our smaller business groups	22 %	14 %	20 %	11 %	10 %	46 %	20 %
We are on a multi-tenant hosted software solution and are not able to make changes	2 %	0 %	0 %	0 %	0 %	0 %	5 %
*Other, please specify	3 %	0 %	0 %	0 %	10 %	0 %	5 %
<b>Base</b>	<b>64</b>	<b>7</b>	<b>5</b>	<b>9</b>	<b>10</b>	<b>13</b>	<b>20</b>

\*Other, please specify: "Each update always has a specific bug, that is only then fixed by the 'next' required update", "Lack of re-use in developments, launching new products is more costly than I would want".

Base: Only asked of those whose enterprise software prevent them from taking advantage of new opportunities or slows down attempts to change the way they do business

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Once in place, it is very difficult to reconfigure our enterprise software, as if it were "dipped in concrete."	52 %	60 %	54 %	44 %	64 %	33 %
In order to gain the new functionality we need to accommodate change, we need to move to a completely different, more advanced enterprise software product offered by our vendor	50 %	60 %	54 %	39 %	45 %	67 %
Our software application does not offer the functionality necessary to manage the new business processes we need to implement	42 %	40 %	29 %	50 %	36 %	83 %
The software application really forces us to do things in a proscribed way, and is not designed to be configured to accommodate different business process flows	33 %	40 %	25 %	44 %	27 %	33 %
We want to extend our enterprise application to new divisions, but it is too complicated and hard to run for our smaller business groups	22 %	20 %	25 %	17 %	18 %	33 %
We are on a multi-tenant hosted software solution and are not able to make changes	2 %	0 %	0 %	0 %	9 %	0 %
Other, please specify	3 %	0 %	4 %	0 %	9 %	0 %
<b>Base</b>	<b>64</b>	<b>5</b>	<b>24</b>	<b>18</b>	<b>11</b>	<b>6</b>



### What is the single most significant way that your enterprise software slows you down or makes change more difficult?

NB: Respondents were only shown the answers that they selected as being significant on sheet 18

Base: Only asked of those whose enterprise software prevent them from taking advantage of new opportunities or slows down attempts to change the way they do business

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
In order to gain the new functionality we need to accommodate change, we need to move to a completely different, more advanced enterprise software product offered by our vendor	33 %	14 %	60 %	33 %	60 %	38 %	15 %
Once in place, it is very difficult to reconfigure our enterprise software, as if it were "dipped in concrete."	28 %	29 %	0 %	44 %	0 %	46 %	30 %
Our software application does not offer the functionality necessary to manage the new business processes we need to implement	16 %	29 %	20 %	11 %	20 %	0 %	20 %
The software application really forces us to do things in a proscribed way, and is not designed to be configured to accommodate different business process flows	11 %	29 %	20 %	11 %	0 %	0 %	15 %
We want to extend our enterprise application to new divisions, but it is too complicated and hard to run for our smaller business groups	9 %	0 %	0 %	0 %	10 %	15 %	15 %
We are on a multi-tenant hosted software solution and are not able to make changes	0 %	0 %	0 %	0 %	0 %	0 %	0 %
*Other, please specify	3 %	0 %	0 %	0 %	10 %	0 %	5 %
<b>Base</b>	<b>64</b>	<b>7</b>	<b>5</b>	<b>9</b>	<b>10</b>	<b>13</b>	<b>20</b>

\*Other, please specify: "Each update always has a specific bug, that is only then fixed by the 'next' required update", "Lack of re-use in developments, launching new products is more costly that I would want".

Base: Only asked of those whose enterprise software prevent them from taking advantage of new opportunities or slows down attempts to change the way they do business

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
In order to gain the new functionality we need to accommodate change, we need to move to a completely different, more advanced enterprise software product offered by our vendor	33 %	40 %	42 %	39 %	18 %	0 %
Once in place, it is very difficult to reconfigure our enterprise software, as if it were "dipped in concrete."	28 %	40 %	29 %	17 %	45 %	17 %
Our software application does not offer the functionality necessary to manage the new business processes we need to implement	16 %	20 %	4 %	17 %	18 %	50 %
The software application really forces us to do things in a proscribed way, and is not designed to be configured to accommodate different business process flows	11 %	0 %	8 %	22 %	9 %	0 %
We want to extend our enterprise application to new divisions, but it is too complicated and hard to run for our smaller business groups	9 %	0 %	13 %	6 %	0 %	33 %
We are on a multi-tenant hosted software solution and are not able to make changes	0 %	0 %	0 %	0 %	0 %	0 %
Other, please specify	3 %	0 %	4 %	0 %	9 %	0 %
<b>Base</b>	<b>64</b>	<b>5</b>	<b>24</b>	<b>18</b>	<b>11</b>	<b>6</b>



## How many employees are there within your organisation?

Base: All respondents

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Between 100 - 250	1 %	4 %	5 %	0 %	0 %	0 %	0 %
Between 250 - 500	9 %	30 %	24 %	14 %	0 %	0 %	0 %
Between 500 - 1000	21 %	44 %	29 %	33 %	29 %	6 %	0 %
Between 1000 - 3000	21 %	11 %	24 %	39 %	29 %	29 %	2 %
More than 3000	49 %	11 %	19 %	14 %	42 %	65 %	98 %
<b>Base</b>	<b>200</b>	<b>27</b>	<b>21</b>	<b>36</b>	<b>31</b>	<b>34</b>	<b>51</b>

Base: All respondents

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Between 100 - 250	1 %	5 %	0 %	2 %	0 %	0 %
Between 250 - 500	9 %	20 %	8 %	14 %	3 %	3 %
Between 500 - 1000	21 %	20 %	18 %	29 %	14 %	20 %
Between 1000 - 3000	21 %	15 %	26 %	20 %	19 %	17 %
More than 3000	49 %	40 %	48 %	35 %	64 %	60 %
<b>Base</b>	<b>200</b>	<b>20</b>	<b>65</b>	<b>49</b>	<b>36</b>	<b>30</b>



## What do you estimate your company's revenues in 2010 were?

Base: All respondents

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Less than £70 million	0 %	0 %	0 %	0 %	0 %	0 %
Revenue of £70 million - £100 million	14 %	20 %	9 %	29 %	6 %	3 %
Revenue of £100 million - £170 million	11 %	20 %	6 %	10 %	11 %	13 %
Revenue of £170 million - £330 million	18 %	15 %	17 %	18 %	22 %	17 %
Revenue of £330 million - £670 million	16 %	0 %	20 %	18 %	8 %	20 %
Revenue of £670 million - £1.7 billion	17 %	20 %	26 %	8 %	14 %	13 %
Revenue of More than £1.7 billion	26 %	25 %	22 %	16 %	39 %	33 %
Average (in £millions)	860	819	899	599	1059	987
Base	200	20	65	49	36	30

Source: Vanson Bourne



**Which of the following best describes the industry in which you are employed?**

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
<b>Retail</b>	<b>21 %</b>	37 %	10 %	25 %	29 %	12 %	16 %
<b>Utilities and telecoms</b>	<b>17 %</b>	7 %	14 %	22 %	10 %	12 %	25 %
<b>Transportation/warehouse services</b>	<b>15 %</b>	4 %	19 %	14 %	19 %	12 %	20 %
<b>Installation and service</b>	<b>6 %</b>	11 %	10 %	6 %	0 %	6 %	6 %
<b>Manufacture of machinery and equipment</b>	<b>5 %</b>	7 %	0 %	0 %	13 %	9 %	2 %
<b>Automotive</b>	<b>5 %</b>	4 %	0 %	6 %	0 %	6 %	8 %
<b>Process Manufacturing - food and beverage</b>	<b>5 %</b>	4 %	0 %	6 %	6 %	9 %	2 %
<b>Manufacture of semiconductor, electronics and electrical components</b>	<b>5 %</b>	0 %	5 %	6 %	3 %	6 %	6 %
<b>Construction</b>	<b>4 %</b>	4 %	10 %	3 %	0 %	6 %	4 %
<b>Manufacture of fabricated metals</b>	<b>4 %</b>	4 %	0 %	3 %	3 %	3 %	6 %
<b>Wholesale</b>	<b>4 %</b>	15 %	14 %	0 %	0 %	0 %	0 %
<b>Process Manufacturing - paper and paper products</b>	<b>3 %</b>	4 %	0 %	6 %	3 %	6 %	0 %
<b>Process Manufacturing - chemicals</b>	<b>3 %</b>	0 %	10 %	0 %	6 %	3 %	0 %
<b>Manufacture of building products</b>	<b>2 %</b>	0 %	5 %	3 %	3 %	3 %	0 %
<b>*Other Manufacturing, please specify</b>	<b>2 %</b>	0 %	0 %	3 %	0 %	3 %	2 %
<b>Oil and Gas - Service Provider</b>	<b>2 %</b>	0 %	5 %	0 %	0 %	3 %	2 %
<b>Process Manufacturing - pharmaceutical products</b>	<b>1 %</b>	0 %	0 %	0 %	3 %	0 %	2 %
<b>Aerospace, Defence</b>	<b>1 %</b>	0 %	0 %	0 %	0 %	3 %	0 %
<b>Oil and Gas - EPCI Contractor</b>	<b>0 %</b>	0 %	0 %	0 %	0 %	0 %	0 %
<b>Oil and Gas - Operator</b>	<b>0 %</b>	0 %	0 %	0 %	0 %	0 %	0 %
<b>Base</b>	<b>200</b>	27	21	36	31	34	51

\*Other manufacturing, please specify: "Healthcare", "Packaging film", "Process Manufacturing - Steel".



**What is your job title/function?**

Base: All respondents

	Total	Revenue of £70 million - £100 million	Revenue of £100 million - £170 million	Revenue of £170 million - £330 million	Revenue of £330 million - £670 million	Revenue of £670 million - £1.7 billion	Revenue of more than £1.7 billion
Senior IT Management (CIO/CTO, VP of IT, IT Director, etc)	47 %	63 %	52 %	42 %	45 %	41 %	43 %
Operations Manager	9 %	0 %	5 %	6 %	13 %	15 %	12 %
Consultant/Analyst	8 %	0 %	14 %	6 %	3 %	9 %	14 %
Systems Integrator	7 %	4 %	0 %	8 %	13 %	12 %	4 %
Senior Manufacturing/Production/Operations Management	7 %	15 %	10 %	17 %	0 %	3 %	0 %
Supply Chain Manager/Executive	4 %	7 %	5 %	3 %	6 %	3 %	0 %
Sourcing/Procurement Manager/Executive	3 %	0 %	0 %	3 %	0 %	3 %	6 %
Plant Manager	2 %	4 %	5 %	3 %	3 %	0 %	0 %
Senior Corporate/Financial Management	2 %	0 %	0 %	6 %	3 %	3 %	0 %
CEO/COO/President	2 %	0 %	10 %	0 %	0 %	0 %	2 %
Design Engineer	1 %	0 %	0 %	3 %	0 %	0 %	2 %
Logistics or Transportation	1 %	0 %	0 %	0 %	0 %	0 %	4 %
CFO or Financial Executive	1 %	0 %	0 %	3 %	0 %	0 %	2 %
Process Control Engineer	1 %	4 %	0 %	0 %	0 %	0 %	0 %
Other, please specify	8 %	4 %	0 %	3 %	13 %	12 %	12 %
<b>Base</b>	<b>200</b>	<b>27</b>	<b>21</b>	<b>36</b>	<b>31</b>	<b>34</b>	<b>51</b>

\*Other, please specify: "Business Service Management", "Delivery Manager", "Head of IT Line of Business", "HR Business Partner", "IT Manager" x5, "Programme Manager", "Project Manager" x4, "Senior IT Project Manager", "VP of HR"

Base: All respondents

	Total	Construction, Installation and Service	Manufacturing	Retail and Wholesale	Oil and Gas, Utilities and Telecoms	Transportation / Warehouse Services
Senior IT Management (CIO/CTO, VP of IT, IT Director, etc)	47 %	45 %	46 %	63 %	42 %	27 %
Operations Manager	9 %	15 %	2 %	4 %	17 %	20 %
Consultant/Analyst	8 %	10 %	8 %	2 %	14 %	10 %
Systems Integrator	7 %	0 %	15 %	4 %	3 %	3 %
Senior Manufacturing/Production/Operations Management	7 %	5 %	9 %	4 %	11 %	0 %
Supply Chain Manager/Executive	4 %	0 %	3 %	8 %	0 %	3 %
Sourcing/Procurement Manager/Executive	3 %	0 %	3 %	4 %	3 %	0 %
Plant Manager	2 %	0 %	0 %	0 %	0 %	13 %
Senior Corporate/Financial Management	2 %	5 %	2 %	4 %	0 %	0 %
CEO/COO/President	2 %	5 %	0 %	2 %	0 %	3 %
Design Engineer	1 %	5 %	0 %	0 %	0 %	3 %
Logistics or Transportation Manager/Executive	1 %	0 %	0 %	0 %	0 %	7 %
CFO or Financial Executive	1 %	0 %	2 %	0 %	3 %	0 %
Process Control Engineer	1 %	5 %	0 %	0 %	0 %	0 %
Other, please specify	8 %	5 %	11 %	4 %	8 %	10 %
<b>Base</b>	<b>200</b>	<b>20</b>	<b>65</b>	<b>49</b>	<b>36</b>	<b>30</b>