

# The Planning Survey 23

*The voice of the planning software user community*

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

**OneStream**

**BARC**



## KPI results

**47** top rankings  
*and*  
**41** leading positions  
*in 5 different peer groups.*

BARC



## Recommendation

**100%**  
of surveyed users  
say they would  
**recommend**  
OneStream.\*

*\* Based on the aggregate of "Definitely" and "Probably".*

BARC



## Workflow

**97%**  
of surveyed users rate  
OneStream's  
**workflow functionality**  
as **very good or good**.\*

*\* Compared to 61% for the average planning tool.*

BARC



## Ease of Use

**96%**  
of surveyed users rate  
OneStream's **ease of use for planners** as  
**very good or good**.\*

*\* Compared to 82% for the average planning tool.*

BARC



## Satisfaction

**100%**  
of surveyed users  
are **satisfied**  
with OneStream.\*

*\* Compared to 78% for the average planning tool.*

BARC



## Legal Consolidation

**97%**  
of surveyed users rate  
OneStream's  
**legal consolidation** as  
**very good or good**.\*

*\* Compared to 72% for the average planning tool.*

BARC



## Peer Groups and KPIs

### The KPIs

The Planning Survey 23 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:

- Only measures that have a clear good/bad trend are used as the basis for KPIs.
- KPIs may be based on one or more measures from The Planning Survey.
- 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.
- For quantitative data, KPIs are converted to a scale of 1 to 10 (worst to best).
- 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 23 features a range of different types of planning, budgeting and forecasting products so we use peer groups to help identify competing products. The peer groups have been defined by BARC analysts using their experience and judgment, with segmentation based on the following key factors:

1. Focus – Is the product focused on and typically used for planning, budgeting and forecasting (e.g., finance, sales & operations, HR, etc.), financial consolidation or business intelligence and analytics?
2. Specialization – Is the vendor a performance management/planning specialist or a business software generalist, offering a broader portfolio of enterprise software for a variety of business requirements?
3. Usage scenario – Is the product typically used in midsize/departmental implementations or large/enterprise-wide implementations?
4. Global presence – Does the vendor have a global reach and offer its products worldwide?

OneStream features in the following peer groups:

- Planning-Focused Products
- Financial Consolidation-Focused Products
- Performance Management Specialists
- Large/Enterprise-Wide Implementations
- Global Vendors

### Peer Groups Overview

**Planning-Focused Products:** Planning-focused products support planning, budgeting and forecasting processes. Since The Planning Survey is focused on exactly this use case, this peer group includes all of the products featured in the survey. Planning-focused products often offer flexibility to model a wide range of individual sub-plans (financial, operational, strategic, etc.) but may also include pre-defined planning solutions designed for particular applications.

**Financial Consolidation-Focused Products:** Besides planning, financial consolidation-focused products have a strong focus on group consolidation and close processes. Typically, these products are standardized applications that offer built-in financial intelligence with predefined business rules for financial management as well as supporting use cases such as financial planning (P&L, balance sheet, cash flow).

**BI & Analytics-Focused Products:** Besides planning and performance management, BI and analytics-focused products also target use cases such as reporting, dashboarding, (ad hoc) analysis and advanced analytics.

**Business Software Generalists:** Business software generalists have a broad product portfolio including most (or all) types of enterprise software for a variety of business requirements (e.g., ERP).

**Performance Management Specialists:** Performance management specialists are software vendors who focus solely on performance management and/or planning. Often, they have just one product in their portfolio.

**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 a large number of users.

**Global Vendors:** Global vendors have a truly global sales and marketing reach. They are present worldwide, and their products are used all around the world.



*Peer Group*  
**Large/Enterprise-Wide Implementations**



**Top-ranked in**

- Recommendation
- Vendor Support
- Implementer Support
- Product Satisfaction
- Customer Satisfaction
- Planning Content
- Workflow
- Forecasting
- Financial Consolidation
- Functionality
- Flexibility
- Performance Satisfaction
- User Experience
- Competitive Win Rate



**Leader in**

- Price to Value
- Sales Experience
- Data Integration
- Simulation
- Reporting/Analysis
- Ease of Use

*Peer Group*  
**Global Vendors**



**Top-ranked in**

- Recommendation
- Product Satisfaction
- Customer Satisfaction
- Planning Content
- Workflow
- Forecasting
- Financial Consolidation
- Functionality
- Flexibility
- User Experience
- Competitive Win Rate



**Leader in**

- Price to Value
- Vendor Support
- Implementer Support
- Data Integration
- Simulation
- Reporting/Analysis
- Ease of Use
- Performance Satisfaction

*Peer Group*  
**Financial Consolidation-Focused Products**



**Top-ranked in**

- Recommendation
- Product Satisfaction
- Customer Satisfaction
- Planning Content
- Workflow
- Forecasting
- Financial Consolidation
- Functionality
- Flexibility
- User Experience



**Leader in**

- Price to Value
- Vendor Support
- Implementer Support
- Data Integration
- Simulation
- Reporting/Analysis
- Ease of Use
- Performance Satisfaction
- Competitive Win Rate

## BARC Summary

With 47 top ranks and 41 leading positions across five different peer groups, OneStream once again achieves an outstanding set of results in this year's Planning Survey. Convincing ratings in numerous important KPIs help to consolidate its position as a market-leading CPM platform. Companies can benefit from using OneStream in terms of improved software user satisfaction, increased transparency of planning and more precise/detailed planning. Overall, these benefits lead to a better quality of planning results for many customers. 99 percent of OneStream 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.



*Peer Group*  
**Planning-Focused  
Products**



**Top-ranked in**

- Recommendation
- Workflow
- Forecasting
- Financial Consolidation
- Flexibility
- User Experience



**Leader in**

- Vendor Support
- Implementer Support
- Product Satisfaction
- Customer Satisfaction
- Data Integration
- Planning Content
- Simulation
- Reporting/Analysis
- Functionality
- Ease of Use
- Performance Satisfaction

*Peer Group*  
**Performance  
Management Specialists**



**Top-ranked in**

- Recommendation
- Workflow
- Forecasting
- Financial Consolidation
- Flexibility
- User Experience



**Leader in**

- Product Satisfaction
- Customer Satisfaction
- Data Integration
- Planning Content
- Simulation
- Functionality
- Performance Satisfaction



# The Planning Survey 23: OneStream top ranks





# The Planning Survey 23: OneStream top ranks





# The Planning Survey 23: OneStream top ranks







# The Planning Survey 23: OneStream top ranks





I'm a very happy user of OneStream

**BARC**

” *Line of business employee,  
Manufacturing, >2,500 employees*



Really fantastic! I've never used a better financial tool.

**BARC**

” *Healthcare, >2,500 employees*



Totally fantastic! Best customer service I have ever dealt with. The representatives that are assigned to you are awesome. They care and they want to take care of you and are always there to help.

**BARC**

” *Line of business employee, Manufacturing, 100-2,500 employees*



I love OneStream and strongly recommend the software.

**BARC**

” *Project manager for departmental BI, IT, 100-2,500 employees*



Great product that delivers more than promised in the area of corporate performance management and all related processes.

**BARC**

” *Line of business employee, Process industry, >2,500 employees*



## What Customers Like Most

Extensibility feature, one tool, multiple solutions to integrate.

**BARC**

” Project manager for BI from IT department, Manufacturing, >2,500 employees

” The great integration power, its flexibility and speed of development and positive user experience.

**BARC**

” Line of business employee, Process industry, >2,500 employees

” The flexibility and ability to create the application we needed to run our planning process, while making the process easier and more transparent

**BARC**

” Healthcare, >2,500 employees

” Very dynamic solution that is highly customizable.

**BARC**

” Project manager for departmental BI, IT, 100-2,500 employees

” OneStream always just works the way it's supposed to. The support has also been great.

**BARC**

” Line of business employee, Manufacturing, 100-2,500 employees



## OneStream overview

OneStream Software is an independent US-based CPM software company backed by private equity investors. Headquartered in Birmingham, Michigan, USA, the company has offices in North America, Europe, the UK and APAC with more than 1,200 employees globally.

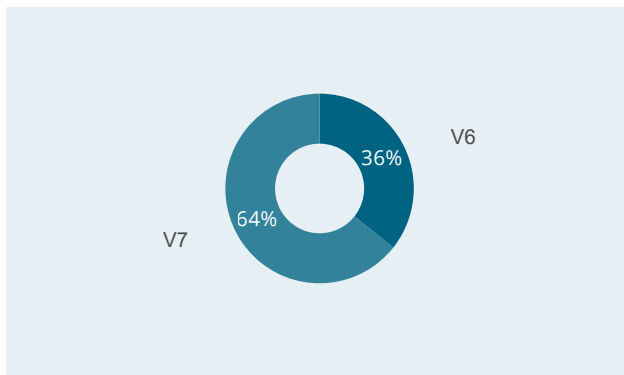
OneStream was developed with the intention of creating a single platform that enables a unified approach to support all the various CPM processes and information streams in organizations. The platform integrates financial consolidation and close, planning, budgeting and forecasting, reporting, analysis and financial data quality management in one single application. The OneStream™ MarketPlace provides productivity and business solutions that allow customers to extend the platform with additional capabilities, such as predictive analytics, account reconciliations, transaction matching and specialty planning solutions. All OneStream-developed MarketPlace solutions are fully supported and available free of charge to active customers. OneStream is available for deployment in the Microsoft Azure cloud.

OneStream is ideally suited to mid-sized to large enterprises across all industries who require a unified, robust and complete CPM solution. The vendor employs a direct sales model alongside its partner network to support customers with implementation services. According to the vendor, more than 1,100 customers currently use OneStream, and the company is in a period of strong growth.

OneStream is a financial consolidation and planning platform with built-in financial data quality functionality that focuses on supporting the full

## Versions used

n = 28



OneStream in The Planning Survey 23 – © BARC 2023

range of corporate performance management processes. The product provides a proprietary in-memory financial analytic engine with built-in financial intelligence (e.g., supporting complex financial consolidations) that uses ROLAP storage in Microsoft SQL Server. Company-wide consolidated financial results statements and plans at subsidiary or group level can be created. In addition, Extensible Dimensionality® provides the ability to extend the account and other dimension structures to support both corporate and line-of-business financial and operational planning and reporting in one single solution.

Fully supported operational planning solutions in the MarketPlace – including workforce, capex, cash, sales and project planning – feed into the financial model. For predictive modeling and advanced analytics, OneStream offers several options including its Predictive Analytics 123 solution with built-in predictive models and forecast methods that can be leveraged within financial and operational planning and forecasting scenarios. Additional AI-enabled MarketPlace solutions such as Sensible Machine Learning (Sensible ML) offer scalable AI purpose-built for finance, operations and data science teams to build, deploy and consume time-series ML models for demand planning and forecasts inside OneStream.

In addition to its financial consolidation and planning capabilities, OneStream has integrated BI and analytics functionality. For individual, flexible (ad hoc) reporting and analysis, the product includes a reporting studio, spreadsheet interface or Excel add-in. Interactive dashboards can bring key financial and operational metrics together by combining tables, charts, graphs and other visualizations. In addition, Analytic Blend includes a relational column store engine that blends detailed operational data with financial data. Financial analytics, detailed operational analysis or a “blended” view of both can be presented within the same dashboard. For those customers following a Microsoft strategy for analytics, a new OneStream Power BI connector enables Power BI Desktop users to query OneStream data and import it into Power BI for reports and visualizations.

## OneStream customer responses

This year we had 32 responses from OneStream users. At the time of the survey, 64 percent of them were using version 6 and 34 percent were running version 7.

## Introduction

Planning Survey 23 is based on findings from the world’s largest and most comprehensive survey of planning software users, conducted from November 2022 to February 2023. In total, 1,321 people responded to the survey with 1,046 answering a series of detailed questions about their usage of a named product. Altogether, 19 products (or groups of products) are analyzed in detail.

The Planning Survey 23 examines user feedback on planning product selection and usage across 33 criteria (KPIs) including *Business Benefits, Project Success, Business Value, Recommendation, Customer Satisfaction, Planning Functionality and Competitiveness*.

This document contains just a selection of the headline findings for OneStream. It does not show all the KPI results and focuses mainly on the positive findings.

For more information on the survey, visit

[The BI Survey website.](#)



# User and Use Case Demographics

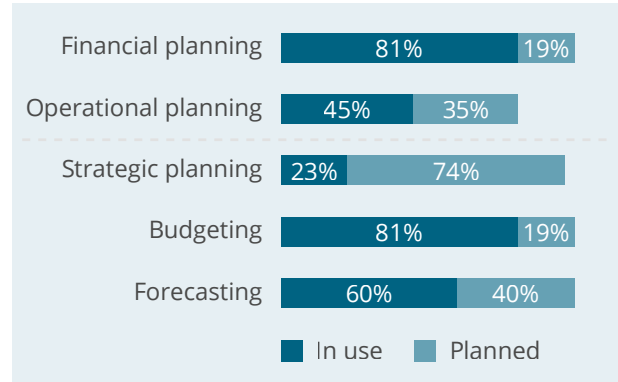
## BARC Comment

58 percent of OneStream users are planning users – significantly below the survey average of 69 percent – reflecting the fact that OneStream is essentially an integrated platform that unifies several CPM processes in one single application. This is also born out in its typical use cases. Customers leverage OneStream mainly for financial planning (81 percent). Here, planning takes place at different aggregation levels. OneStream is used for budgeting (81 percent), forecasting (60 percent) and strategic planning (23 percent). Besides planning, customers mainly use it for ad hoc query (91 percent), standard/enterprise reporting (84 percent), group consolidation (78 percent) and dashboards/BI applications (63 percent). Many respondents also plan to use it for strategic planning (74 percent), analysis (48 percent) and forecasting (40 percent) in the future.

OneStream targets mid-sized and large companies across all industries. 69 percent of our sample of OneStream customers come from large companies (more than 2,500 employees) with a median of 88 users (including 48 using planning functionality), but the mean of 621 users (265 for planning) indicates there are also several larger implementations.

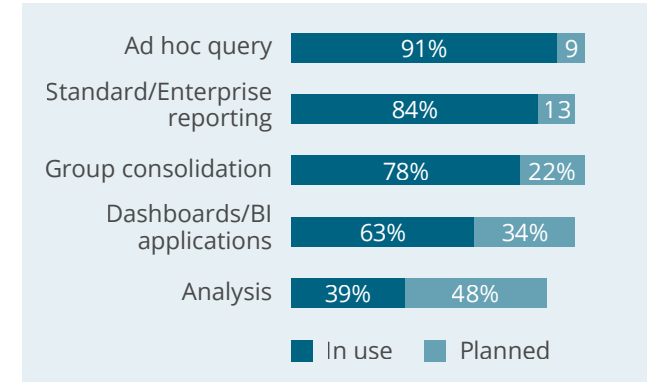
### Current vs. planned use (planning use cases)

n=31



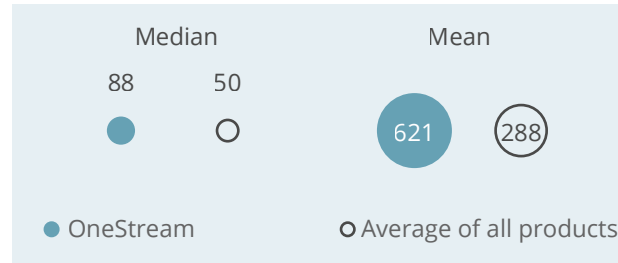
### Current vs. planned use (other use cases)

n=32



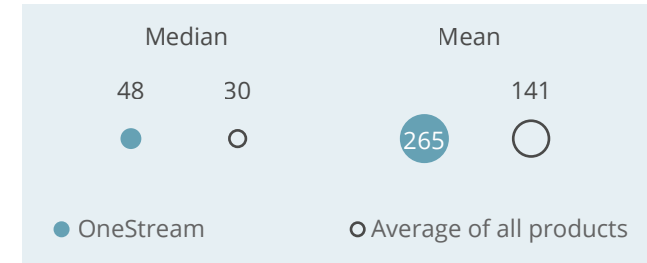
### Total number of users per company

n=32



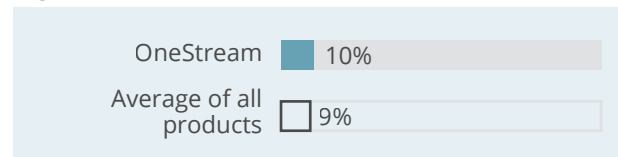
### Planning users per company

n=32



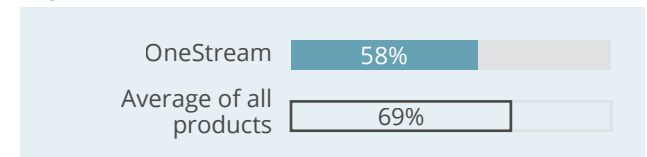
### Percentage of employees using OneStream

n=32



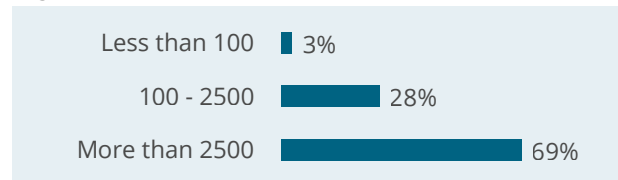
### Planning users (as a percentage of all users)

n=32

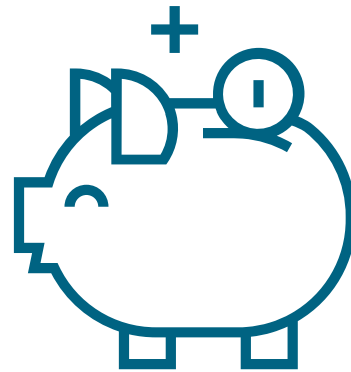


### Company size (employees)

n=32



# Price to Value

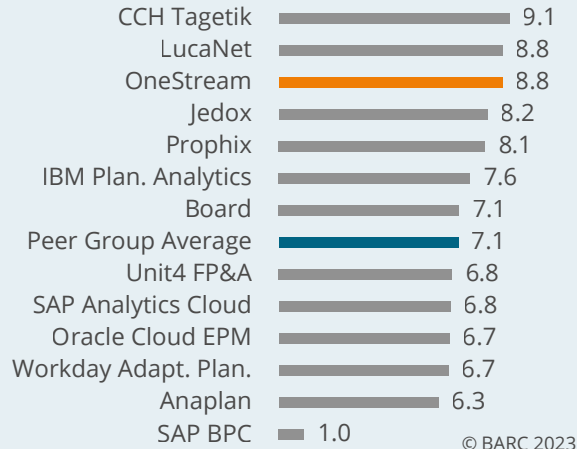


This KPI is based on how users rate their tool in terms of price to value.

## Price to Value – Leader



Peer group: Global Vendors



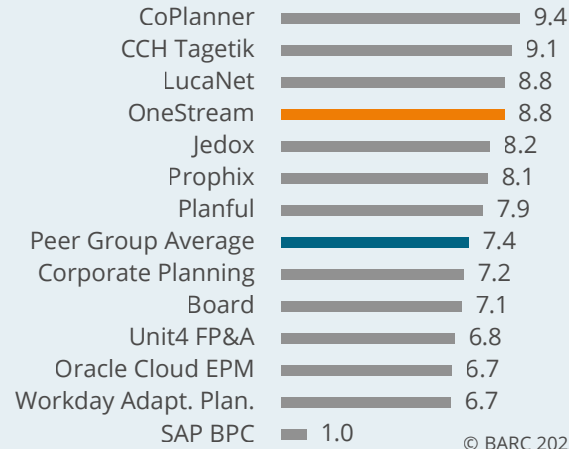
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

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## Price to Value – Leader



Peer group: Financial Consolidation-Focused Products



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

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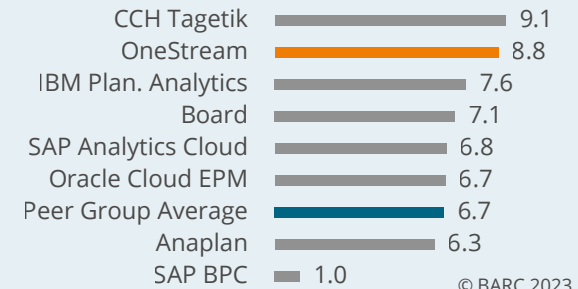
## Price to Value



## Price to Value – Leader



Peer group: Large/Enterprise-Wide Implementations



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

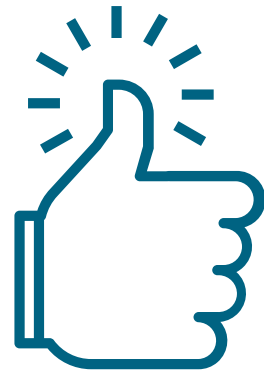
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## BARC Viewpoint

34 percent of the OneStream customers surveyed cited 'Price-performance ratio' as an important reason why they chose the product. They consider OneStream to be attractively priced, offering good value and comprehensive functionality to address a variety of corporate and financial performance management use cases. Consequently, OneStream comes out as a leader for *Price to Value* in three of its peer groups this year. Standard licensing is based on a named user software-as-a-service pricing model leveraging Microsoft Azure cloud. Non-cloud (customer-hosted) and on-premises / perpetual licensing options are also available. Several survey respondents praised the pricing and contract flexibility offered by OneStream and also the fact they only pay a set price for access to all platform features, not for individual modules.



# Recommendation



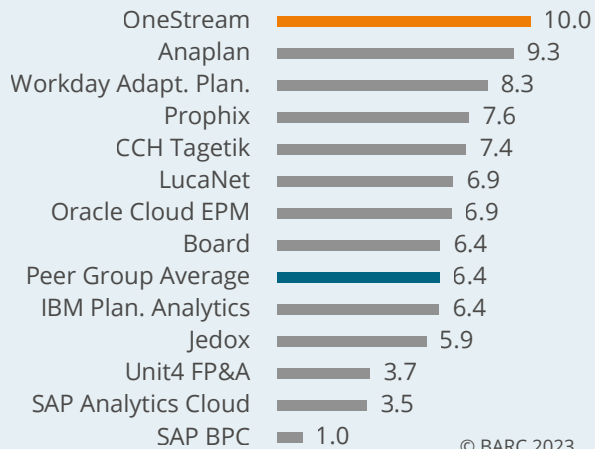
This KPI is based on the proportion of users that say they would recommend the product to others.



## Recommendation – Top-ranked



Peer group: Global Vendors



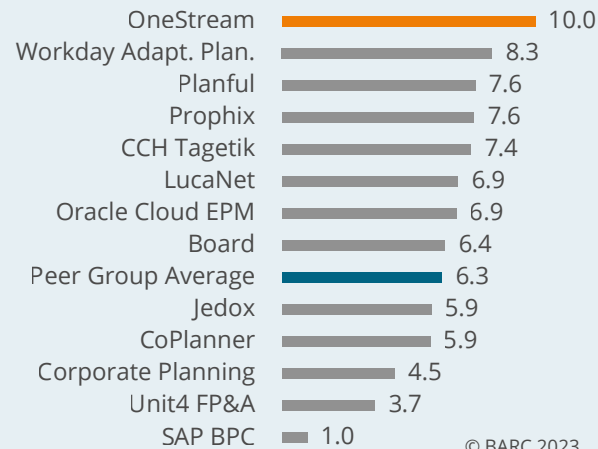
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## Recommendation – Top-ranked



Peer group: Financial Consolidation-Focused Products



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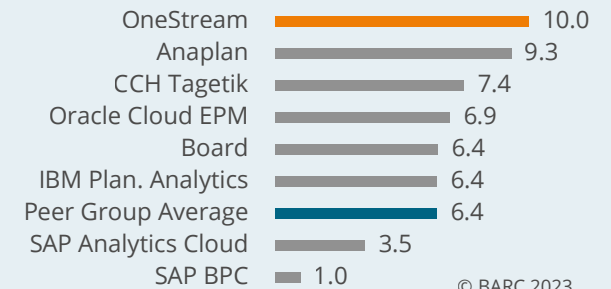
## Recommendation



## Recommendation – Top-ranked



Peer group: Large/Enterprise-Wide Implementations



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

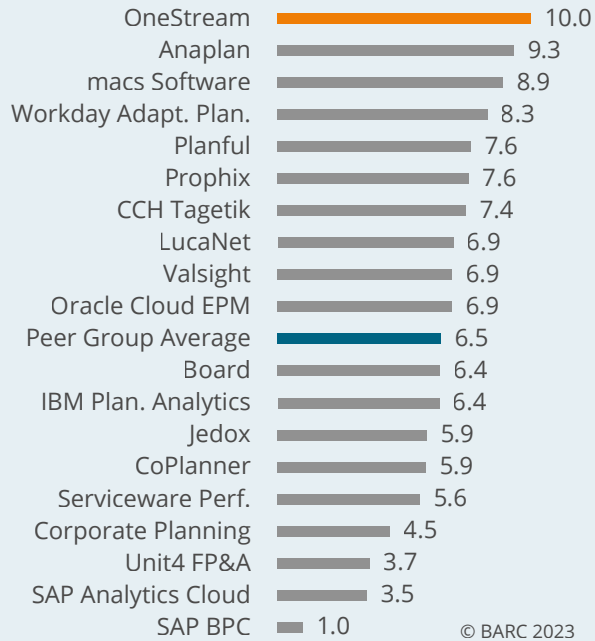
## BARC Viewpoint

99 percent of OneStream users say they would “definitely” or “probably” recommend their planning product to other organizations. This positivity clearly points to a high level of customer satisfaction with the vendor and product. OneStream deservedly tops all of its peer groups for the *Recommendation* KPI. The Planning Survey results suggest that the vendor sticks to its mission statement: “Every customer must be a reference and success.” Several positive customer quotes back this up. For example, one said simply, “I love OneStream and strongly recommend the software!”

## Recommendation – Top-ranked



Peer group: Planning-Focused Products



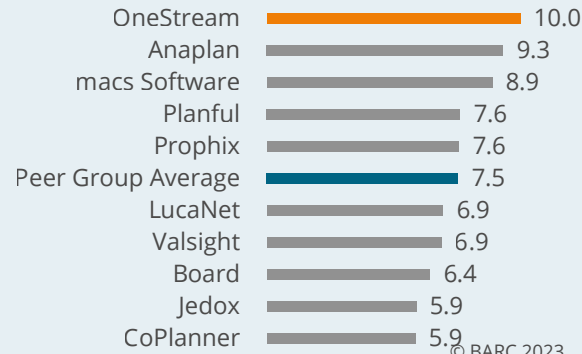
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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Recommendation – Top-ranked



Peer group: Performance Management Specialists



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

# Recommendation



# Vendor Support

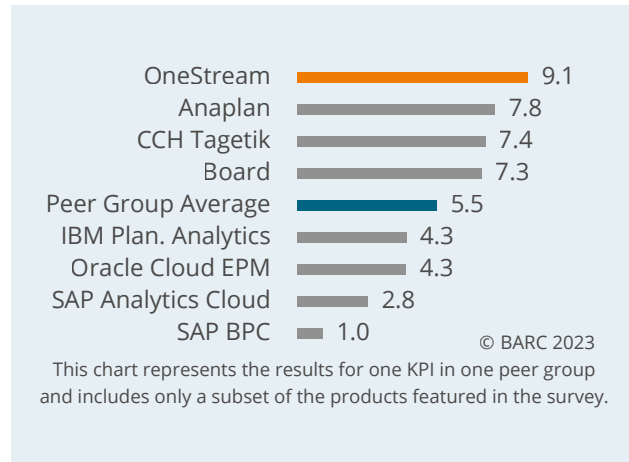


This KPI measures user satisfaction with the level of vendor support provided for the product.

## Vendor Support – Top-ranked



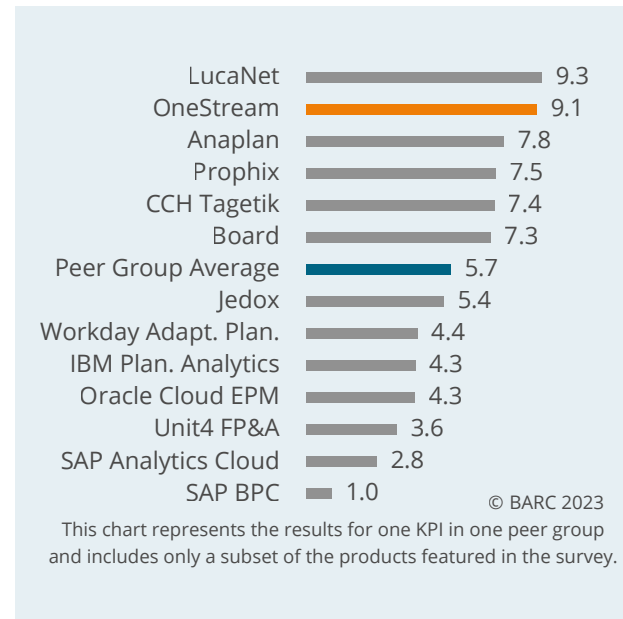
Peer group: Large/Enterprise-Wide Implementations



## Vendor Support – Leader



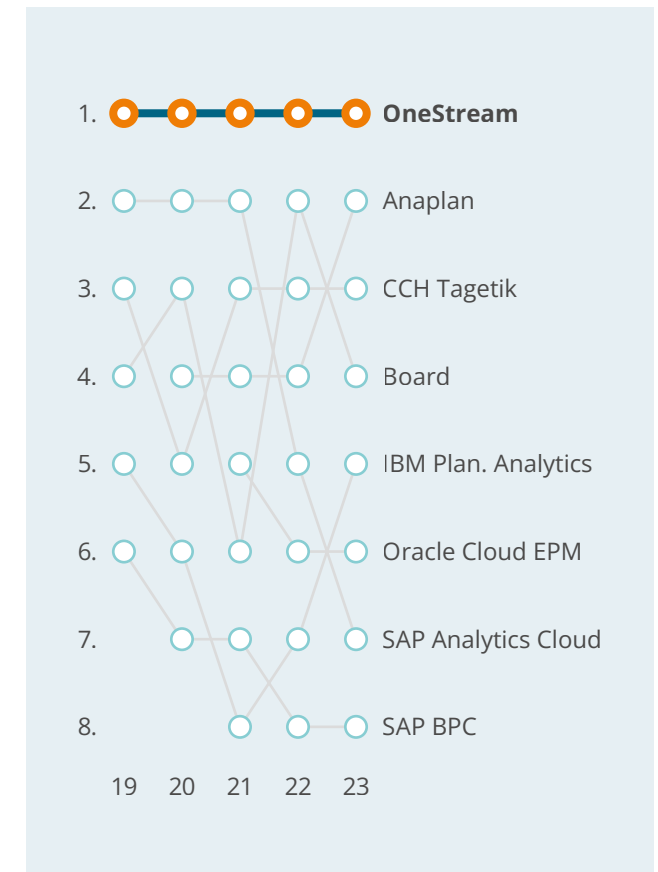
Peer group: Global Vendors



# Vendor Support

## Consistently top-ranked in Vendor Support

Peer group: Large/Enterprise-Wide Implementations



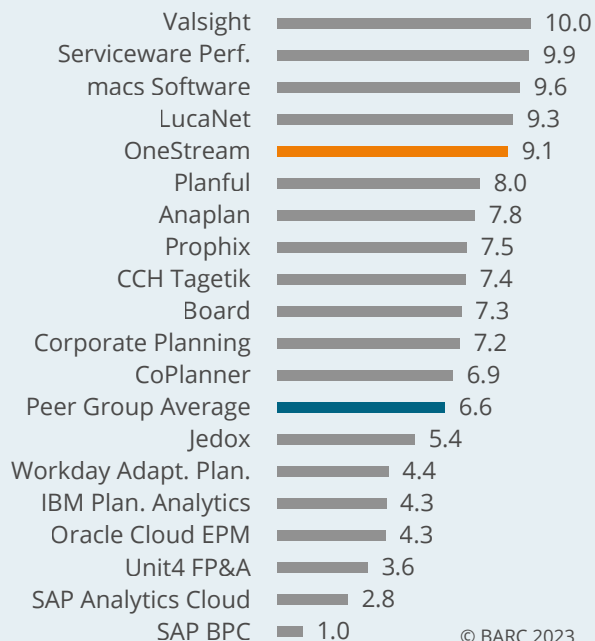
## BARC Viewpoint

Customers are clearly satisfied with OneStream’s support services and benefit from the vendor’s product knowledge and implementation experience. Several customer quotes highlight OneStream’s outstanding support and the vendor is highly rated for *Vendor Support* in four of its peer groups. Technical support is provided directly by the vendor and is available 24/7. Customers can log issues via phone, e-mail or web portal and access issue status information at any time using self-service reports. A OneStream Community Forum is also available for registered support users and offers an area for customers to share ideas and collaborate. The vendor’s annual user conference gives customers the opportunity to meet up and attend presentations and workshops.

## Vendor Support – Leader



Peer group: Planning-Focused Products



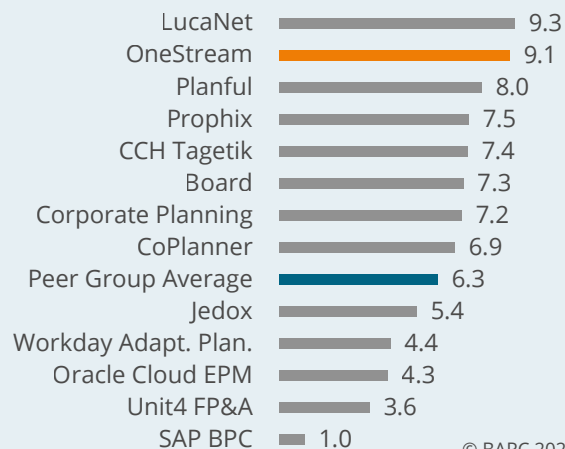
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## Vendor Support – Leader



Peer group: Financial Consolidation-Focused Products

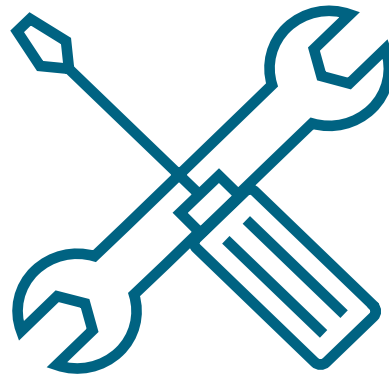


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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.



# Implementer Support

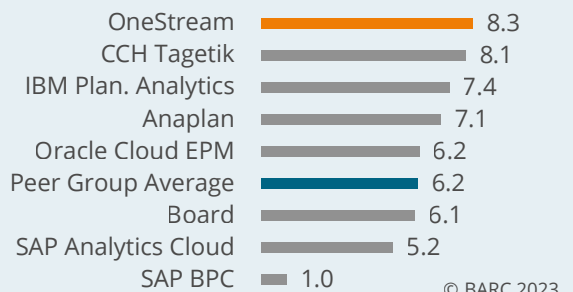


This KPI measures user satisfaction with the level of the implementer's support for the product.

## Implementer Support – Top-ranked



Peer group: Large/Enterprise-Wide Implementations



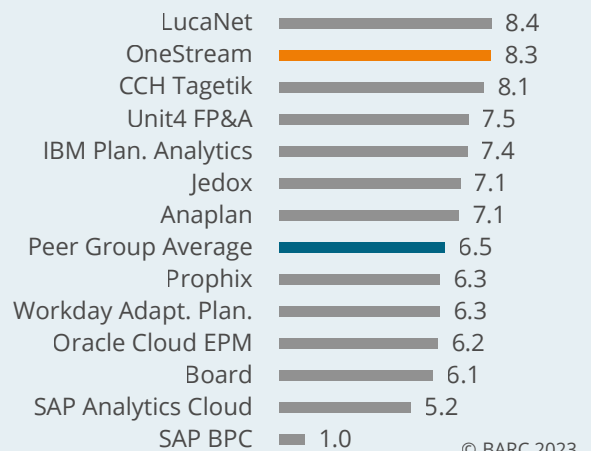
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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Implementer Support – Leader



Peer group: Global Vendors



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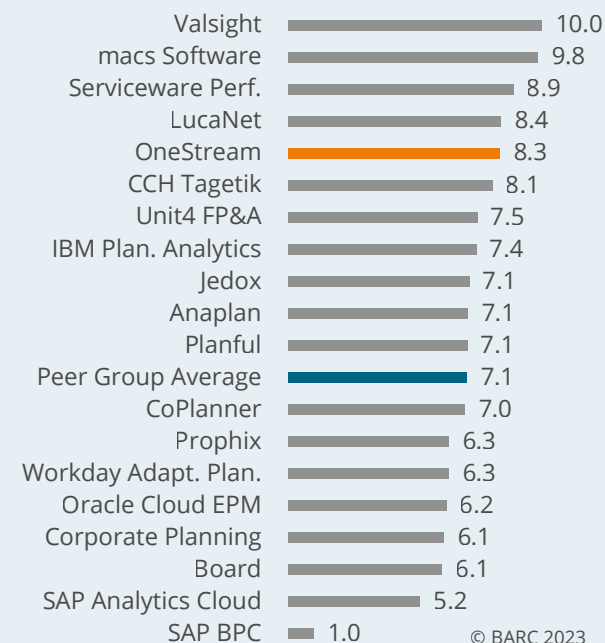
## Implementer Support



### Implementer Support – Leader



Peer group: Planning-Focused Products



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

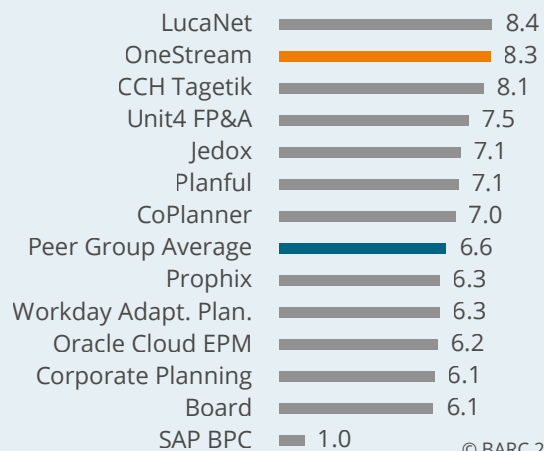
## BARC Viewpoint

OneStream can either be implemented by the vendor’s own consulting team or through its experienced partner network. The vendor has a worldwide network of more than 200 partners. *Implementer support* plays a crucial role in successful software implementations. Strong results for Implementer Support in four of its peer groups this year confirm that a high proportion of OneStream projects are successfully implemented and the majority of customers are satisfied. Considering that OneStream implementations are often large and complex, this is a great result. Many customers confirm that the level of implementation satisfaction and the frequency of projects completed on time and on budget are both high. Nonetheless, some customers recommend taking care to select an experienced implementation partner.

## Implementer Support – Leader



Peer group: Financial Consolidation-Focused Products



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





# Product Satisfaction

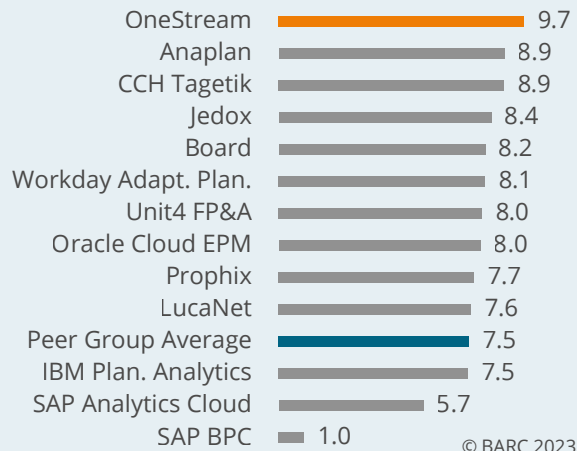


This KPI is based on the level of satisfaction with the product.

## Product Satisfaction – Top-ranked



Peer group: Global Vendors



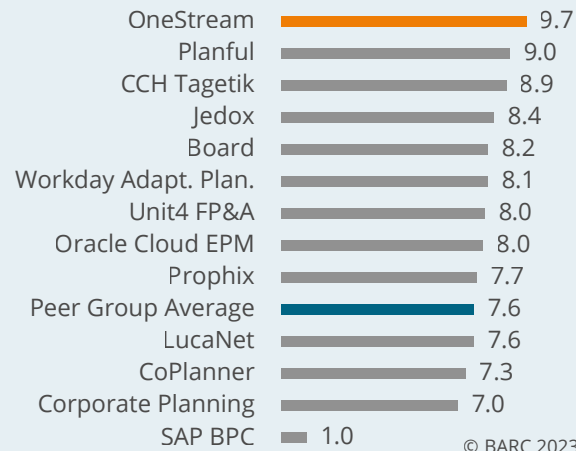
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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Product Satisfaction – Top-ranked



Peer group: Financial Consolidation-Focused Products



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

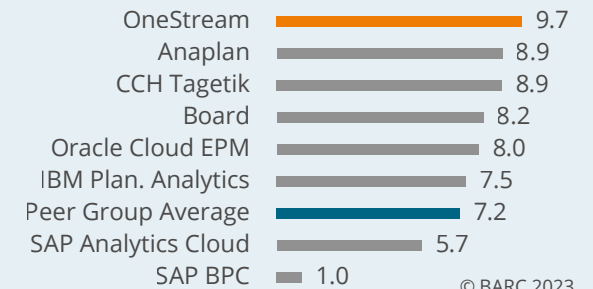
## Product Satisfaction



## Product Satisfaction – Top-ranked



Peer group: Large/Enterprise-Wide Implementations



© BARC 2023

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

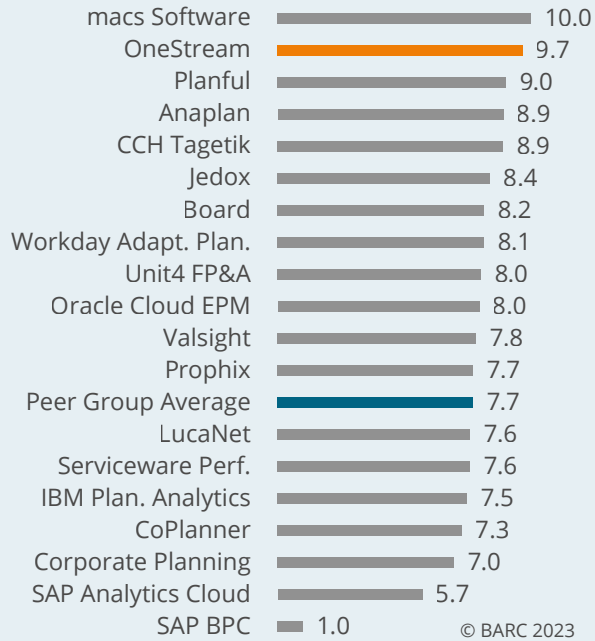
## BARC Viewpoint

OneStream was developed with the intention of creating a single platform which enables a unified approach to support all the various corporate and financial performance management processes and information streams in organizations. The platform integrates financial consolidation and close, planning, budgeting and forecasting, reporting, analysis and financial data quality management in one single application. The vendor's unified approach clearly works to the advantage of customers and many highlight its breadth of functionality to address various use cases. This is underpinned by excellent rankings for *Product Satisfaction* in all of its peer groups. Year after year, The Planning Survey shows that OneStream customers are largely satisfied with the vendor and product.

## Product Satisfaction – Leader



Peer group: Planning-Focused Products



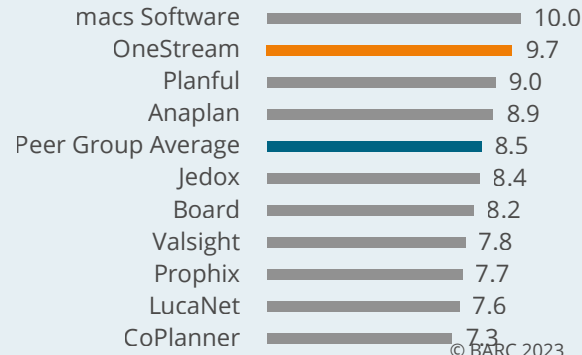
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

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## Product Satisfaction – Leader



Peer group: Performance Management Specialists



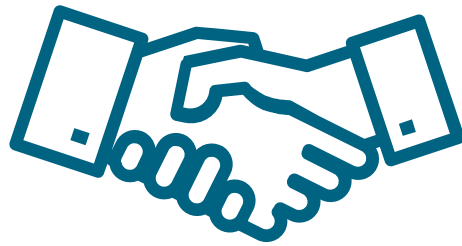
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

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# Product Satisfaction



# Sales Experience

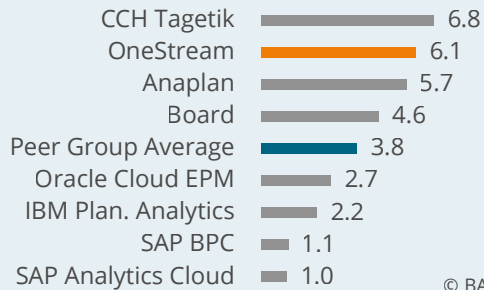


This KPI is based on how respondents rate their sales/purchasing experience with the vendor.

## Sales Experience – Leader



Peer group: Large/Enterprise-Wide Implementations



© BARC 2023

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

## Sales Experience



## BARC Viewpoint

Most OneStream customers are happy with their sales/purchasing experience with the vendor. In addition to its general conduct during the product evaluation and contract negotiation as well as its timely and thorough response to product-related and technical questions, respondents rate OneStream's ability to understand an organization's needs and keep marketing and sales promises as excellent. In a competitive market like the CPM and analytics software market, a highly professional sales organization is essential for survival and to continue to win new customers. The results of this year's Planning Survey indicate that OneStream sincerely cares for its prospects and customers. With good reason, OneStream is ranked among the leaders for *Sales Experience* in the *Large/Enterprise-Wide Implementations* peer group.

# Customer Satisfaction

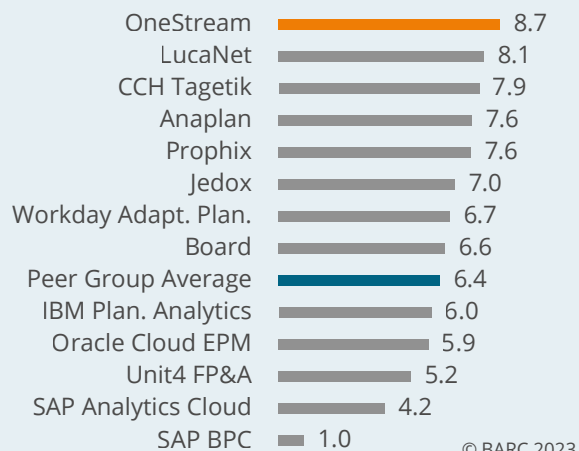


This KPI combines the *Price to Value, Recommendation, Vendor Support, Implementer Support, Product Satisfaction* and *Sales Experience* KPIs.

## Customer Satisfaction – Top-ranked



Peer group: Global Vendors



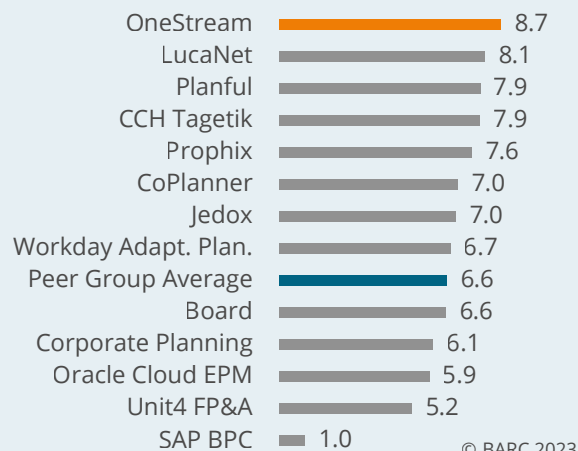
© BARC 2023

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

## Customer Satisfaction – Top-ranked



Peer group: Financial Consolidation-Focused Products



© BARC 2023

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

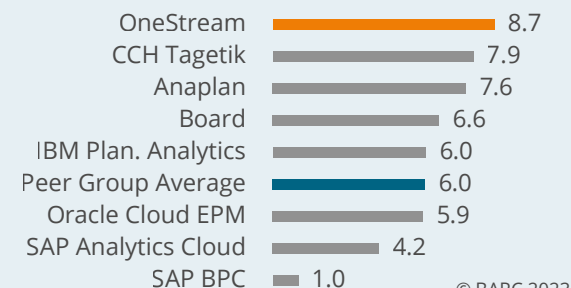
## Customer Satisfaction



## Customer Satisfaction – Top-ranked



Peer group: Large/Enterprise-Wide Implementations



© BARC 2023

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

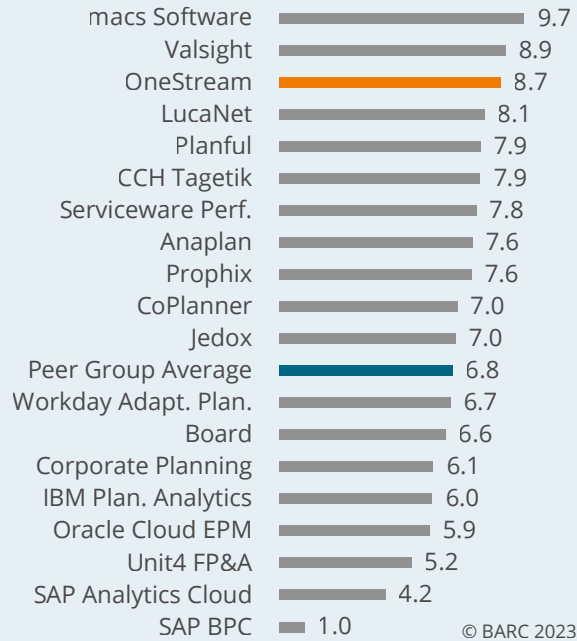
## BARC Viewpoint

*Customer Satisfaction* aggregates the *Price to Value*, *Recommendation*, *Vendor Support*, *Implementer Support*, *Product Satisfaction* and *Sales Experience* KPIs. Great results in all of these KPIs lead to high rankings for OneStream in all of its peer groups this year for *Customer Satisfaction*. Survey feedback confirms that OneStream is an attractively priced product, offering good value and comprehensive functionality. Many customers praise the vendor and its partners' support services and benefit from their product knowledge and implementation experience. Comprehensive functionality for financial consolidation and close, planning, budgeting and forecasting, reporting, analysis and financial data quality management in one single application allows customers to address various corporate and financial performance management use cases. The fact that 99 percent of the OneStream customers surveyed said they would "definitely" or "probably" recommend their planning product to other organizations speaks volumes.

## Customer Satisfaction – Leader



Peer group: Planning-Focused Products



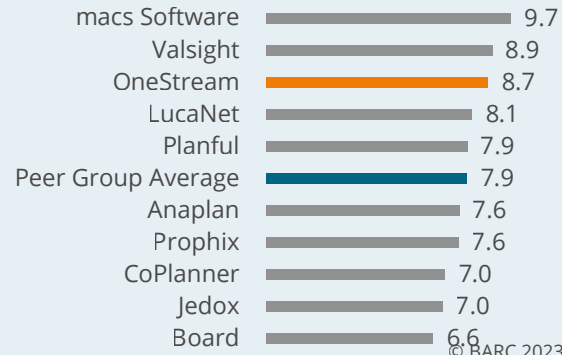
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

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## Customer Satisfaction – Leader



Peer group: Performance Management Specialists



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

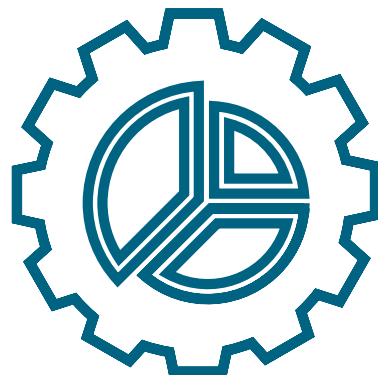
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## Customer Satisfaction





# Data Integration

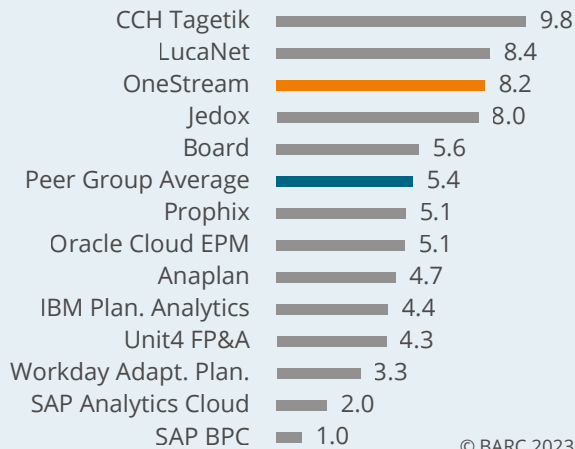


This KPI measures user ratings of the product's data integration functionality.

## Data Integration – Leader



Peer group: Global Vendors



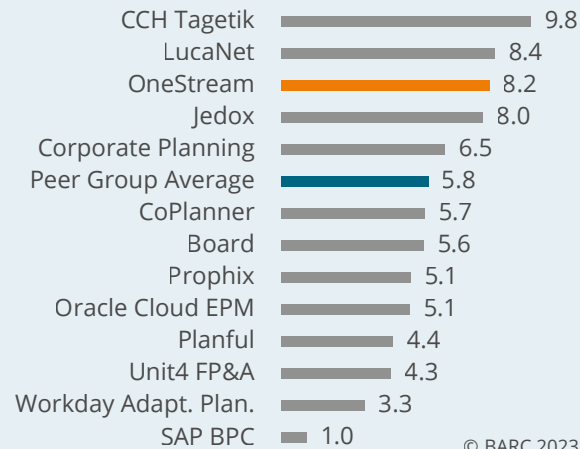
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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Data Integration – Leader



Peer group: Financial Consolidation-Focused Products



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

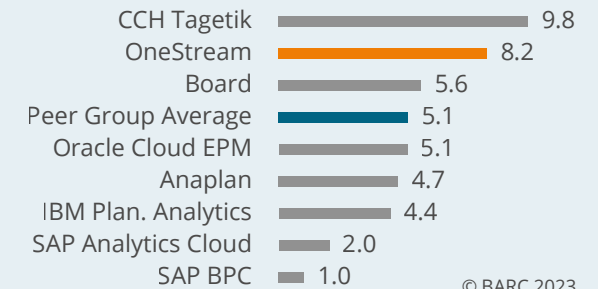
## Data Integration



### Data Integration – Leader



Peer group: Large/Enterprise-Wide Implementations



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

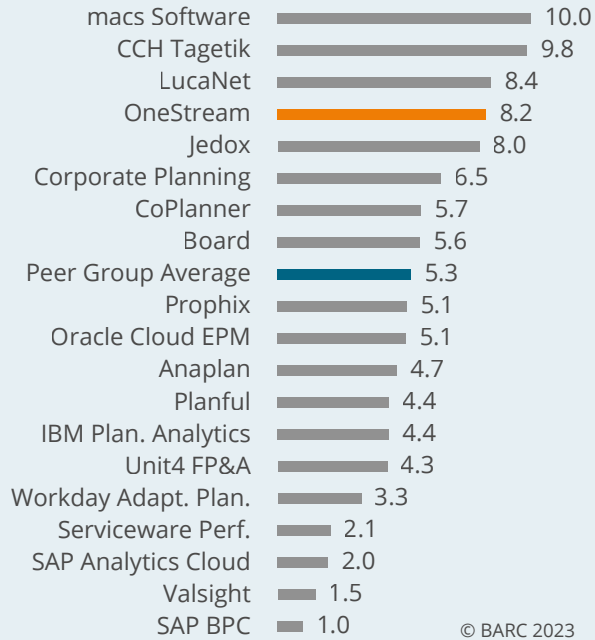
## BARC Viewpoint

Integrating data from various source systems is a challenge in every CPM and analytics project. OneStream has its own integrated capabilities to access data in source systems and transfer it to the product's relational data model in Microsoft SQL Server. Guided access to a wide variety of data sources is provided by integrated wizards. Using OneStream's flexible load options and data connectors, scripting is not usually required for import operations. Embedded data quality capabilities provide pre-load and post-load data validation and confirmation to ensure the quality of the data. This year, customer feedback places OneStream as a leader for *Data Integration* in all of its peer groups.

## Data Integration – Leader



Peer group: Planning-Focused Products



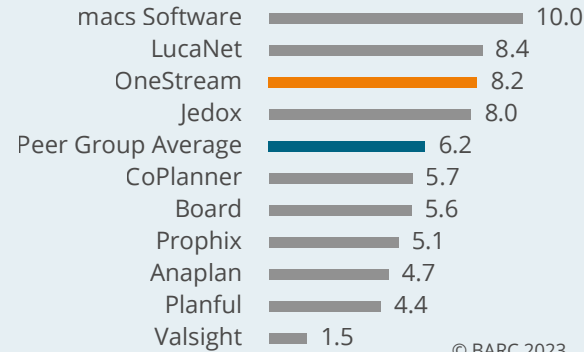
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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Data Integration – Leader



Peer group: Performance Management Specialists



© BARC 2023

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

# Data Integration



# Planning Content

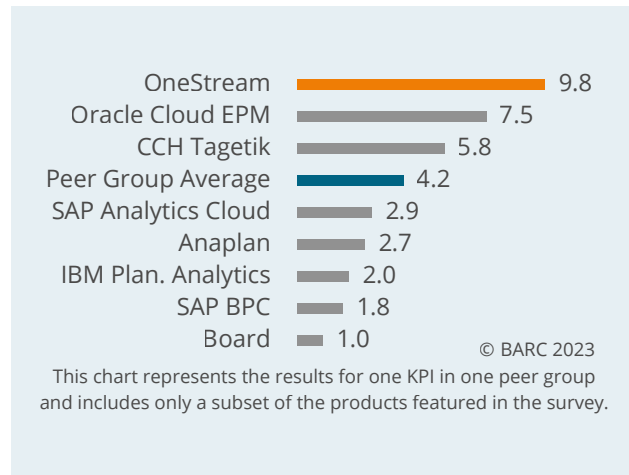


This KPI measures user ratings of the predefined planning content available with the product.

## Planning Content – Top-ranked



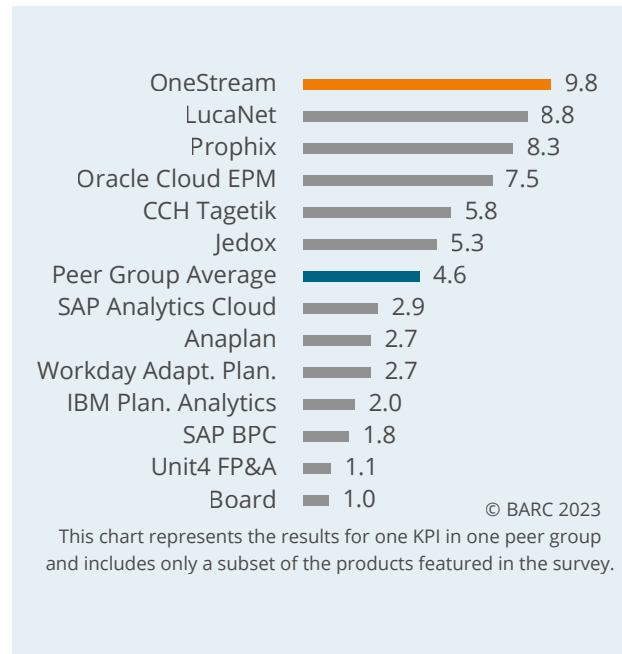
Peer group: Large/Enterprise-Wide Implementations



## Planning Content – Top-ranked



Peer group: Global Vendors

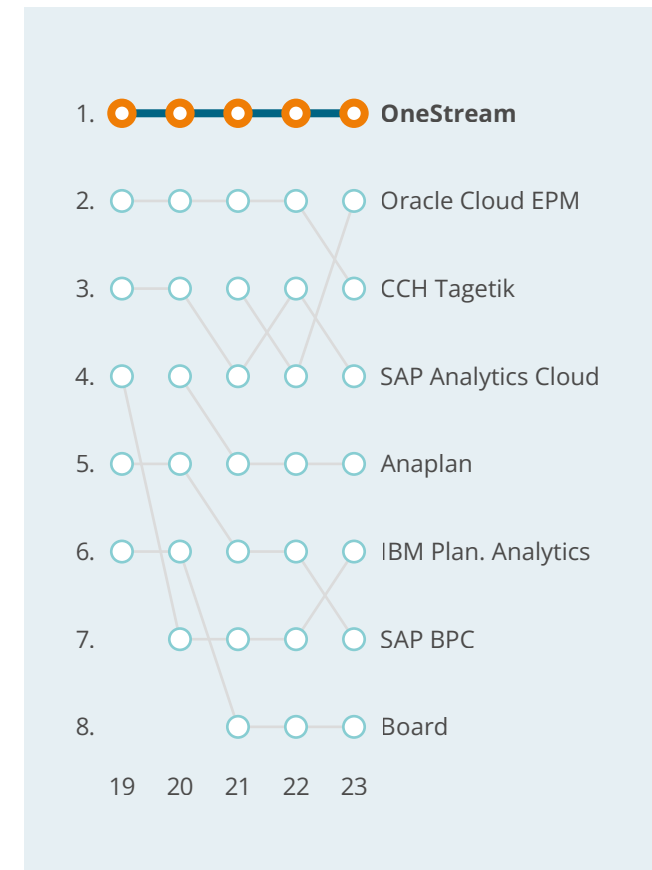


# Planning Content



## Consistently top-ranked in Planning Content

Peer group: Large/Enterprise-Wide Implementations



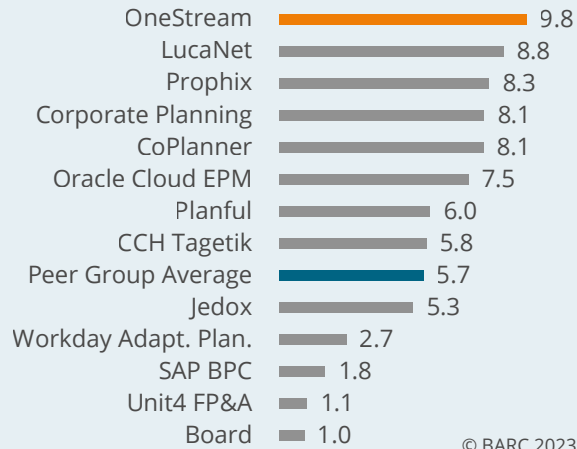
## BARC Viewpoint

The OneStream™ MarketPlace provides numerous productivity and business solutions to extend the platform with additional capabilities, such as account reconciliations, transaction matching and operational planning solutions. The latter – including workforce, capex, cash, sales, project planning and others – are designed to feed into the product’s core financial model. For predictive modeling and advanced analytics, OneStream offers Predictive Analytics 123 with built-in predictive models and forecast methods. In addition to its own models, the newly released (April 2023) OneStream Solution Exchange has two new solution portals: a PartnerPlace portal where users can download solutions created by OneStream partners and an OpenPlace portal that includes community-shared (or OneStream developed) solutions. Excellent results in the *Planning Content* KPI indicate that most customers are satisfied with the vendor’s prebuilt solutions.

## Planning Content – Top-ranked



Peer group: Financial Consolidation-Focused Products



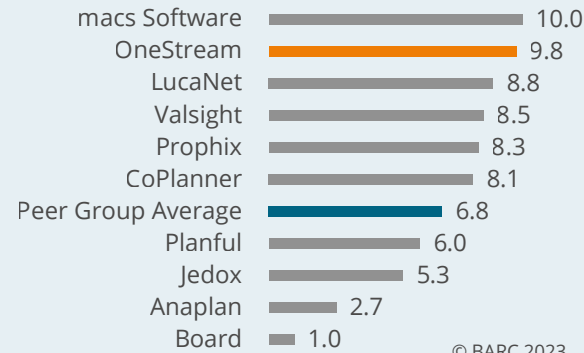
© BARC 2023

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

## Planning Content – Leader



Peer group: Performance Management Specialists



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

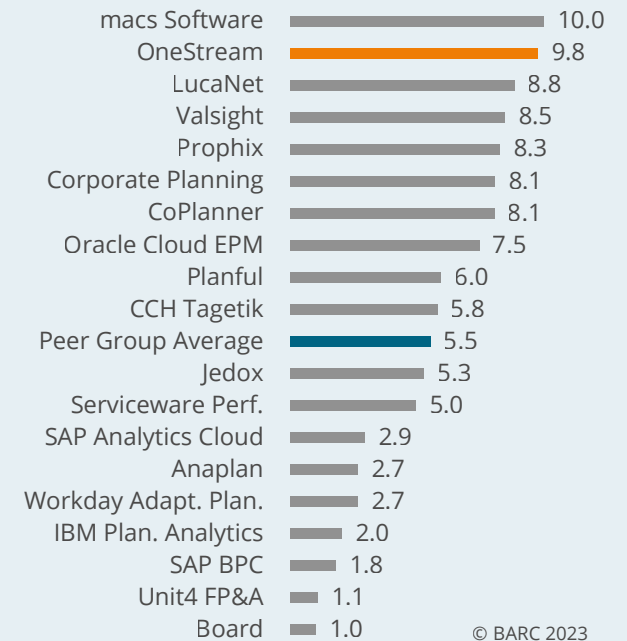
## Planning Content



### Planning Content – Leader



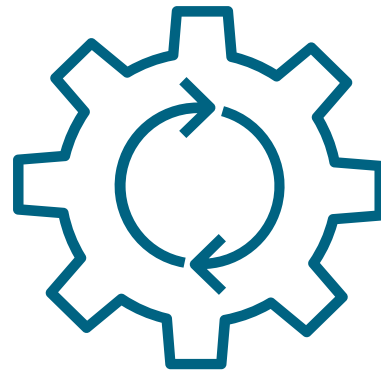
Peer group: Planning-Focused Products



© BARC 2023

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

# Workflow

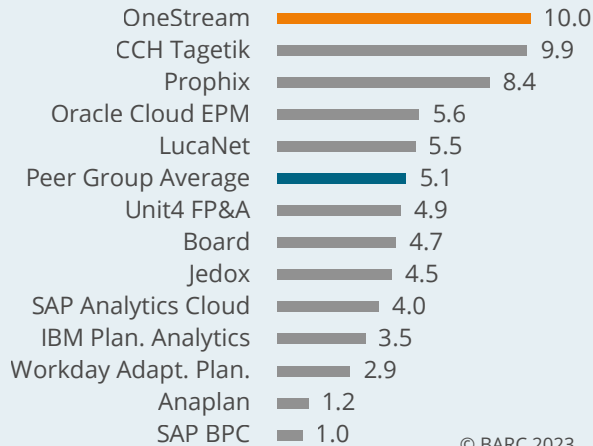


This KPI measures user ratings of the product's workflow functionality.

## Workflow – Top-ranked



Peer group: Global Vendors



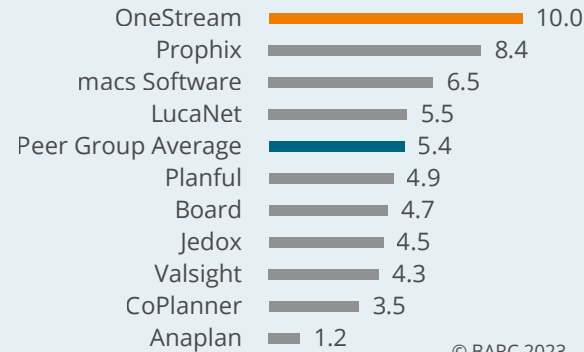
© BARC 2023

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

## Workflow – Top-ranked



Peer group: Performance Management Specialists



© BARC 2023

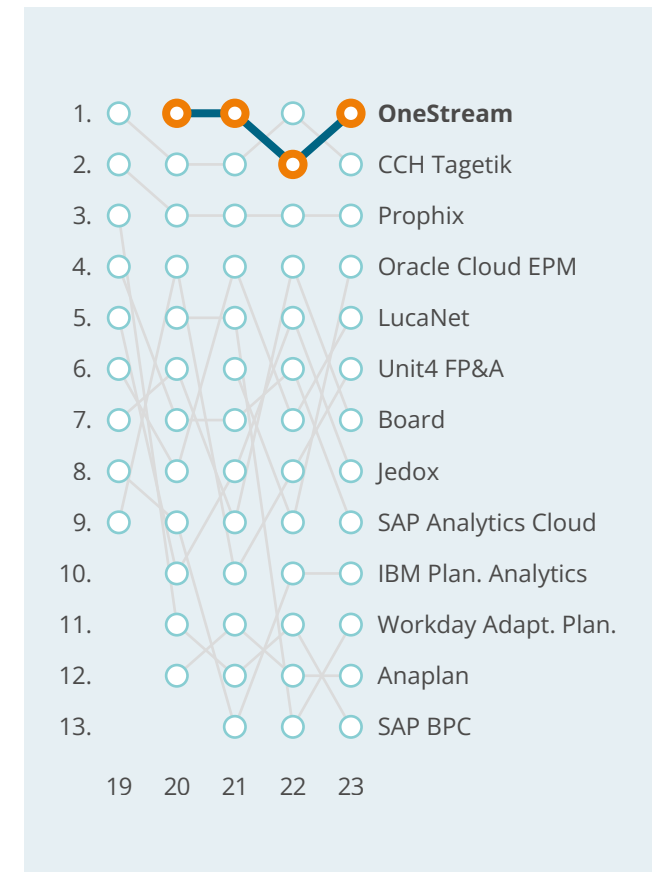
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Workflow



### Consistently outstanding in Planning Content

Peer group: Global Vendors



## BARC Viewpoint

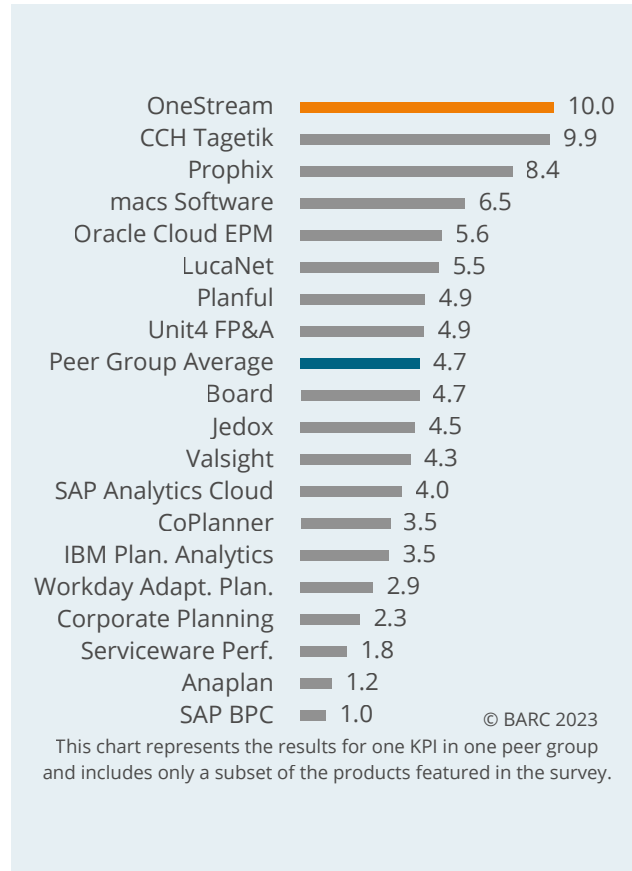
When managing decentralized bottom-up planning and forecasting processes with lots of planners involved, workflow functionality can be helpful to coordinate consecutive planning activities. OneStream provides capabilities for top-down and bottom-up planning scenarios including embedded workflows and collaboration capabilities. Functionality includes advanced features such as status monitoring, time management, task assignment, email notifications, locking/unlocking depending on security levels and approval processes. Workflows are linked to scenarios, which are based on scenario types with process-specific characteristics. The workflow concept allows for the confirmations, certifications and process control required for financial close and planning processes. The majority of customers are satisfied with the workflow capabilities on offer and rank OneStream number one in the *Workflow* KPI across all its peer groups.



## Workflow – Top-ranked

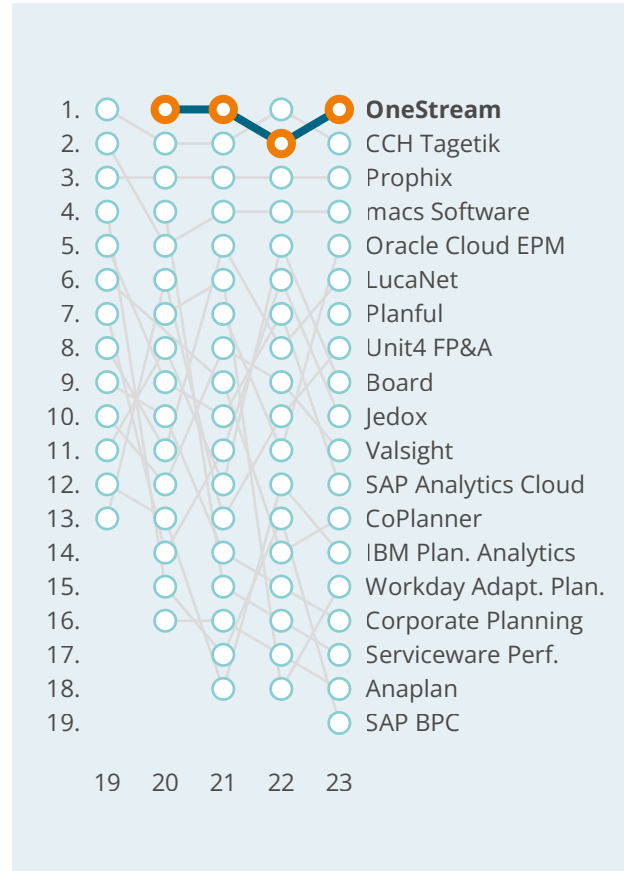


Peer group: Planning-Focused Products



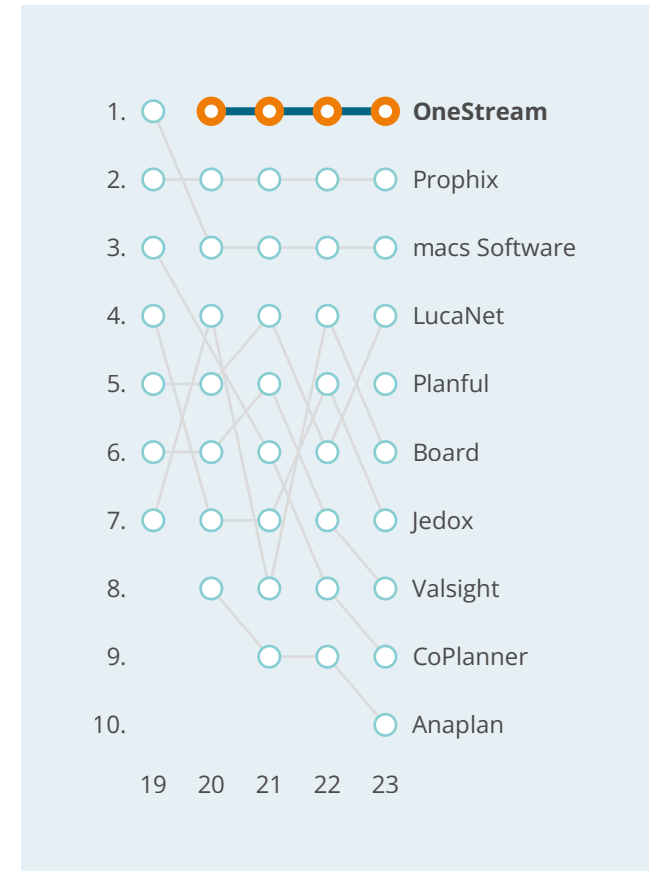
## Consistently outstanding in Planning Content

Peer group: Planning-Focused Products



## Consistently top-ranked in Planning Content

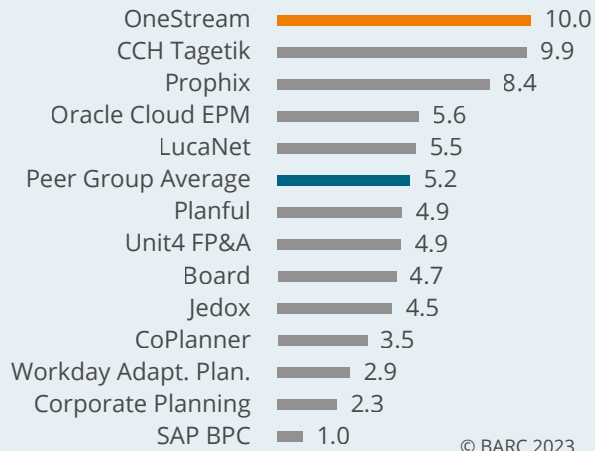
Peer group: Performance Management Specialists



## Workflow – Top-ranked



Peer group: Financial Consolidation-Focused Products



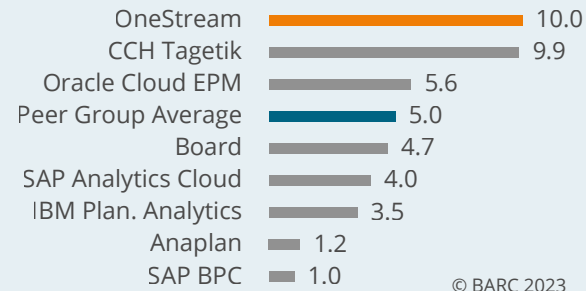
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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Workflow – Top-ranked



Peer group: Large/Enterprise-Wide Implementations



© BARC 2023

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



# Forecasting

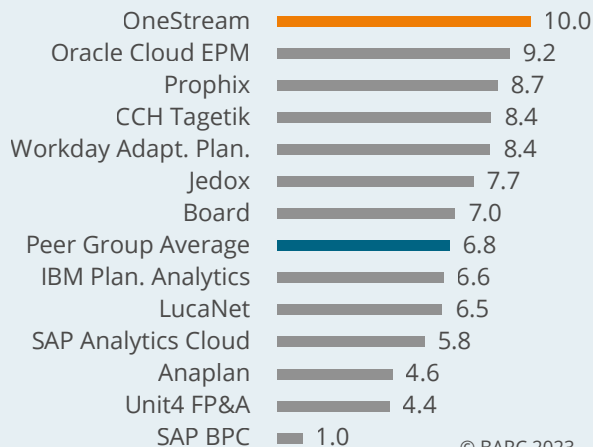


This KPI measures user ratings of the product's forecasting functionality.

## Forecasting – Top-ranked



Peer group: Global Vendors



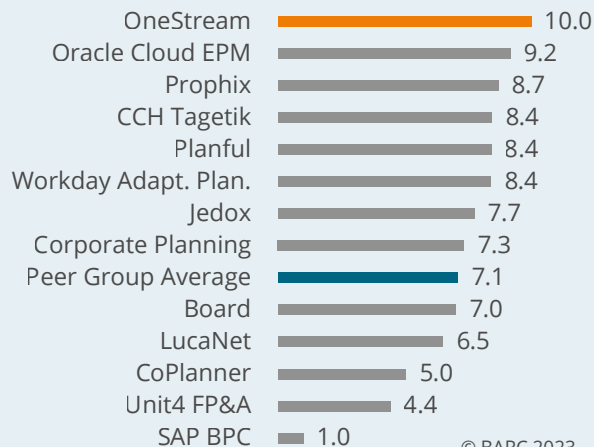
© BARC 2023

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

## Forecasting – Top-ranked



Peer group: Financial Consolidation-Focused Products



© BARC 2023

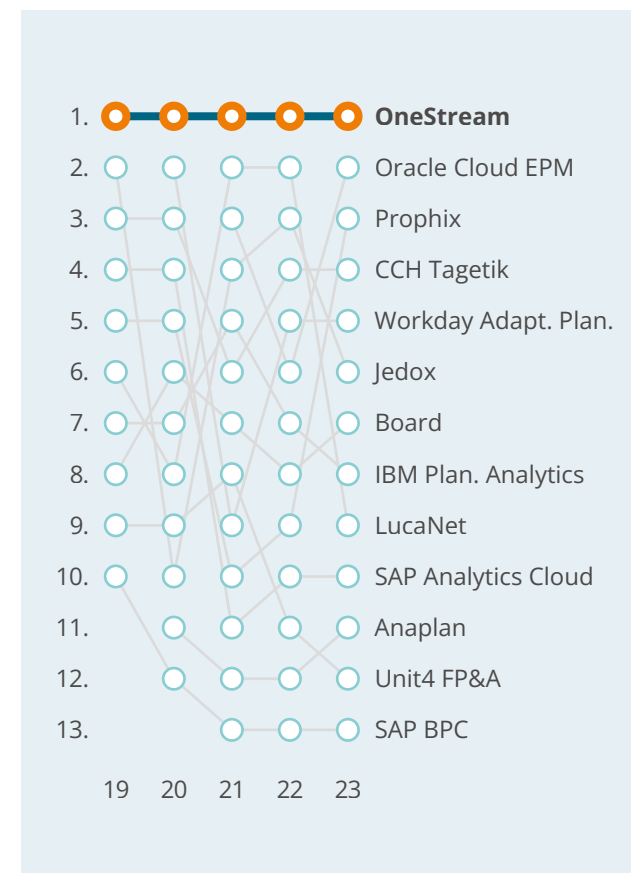
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Forecasting



### Consistently top-ranked in Forecasting

Peer group: Global Vendors



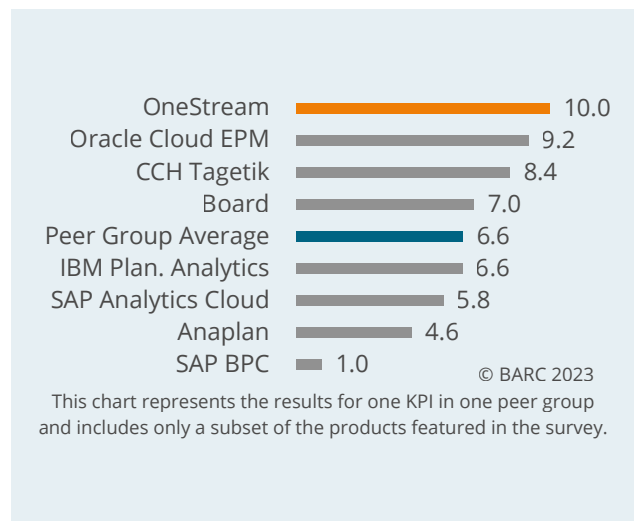
## BARC Viewpoint

For many companies, the importance attached to up-to-date forecasts for corporate management has increased significantly in recent times. As a result, forecasts have to be updated more frequently. OneStream ensures the integration of different planning levels from strategic planning, operational planning and budgeting to quarterly forecasts and plan adjustments. Based on plan values already entered for certain planning periods and their comparison with realized actuals from operational source systems, OneStream supports forecasts of future corporate development. Options to support forecasting processes include seeding options and versioning of budgets. Goal-seeking functions are also available. Furthermore, customers can leverage predictive and/or machine learning models as a non-biased forecast scenario within planning, budgeting and forecasting. Top rankings in all five peer groups confirm that customers are more than happy with the product's forecasting capabilities.

## Forecasting – Top-ranked

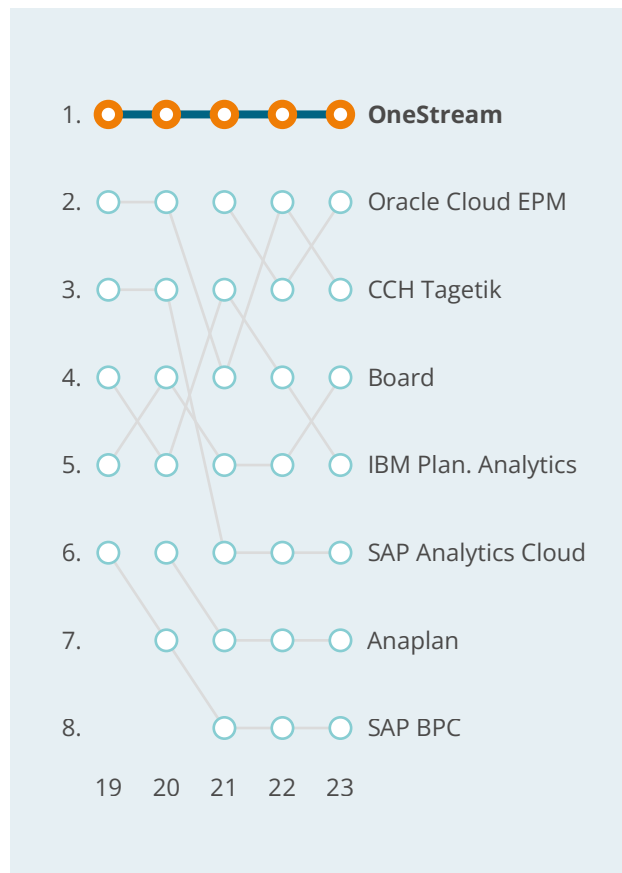


Peer group: Large/Enterprise-Wide Implementations



## Consistently top-ranked in Forecasting

Peer group: Large/Enterprise-Wide Implementations

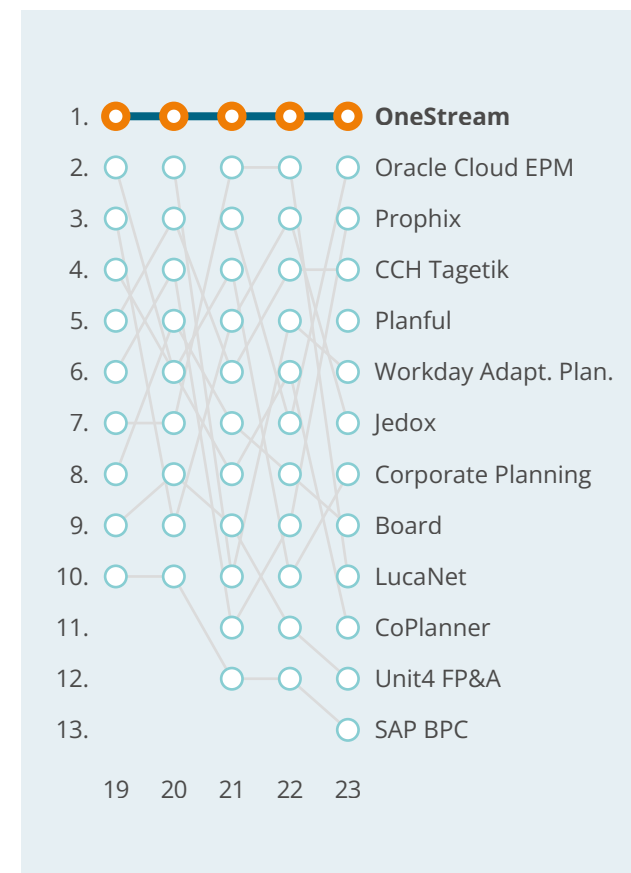


## Forecasting



## Consistently top-ranked in Forecasting

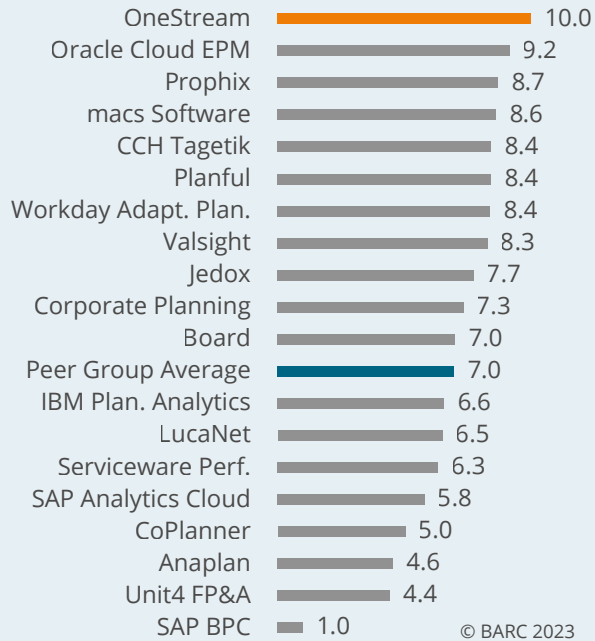
Peer group: Financial Consolidation-Focused Products



## Forecasting – Top-ranked



Peer group: Planning-Focused Products



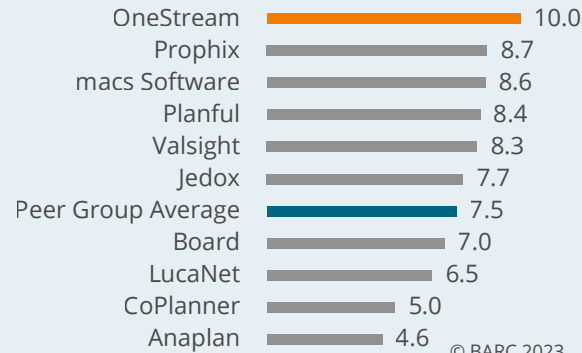
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

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## Forecasting – Top-ranked



Peer group: Performance Management Specialists



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



# Simulation

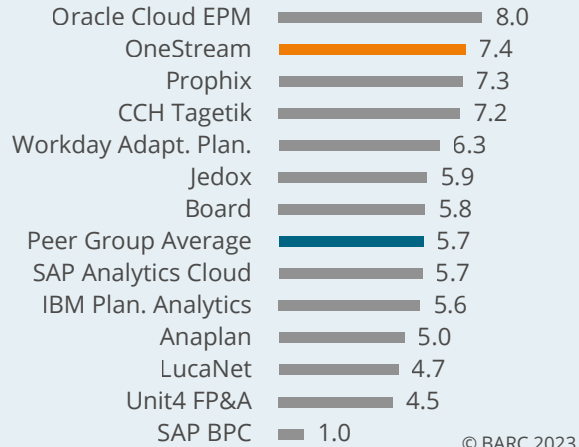


This KPI measures user ratings of the product's simulation functionality.

## Simulation – Leader



Peer group: Global Vendors



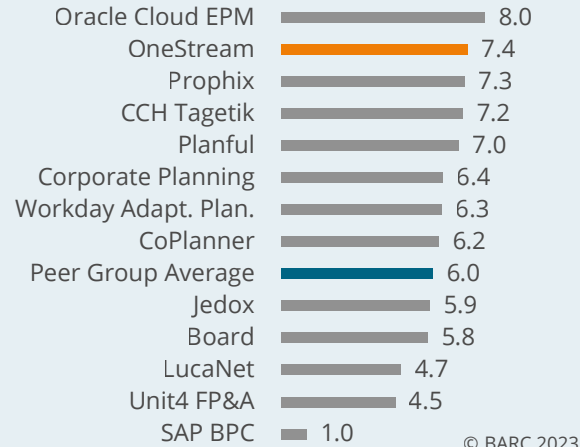
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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Simulation – Leader



Peer group: Financial Consolidation-Focused Products



© BARC 2023

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

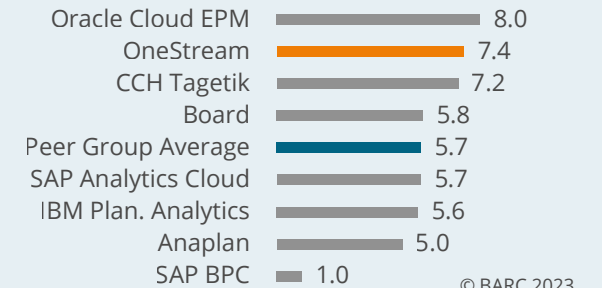
## Simulation



## Simulation – Leader



Peer group: Large/Enterprise-Wide Implementations



© BARC 2023

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

## BARC Viewpoint

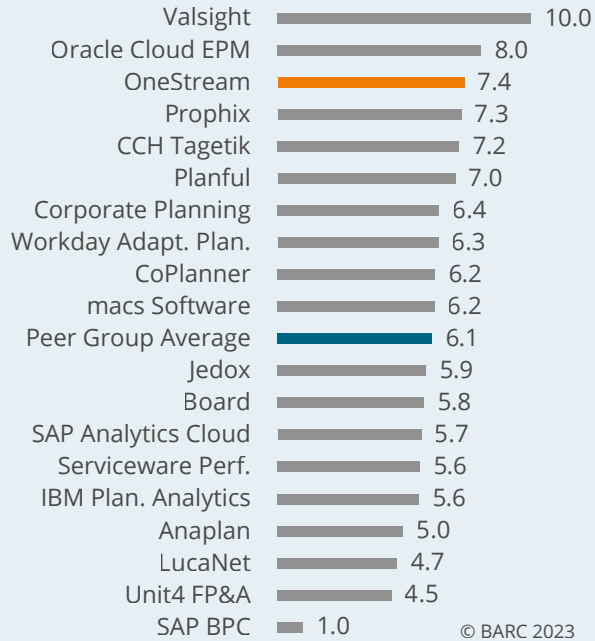
Simulations and scenario evaluations are the basis for the well-founded analysis and evaluation of alternative actions, opportunities and risks. Increasing dynamics and uncertainty massively influence the importance of simulations for corporate management. OneStream offers multiple options to simulate future corporate development. The copying of scenarios is a standard function available to users to play with and model their plans. The number of scenarios that can be made available to users is unlimited. Planning can be parameterized for simulation (e.g., driver-based scenario simulation). All necessary functions to create simulation scenarios are accessible using the standard metadata editor (properties of the scenario dimension). In this year's Planning Survey, customer rate OneStream highly for *Simulation* in all of its peer groups.



## Simulation – Leader



Peer group: Planning-Focused Products

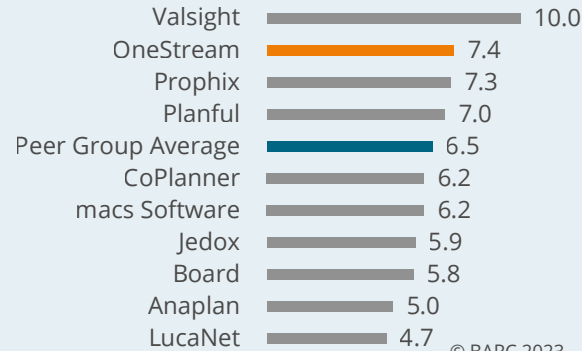


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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Simulation – Leader



Peer group: Performance Management Specialists



© BARC 2023  
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.



# Reporting/Analysis

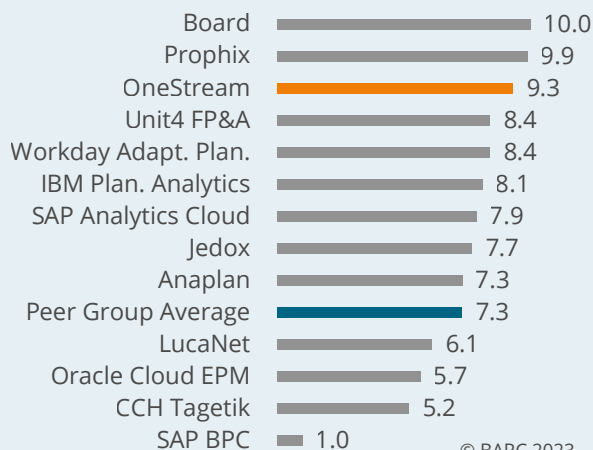


This KPI measures user ratings of the product's coverage of reporting/analysis requirements.

## Reporting/Analysis – Leader



Peer group: Global Vendors



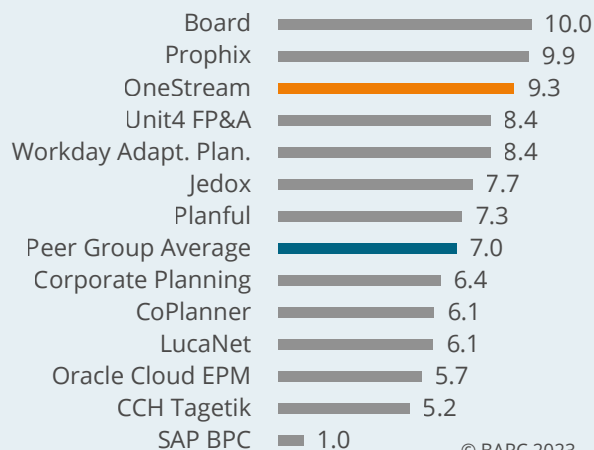
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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Reporting/Analysis – Leader



Peer group: Financial Consolidation-Focused Products



© BARC 2023

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

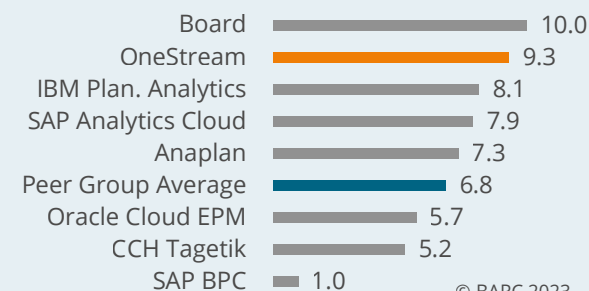
## Reporting/Analysis



### Reporting/Analysis – Leader



Peer group: Large/Enterprise-Wide Implementations



© BARC 2023

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

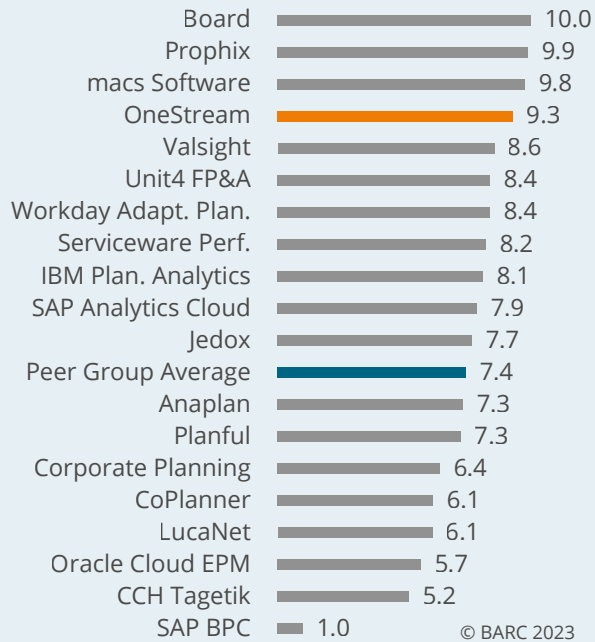
## BARC Viewpoint

In contrast to other products on the market, OneStream has its own integrated functionality for business intelligence and analytics. For individual, flexible (ad hoc) reporting and analysis, a reporting studio, spreadsheet interface and Excel add-in are available. Interactive dashboards can bring key financial and operational metrics together by combining tables, charts, graphs and other visualizations. The vendor's MarketPlace also provides solutions for external reporting and disclosure management. For those customers following a Microsoft strategy for analytics, a new OneStream Power BI connector enables Power BI Desktop users to query OneStream data and import it into Power BI for reports and visualizations. Leading ranks across four peer groups for *Reporting/Analysis* confirm that customers are satisfied with the product's integrated capabilities.

## Reporting/Analysis – Leader



Peer group: Planning-Focused Products

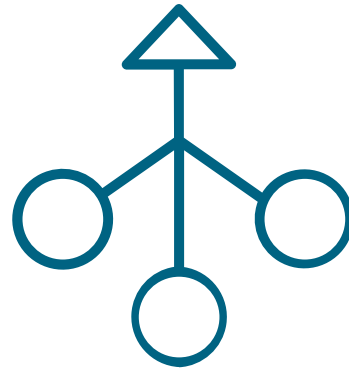


© BARC 2023  
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Reporting/Analysis



# Financial Consolidation

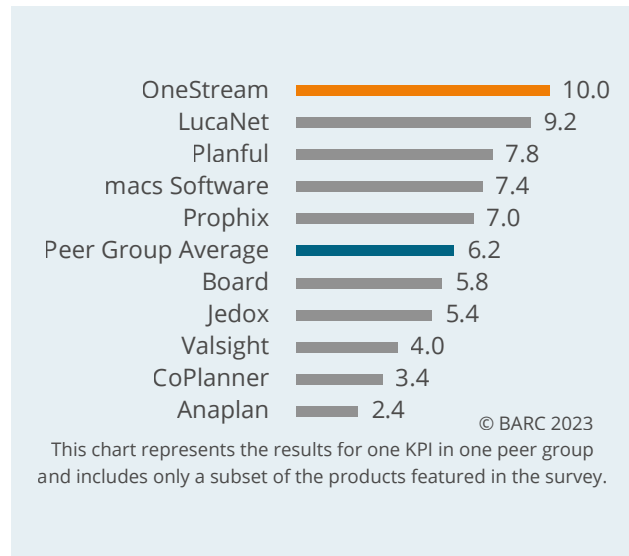


This KPI is based on how respondents rate the product's functionality to support legal consolidation (e.g., according to IFRS).

## Financial Consolidation – Top-ranked



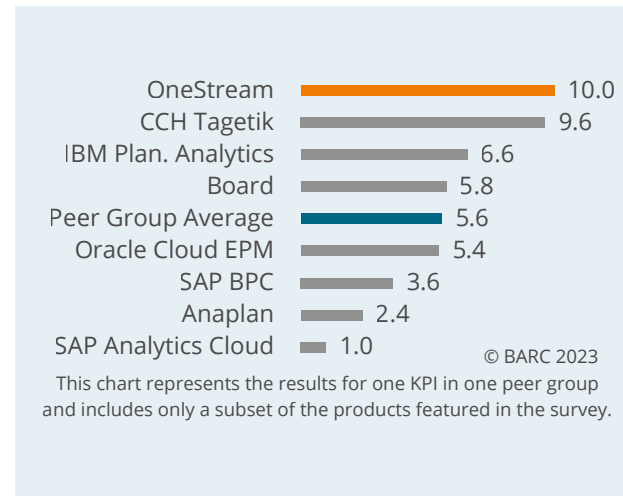
Peer group: Performance Management Specialists



## Financial Consolidation – Top-ranked



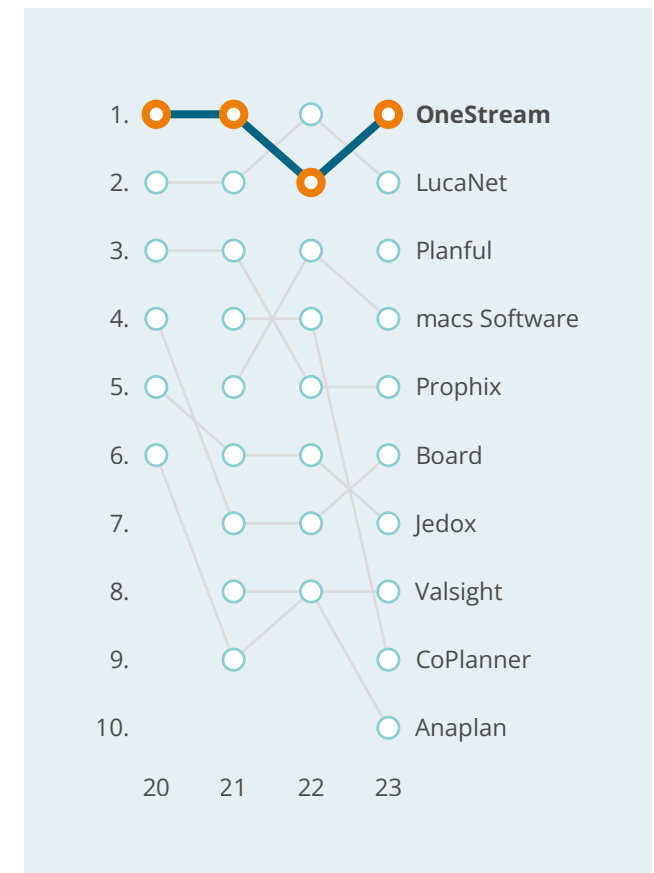
Peer group: Large/Enterprise-Wide Implementations



# Financial Consolidation

## Consistently outstanding in Financial Consolidation

Peer group: Performance Management Specialists



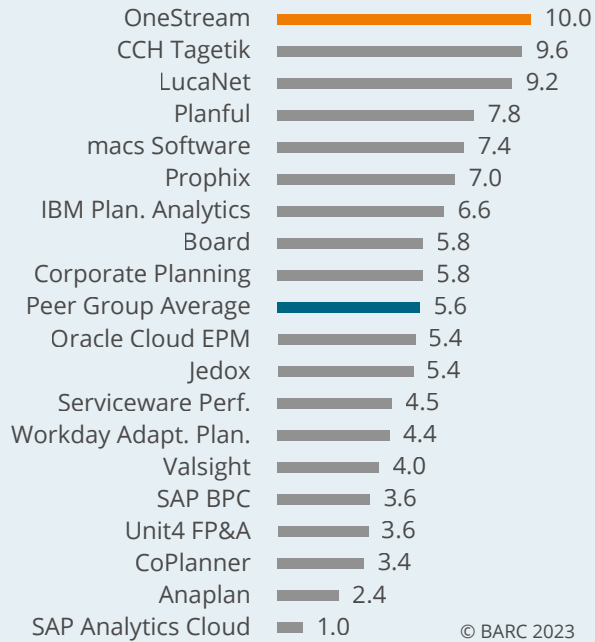
## BARC Viewpoint

All the OneStream customers we surveyed either use the product (78 percent of respondents) or plan to use it (22 percent) for group consolidation. Functionality for legal and management consolidation is at the heart of OneStream. A proprietary in-memory financial analytic engine with built-in financial intelligence (e.g., supporting complex financial consolidations) is provided. Company-wide consolidated financial results statements and plans at subsidiary or group level can be created using OneStream. The platform supports financial consolidation and close processes with comprehensive features such as statutory consolidation logic, multi-currency conversions, fully auditable adjustments and data flows, and journals. Furthermore, the MarketPlace offers additional solutions (e.g., for account reconciliation, disclosure management and tax provisioning). Top rankings for *Financial Consolidation* in all its peer groups show that customers are very comfortable using OneStream for financial consolidation and close.

## Financial Consolidation – Top-ranked



Peer group: Planning-Focused Products

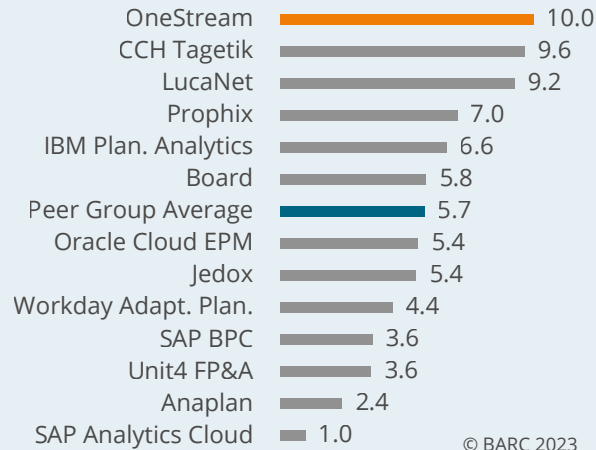


© BARC 2023  
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Financial Consolidation – Top-ranked



Peer group: Global Vendors



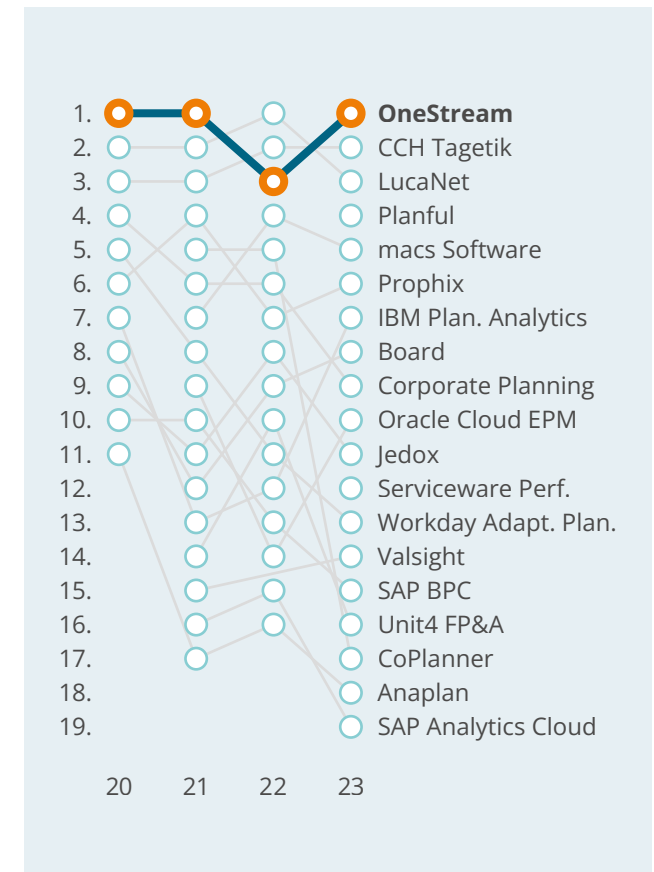
© BARC 2023  
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

# Financial Consolidation



## Consistently outstanding in Financial Consolidation

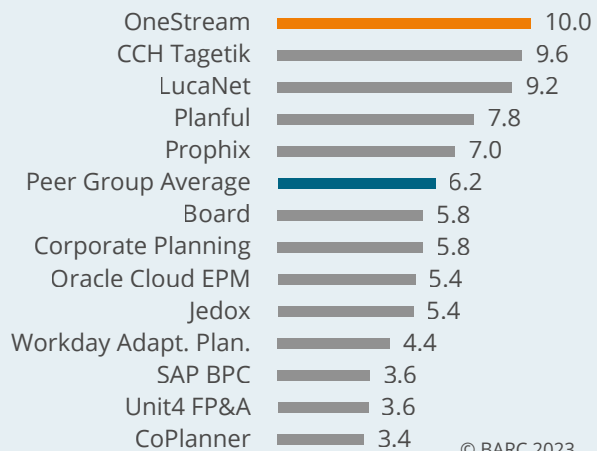
Peer group: Planning-Focused Products



## Financial Consolidation – Top-ranked



Peer group: Financial Consolidation-Focused Products



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



# Functionality

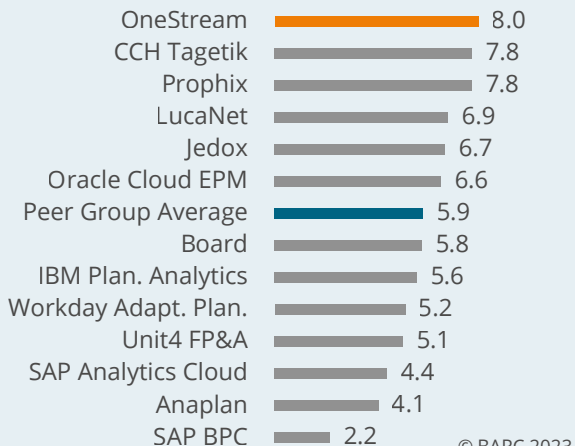


This KPI combines the *Predefined Connectors, Data Integration, Planning Content, Planning Functionality, Workflow, Forecasting, Simulation, Reporting/Analysis* and *Financial Consolidation* KPIs.

## Functionality – Top-ranked



Peer group: Global Vendors



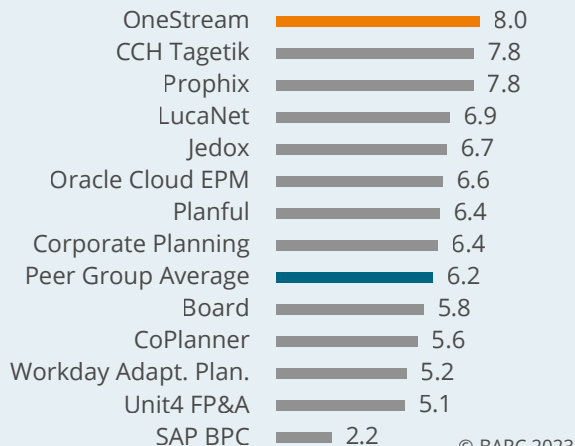
© BARC 2023

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

## Functionality – Top-ranked



Peer group: Financial Consolidation-Focused Products



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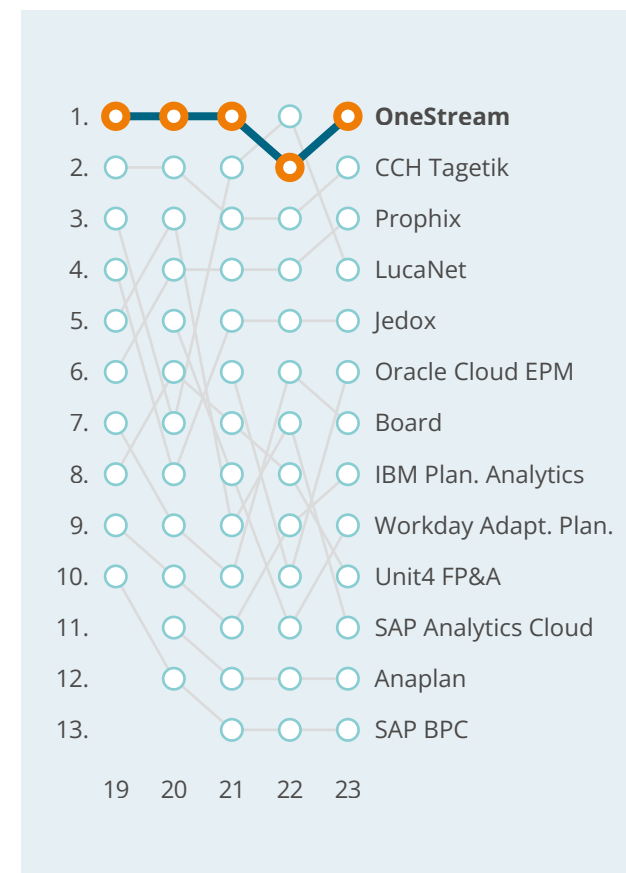
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

# Functionality



## Consistently outstanding in Functionality

Peer group: Global Vendors



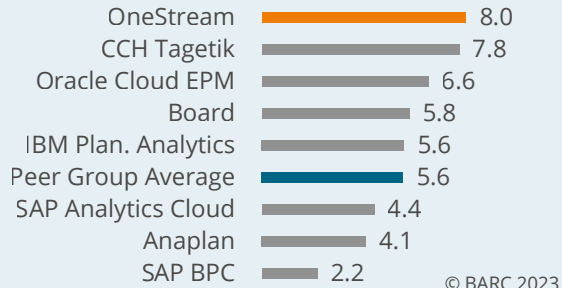
## BARC Viewpoint

OneStream's unified approach to support all the various corporate and financial performance management processes and information streams in organizations in one single platform clearly works to the advantage of customers. The product integrates capabilities for financial consolidation and close, planning, budgeting and forecasting, reporting, analysis and financial data quality management. As the Planning Survey reveals, customers greatly appreciate the product's range of functions and are very satisfied. Consequently, OneStream tops three of its peer groups and emerges as a leader in its other two for the aggregated *Functionality* KPI. In addition to the standard functionality, the OneStream™ MarketPlace provides productivity and business solutions that allow customers to extend the platform with additional capabilities.

## Functionality – Top-ranked



Peer group: Large/Enterprise-Wide Implementations



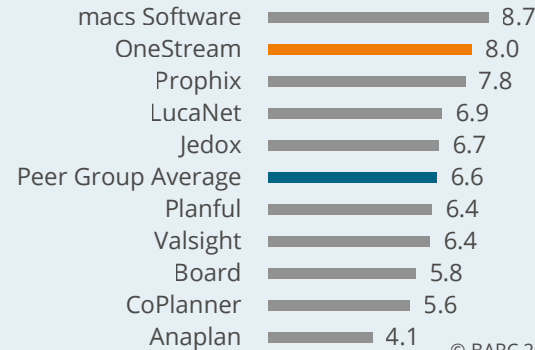
© BARC 2023

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

## Functionality – Leader



Peer group: Performance Management Specialists



© BARC 2023

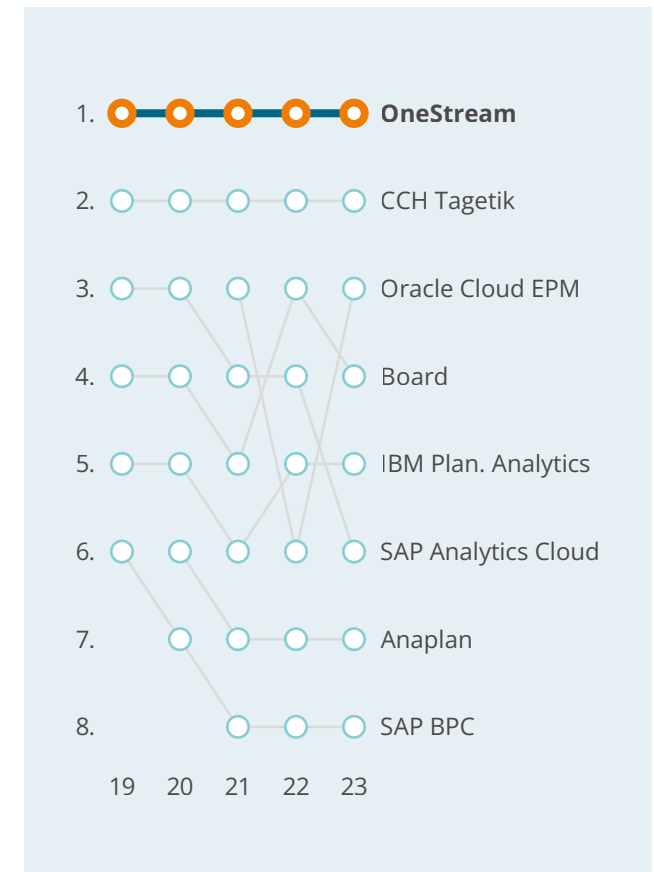
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Functionality



### Consistently top-ranked in Functionality

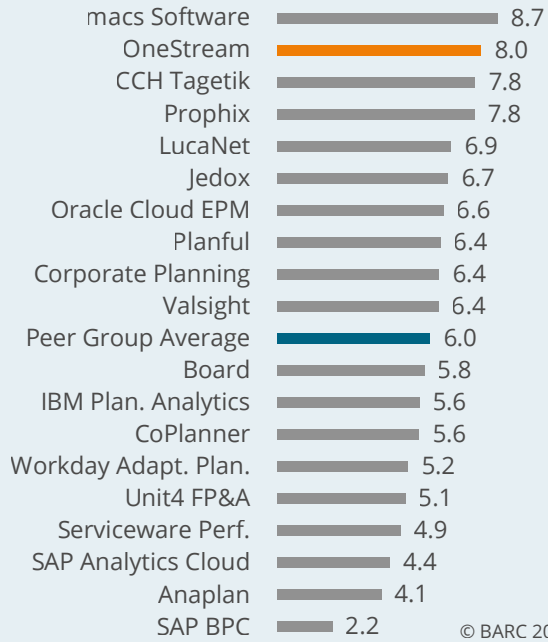
Peer group: Large/Enterprise-Wide Implementations



## Functionality – Leader



Peer group: Planning-Focused Products

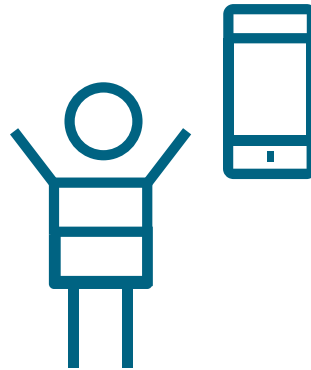


© BARC 2023

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



# Ease of Use

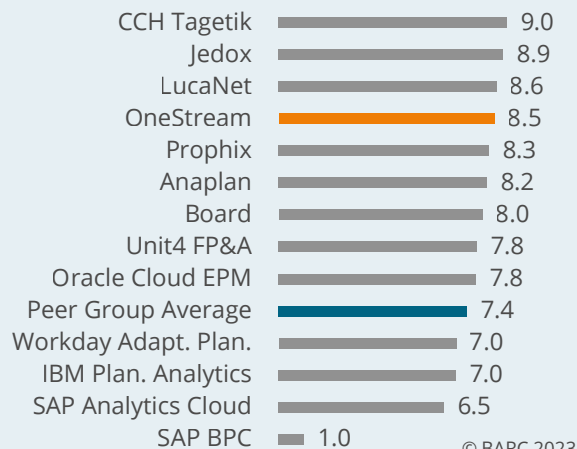


This KPI is based on how often the product was chosen for its ease of use, and on the level of complaints about ease of use post-implementation.

## Ease of Use – Leader



Peer group: Global Vendors



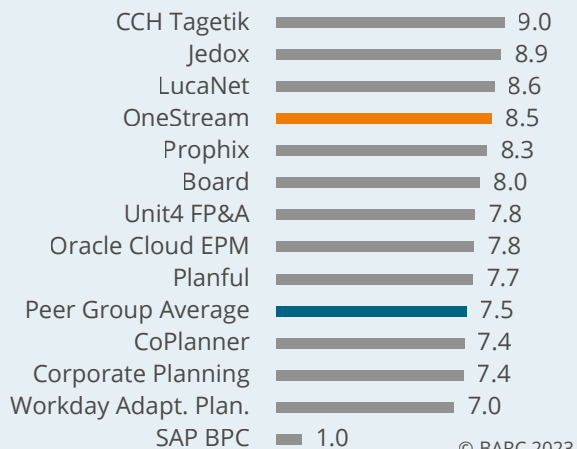
© BARC 2023

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

## Ease of Use – Leader



Peer group: Financial Consolidation-Focused Products



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

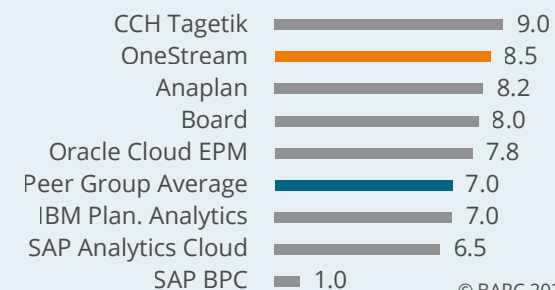
## Ease of Use



## Ease of Use – Leader



Peer group: Large/Enterprise-Wide Implementations



© BARC 2023

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

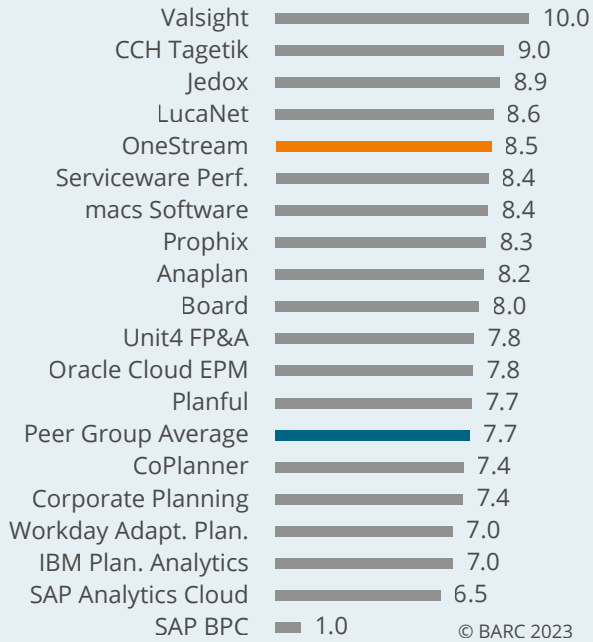
## BARC Viewpoint

OneStream primarily targets finance and business users in mid-sized and large global organizations. A high proportion of customers confirm that the product is easy to use so OneStream is ranked as a leader for *Ease of Use* in four of its peer groups. In general, the product requires little technical knowledge to use except on the data management side (particularly with data integration). As a consequence, many customers feel they can roll out and use OneStream in a self-service manner in business departments. This is especially true when leveraging the cloud option, where OneStream looks after the running and maintenance of the system (software-as-a-service). In fact, 34 percent of the customers surveyed chose OneStream because of its ease of use for planners.

## Ease of Use – Leader



Peer group: Planning-Focused Products

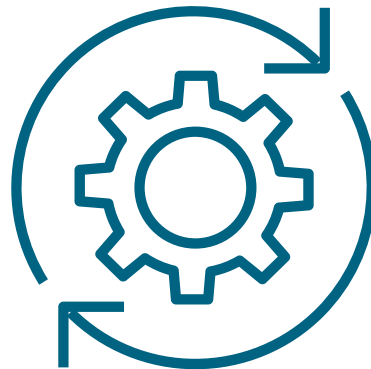


© BARC 2023

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



# Flexibility



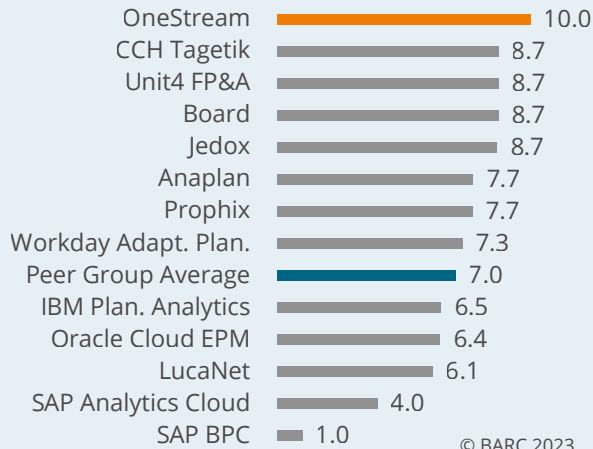
This KPI is based on how often the product was chosen for its flexibility, and on the frequency of complaints about user flexibility post-implementation.



## Flexibility – Top-ranked



Peer group: Global Vendors



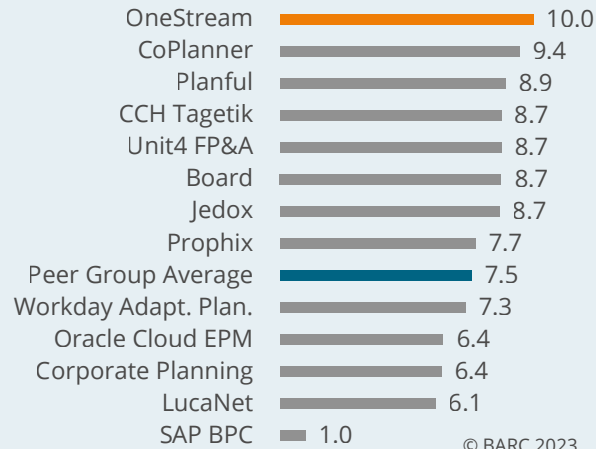
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

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## Flexibility – Top-ranked



Peer group: Financial Consolidation-Focused Products



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

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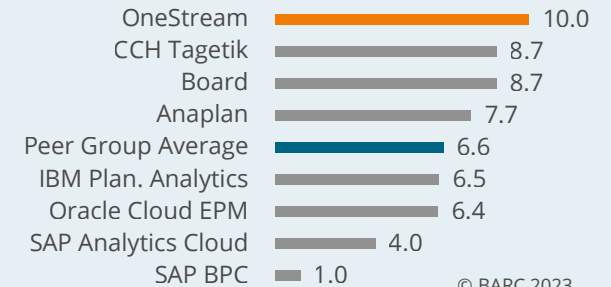
## Flexibility



## Flexibility – Top-ranked



Peer group: Large/Enterprise-Wide Implementations



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

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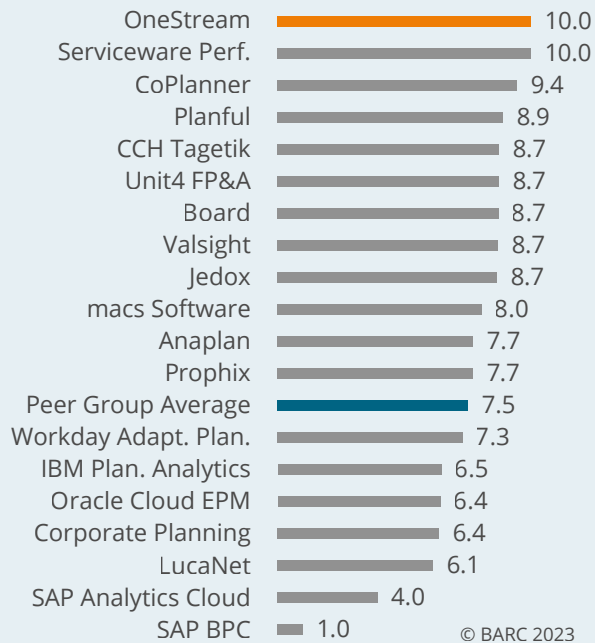
## BARC Viewpoint

Flexibility of the software to address various corporate and financial performance management use cases is an important factor for many companies when buying planning products. 77 percent of the customers surveyed confirm that this was the major reason why they chose OneStream. As a unified platform, OneStream focuses on supporting the full range of corporate and financial performance management requirements in companies of varying sizes and industries. At the heart of the product is its proprietary in-memory financial analytic engine with built-in financial intelligence. In addition, OneStream has invented flexible concepts such as Extensible Dimensionality®, which enables customers to extend the account and other dimension structures to support both corporate and line-of-business financial and operational scenarios in one single solution. One customer quote sums this up very well: “It is a great tool with streamlined capabilities. It offers a good mix of structure and flexibility. Organizations that are structured and have clean processes will benefit greatly from this tool.”

## Flexibility – Top-ranked



Peer group: Planning-Focused Products

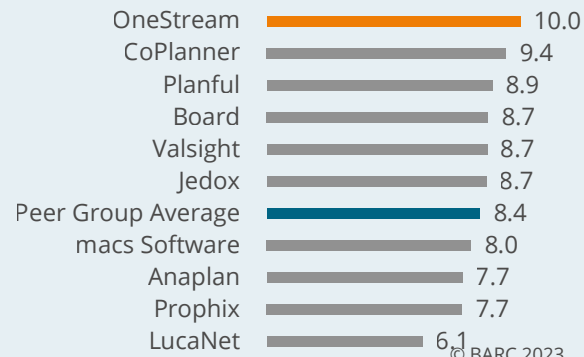


© BARC 2023  
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Flexibility –Top-ranked



Peer group: Performance Management Specialists



© BARC 2023  
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.



# Performance Satisfaction

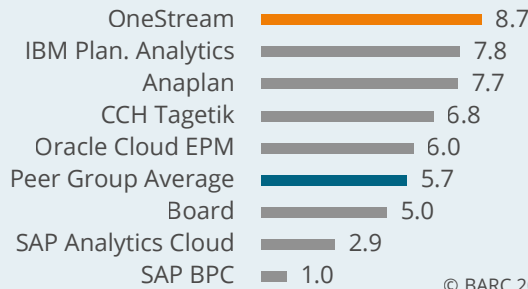


This KPI measures the frequency of complaints about the system's performance.

## Performance Satisfaction – Top-ranked



Peer group: Large/Enterprise-Wide Implementations



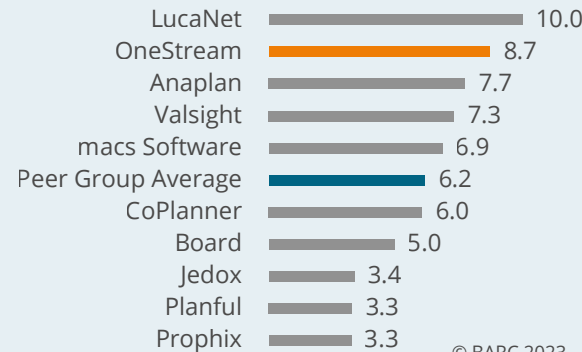
© BARC 2023

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

## Performance Satisfaction – Leader



Peer group: Performance Management Specialists



© BARC 2023

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

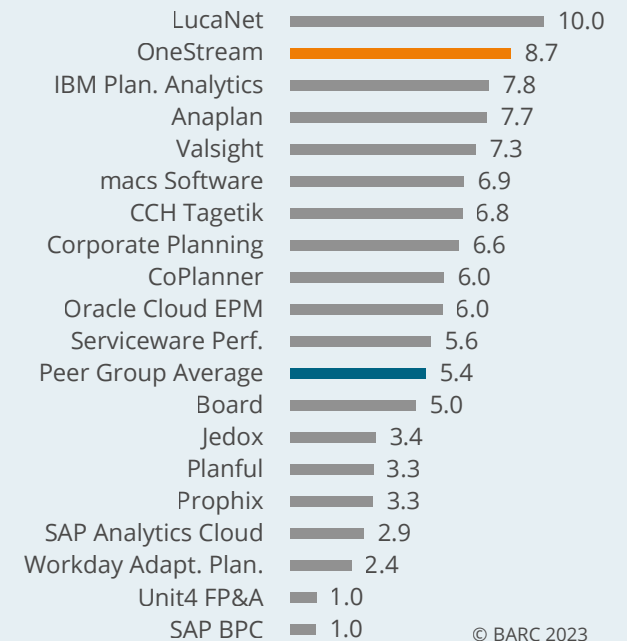
## Performance Satisfaction



### Performance Satisfaction – Leader



Peer group: Planning-Focused Products



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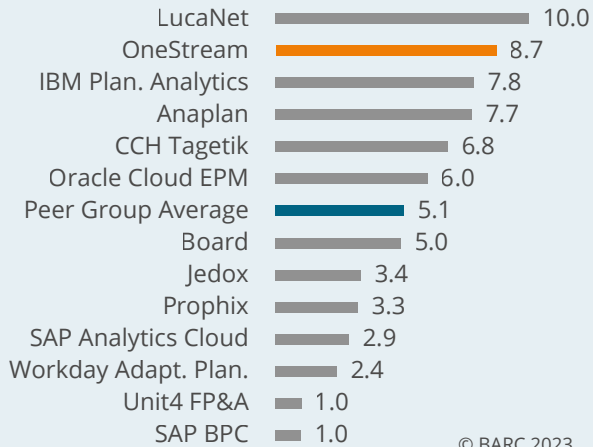
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## BARC Viewpoint

Technically, OneStream leverages a proprietary in-memory financial analytic engine, relational data engine and column store engine with built-in financial intelligence that uses Microsoft SQL Server as a data store. The Planning Survey results confirm that the product and its underlying database environment are clearly capable of dealing with the data volumes and user numbers its customers typically work with. Complaints about slow performance when using OneStream are very rare (13 percent). The unified platform clearly convinces companies with superior performance in the evaluation process and use phase. Overall, performance satisfaction is high among customers, which is a major reason for OneStream's strong rankings in this KPI.

## Performance Satisfaction – Leader

Peer group: Global Vendors



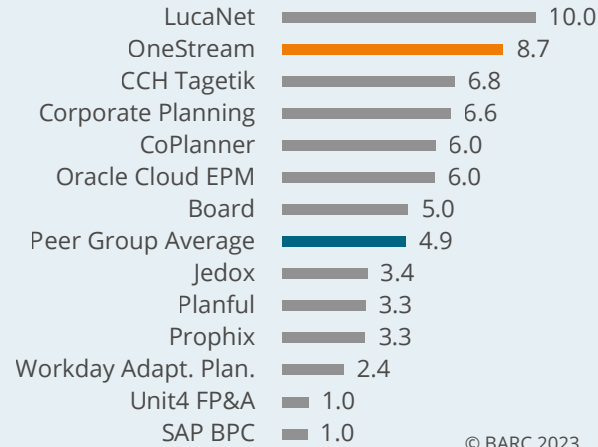
© BARC 2023

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

## Performance Satisfaction – Leader



Peer group: Financial Consolidation-Focused Products



© BARC 2023

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

# Performance Satisfaction



# User Experience

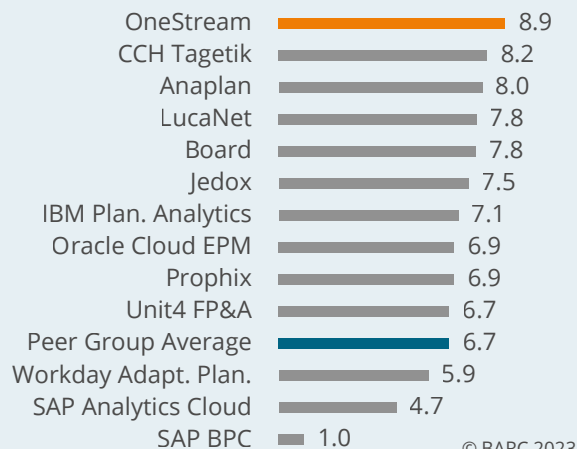


This KPI combines the *Self-Service, Flexibility, Ease of Use* and *Performance Satisfaction* KPIs.

## User Experience – Top-ranked



Peer group: Global Vendors



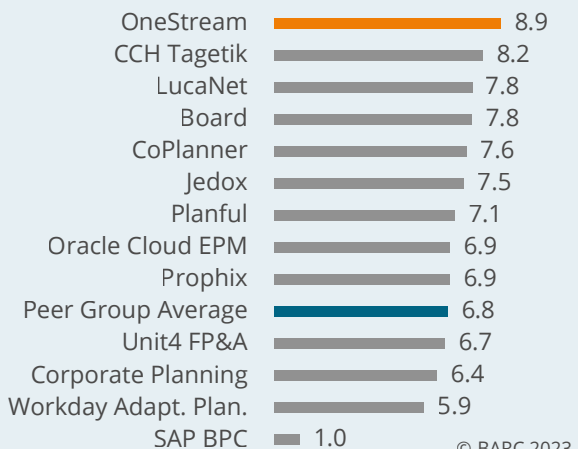
© BARC 2023

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

## User Experience – Top-ranked



Peer group: Financial Consolidation-Focused Products



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

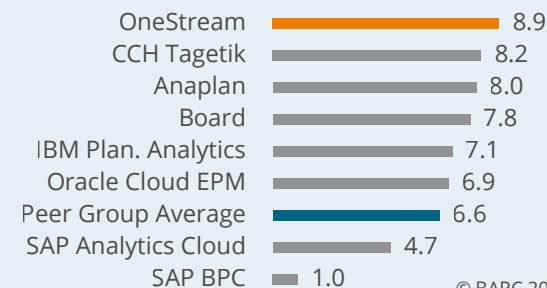
# User Experience



## User Experience – Top-ranked



Peer group: Large/Enterprise-Wide Implementations



© BARC 2023

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

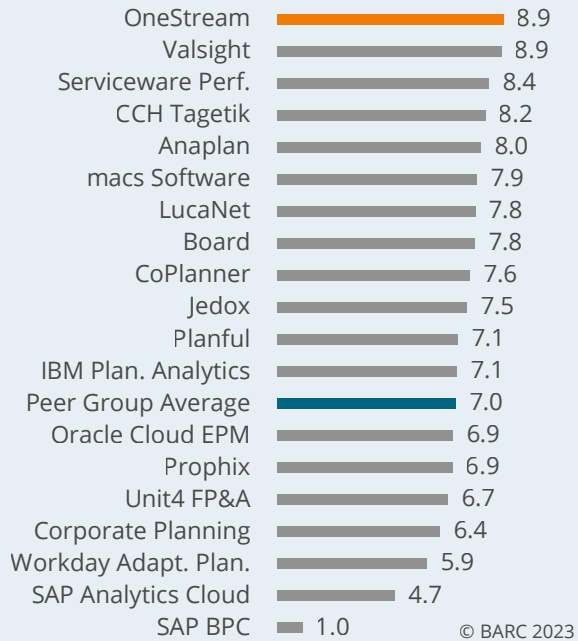
## BARC Viewpoint

*User Experience* combines the *Self-Service*, *Ease of Use*, *Flexibility* and *Performance Satisfaction* KPIs. Strong results in most of these contribute to OneStream's top ratings for *User Experience* across all peer groups. OneStream is considered by many customers to be easy to use and is often deployed in a self-service manner in business departments (typically finance and controlling). Moreover, 'Flexibility of the software' is by far the dominant reason why companies decide to buy the product (77 percent). As a unified platform, OneStream focuses on supporting the full range of corporate and financial performance management requirements in companies of varying sizes and industries. Superior performance satisfaction contributes to OneStream's outstanding ratings for *User Experience* this year.

## User Experience – Top-ranked



Peer group: Planning-Focused Products

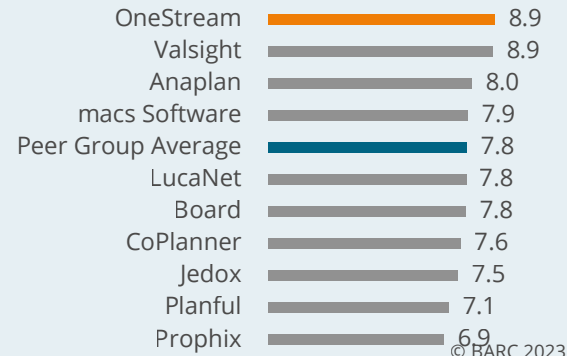


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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## User Experience – Top-ranked



Peer group: Performance Management Specialists



© BARC 2023  
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.





# Competitive Win Rate

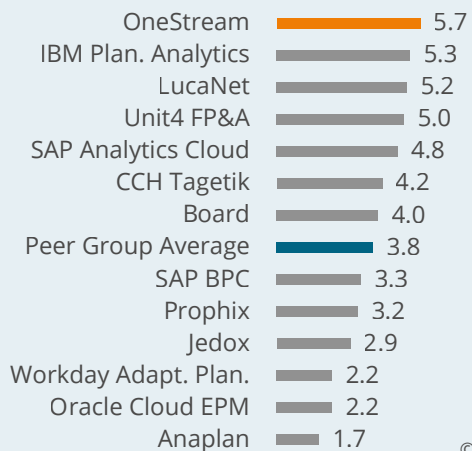


This KPI is based on the percentage of wins in competitive evaluations.

## Competitive Win Rate – Top-ranked



Peer group: Global Vendors



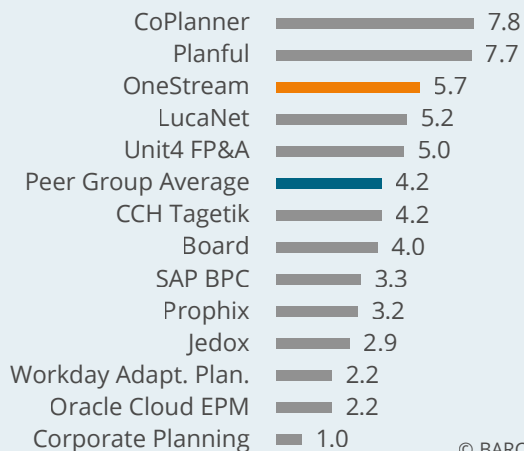
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This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Competitive Win Rate – Leader



Peer group: Financial Consolidation-Focused Products



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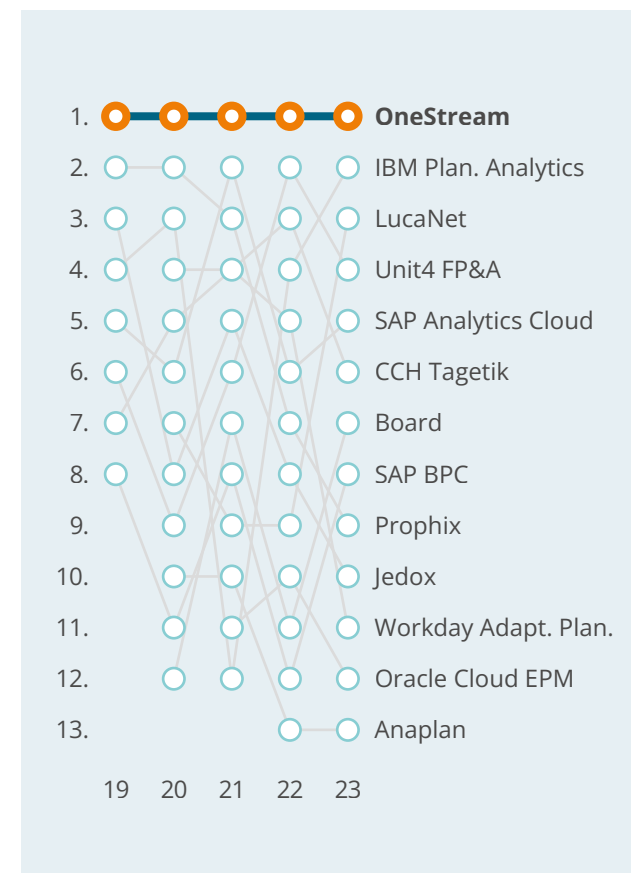
This chart represents the results for one KPI in one peer group and includes only a subset of the products featured in the survey.

## Competitive Win Rate



### Consistently top-ranked in Competitive Win Rate

Peer group: Global Vendors



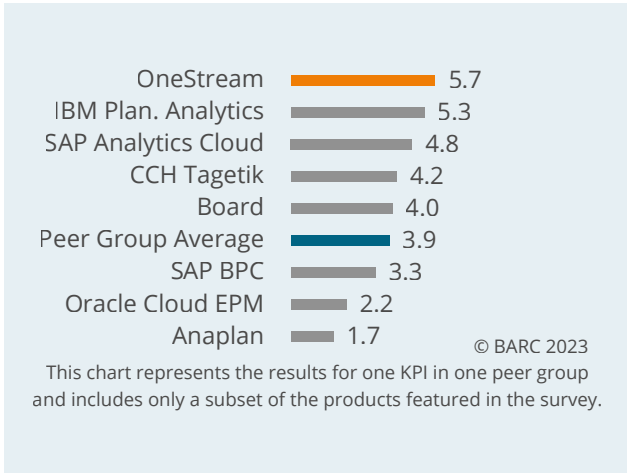
## BARC Viewpoint

When organizations decide to evaluate OneStream, its competitive win rate against other vendors in head-on competitions to win customers is very good. The vendor, its experienced consulting team and partners clearly perform very well in competitive evaluations. This is confirmed by high rankings for *Competitive Win Rate* in three of its peer groups. OneStream convinces companies with its unified platform approach to address various corporate and financial performance management use cases with one single application. OneStream is a modern, fast-growing vendor and is constantly improving its market visibility worldwide. As a result, many companies now consider it when looking for a unified corporate and financial performance management platform.

## Competitive Win Rate – Top-ranked

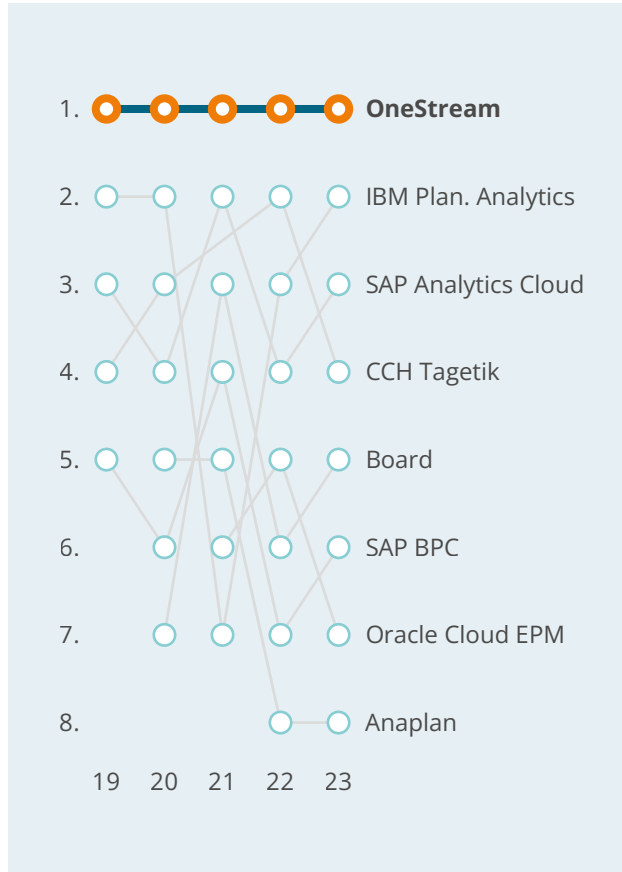


Peer group: Large/Enterprise-Wide Implementations



## Consistently top-ranked in Competitive Win Rate

Peer group: Large/Enterprise-Wide Implementations



# Competitive Win Rate

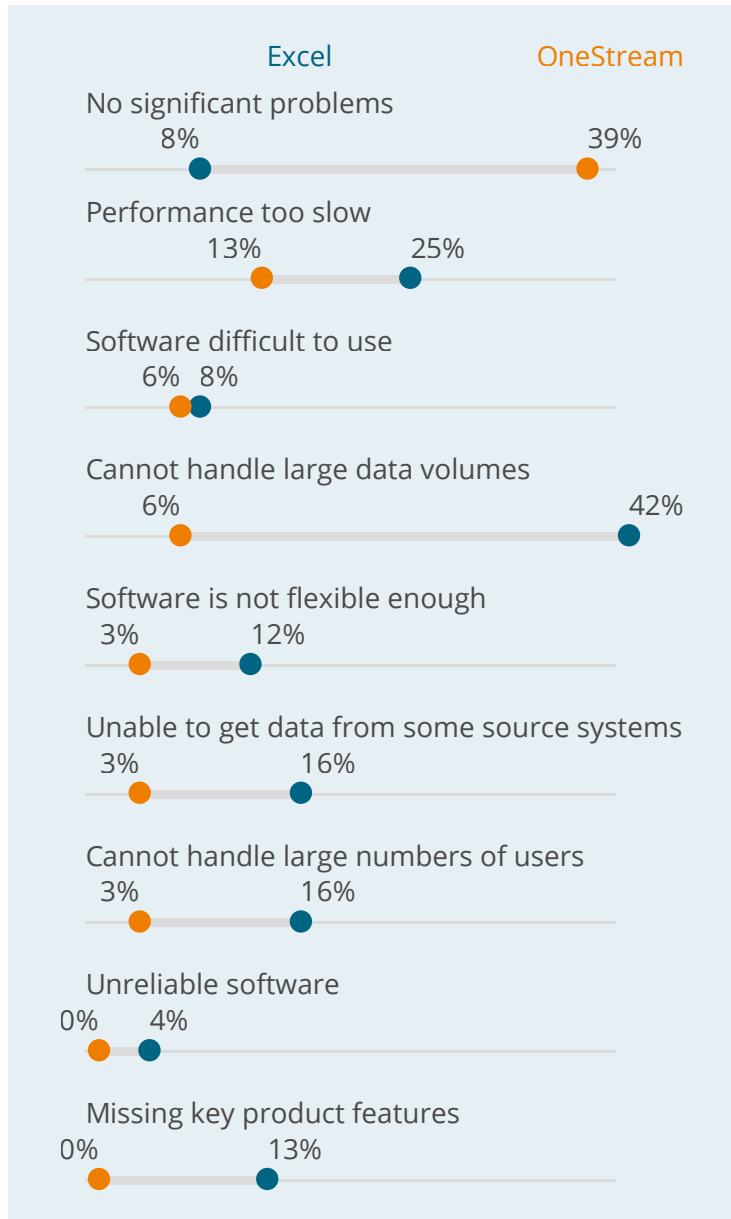


# OneStream vs. Excel



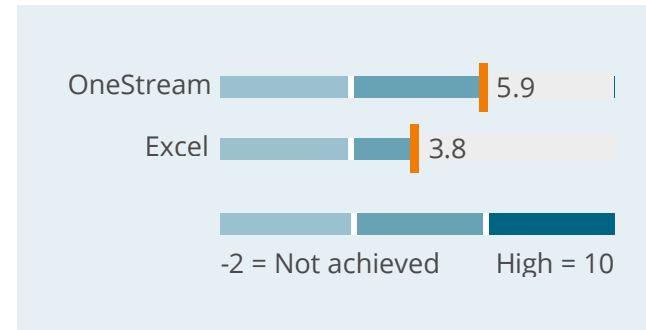
## Problems encountered by OneStream and Excel users

n=32/150



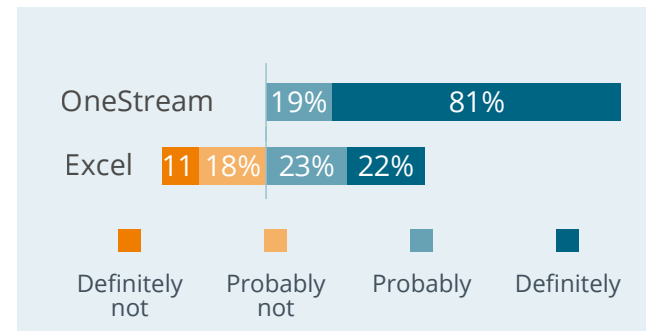
## Business Benefits Index\*

n=32/149



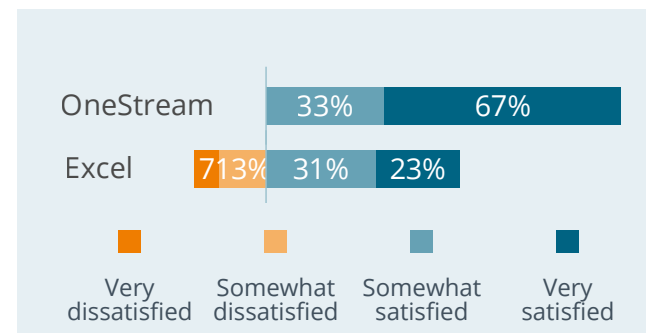
## Recommendation\*\*

n=30/152



## Satisfaction level\*\*

n=30/154



## OneStream vs. Excel



## BARC Viewpoint

Year after year, BARC's Planning Survey reveals that Excel remains one of the world's most widely used products for planning and analytics. However, many users and companies are dissatisfied with it. OneStream users have far fewer complaints than Excel users. Common issues in planning projects such as performance, inflexibility and handling of large numbers of users or data volumes do not seem to be a major problem for OneStream customers. 39 percent even report having no significant problems at all with the product. Business benefits regularly achieved by OneStream users (and achieved more frequently than with Excel) include improved software user satisfaction, increased transparency of planning, more precise/detailed planning and better quality of planning results. 99 percent of OneStream users say they would "definitely" or "probably" recommend their planning product to other organizations, while every single user surveyed said they are "somewhat satisfied" or "very satisfied" with OneStream.

\* 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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