iSG Provider Lens™

2021

Enterprise Application-as-a-Service Platforms 2021

imagine your future®

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006 and based in Stamford, Conn., ISG employs more than 1,300 professionals operating in more than 20 countries — a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

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Definition

In 2019, ISG introduced the ISG Digital Cube™, an interactive model, to define the enterprise capabilities required for digital transformation. It includes six parameters, namely, digital backbone, emerging technologies at scale, enterprise agility, digital ecosystems, insights and business model innovation. The ISG Digital Cube™ is the primary reference model for ISG as it guides clients toward realizing their digital ambitions. This ISG Provider Lens™ study focuses on identifying the service providers that can support clients in achieving digital capabilities.

Enterprise clients looking for alternative ways of building a robust digital backbone may consider the cloud-based enterprise application software option. It is ready to use and can support end-to-end business processes such as market-to-order, recruitment-to-hire and procurement-to-pay. Application software includes technical, commercial and industrial programs, and codesets designed to automate specific sets of business processes for any of the following: for industry or business functions, to make individuals in organizations more productive, to support education or to support data processing in Individual activities.

The ISG Provider Lens™ study offers IT-decision makers:

- A differentiated positioning of providers based on competitive strengths and portfolio attractiveness

- Focus on different markets, including the Global, U.S. and Europe

ISG studies serve as the foundation for important decision-making in the areas of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients use information from these reports to evaluate their current vendor relationships and potential engagements.

Quadrants Research

For this ISG Provider Lens™ quadrant study, Enterprise Application-as-a-Service Platforms providers will be evaluated on three quadrants: Cloud Human Capital Management (HCM), Cloud Enterprise Resource Planning (ERP) and Cloud Customer Relationship Management (CRM).

Companies that do not meet the eligibility criteria can respond to the survey to include their offerings in the ISG knowledge base. Their solutions will not be included in the quadrant report but be a part of the solution and services procurement processes supported by ISG Advisory Services (Candidate Provider Qualification process).

Simplified illustration

Enterprise Application-as-a-Service Platforms 2021	
Human Capital Management	Enterprise Resource Planning
Customer Relationship Management	
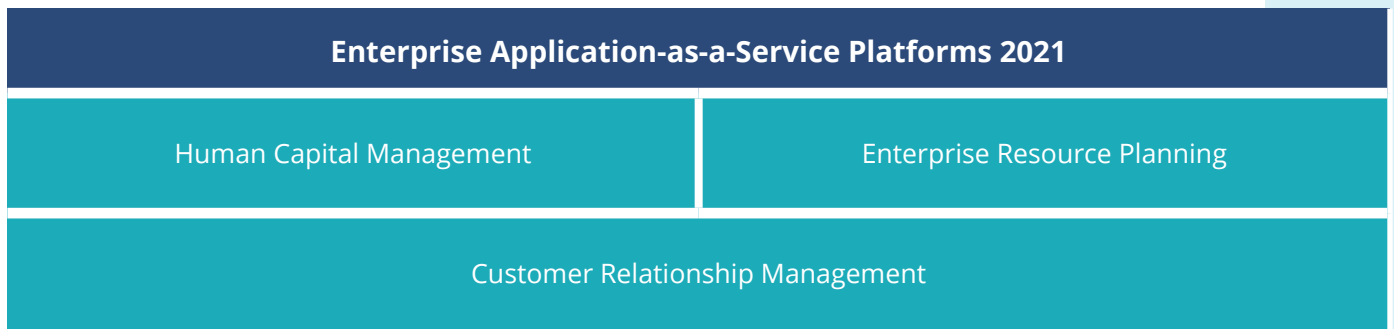
Source: ISG 2021

HCM

HCM solutions include applications for core HR, talent management, workforce management, HR service management and business intelligence, supporting functions such as recruitment, development, training, compensation, pay, benefit management and related functionalities. Leading software-as-a-service (SaaS) providers enable a superior user experience in a digital workplace that attracts the best talents.

HCM software enables companies to manage, engage, develop and retain employees, which, in turn increases business agility. It improves decision making, customizes employee experiences and leverages highly config-urable business processes to offer scalability and localization. Cloud HCM helps to adapt workforce-related strategies in a dynamic business environment, with an all-in-one HCM solution that unifies all processes in the employee lifecycle. It also includes voice-based user interfaces (UIs), digital assistants and real-time visibility for quick response.

Eligibility criteria:

- Solution is offered as-a-service and the software commercialization model is subscription-based;

- This survey and analysis are not looking at single-function solutions, such as payroll or recruitment only. The solution should cover at least 4 of major applications across core HR, talent management, learning & development, workforce management, HR service management, business intelligence and HR data management. Offer and support self-provisioning capabilities for development and testing;

- Showcase use cases highlighting the ability to manage end-to-end business processes, integrate with complex legacy environments and manage large number of enterprise processes and large volumes of function-related data;

- Demonstrate use cases around advanced analytics, artificial intelligence (AI) and automation;

- Provide thought leadership to customers through webinars, training, blogs, use cases/success stories and white papers;

- Provide solutions compatible with multiple industries and must have buyers across a diverse range of industries (B2B, B2C and B2B2C);

- Offer HCM systems that support multiple currencies, languages and local requirements to meet demands in the U.S. and Europe;

- Deliver minimum one update annually with new functionalities and features for all its cloud users, and must implement upgrades as a part of the cloud service.

ERP

ERP software automates and organizes back-office processes and manages the daily activities of organizations such as accounting, finance, project management and procurement. ERP systems are designed to have a common database, based on a defined data structure, for integrating people, processes and technologies across an enterprise. ERP software makes it easy for enterprises to collect, organize, analyze and distribute information across systems. Cloud ERP solutions have features and functionalities similar to on-premises ERP, but are available in easy deployment models that also enable the integration of advanced technologies such as analytics, AI and collaboration tools. In short, cloud ERP deployment solutions act as catalysts for automating and improving back-office processes. In cloud-based ERP, a software provider is responsible for the cloud applications, data storage & management, operating systems, data center infrastructure, security, upgrades and maintenance.

Superior ERP-as-a-Service encompasses industry specific solutions and offers real-time business dashboards that leverage insights from AI algorithms.

Eligibility criteria:

- Solution is offered as-a-service and the software commercialization model is subscription-based;

- Demonstrate their cloud ERP capabilities in product-centric, industry specific and service-centric ERP solutions; (Minimum of 2 major ERP capabilities)

- Offer and support self-provisioning capabilities for development and testing;

- Showcase use cases highlighting the ability to manage end-to-end business processes, integrate with complex legacy environments and manage a large number of enterprise processes and large volumes of function-related data;

- Demonstrate use cases around advanced analytics, AI and automation;

- Provide thought leadership to customers through webinars, training, blogs, use cases/success stories and white papers;

- Provide solutions compatible with multiple industries and must have buyers across a diverse range of industries (B2B, B2C and B2B2C);

- Offer ERP systems that support multiple currencies, languages and local requirements to meet demands in the U.S. and Europe;

- Deliver a minimal of one update annually with new functionalities and features for all its cloud users and must implement upgrades as a part of the cloud service.

- **For midmarket quadrant:** This quadrant will evaluate ERP vendors that typically serve clients with less than 5,000 employees. These vendors can serve larger enterprises, and in fact they do, but this quadrant is directed to the buyer company. The purpose of this evaluation is to help midmarket clients start on the procurement process and enables them to shortlist the vendors that best serve their needs.

- **For large enterprise quadrant:** This quadrant will evaluate ERP vendors that typically serve large enterprise clients with more than 5,000 employees. These providers can handle small deals and smaller corporate clients but are less focused on small accounts. This quadrant report enables the shortlisting of providers that best serve the needs of large clients.

CRM

CRM covers applications for marketing, sales, customer service and digital commerce. These applications manage the entire lifecycle of a customer, including brand building, converting a prospect to a customer and providing services to users to build and maintain successful customer relationships.

CRM software enables companies to improve service levels. By providing sales automation tools, including mobility for sales workers, CRM has become the core solution to improve sales team productivity. Account information is shared throughout the organization, ensuring service consistency. Sales activity and negotiation steps are shared with sales managers to equip them to improve on revenue forecasts. Contact management is a part of the core functionality of a CRM system, keeping track of all customer interactions, from pre-sale to after-sale. Clients have improved service delivery capabilities with field service scheduling, routing and field worker mobility, thus eliminating the need for sales executives and field workers to return to office facilities. Overall, clients that optimize their CRM can provide superior customer experience and achieve higher customer satisfaction scores.

CRM solutions support all the touchpoints between a company and its clients. CRM-as-a-Service, minimally, covers client records (accounts), registers contacts from multiple channels (such as phone, e-mail and chat) and provides sales and service support dashboards. Leading SaaS providers enable clients to increase sales and automate customer support using cognitive solutions.

Eligibility criteria:

- Solution is offered as-a-service and the software commercialization model is subscription-based;
- CRM suite includes at least three applications across CRM sub-segments: marketing, sales, customer service, field service, e-commerce, sales automation and customer analytics;
- Showcase how its CRM suite integrates with other applications;
- Demonstrate use cases highlighting the ability to manage end-to-end business processes, integrate with complex legacy environments and manage large volumes of customer-related data;
- Demonstrate use cases around advanced analytics, AI and automation;
- Provide thought leadership to customers through webinars, trainings, blogs, use cases/success stories and white papers;
- Provide solutions compatible with multiple industries and must have buyers across a diverse range of industries (B2B, B2C and B2B2C);
- CRM needs to support multiple currencies, languages and local requirements to meet demands in the U.S. and Europe;
- Deliver a minimal of one update annually with new functionalities and features for all its cloud users and must implement upgrades as a part of the cloud service.
- **For the midmarket quadrant** - This quadrant will evaluate CRM vendors that typically serve clients with less than 5,000 employees. These vendors can serve larger enterprises, and in fact they do, but this quadrant is directed to the buyer company. The purpose of this evaluation is to help midmarket clients start on the procurement processes and enables them to shortlist the vendors that best serve their needs.
- **For Large Enterprise Quadrant** - This quadrant will evaluate CRM vendors that typically serve large enterprise clients with more than 5,000 employees. These providers can handle small deals and smaller corporate clients but are less focused on small accounts. This quadrant report enables the shortlisting of providers that best serve the needs of large clients.

Quadrants by Region

Quadrants	Europe	Global	U.S.
HCM	√	√	√
ERP	√	√	√
CRM	√	√	√

Schedule

The research phase is during the period **February 2021 to June 2021**. During this period, survey, evaluation, analysis and validation will take place.

Milestones	Beginning	End
Launch	February 24, 2021	
Survey phase	February 24, 2021	March 23, 2021
Sneak previews	July, 2021	
Press release	September, 2021	

Please refer to this link to view/download the ISG Provider Lens™ 2021 research agenda.

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

Partial list of companies being invited for the survey

Are you on the list or do you see your company as a relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

Abas ERP	Freshworks
ActiveCampaign	Hubspot
Acumatica	IFS
Adobe	Infor
ADP Systems	Intuit
Agile CRM	IQMS
AP Plus by Cobus Concept	IQVIA
BambooHR	Kenjo
BatchMaster Software	Leapsome
BQE Software	Lexbizz
Cegid (Meta4)	Meta4
Ceridian	Microsoft
Comarch	Monday.com
Cornerstone OnDemand	Nice Systems
Creatio	Oracle
CRMNEXT	Orion ERP by 3i
Deltek	Oxaion
eGain	Paycom
Epicor	Paylocity
ePROMIS Solutions	Pegasystems
Epsilon	Perbit
ERPAG	Personio
Exact	Plex Systems
FinancialForce	Prioity Software
Fiserv	PSIpenta

QAD

Rambase (Hatteland Company)

Ramco

Rootstock Software

Sage

Salesforce

SAP

ServiceNow

Shoptech Software

Step Aheaqd

SugarCRM

SYSPRO

Talentia

Talentsoft

TOTVS

TrueERP

UKG (Ultimate Kronos Group)

Unit4

Verint

Visma

Workday

Zendesk

Zoho

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Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.