

# Cloud-Based Planning and Performance Management Platforms

*Disruptive times call for agile business planning*  
2024 CONSTELLATION SHORTLIST

The Constellation ShortList™ presents vendors in different categories of the market relevant to early adopters. In addition, products included in this document meet the threshold criteria for this category as determined by Constellation Research.

This Constellation ShortList of vendors for a market category is compiled through conversations with early adopter clients, independent analysis and briefings with vendors and partners.

## ABOUT THIS SHORTLIST

Cloud-based planning platforms help companies with budgeting and forecasting, financial reporting and analysis, strategic planning, and operational planning and optimization in areas such as sales and human resources. The category emerged in the '90s and '00s as on-premises “performance management” systems aimed at large enterprises. Cloud-based planning platforms are rapidly replacing these legacy systems, as well as manual, spreadsheet-based approaches still used by small- and mid-sized organizations.

This category refers to cloud-based planning platforms that support budgeting, planning, forecasting, and analysis across financial and operational areas. These platforms also support or integrate with tools for financial closing and reporting. These cloud-native platforms make it possible to quickly deploy, configure and change these systems to support a broad base of users both within and beyond finance departments. Planning platforms bring vital what-if analysis capabilities for dealing with rapid growth, fast-changing business conditions and the development of new products/business models.

OneStream Software and SAP Analytics Cloud have been removed from this list based on analysis of deployment times and enterprise wins, respectively.

## 4 SOLUTIONS TO KNOW

Constellation evaluates more than a dozen solutions categorized in this market. This Constellation ShortList is determined by client inquiries, partner conversations, customer references, vendor selection projects, market share and internal research.



ANAPLAN



ORACLE CLOUD ENTERPRISE PERFORMANCE MANAGEMENT



PLANFUL



WORKDAY ADAPTIVE PLANNING

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To learn more about Constellation Research Shortlists visit: [www.constellationr.com/ShortList](http://www.constellationr.com/ShortList)



## THRESHOLD CRITERIA

Constellation considers the following criteria for these solutions:

- Rapid cloud deployment and configuration
- Agile planning and forecasting capabilities
- Flexible modeling and “what-if” scenario planning capabilities
- Support for operational planning in areas such as sales and human resources
- Rich financial close and reporting capabilities, including options or integrations for regulatory reporting
- Modern, intuitive interfaces easing frequent planning, forecasting and analysis
- Artificial intelligence/machine learning-augmented capabilities supporting predictive analysis

## BUSINESS THEMES



Data to Decisions

## ABOUT CONSTELLATION RESEARCH

As an award-winning Silicon Valley-based strategic advisory and futurist analyst firm, Constellation Research serves leaders and organizations navigating the challenges of digital strategy, business-model disruption and digital transformation. Constellation works closely with solution providers, partners, C-suite executives, board of directors, and its Constellation Executive Network of buy-side leaders to lead the way in research coverage and advise clients how to achieve valuable business results.

## FREQUENCY OF EVALUATION

Each Constellation ShortList is updated at least once per year. Updates may occur after six months if deemed necessary.

## EVALUATION SERVICES

Constellation clients can work with the analyst and the research team to conduct a more thorough discussion of this ShortList. Constellation can also provide guidance in vendor selection and contract negotiation.



### Doug Henschen VP & Principal Analyst

Doug Henschen focuses on data-driven decision making. His Data-to-Decisions research examines how organizations employ data analysis to gain a deeper understanding of customers, partners, employees, and operations and to reimagine business models. His research acknowledges that innovative, data-driven applications require a multi-disciplinary approach, starting with integration and orchestration technologies, embracing next-generation data platforms, continuing through business intelligence and analytics, and applying cutting-edge machine learning and artificial intelligence techniques.

