

SAPinsider Benchmark Report

SAP S/4HANA Migration Benchmark Report

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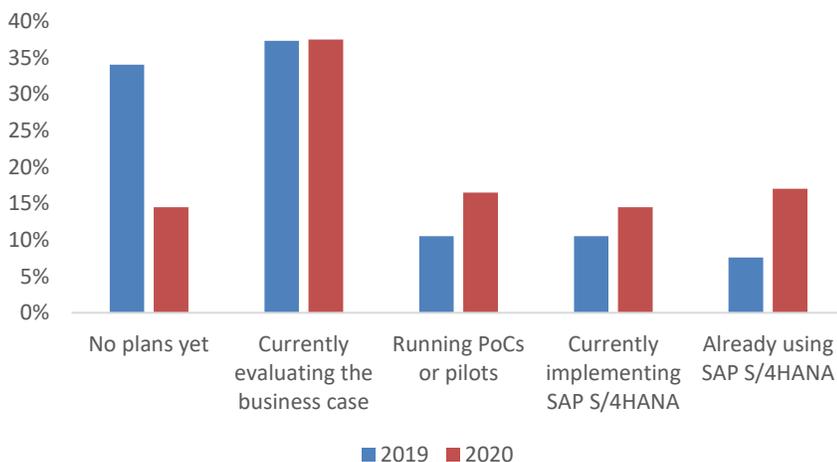
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Executive Summary

SAP recently announced that it would extend mainstream maintenance and support for SAP customers on SAP ERP 6 and Business Suite 7 until 2027, giving SAP customers two more years to migrate to SAP S/4HANA. SAP did this because the migration represents the biggest project of the decade for members of most IT departments, who must work with almost every single line of business (LoB) to build the business case, migrate operations, and re-engineer processes.

In Q1 of 2020, SAPinsider surveyed 537 members of our audience to understand their current SAP S/4HANA migration strategy, and how they plan to meet their strategic needs and objectives. Over the past year we've found a progression in SAP S/4HANA adoption, with 17% of SAP customers reporting that they've already gone live, up from 8% a year ago. Also, last year, 34% of SAP customers did not yet have any plans for migrating to SAP S/4HANA. Now, that number has dropped to 14.5%, and the other 85.5% have at least started evaluating the business case (see **Figure 1**).

Figure 1. SAP S/4HANA adoption progress



Source: SAPinsider, February 2020



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After running on SAP ECC for 15+ years, our business has changed, and SAP has changed. Some of our processes have been firmly integrated in both internal and external software, but SAP S/4HANA is a great chance to start over again. For instance, we need to implement best practices for purchasing and approval.

”

~ Internal SAP Consultant,
Danish Oil & Energy
Company

The survey results revealed several other trends for SAP customers approaching the SAP S/4HANA migration:

- Of those who have at least started planning their migration, 51% of SAP customers plan to migrate at least 81% of their ERP instances to SAP S/4HANA.
- Most (61%) respondents who have not yet started using SAP S/4HANA currently use SAP ECC.
- Over one-third (38%) of SAP customers that have not yet started using SAP S/4HANA do not see a clear path to integrating SAP's current product line and innovations with their current ERP.
- Building the business case emerged as the top challenge in migrating to SAP S/4HANA from those who have started implementing or already gone live. The second biggest challenge was learning about and educating decision makers about the capabilities of SAP S/4HANA.

Required Actions

Organizations planning to migrate to SAP S/4HANA must:

- **Align SAP S/4HANA migration strategies with the overall operating strategy.** SAP S/4HANA will affect almost every part of the business. It comes with centralized financial applications, the Universal Journal, global trade services (GTS), material ledger (ML), internationally-compliant SAP Revenue Accounting and Reporting (RAR), and more. SAP customers should include these applications and capabilities in their business case and migration strategy.
- **Research and test best practice business process models in SAP S/4HANA.** Each of the applications and capabilities in the previous bullet can affect business processes, and 48% of survey respondents chose adopting best practice business process

SAP EXPERTS PERSPECTIVE

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The primary reason we see higher adoption of SAP S/4HANA is because releases 1809 and 1909 have completed the product vision SAP laid out a few years ago. A lot of promised functionality is now part of the core product. Our clients are starting to see the total benefit they can get from SAP S/4HANA whether through faster core systems, additional functionality now part of core SAP S/4HANA such as SAP EWM and SAP TM, or innovations through SAP Cloud Platform.

”

~ Krishnakant (KK) Dave,
Principal/Owner, Deloitte

models as a top strategy to address SAP S/4HANA migration. These capabilities need testing by end-users to ensure they will deliver the promised value.

- **Confront custom code issues upfront and with an open mind.** Customization in current ERP systems emerged as the third most common inhibitor (36%) for implementing SAP S/4HANA. SAP offers several free tools such as SAP Readiness Check, Custom Code Lifecycle Management, and Usage Procedure Logging to manage and test custom code; however, some SAP customers may discover that a new implementation or selective data transition will suit their needs better than a system conversion with all their old custom code.
- **Make time to learn about and educate decision makers about the capabilities of SAP S/4HANA to build the business case.** Respondents that have already started implementing SAP S/4HANA ranked building the business case as the biggest challenge and learning about and educating decision makers as the second biggest challenge in migration, and the two go hand in hand. To build the business case, leaders from both IT and the LoBs must understand the relevant capabilities of SAP S/4HANA.



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A lot of customers assume that custom code will get in the way. It's something that needs to be dealt with, but it's not the biggest issue. Customers need to think about user acceptance and data quality, especially customers moving multiple SAP ERP systems to SAP S/4HANA. The effort needed to consolidate multiple systems depends on cleansing and harmonizing operational data.



~ Carl Dubler,

**SAP S/4HANA Adoption
Marketing,**

SAP

Chapter One: SAP S/4HANA Migration Overview

SAP S/4HANA can have significant benefits for SAP customers with intelligent automation of business processes such as accounts receivable, accounts payable and financial close, embedded analytics, support for new and diverse business models, and more. However, to take advantage of all these capabilities, SAP customers must first go through an often-complex migration and implementation process involving almost every LoB.

Best Practices Model - DART

SAPinsider grounds all its research insights in its proprietary DART model. This research model provides practical insights that connect business **D**rivers and **A**ctions to supporting **R**equirements and **T**echnologies. Drivers represent internal and external pressures that shape organizational direction. Organizations take Actions to address those Drivers. They need certain people, processes, and capabilities as Requirements for those strategies to succeed. Finally, they need enabling Technologies to fulfill their Requirements.

In the case of this report, the end of mainstream maintenance for legacy SAP ERP releases and the opportunity to re-engineer processes to better fit operational needs or correct poor configurations from a previous ERP implementation emerged as the key business drivers. Respondents adopt best practice business processes, centralize and automate financial operations, modernize reporting and business intelligence (BI), and cleanse, delete, and archive data to prepare for their SAP S/4HANA migrations. To succeed, they need to minimize disruption to operations during the migration, understand how it will impact custom code and business processes, clean and harmonize all operational data, find a proven,

experienced partner, and ensure SAP S/4HANA will integrate with all LoB applications. Respondents use or plan on using a wide range of free and paid SAP and partner tools and platforms to fulfill all the requirements.

As such, respondents' answers to our survey and interview questions revealed clear trends, which are summarized in **Table 1** and will be examined over the course of the rest of the report.

Table 1: DART model framework for SAP S/4HANA migration

Drivers	Actions	Requirements	Technologies
<ul style="list-style-type: none"> End of maintenance and support for core SAP ERP releases (43%) The opportunity to re-engineer processes to better fit operational needs or correct poor processes/configurations from a previous ERP implementation (41%) 	<ul style="list-style-type: none"> Adopting best practice business process models (48%) Centralizing and automating financial planning, accounting, and reconciliation activities on a global basis (42%) Modernizing reporting and business intelligence strategy to provide faster access to business insights (42%) Cleansing, deleting, and/or archiving data to minimize the SAP HANA footprint and minimize down-time during migration (41.5%) 	<ul style="list-style-type: none"> Minimal disruption to operations as they migrate to SAP S/4HANA (70%) Cleansed and harmonized operational data across systems (64%) Detailed impact analysis on existing custom code, business processes, and operations costs (64%) A partner with a proven track record implementing SAP S/4HANA (63%) Integrations between core ERP and line of business applications (62%) 	<ul style="list-style-type: none"> SAP Readiness Check (78%) SAP ERP Integration Platform (77%) SAP Business Scenario Recommendations (77%) Extraction, Transformation and Loading (ETL) tools (76%) Process management tools for ERP Business Process Modelling (BPM) (70%) Data cleansing tools (70%) Custom Code Lifecycle Management (68%) SAP Transformation Navigator (64%)

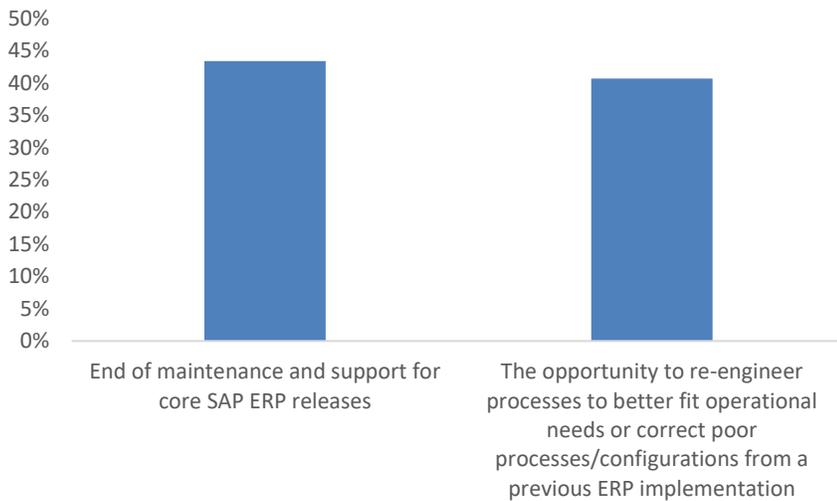
Source: SAPinsider, February 2020

What are the Business Drivers for SAP S/4HANA Migration?

Drilling into the data, 43% of survey respondents indicated that the end of mainstream maintenance for core SAP ERP releases drove their approach to SAP S/4HANA migration, and 41% said the opportunity to re-engineer processes to better fit operational needs

drove their approach (see **Figure 2**). The survey launched before SAP announced that it had pushed back the end of maintenance date from 2025 to 2027, but either way, SAP's maintenance and support plans have a significant and real effect on how its customers approach the migration to SAP S/4HANA.

Figure 2. Top drivers for SAP S/4HANA migration



Source: SAPinsider, February 2020

Of course, a significant number of SAP customers clearly see SAP S/4HANA as an opportunity to improve business operations and not simply a necessary IT upgrade. In fact, respondents chose end-user and business satisfaction as the most popular metric for a successful SAP S/4HANA migration at a rate of 69%, followed by process efficiency improvement at 64%. During interviews, SAP customers that were already live on SAP S/4HANA shared that the upgrade helped them complete financial close quicker and improved inventory management.



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We used this migration for financial and operational transformation. We were able to close our financial month end process quicker and more effectively than ever before. SAP S/4HANA also improved visibility into operations, resulting in fewer items sitting in our distribution center.

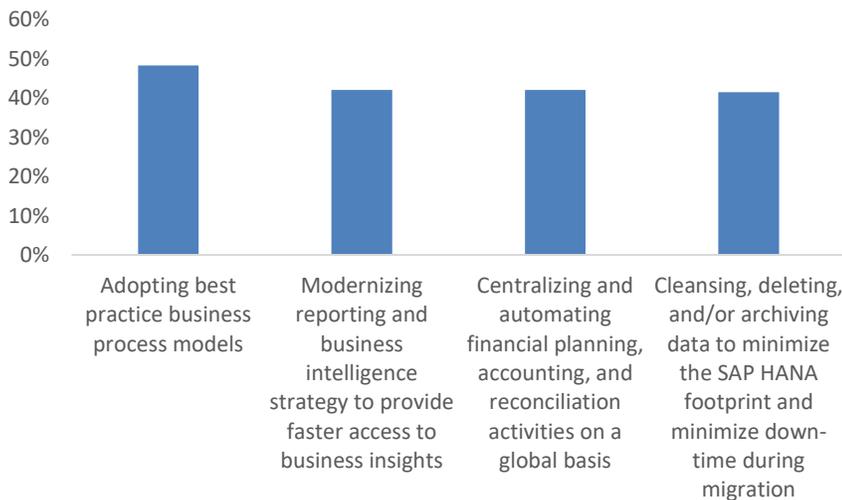
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~ IT Professional,
North American
Manufacturing Company

How Do SAP Customers Meet Their Business Drivers?

About half (48%) of respondents reported adopting best practice business processes as a strategic part of their SAP S/4HANA migration (as seen in **Figure 3**). This strategy directly addresses the driver to re-engineer processes as SAP customers replace outdated processes with best practices.

Figure 3. Top strategies prioritized to address the top drivers of change



Source: SAPinsider, February 2020

Additionally, 42% of organizations chose centralizing and automating financial planning, accounting, and reconciliation activities on a global basis as a top strategy. With SAP Central Finance, SAP customers can connect multiple ERP instances to SAP S/4HANA Finance. This can help with SAP S/4HANA migration as well as use cases such as mergers and acquisitions, consolidation, and organizational change. Therefore, it supports the two key drivers: preparing to migrate before the end of maintenance, and re-engineering processes.

An equal number of respondents (42%) said their top strategy was modernizing reporting and business intelligence (BI) strategy to provide faster access to business insights. This also addresses the opportunity to re-engineer processes as modern reporting, BI, and analytics capture data from many parts of the enterprise and empower users to manipulate the data and analyze it from different perspectives.

As the final top strategy, respondents (41.5%) chose cleansing, deleting, and/or archiving data to minimize the SAP HANA footprint and minimize down-time during migration. Since a migration to SAP S/4HANA requires table and data changes such as converting vendors/suppliers and customers to business partners, these changes and other types of data cleansing represent a critical step in preparing to migrate to SAP S/4HANA.

Key Takeaways

Based on our research with respect to SAP S/4HANA migration strategies, the following takeaways are clear:

- **Align migration strategies to take advantage of the opportunity to re-engineer processes to better fit operational needs before the 2027 end of maintenance deadline.** SAP customers pursue a variety of strategies to prepare for their migrations to SAP S/4HANA, but to build the business case and take advantage of all SAP S/4HANA has to offer, they must re-evaluate and re-engineer all the business processes that SAP S/4HANA touches. To avoid paying a premium for maintenance, they must also complete all migrations before the end of 2027.
- **Adopt best practice business processes.** If companies have decided that they will re-engineer business processes as part of this migration, they should leverage the opportunity to implement best practices when doing this. Almost half (48%) of respondents chose this as a strategy.



We've identified the largest tables and are in the process of deleting unneeded data and implementing archiving processes to minimize our SAP HANA footprint and downtime during migration.



~ IT Professional,
North American
Government Organization

- **Centralize and automate financial planning, accounting, and reconciliation activities on a global basis.** This strategy supports both key business drivers of preparing to migrate before the end of maintenance and re-engineering processes. SAP Central Finance can help with mergers and acquisitions, consolidation, and organizational change.
- **Cleanse, delete, and/or archive data to minimize the SAP HANA footprint and minimize down-time during migration.** SAP S/4HANA requires several table and data changes. These changes and other types of data cleansing represent an important step in preparing to migrate to SAP S/4HANA.

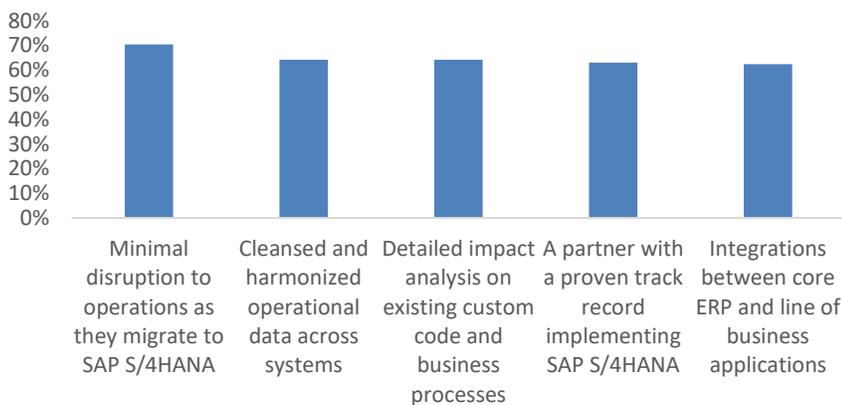
Chapter Two: How Do SAP Customers Approach SAP S/4HANA Migration?

Aligning all LoBs impacted by an SAP S/4HANA implementation around a migration strategy and business case can get very complex as deployment and design decisions can affect many business processes. This section explores how organizations prioritized the different requirements and capabilities that respondents indicated they needed for a successful migration and the tools they used to prepare for said migration.

Top Requirements for SAP S/4HANA Migrations

Respondents to the survey selected minimal disruption to operations during migration as the most important requirement, with 70% indicating this was very or extremely important to the success of their SAP S/4HANA migration (see **Figure 4**). Of course, what qualifies as a disruption to operations differs between industries and organizations.

Figure 4. Top requirements for SAP S/4HANA migration



Source: SAPinsider, February 2020

SAP EXPERTS PERSPECTIVE

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Start with the end goal in mind. Proactively think about overall vision for the program and associated business case benefits. Ensure that there is business involvement and executive level sponsorship of the program. SAP S/4HANA is a powerful platform and it is critical that you pick a partner that has done multiple SAP S/4HANA implementations in the past. Experience tells us that business and consumer needs are ever evolving hence you need to build your system to evolve.

”

~ Krishnakant (KK) Dave,
Principal/Owner, Deloitte

For example, companies that operate primarily nine to five in one time zone, Monday through Friday, might find 72 hours of downtime perfectly acceptable. Meanwhile, a 24/7 manufacturing firm might see that as a total non-starter. Some companies that need to minimize that downtime use SAP's near zero downtime (nZDT) service, which helps resolve many of the challenges that cause downtime ahead of the migration. Even as organizations adopt new best practice business processes and clean data, those changes must not disrupt operations. This also aligns with the strategy to cleanse data to minimize down-time during migration.

Respondents chose cleansed and harmonized operational data across systems as the second most important requirement (64%) because the change in table structures between SAP ERP 6.0 and SAP S/4HANA requires significant data preparation before it can be migrated to the new platform. This clearly aligns with the strategy to cleanse data for a minimal SAP HANA footprint and minimal down-time during migration. Also, efforts to consolidate and centralize financial operations depends on cleansed and harmonized financial and operational data.

Other top requirements included a detailed impact analysis on existing custom code and business processes (64%), a proven partner (63%), and integrations between the core ERP and LoB applications (62%). An impact analysis of custom code, business processes, and costs supports the data cleansing strategy because even as they cleanse code and data, customers must know how that will impact processes.

Some of the top ways respondents indicated that they work with partners and systems integrators (SIs) during an SAP S/4HANA migration included developing a business case and roadmap (37%), cleansing data (37%), adapting custom code (35%), and optimizing workflows and processes (34%). Therefore, having a proven partner can help support the strategies of cleansing data and adopting best practice business processes.



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We used SAP Readiness Check and then SAP MaxAttention to figure out how many hours we would need to set up development for our SAP S/4HANA migration. We determined that we would experience three days of down-time for the migration if everything went smoothly. We therefore decided to go with the near zero downtime (nZDT) service, which helped us work out some issues to reduce that projected downtime to a day.

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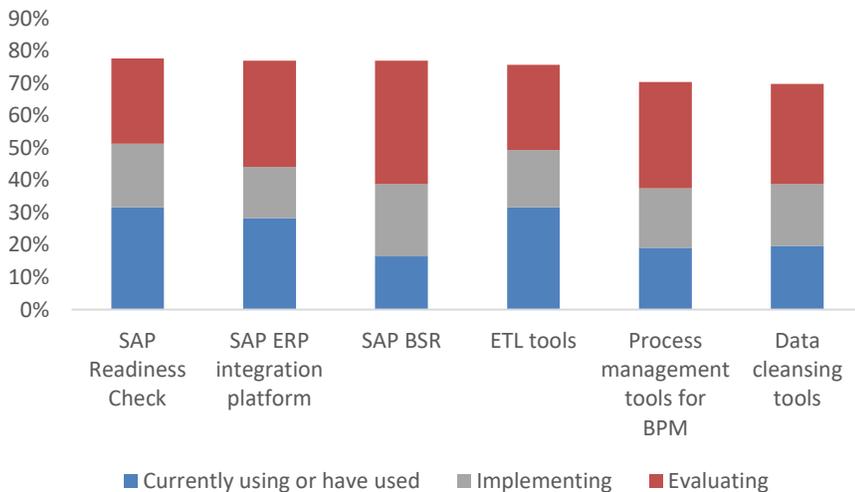
~ IT Professional,
North American Steel
Production Company

Among respondents not already live on SAP S/4HANA, 38% said they do not see a clear path to integrating their ERP with SAP's other current LoB products. A successful migration should resolve this issue and result in deep integrations between all SAP systems and products.

What Tools Do Respondents Use to Support Their Migration Strategies?

SAP Readiness Check represents the most popular tool for respondents as they prepare to migrate to SAP S/4HANA, with 78% saying they've used or plan to use it (**Figure 5**). SAP Readiness Check, a free self-service tool available to anyone with an SAP maintenance contract, helps SAP customers assess how much effort they will need to exert to perform a system conversion, commonly known as a brownfield implementation, from a legacy SAP ERP system.

Figure 5. Popular technologies and migration tools



Source: SAPinsider, February 2020

Most (77%) of SAP customers also plan to use SAP ERP integration platforms. These products create deep integrations and connections between front-end systems and LoB applications to the SAP ERP. This directly addresses the requirement for integrations between the core ERP and



“

We found SAP Readiness Check valuable and useful. It was a good process with a comprehensive report. I would highly recommend that anyone looking at a system conversion work with their SAP S/4HANA Regional Implementation Group (RIG). SAP assigns you a person to help you through the conversion free of charge. It's someone with whom you have a call once every few weeks to track your pilot and navigate through the ecosystem to help with problems.

”

~ Head of ITC

Australian Mining Company

LoB applications and can help harmonize operational data as organizations prepare to migrate to SAP S/4HANA.

Respondents also use or plan to use SAP Business Scenario Recommendations (BSR) (77%). This tool (free for those with SAP maintenance contracts) analyzes SAP customers' current ERP setup and provides custom insights on how business processes and system usage could improve with SAP S/4HANA and makes recommendations for each LoB to help build the business case, which emerged as the top migration challenge for SAP customers that have already started implementing SAP S/4HANA. It also serves as the first step in analyzing the impact SAP S/4HANA can have on business processes.

SAP customers also have plans to use extract, transform, and load (ETL) tools (76%), process management tools for ERP Business Process Modelling (BPM) (70%), and data cleansing tools (70%). Respondents use ETL tools to integrate systems and move data to SAP S/4HANA and BPM tools to model, automate, and optimize business processes. ETL tools and data cleansing tools can help minimize disruption to operations during migrations, harmonize data across systems, and integrate the core ERP with LoB applications. BPM tools also help perform detailed impact analyses on business processes.

Key Takeaways

When it comes to equipping organizations with the capabilities and technology enablers required for an SAP S/4HANA migration strategy:

- **Do not allow the migration to disrupt operations.** Respondents selected minimized disruption to operations as their most important requirement, with 70% choosing this as very or extremely important to a successful migration to SAP S/4HANA.
- **Leverage tools and technologies to cleanse and harmonize operational data across systems.**



PERSPECTIVE



Normally, customers start with SAP Business Scenario Recommendations followed by SAP Readiness Check. SAP Business Scenario Recommendations helps customers understand the potential value of SAP S/4HANA, but I would imagine a lot of customers look at SAP Readiness Check because they already know they want to do a system conversion to SAP S/4HANA.



~ Carl Dubler,

SAP S/4HANA Adoption
Marketing,

SAP

Respondents chose cleansed and harmonized operational data across systems as the second most important requirement (64%). To fulfill this requirement, SAP customers can leverage SAP ERP integration platforms, ETL tools, and data cleansing tools.

- **Support strategies for adopting best practice business processes with detailed impact analyses, a proven partner, and integrations between the core ERP and LoB applications.** Respondents chose detailed impact analysis of custom code and business processes (64%), a proven partner (63%), and integrations between ERP and LoB applications (62%) as very or extremely important requirements. Companies must fulfill these requirements to adopt best practice business processes as part of their migration to SAP S/4HANA.
- **Use or plan to use free SAP tools to prepare for migrations to SAP S/4HANA.** SAP Readiness Check represents the most popular migration tool among respondents (78%), while SAP Business Scenario Recommendations emerged as the third most popular (77%). Business Scenario Recommendations helps SAP customers analyze the potential business impact of SAP S/4HANA while SAP Readiness Check helps them assess the effort needed for a system conversion.

Chapter Three: Required Actions

The previous chapters clearly show how SAP customers currently align business drivers and actions with supporting requirements and technologies.

Most (85.5%) respondents have at least started evaluating the business case for SAP S/4HANA, and the rate of companies that have gone live has increased from 8% in 2019 to 17% in 2020. Competing priorities, the top inhibitor (52%), have slowed down adoption and will continue to slow down many organizations until they get closer to the 2027 deadline for end of mainstream maintenance on legacy SAP ERP systems, which drives the migration strategies of 43% of respondents. On the other hand, 41% of companies now recognize SAP S/4HANA as an opportunity to re-engineer processes to better fit operational needs and chose that as a key business driver for their migration strategy.

Respondents demonstrated a proclivity towards the free SAP solutions SAP Readiness Check and SAP Business Scenario Recommendations. These tools support the requirements of minimizing disruption to operations and provide detailed impact analyses of custom code and business processes. Respondents also use or plan to use SAP ERP integration platforms to support the requirement of integrating core ERP with LoB applications.

Almost half (48%) of SAP customers prioritize adopting best practice business models as part of their migration to SAP S/4HANA to take advantage of the opportunity that this migration presents to re-engineer processes before the 2027 end of mainstream maintenance deadline, which represent the top key business drivers for SAP S/4HANA migration.

Steps to Success

Our research reveals that SAP customers should apply the following key steps to execute their SAP S/4HANA migration strategies:

- **Take the opportunity to adopt best practice business processes.** SAP customers have demonstrated that they plan to use this migration to adopt and implement best practice business processes to take advantage of all that SAP S/4HANA has to offer and they intend to do so before the 2027 end of mainstream maintenance deadline. SAP S/4HANA offers significant improved functionality from SAP ECC, but customers must adapt their processes to take advantage of this functionality.
- **Build the business case around re-engineered business processes and integrations with LoB applications.** A significant portion of respondents (41%) chose the opportunity to re-engineer business processes as a key driver of their SAP S/4HANA migration, and 62% designated integrations between the core ERP and LoB applications as very or extremely important. Among respondents not yet live on SAP S/4HANA, 38% said they saw no clear path to integrating SAP's current product line and innovations with their current ERP system, which partially explains why 77% use or plan to use an SAP ERP integration platform. This directly addresses the requirement for integrations between the core ERP and LoB applications and can help harmonize operational data as organizations prepare to migrate to SAP S/4HANA. SAP customers need to involve almost every LoB to build a successful business case for SAP S/4HANA.
- **Prioritize data preparation and analyzing existing custom code and processes to minimize downtime during migration so that it will not disrupt operations.** Respondents chose cleansing data to

minimize downtime during migration as a top migration strategy (41.5%) and detailed impact analyses on existing custom code and business processes as one of the most important requirements (64%). Some companies that need to minimize that downtime during the migration have used SAP's near zero downtime (nZDT) service, which helps resolve many of the challenges that cause downtime ahead of the migration.

- **Use the free SAP tools and appropriate third-party tools to make the migration as smooth as possible and integrate with LoB tools to harmonize data.**

Start with SAP Business Scenario Recommendations to start to build the business case. If the business case calls for a brownfield system conversion, use SAP Readiness Check to assess the effort this will take. From there, investigate working with the SAP S/4HANA RIG to run a pilot. Additionally, several third-party vendors offer SAP ERP integration platforms that integrate and connect front-end systems and LoB applications to SAP ERP to help harmonize data across operational systems. This should help minimize disruption to operations during the migration and make it easier to adopt best practice business processes to take advantage of the opportunity that the SAP S/4HANA migration presents.

Methodology

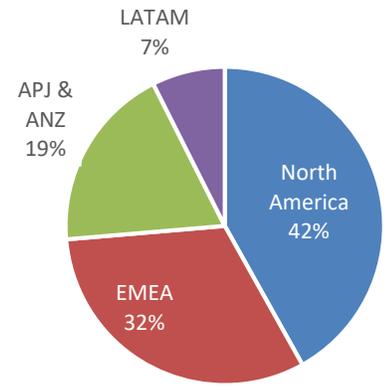
In Q1 of 2020, SAPinsider examined the experiences of business and technology professionals related to their migration to SAP S/4HANA. Our survey was administered to 200 SAP customers and generated responses from across a wide range of geographies, industries, and company sizes. Respondents completed an online survey and provided feedback in customer interviews that questioned them on topics such as:

- What are the top drivers for your organization's approach to SAP S/4HANA migration?
- What actions is your organization taking to address your organization's drivers?
- Which technologies and tools does your organization use or plan to use to support your migration to SAP S/4HANA?
- Do you see a clear path to integrating SAP's current product line and innovations with your current ERP system?
- What is preventing you from implementing SAP S/4HANA?
- Please rank the challenges in migrating to SAP S/4HANA from most to least difficult and time consuming.

Demographic information on the respondents included the following:

- **Job function:** Functional areas reported by respondents include: Information Technology (58%), GRC (8.5%), Finance & Accounting (6%), Business Development/Sales (4%), and Manufacturing/Production (4%).
- **Sector:** The survey respondents came from every major economic sector, including: Industrial (34.5%), Software & Technology (27%), Public Services & Healthcare (18%),

PARTICIPANTS PROFILE



Financial Services & Insurance (9.5%), Retail & Distribution (5%), Hospitality, Transportation, & Travel (4%), and Media & Entertainment (2%).

- **Geography:** Of our survey respondents, 42% were from North America, 32% were from Europe, The Middle East, and Africa, 19% were from Asia-Pacific, Japan, and Australia, and 7% were from Latin America.

Appendix A: The DART™ Methodology

SAPinsider has rewritten the rules of research to provide actionable deliverables from its fact-based approach. The DART methodology serves as the very foundation on which SAPinsider educates end users to act, creates market awareness, drives demand, empowers sales forces, and validates return on investments. It's no wonder that organizations worldwide turn to SAPinsider for research with results.

The DART methodology provides practical insights, including:

- **Drivers:** These are macro-level events that are affecting an organization. They can be both external and internal and require the implementation of strategic plans, people, processes, and systems.
- **Actions:** These are strategies that companies can implement to address the effects of drivers on the business. These are the integration of people, processes, and technology. These should be business-based actions first, but they should fully leverage technology-enabled solutions to be relevant for our focus.
- **Requirements:** These are business and process-level requirements that support the strategies. These tend to be end-to-end for a business process.
- **Technology:** These are technology and systems-related requirements that enable the business requirements and support the company's overall strategies. The requirements must consider the current technology architecture and provide for the adoption of new and innovative technology-enabled capabilities.

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