



## White Paper

# Voice of the Customer: 10 Insights, Direct from SAP S/4HANA Pioneers

Sponsored by: SAP

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## EXECUTIVE SUMMARY

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IDC sought to capture the voice of the customer by conducting a web-based survey of over 300 SAP customers in nine countries, soliciting the views of SAP customers that are considering, planning for, or have already implemented the new ERP system – SAP S/4HANA. Three key findings from the survey are:

- 67% of the SAP customers responding to the survey indicated that they either planned to implement S/4HANA or already had some live deployments.
- Those customers planning to deploy or that are already live with S/4HANA indicated the following as the leading drivers for their selection – all business benefits:
  - 28.4% state real-time access to information about the business leveraging in-memory technology
  - 27.6% state improved employee productivity, including use of machine learning
  - 26.4% state reduced costs
- Those customers that had not yet decided whether to deploy S/4HANA indicated the following as the leading drivers for considering it (interestingly, not one of these are direct business benefits):
  - 28.9% state alignment with SAP's direction and investment
  - 26.7% state IT landscape and ERP instance consolidation
  - 26.7% state better integration with other SAP and non-SAP systems

In addition to the survey, IDC conducted in-depth interviews with nine organizations that are already live with S/4HANA, and this provided valuable insights based on their experiences – on the business case for S/4HANA during and after the implementation. We report on these insights in this white paper and contrast the experience of these S/4HANA pioneers with the attitudes and perspectives of the broader sample of SAP customers we reached out to in the survey. We believe that the result will be of value to those that are considering, planning, or implementing SAP's new ERP suite, SAP S/4HANA.

## The Survey: What Are the Factors That Influence S/4HANA Decisions?

The factors that drive or inhibit decisions for implementing S/4HANA vary. Based on their responses, we divided the population surveyed into three groups, which we will refer to in this white paper as the considerers, the planners, and the deployed:

- **Considerers:** Those that have not yet decided if they will deploy S/4HANA
- **Planners:** Those that are planning to deploy S/4HANA but are not live yet
- **Deployed:** Those that have some live deployments of S/4HANA

Each group has a different perspective on the business and technology issues of greatest concern when considering, planning, or implementing a core enterprise application suite.

## Key Drivers/Benefits for Implementing SAP S/4HANA

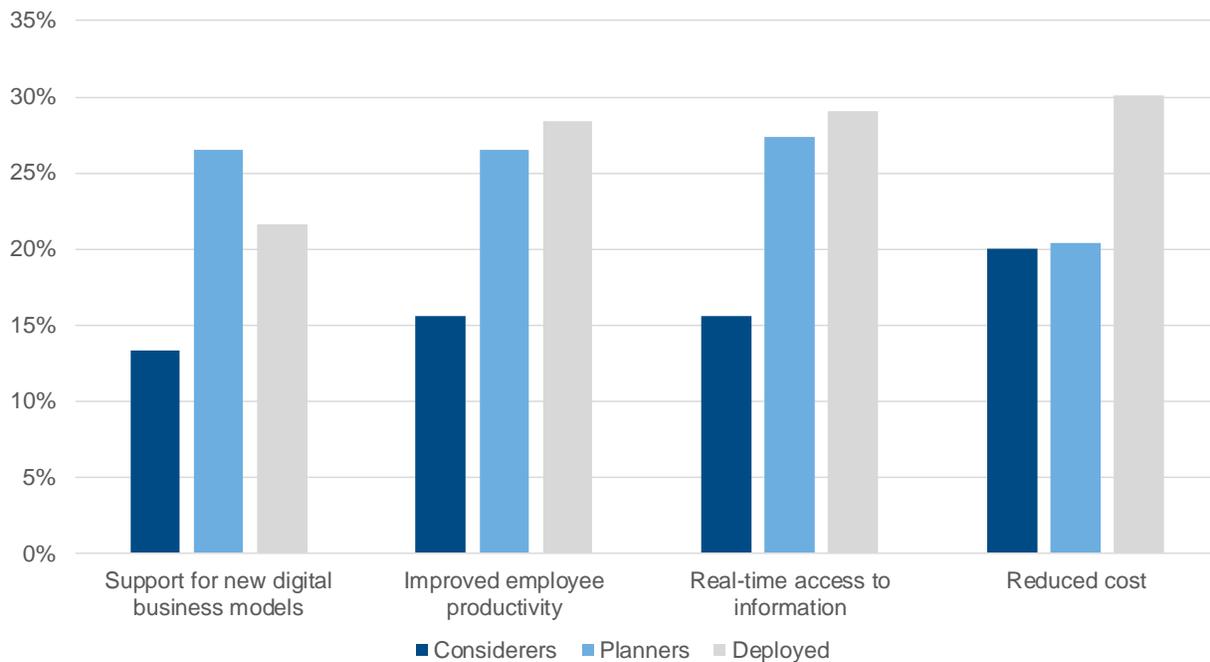
Getting the organization ready for a new ERP system is appropriately top of mind for the survey respondents. But there were differences across the groups. For the deployed, training business users was a top priority, but less so in the planners and much less for those that are considering S/4HANA. This was reflected in the in-depth interviews where creative strategies were used to bring in the business users into the implementation process from the start and then to simplify access with the modern user experience of SAP Fiori.

Making a solid business case for SAP S/4HANA is critical, so we asked about the major factors that drove the decision. Top choices were "improved employee productivity, including machine learning," "real-time access to information about the business leveraging in-memory technology," and "support for new business models." The highest factor for the *deployed* was "reduced cost" (31.1%), indicating that even early on, they were beginning to realize measurable benefits.

Figure 1 shows the leading drivers for those choosing to implement S/4HANA. (Those that said they were live were asked about "benefits" rather than "drivers," but presented with the same list of choices.)

**FIGURE 1**

### Drivers/Benefits for Selecting SAP S/4HANA



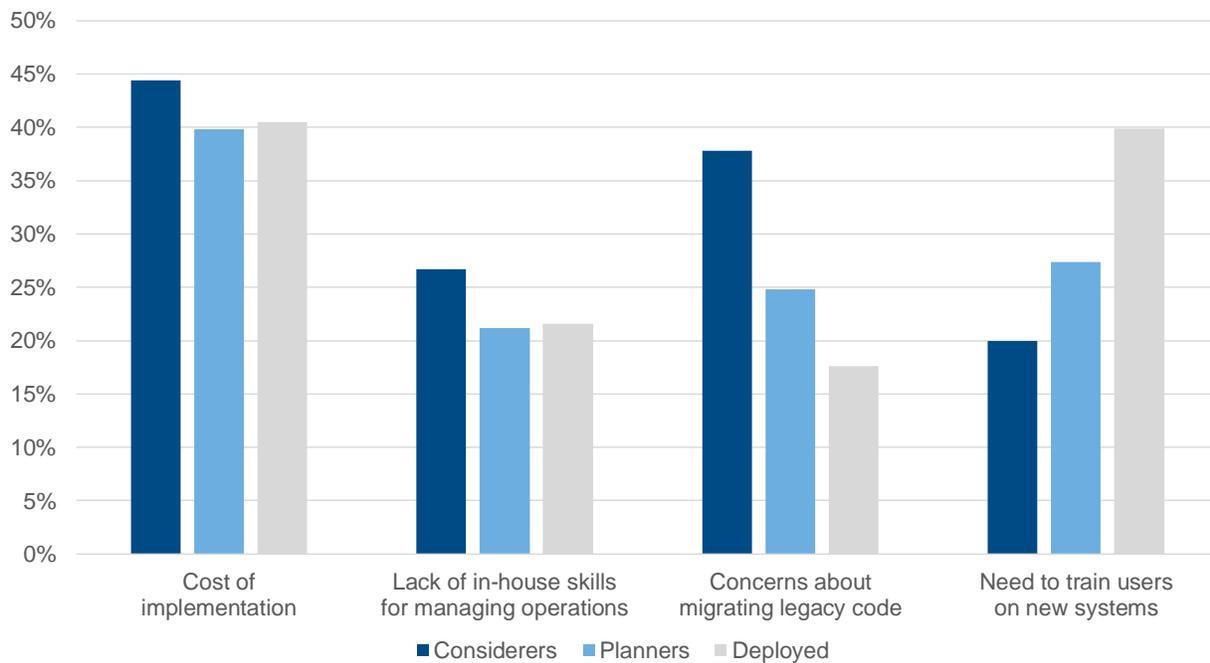
Source: IDC, 2017

## Key Inhibitors/Challenges for Implementing SAP S/4HANA

We also asked about what factors tend to inhibit a decision to deploy S/4HANA. Cost of implementation is the greatest concern, though it was less for those that were live (many of whom had also cited reduced costs post-implementation) compared with those that were considering or planning an implementation. Concerns about migrating legacy code were high for those considering S/4HANA, but lessened progressively for the planners and the deployed. The in-depth interviews supported this point, as the organizations we spoke with made a concerted effort to limit customizations so as to preserve greater agility going forward. Figure 2 shows leading inhibitors for selecting S/4HANA. (Those that said they were live were asked about "challenges" rather than "inhibitors," but presented with the same list of choices.)

FIGURE 2

### Inhibitors to Selecting SAP S/4HANA



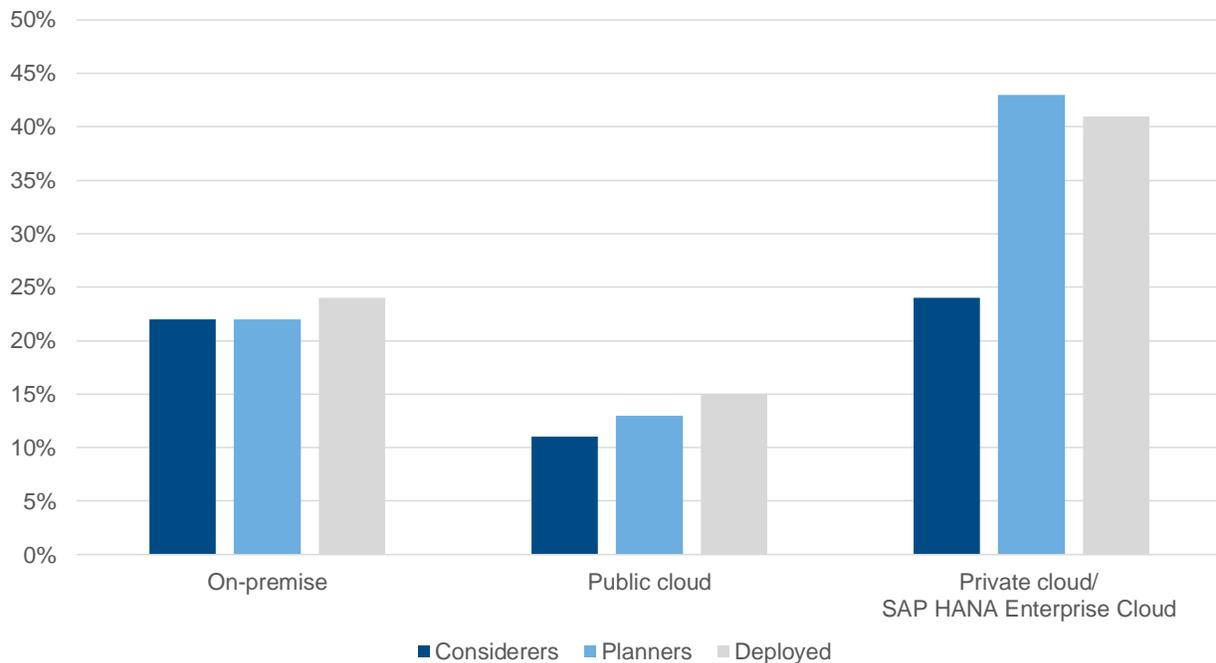
Source: IDC, 2017

## Deployment Choices for SAP S/4HANA

One important point to consider is how to deploy S/4HANA. Figure 3 shows the difference in deployment choices among the three groups for three popular choices – on-premise, public cloud (software as a service), and private cloud (SAP HANA Enterprise Cloud).

FIGURE 3

### SAP S/4HANA Deployment Choices



Source: IDC, 2017

Running the on-premise edition of SAP S/4HANA in an infrastructure-as-a-service environment (Amazon Web Services, Microsoft Azure, or Google Cloud Platform), another option, received support from 20% of the considerers, but only 11.5% of the deployed. Although this option provides management of the infrastructure, the organization is still responsible for managing the application (tuning, applying patches, and such), unless deployed with managed services provided by a partner or SAP itself (managed services from the SAP HANA Enterprise Cloud offering). This added responsibility was a concern expressed in the in-depth interviews with organizations that were live with SAP S/4HANA. They were keen to divert their IT expertise to projects that would contribute to the bottom line of the business rather than devote scarce expertise to infrastructure issues that could be managed alternatively via a contracted service.

Interestingly, the considerers were more concerned about a lack of in-house IT skills to manage S/4HANA operations. This was not nearly as significant a deterrent to the planners and the deployed, which were most likely to support a private cloud managed service like SAP HANA Enterprise Cloud.

## Ten Insights, Direct from the SAP S/4HANA Pioneers

The survey showed the leading drivers and challenges that SAP customers tend to contemplate as they consider, plan, and implement a move to SAP S/4HANA. The in-depth interviews with early implementers showed how firms can address the key concerns and provide insight on strategies for managing the change that comes with a new ERP. This experience is captured in the 10 insights consolidating direct feedback from the SAP S/4HANA pioneers.

Each organization is different and their needs are not the same. Yet there were several common themes that we found across the in-depth interviews. Many were living with ERP systems that were installed around the year 2000, when Y2K considerations drove the time frame for implementations. Yet business conditions have changed since that time, and the ERP system was constraining the ability of firms to adapt. Many firms had a significant global presence, and this was not a factor in 2000. New competitors had come on the scene that were more sophisticated in the use of technology – able to reach out directly to customers and suppliers without the constraints of legacy systems. There was a sense of urgency for change at these organizations to be able to support the transformation to a digital world that was not contemplated when the existing system was put in.

Common to all were a commitment to a clear strategy, careful preparation, and dedicated implementation. Based on their experiences, here are 10 insights direct from the S/4HANA early implementers we interviewed on how to move successfully to SAP S/4HANA:

- Assess your strategy to differentiate
- Digitize what your organization knows but is currently outside the ERP system, and unify the data
- Digital processes incorporate new levels of automation, which drives productivity
- Prepare the organization; take the time to do this right
- IT should partner with the business to enable direct, real-time access to data
- Preparing the data is the biggest technical hurdle
- Connect Signals and Insights to Business Action
- Use standard processes in S/4HANA rather than reapplying old customizations
- Plan for broader access to ERP within and outside the enterprise
- ERP is the lifeblood of the business, not just a processor of transactions

The sections that follow cover each of the insights in detail.

### Insight Number 1: Assess Your Strategy to Differentiate

Moving to a new ERP system for early adopter firms was a business imperative. Realizing that business conditions as well as the supporting technology had changed, the people we spoke with expected that the new ERP system would reflect these changes. They looked to the ERP system for best practices for today, not as a container within which to reproduce the existing (and now often outdated) ways of getting things done.

One manager [O.C. Tanner] advised that you must ask what makes you different as a business. If the activity is not differentiating, then isn't parity sufficient? Granted that each business feels that it is unique. But you need to separate those qualities that reflect your business' unique IP (your *differentiation*) from those qualities that place you in parity with other firms. If you investigate the functionality and process support in S/4HANA, you may be surprised. There are now rich capabilities

available off the shelf in the new suite that can be readily taken out of the box to support the way your business runs today or needs to run to become more efficient.

Another manager [Sabre] made a related point. In the past, he noted, the organization spent scarce IT resources to build systems that were not differentiating. But what's the point in investing effort in managing the infrastructure? Take advantage of cloud services (such as SAP HANA Enterprise Cloud, SAP S/4HANA Public Cloud, or partner offerings like AWS, Azure, GCP) for datacenter and application management where you can. Free up IT resources on things that will make a difference to your customers, your partners and, ultimately, the bottom line. Focus on higher-value products and services, not on those necessary functions that any business must do.

### **Insight Number 2: Digitize What Your Organization Knows But Is Currently Outside the ERP System, and Unify the Data**

In the survey, a major driver for moving to S/4HANA was the need to support new digital business models. This factor was cited by 26.5% of the *planners* and 21.6% of the *deployed* as one of the three major drivers, while only 13.3% of the *considerers* cited it. It's evident that digital transformation is proving to be a great driver and one of urgency in the ERP decision.

What we additionally learned from the interviews was that digital transformation starts with information for which ERP is a core asset in doing business. Yet there is much business knowledge that is outside the current ERP system. One striking example [New England Biolabs] is a manufacturing company in the biotech field that is new to SAP. The differentiating IP of this company is in the notebooks and minds of the company's scientists – information about ingredients and recipes for producing enzymes that are not kept in any formal system. What's more concerning is that the average tenure at the company is 17 years and that there is a core group at retirement age or beyond. There is a risk that unless this knowledge is captured into systems, the firm could lose valuable insight into making these products. This information has to be digitized in order to automate operational planning and scale production.

Several other interviews described the critical work of production and operations planners. These skilled professionals look to rebalance production schedules based on the latest real-time data, which in turn drives costs and pricing. This work is often driven by spreadsheets, which are prone to error and slow the process. Production planning based on S/4HANA leverage direct access to the latest data. And bringing the knowledge of the planners into the ERP system protects and preserves this IP beyond the limited tenure of a planner.

In each of these cases, implementing S/4HANA was a catalyst to capture knowledge, resulting in IP preservation and more seamless, efficient, and accurate processes based on a unified and real-time data structure.

### **Insight Number 3: Digital Processes Incorporate New Levels of Automation, Which Drives Productivity**

Digitizing knowledge is a first step to going digital. Nearly every industry and every function now runs on information, leveraging data to gain efficiency via greater automation.

Several manufacturers among the early S/4HANA implementers talked about this dependency on data and the way they were changing their processes to incorporate higher levels of automation. Two companies we spoke with were making greater use of barcodes. In the past, receiving goods into the plant required manually filling out a series of screens. Now information from the barcodes speed goods into the plant and then from the plant out to delivery.

Several managers cited the new quality management module in S/4HANA as enabling digital tracking of materials throughout the manufacturing process, especially important in regulated industries. One manufacturer [Indus Motor Company] is benefiting from quality management and also notes that material requirements planning is much faster. It used to take 3 hours to process a model, but now it can be done in 15 minutes.

Automation enabled by S/4HANA was cited in multiple cases, powered by direct access to the latest information. Interviewees agreed with IDC's model of intelligent ERP powered by machine learning as the direction they want SAP to pursue. They understood that machine learning will make possible the automation of a range of tasks that resist step-by-step description. Further automation will drive more efficiencies (which is associated with higher productivity), and this was seen as desirable for staying competitive in the future. The leading driver for the *planners* (26.5%) to implement S/4HANA was "improved employee productivity, including machine learning." This factor also was rated highest by the *deployed* (28.4%), but not so much by the *considerers* (15.6%).

#### **Insight Number 4: Prepare the Organization; Take the Time to Do This Right**

An impressive theme in each interview was a commitment to ready the organization for what would become a significant change to how work gets done. Get people on board before the change comes, and be sure to get senior management support.

A Pakistani cement company [Lucky Cement] drew people from each business unit, temporarily redeploying them as members of the implementation project team. This brought the business unit into the project from day 1 with its representatives doing marketing activity for the project and updating the business unit on progress on an ongoing basis. At the same time, they brought in visibility to the project team on the specific requirements of the business unit. So, when the company went live, there were no shocks/surprises to the business units – an excellent case study of the benefits derived from a thoughtful change management program. The company also found that the use of SAP Fiori was helpful, so the user experience looked like a web/internet interface that people were familiar with. That reduced the training time needed at the end of the implementation process.

Two other firms [O.C. Tanner, Sabre] described their use of an agile methodology during the implementation process. This enabled showing users what the experience would be like by providing a demo of the new system that had been prototyped. The project team would then collect feedback and apply suggestions as needed. The net result was greater acceptance of the new system throughout the organization and a reduction in the amount of formal training required.

The requirement to train business users on the new system was cited as a key challenge in the survey by the *planners* (27.4%) and the *deployed* (39.9%) – for which it was the leading challenge. On the other hand, this was a factor of lower importance for the *considerers* (20.0%), perhaps because they had not yet formulated a plan for change management.

## Insight Number 5: IT Should Partner with the Business to Enable Direct, Real-Time Access to Data

A leading driver and benefit cited by survey respondents was "real-time access to information about the business leveraging in-memory technology." This is a signature feature of SAP S/4HANA. What we learned from the interviews was that this capability can change the relationship of IT as a full partner with the business.

One executive of a company live with S/4HANA [Steve Strout, Sabre] stated this point simply: "Put the right data in front of the right people at the right time." He saw the role of IT as a partner to the business in driving efficiency and innovation based on information, not just as a provider of a service to keep the business running. Another executive provided a specific data point on the benefits achieved via direct access. The company's [National Metal Manufacturing & Casting Company "Maadaniyah"] financial closing was greatly streamlined and could now be achieved in one week versus the prior standard of two weeks. Confirming this point, 29.1% of the deployed cited "real-time access to information about the business leveraging in-memory technology" – the highest factor cited as a benefit of S/4HANA.

Another organization [Sigma Paints], a manufacturer, saw that the role of IT is to provide the necessary means for the business to address competitive threats that were not present when the company's legacy ERP system had been installed. Customers wanted things faster and needed to be sure that they could rely on a promise from [Sigma] sales on a delivery date. Now salespeople, via a new mobile application, can get information on available stock directly from S/4HANA. And using the built-in analytics in S/4HANA, they can give a customer a firm date for delivery of the goods rather than a guess.

But real-time access requires more than in-memory technology, though it is a key in reducing data latency. Direct access is not possible where data is not rationalized across the organization and where business users rely on spreadsheets disconnected from the ERP system. If everyone across the organization is to be on the same page as to what the condition of the business is, the business data must be brought together and integrated. For many, the project to implement S/4HANA was a catalyst to clean up the data – the message in insight number 6, which highlights the need for data preparation.

## Insight Number 6: Preparing the Data Is the Biggest Technical Hurdle

Several interviewees [Sabre] noted that preparing the data, specifically the master data, was the most difficult technical challenge in the implementation. Data cleansing and data quality work on the master data is time consuming but necessary in the migration to the new ERP system.

Many implementations were replacing separate systems (whether SAP or another ERP) and some homegrown systems that had become underpowered. The net effect was that it was not possible to get a consistent/unified view of the data across functions in support of an end-to-end process. In other cases, there was key data missing from the ERP systems. The new implementation would need to bring in data from spreadsheets, project reports, or designer notebooks so that the data could be managed and accessible. Data conversion was a key element of the implementation (from unstructured to structured, mapping from source to the target model present in S/4HANA). After the initial conversion, firms looked for ways to revise processes to ensure a higher degree of data quality on initial data entry, such as substituting barcode reading for manual data entry in some cases.

The survey listed moving from another database (Oracle, SQL/Server) to SAP HANA as a possible inhibitor to moving to S/4HANA, but this is not the same thing. Master data rationalization would be an issue even if the same database was being used. The database migration issue as a leading challenge was cited by 15.6% of the *considerers*, 21.2% of the *planners*, and 18.9% of the *deployed*.

## Insight Number 7: Connect Signals and Insights to Business Action

Real-time access to data is an enabler of process improvement. But you also need to recognize the signals that have impact, and act on them. We found that enterprises are already leveraging real-time access to data in SAP S/4HANA to streamline operations. Eliminating information delay enables an accelerated response and that can drive down costs.

One manufacturer [Farma-Tek] has saved 40% on reducing safety stock in a leaner operation with direct access to the production plan and the latest sales data. This direct access to data coupled with intelligent responses to new information has reduced operations costs by 40%. The company is now able to buy the correct goods to manage customers better and predict sales and customer demand.

An executive from an auto manufacturer [Indus Motor Company] reported that the company's processes were being redesigned so that they were capturing information more frequently. After S/4HANA was implemented, defects could be captured every hour or two from the plant floor rather than at end of day. In addition, demand forecasts that incorporated feedback from dealers and distributors on local demand is sent directly to S/4HANA, instead of passing around spreadsheets and getting data into the ERP system much later.

Another company [Sabre] is providing direct access to ERP data combined with related third-party data to drive real-time decisions on how to make operations more efficient. But the company is going further in valuing its data as a strategic asset to be used as a basis for new or enhanced products. Here IT has become a partner to business in creating new opportunities that are information driven.

The future promises greater use of predictive analytics to identify the likely outcome of changes observed in the data. This is more than having greater visibility about current conditions, but an advance warning of changes that will have a significant impact. In other words, of the many signals that are present in the data, which are the ones that require attention and a rapid response? Which are the ones that experience has shown to be signs of great impact? At that point, "sense and respond" moves to "anticipate and respond," with informed predictions giving the business more time to proactively take action.

## Insight Number 8: Use Standard Processes in S/4HANA Rather Than Reapplying Old Customizations

One of the most surprising findings from the in-depth interviews is the urgency placed on limiting customizations to the new system. Several companies went so far as to describe their new system as "greenfield," even though S/4HANA was replacing a Y2K-era SAP system [Indus Motor Company]. The thinking is that adding customizations complicates keeping the system current with the latest SAP enhancements to keep up with best practices. This was a lesson learned from the implementation of the prior SAP system. The net result is that on the scale from heavy customization to no customization, the new implementation deployments are voting for zero or near-zero customization.

But how can you limit changes to the system if there is demand from lines of business to reproduce customizations that were part of the former ERP suite? The example provided here is instructive as a way to meet this challenge. The implementation project leader [Steve Strout of Sabre] described the company's S/4HANA system as a greenfield implementation. To be fair, it is not a greenfield implementation in the traditional sense, since the company had been reliant on ERP for many years. But his point is that the company's objective was to start with a clean sheet to which it migrated rather than an [incremental] upgrade of what it had. He saw the implementation as an opportunity to "simplify, simplify." He worked hard to reduce 60% of the custom objects the company had created, reducing the

number of accounts needed. The company then set up a steering committee to ask lines of business to see what they could live without during a six-month period before the company brought the old constructs back. The company found that it had not taken advantage of what was already in SAP (reducing the need to customize). The implementation was a transformation opportunity, a time to revise business processes to reflect today's digital world. This was not a time to reproduce the past.

Other sites pursued a similar strategy aimed at severely limiting customizations. Several sites talked about instituting a change management board, where all business requests for changing S/4HANA were reviewed. One site indicated that the CEO was a member of the board and that there was a clear direction expressed to leverage the process flows within S/4HANA rather than altering them. Another firm [National Metal Manufacturing & Casting Company "Maadaniyah"] described how line-of-business stakeholders had to make a case for customizing the system, and "astonishingly" no changes made it through the process. The company found ways to map the old data to the new data model/field structure. When changes are needed, the sites are looking to extend the system via supported user exits rather than changing the core.

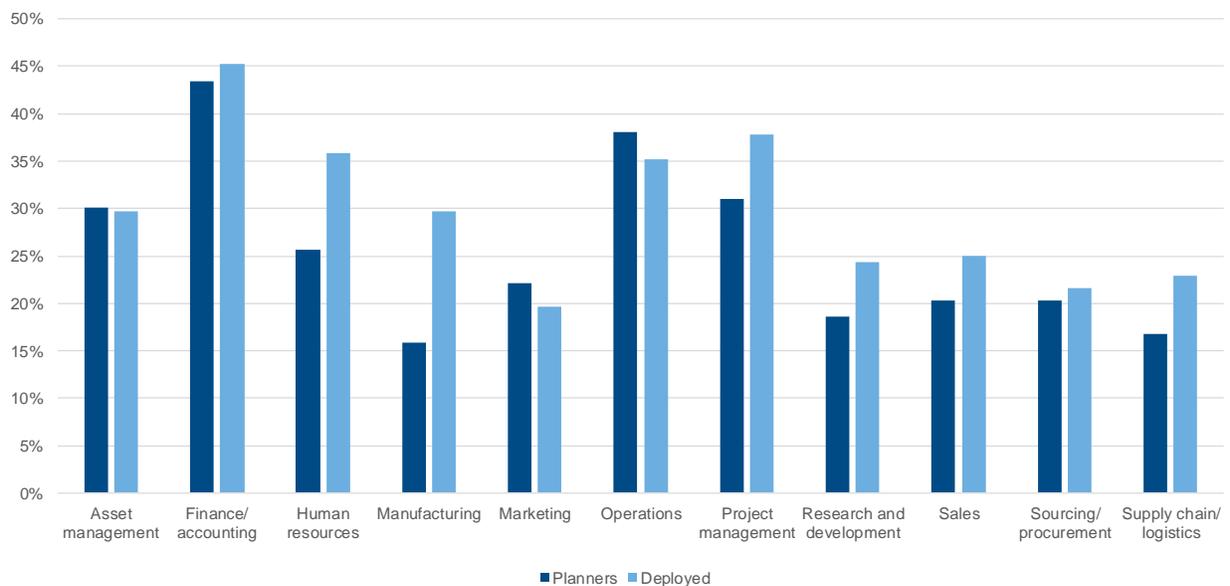
The survey provided support to the limiting customization approach. When asked whether they planned to migrate all, some, or none of their customizations, most respondents said "some." But this doesn't tell the whole story. When considering the challenges of moving to SAP S/4HANA, this factor became less important as the experience level increased. So 37.8% of the *considerers* cited migrating custom code as a key challenge compared with 24.8% of the *planners* and only 17.6% of the *deployed*.

### Insight Number 9: Plan for Broader Access to ERP Within and Outside the Enterprise

SAP S/4HANA is now being deployed more broadly according to survey results (see Figure 4). (The list of functions reported by respondents varied by industry.)

FIGURE 4

#### Functions Planned/Deployed for SAP S/4HANA



Source: IDC, 2017

Broader functional coverage requires broader organizational access to ERP. This puts a commitment to training as already noted. Sites we spoke to also leveraged the improved user experience with SAP Fiori and valued mobile access to the ERP system.

The requirement of access to ERP is not limited to those within the enterprise. Extending access to partners and influencers outside the organization is often required to support new business models. The relationship of ERP to a firm's business network is one of the drivers we enquired about in the survey. "Connecting seamlessly with external partners, customers, and business networks" was cited as a leading driver by 22.2% of the considerers, 17.7% of the planners, and 20.9% of the deployed.

The important role of business networks was highlighted in the interviews as well. One firm [Vectus] we spoke with manufactures water tank and related plumbing connections. It sells through its dealer and distributor partners that need direct access to the ERP system to check on what is available before placing an order. In addition, building customer awareness depends on influencers – architects and plumbers who drive traffic to the dealers. These influencers are part of the business network and require ERP access as well. ERP operations management, whether in-house or via a managed service, needs to plan for what is likely to be broader access than the existing ERP system.

### **Insight Number 10: ERP Is the Lifeblood of the Business, Not Just a Processor of Transactions**

ERP has long been considered a system that captures the transactions that reflect business operations. But the expectations of the S/4HANA pioneers reach well beyond this. They viewed legacy ERP as a high-volume online transaction processing (OLTP) system. The new ERP must be able to handle more routine processes automatically and focus user intervention on the exceptions and higher-value opportunities. In doing so, ERP should be a system for monitoring what is happening and alerting those who need to act, supporting decisions that drive the transactions. Some examples often cited are production planning and costing/pricing decisions.

One IT manager we spoke with [Sabre] captured this point succinctly: "ERP is today the lifeblood of the business. ERP is both an offensive weapon (to sell more to existing and new customers) and a defensive weapon to retain the customers you have." ERP enables new and better products with more efficient delivery to customers. The future of ERP is as a system of intelligence that fosters process improvement and enhances productivity through the application of advanced analytics and machine learning technologies.

## **CONCLUSION**

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Too many ERP systems in use today are aging, often installed to reduce perceived Y2K risks and are now nearly two decades old. Meanwhile, the business environment has fundamentally changed as new digital models and new competitors without the limitations of a legacy ERP system represent the new reality. In the Y2K days, there were no smartphones, no cloud computing, no internet of things.

IDC found that the SAP customers surveyed and the ones we spoke with were concerned that the ERP at the core of their business had become an impediment to being competitive in today's world. Many saw the need to refresh their ERP in order to embrace new digital business models, drive greater employee productivity, and provide real-time access to the latest information impacting the business. With these goals in mind, migrating legacy customizations from the old system to the new

would have worked against these objectives. So the interviewees put in a process of management review that helped the organization use the standard application with limited exceptions.

Although the pull toward change is strong, there are inhibitors and challenges as well. Leading concerns are cost and the technology and business dimensions of a transition: training users and IT, and migrating existing custom code and data. While those considering S/4HANA are concerned about change and the cost of that change, those that have actually deployed report reduced costs and are less worried about migrating their past legacy code.

Moreover, the IT skill deficit is often being addressed by getting outside help via managed services to run the operations for the new ERP. The business user transition is being addressed through various strategies of change management. The key is to bring the lines of business early into implementation decisions. Several cases combined this strategy with use of prototyping and agile methodologies to acclimate the business users to the look and feel of the new system.

These strategies are captured in the 10 insights from the SAP S/4HANA pioneers. These are best practices and sound advice to those organizations that are in the process of either considering, planning, or implementing the new ERP system.

## CUSTOMER BACKGROUNDS

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- **Company: Farma-Tek**
  - Industry/business: Life sciences/manufacture pharmaceuticals
  - Headquarters location: Istanbul, Turkey
  - Interviewee with Title: Şener Giritlioğlu, Managing Director
  - What the company has implemented: SAP S/4HANA 1511
  - What the company replaced: Local software to manage customers
- **Company: Indus Motor Company**
  - Industry/business: Automotive/manufacture Toyota and Daihatsu vehicles
  - Headquarters location: Karachi, Pakistan
  - Interviewee with Title: Faizan Mustafa, CIO
  - What the company has implemented: SAP S/4HANA 1511
  - What the company replaced: SAP ECC 4.6
- **Company: Lucky Cement Limited**
  - Industry/business: Mill products/manufacture cement
  - Headquarters location: Karachi, Pakistan
  - Interviewee with Title: Adnan Qazi, Head of Information Technology and Systems (CIO)
  - What the company has implemented: SAP S/4HANA 1511
  - What the company replaced: Home-grown system

- **Company: National Metal Manufacturing & Casting Company "Maadaniyah"**
  - Industry/business: Mill products/manufacture wire drawings, metal castings, axles, and spare parts
  - Headquarters location: Jubail Industrial City, Saudi Arabia
  - Interviewee with Title: Aamir Khalid Pirzada, IT Manager
  - What the company has implemented: SAP S/4HANA Finance with ECC 6.0 on HANA
  - What the company replaced: Microsoft Dynamics, EIMS and in-house custom production solution
- **Company: New England Biolabs**
  - Industry/business: Life sciences/develop molecular biology reagents
  - Headquarters location: Ipswich, Massachusetts, United States
  - Interviewee with Title: Sharon Kaiser, CIO
  - What the company has implemented: SAP S/4HANA 1610
  - What the company replaced: SAP ECC 6.0 and SAP Business Suite powered by SAP HANA (SoH)
- **Company: O.C. Tanner**
  - Industry/business: High tech/employee reward and recognition solutions
  - Headquarters location: Salt Lake City, Utah, United States
  - Interviewee with Title: Ethan Kennelly, Director of Enterprise Management
  - What the company has implemented: SAP S/4HANA Finance
  - What the company replaced: SAP ECC
- **Company: Sabre**
  - Industry/Business: Travel and transportation/travel technology and solutions
  - Headquarters location: Southlake, Texas, United States
  - Interviewee with Title: Steve Strout, Senior Vice President of Strategy and Operation
  - What the company has implemented: SAP S/4HANA Finance
  - What the company replaced: SAP ECC
- **Company: Sigma Paints**
  - Industry/business: Chemicals/manufacture paints and coatings
  - Headquarters location: Dammam, Saudi Arabia
  - Interviewee with Title: Abdul Muneer Dar, IT Manager Middle East
  - What the company has implemented: SAP S/4HANA 1511
  - What the company replaced: Sage ERP
- **Company: Vectus Industries Limited**
  - Industry/business: Mill products/manufacture plastic piping systems and water storage tanks
  - Headquarters location: Noida, India
  - Interviewee with Title: Manish Sinha, Head of IT
  - What the company has implemented: SAP S/4HANA 1511/upgraded to SAP S/4HANA 1610
  - What the company replaced: Simple accounting and production software

## About IDC

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