



SAP HANA and S/4HANA Services

Client Perspective Report
Abstract

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Who Is This Report For?

NelsonHall's "SAP HANA and S/4HANA Services" client perspective report is a comprehensive report designed for:

- Sourcing managers investigating key drivers of the use of vendors for SAP HANA and S/4HANA Services
- Operational decision makers exploring the benefits and inhibitors of undergoing SAP HANA and S/4HANA initiatives
- Vendor marketing, sales and business managers developing strategies to target SAP HANA and S/4HANA opportunities
- Financial analysts and investors specializing in the IT services sector, including SAP HANA and S/4HANA Services.

Scope of the Report

As part of NelsonHall's most recent SAP HANA and S/4HANA services market analysis, in addition to interviewing leading SAP HANA and S/4HANA services providers globally, our research extended to a survey of these vendors' clients. Through this survey, we met with clients of these vendors, representing a range of geographies, industries, size, scope of services, and various levels of maturity in their sourcing of SAP HANA and S/4HANA services.

Each interview was conducted to cover several focus areas to gain a comprehensive understanding from the client perspective of their experience as a buyer of SAP HANA and S/4HANA services in the current marketplace. This was specifically designed to understand, not only the perception of vendor performance in meeting client needs currently, but also their ability to meet the clients' needs in the future. The survey focused on the following key areas:

1. SAP HANA and S/4HANA services usage
2. Benefits derived from SAP HANA and S/4HANA services
3. Vendor approach to benefit delivery
4. Client satisfaction
5. Client future expectations and vendor ability to meet these future requirements.

For each of these focus areas, we asked clients to rate various attributes including services used, service satisfaction, benefits sought, benefits importance, vendor approach, and overall performance satisfaction.

Key Findings & Highlights

Overall clients are satisfied with the services delivered by vendors and view those services in line with realizing their highest priority benefits of value for money and timely implementation or migration of SAP solutions. Clients place a significant priority on a vendor tying fees to desired outcomes, onshore SAP consulting capabilities and SAP technical delivery capabilities for delivering SAP HANA and S/4HANA services and primarily see vendors meeting these needs.

Clients are also looking for vendors to provide more guidance on the optimal adoption approach. They also place a premium on vendors that are able to staff the appropriate skilled resources in a timely manner in order to deliver the project to meet timelines.

Clients place significant importance on the timely implementation or migration of SAP solutions and value for money. Timely implementation or migration of SAP solutions was cited by 100% of clients as being highly important, while value for money was cited as highly important by ~93% of clients.

Vendors are relatively successful in helping clients achieve these benefits. Approximately 92% of clients view vendors as highly or very highly effective in achieving timely implementation or migration while 75% of clients view vendors as highly or very highly effective in delivering value for money.

A vendor's tying of fees to desired outcomes, onshore SAP consulting capabilities and SAP technical delivery capabilities were all cited by 93% or more of clients as being highly or very highly important to achieving benefits. Tying of fees to outcomes was highly or very highly important to all clients.

Clients do see their vendors as suitable to deliver against future requirements, with 86% of clients rating their vendor as highly or very highly suited to meet future requirements.

With future requirements primarily focused on the on-going support and maintenance of HANA and S/4HANA, clients are focused on vendor's following capabilities:

- SAP software update installation services are highly or very highly important to ~78% of clients today and ~89% in the next three years. Only ~33% of clients are highly or very highly satisfied with services received today.
- Automated ITSM capabilities are highly or very highly important to ~78% of clients today and ~91% in the next three years. One-hundred percent of clients are highly or very highly satisfied with vendor automated ITSM capabilities today.
- Continuous improvement initiatives are highly or very highly important to ~67% of clients today and ~82% in the next three years. Eighty-six percent of clients are highly or very highly satisfied with services received today.



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Report Length

25 pages

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