2024 Market Agenda for Operations and Supply Chain

VENTANA RESEARCH NOW PART OF ISG

OPERATIONS & SUPPLY CHAIN
COVERAGE 2024
VENTANA RESEARCH

Robert Kugel
Executive Director

Our Commitment

Providing independent and objective research without bias.

Ventana Research: Providing market research and insights for two decades.

- Authoritative research and insights on business and IT aspects of the $800b software industry.

- We provide a portfolio of consulting, advisory, research and education (CARE) services for enterprises, software and service providers, and investment firms.

Operations and Supply Chain

The operations and supply chain of an organization is responsible for the efficient delivery of products and services using the resources of the organization.

Continuous Planning	**Supply Chain & ERP**
Product Information Mgt.	**Property Technology**
Supplier Relationship Mgt.	**Sustainability Management**

Areas of Focus

Our area of expertise explores focus areas of coverage with research and advisory to guide value from insights on software industry.

Opportunities for Ops and Supply Chain Leaders

1. **Diverse processes and applications impact supply chain efficiency.**

2. **Integrated demand & supply chain planning augments ERP.**

3. **Customer experience requires integrated product and information processes.**

4. **Property management technology addresses profitability challenges in the new interest rate environment.**

5. **More effective supplier management enables improved supply chain sustainability.**

CHALLENGES AHEAD

Operations and Supply Chain
Market Assertion

By 2026, more than three-fourths of supply chain management software providers will have incorporated an initial set of AI capabilities to accelerate planning and promote agility.
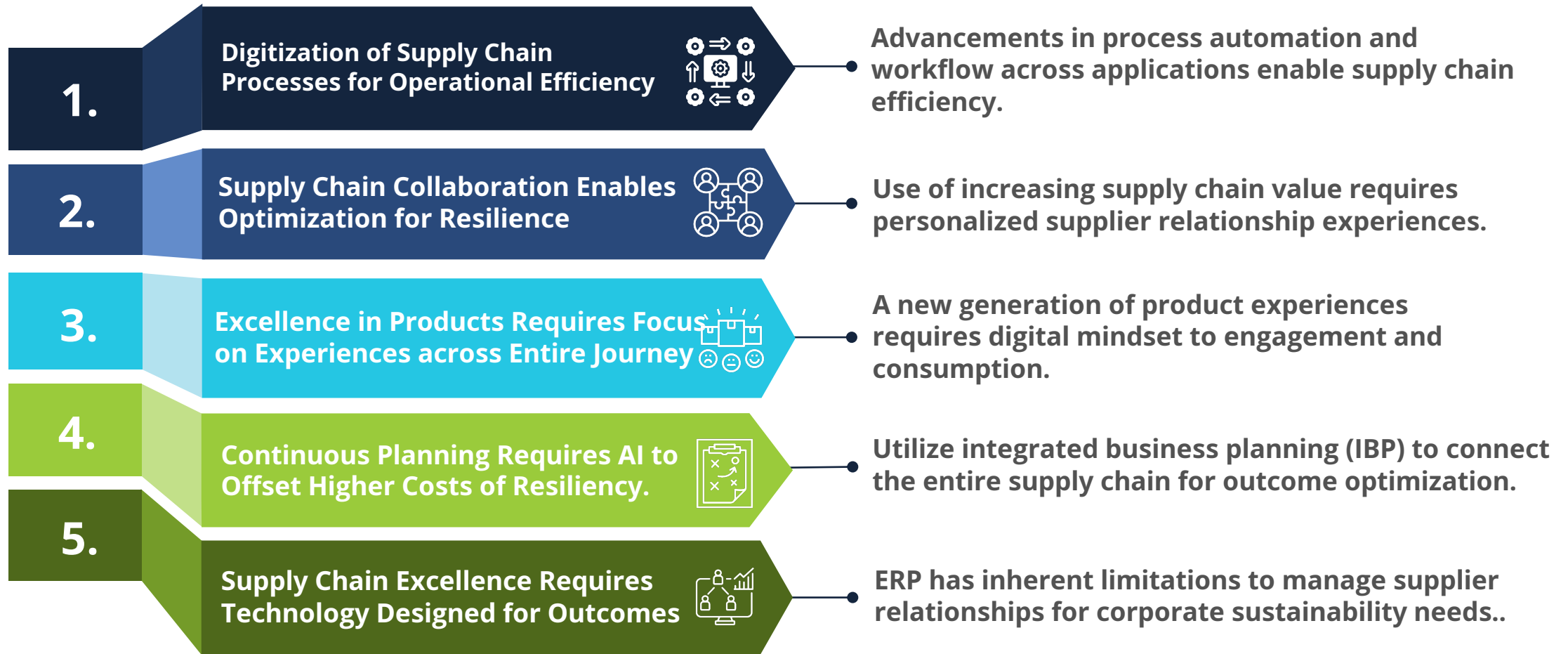
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Robert Kugel, CFA
Executive Director, Business Research

Business Trends in Ops and Supply Chain

1. Digitization of Supply Chain Processes for Operational Efficiency

Advancements in process automation and workflow across applications enable supply chain efficiency.

2. Supply Chain Collaboration Enables Optimization for Resilience

Use of increasing supply chain value requires personalized supplier relationship experiences.

3. Excellence in Products Requires Focus on Experiences across Entire Journey

A new generation of product experiences requires digital mindset to engagement and consumption.

4. Continuous Planning Requires AI to Offset Higher Costs of Resiliency.

Utilize integrated business planning (IBP) to connect the entire supply chain for outcome optimization.

5. Supply Chain Excellence Requires Technology Designed for Outcomes

ERP has inherent limitations to manage supplier relationships for corporate sustainability needs..

Operations and Supply Chain
Market Assertion

By 2026, the supply chain management software category, after years of languishing, will be re-established as relevant with a dramatic overhaul of the platform to be digital and AI-enabled.

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Mark Smith
Partner, Head of Software Research

Technology Trends in Ops and Supply Chain

1. Evolution of ERP and Supply Chain Enhances Responsiveness

Gain supply chain efficiency with cloud computing to streamline events for transactional optimization.

2. AI & ML Supported S&OP Improves Supply Chain Execution

AI drives significant SCM productivity and shortens planning cycles to provide agility and lower costs.

3. Digital Intelligence to Infuse Supply Chain and Product Experiences

Utilize ML to enriched information to intelligently synchronize and activate for consumption.

4. Supply Chain Orchestration Requires Workflow and Process Intelligence

Maximum productivity across supplier channels is gained through automation and intelligence in process design and execution.

5. Digital Technology to Innovate and Operationalize Property Utilization

Property management technology enables commercial and residential operators to lower costs and reduce vacancies.
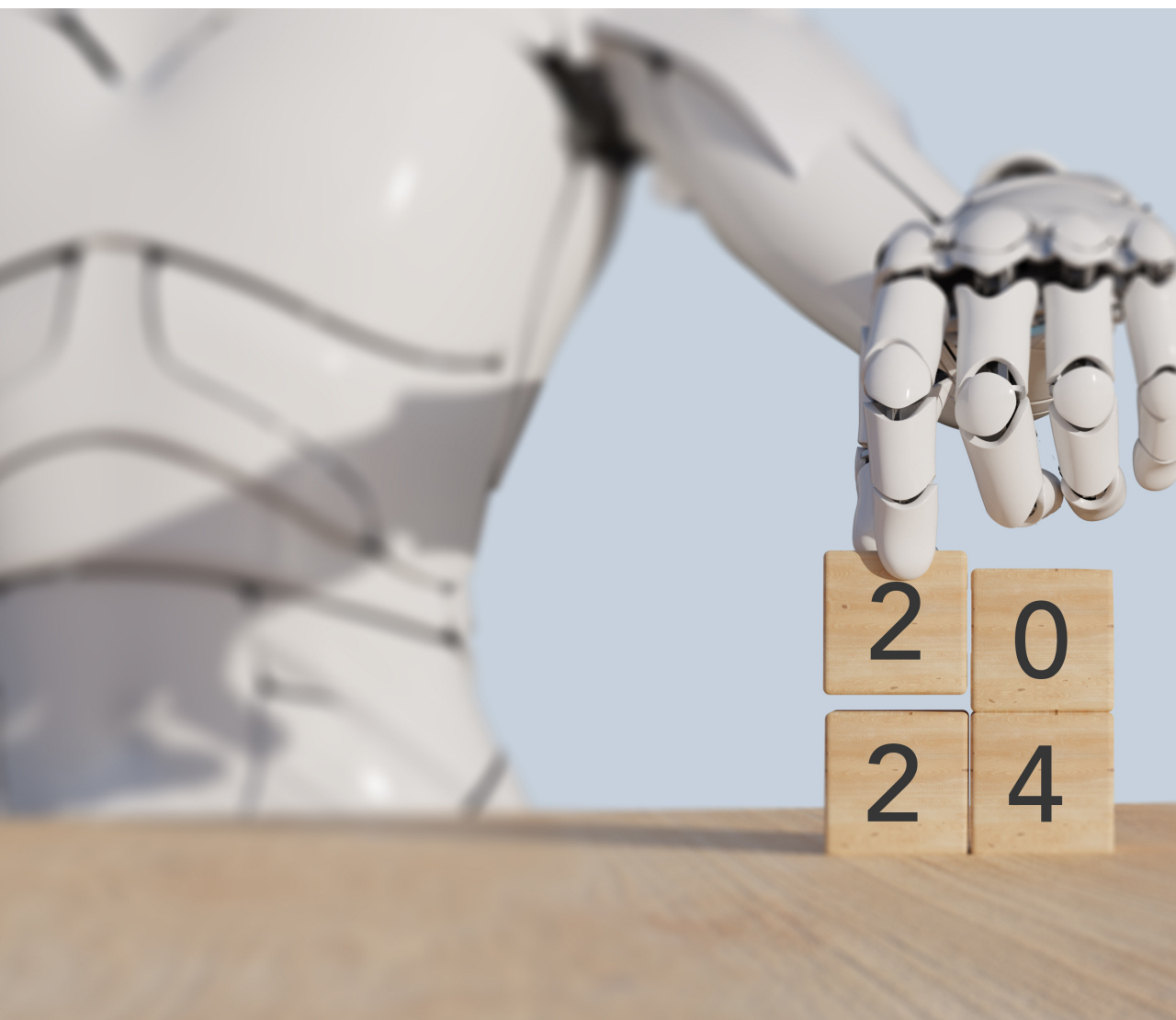
Buyers Guides provide enterprises ability to assess, evaluate, select and source service and software providers and products using advisory services and market research.

- Research simulates RFI evaluation of software providers using Value Index methodology.

- Rating and classification of software providers using proprietary Value Index methodology.

- Provides objective analysis of the product experience across five evaluation categories.

- Examines the customer experience that is available to enterprise buyers.

- Software providers have opportunity to earn prestigious Exemplary and Leader badges.

Buyers Guides

The utilization of Buyers Guide software research guides decisions by enterprises and is essential to ensure maximum business impact from technology investments across business and IT.

Buyers Guide Research Plan for 2024

Topics

- **Business Planning (4)**
  - **Financial Planning, S&OP & Supply Chain**

- **ERP & Accounting (3)**
  - **Manufacturing, Services**

- **ESG Management (3)**
  - **ESG Operations, Analytics and Data**

- **Product eXperience Management**
  - **PXM Customers & Supply Chain**
  - **PXM Product Intelligence / Analytics**

- **Supply Chain Management**
  - **Warehouse, Logistics, Transportation**

(*) Number of Buyers Guide Editions Per Topic

About ISG and ISG Research

Global research and advisory services firm with annual influence on over $200b of technology spend.