

RESEARCH
REPORT

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The CIO's 2024 Transformation Report Card

By Rizal Ahmed

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Executive Summary



“Unfortunately, I hear and see again and again, that companies push in the technology and expect results to flow in, without changing the process or the people’s mindset on what needs to happen. Technology is just a tool. By setting business process improvement as a KPI, this will set up the expectations for the people to change their processes to use the new technology effectively to generate the expected results.”

**DIRECTOR OF PROCUREMENT, OPERATIONS, AND TRANSFORMATION:
LARGE FOOD AND BEVERAGE ORGANIZATION.**

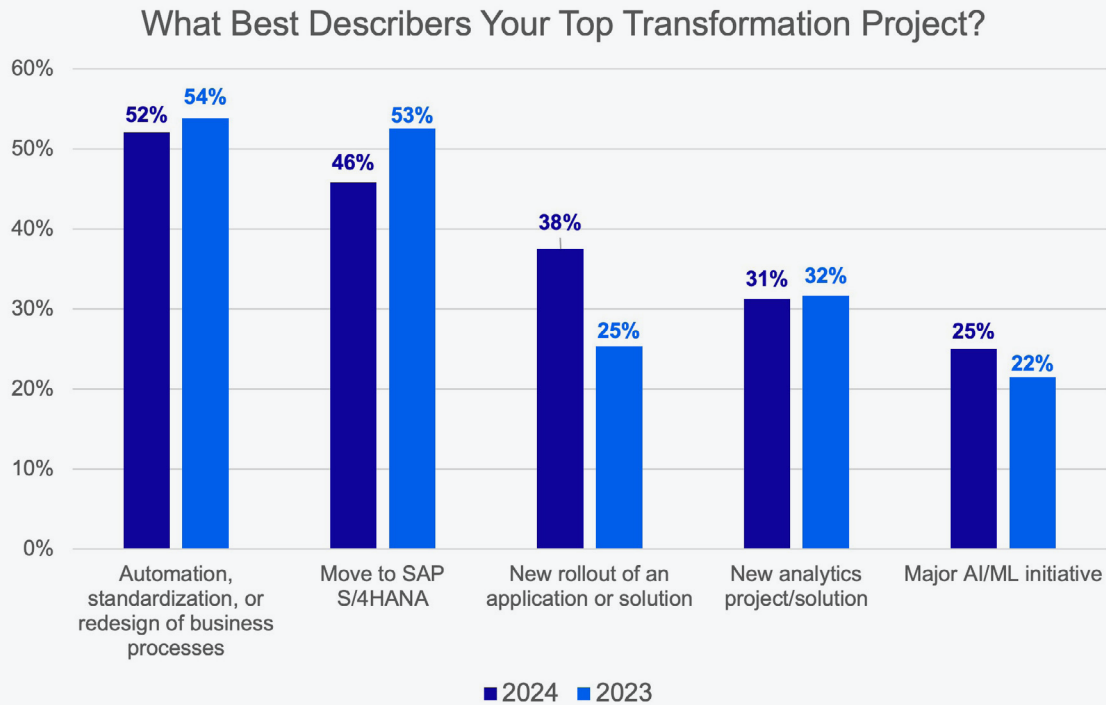
CIOs AND OTHER TECH LEADERS

continue to transform and reinvent their ERP landscapes to support the flexibility, innovation, and resilience their business needs to thrive in today’s climate, according to the findings in our latest benchmark research on the “CIO’s Transformation Report Card.”

In the fourth year of our study, SAPinsider surveyed 124 executives and decision makers from September to November 2024 to better understand their major transformation projects and what makes or breaks success for them.

Throughout the years of the study, the top two transformation projects remain the same (**Figure 1**): automation and standardization of business processes remain in the top spot (52%). The second most popular response was unsurprisingly the move to SAP S/4HANA (46%). The impending deadline is only getting closer as companies continue to assemble their business case and cobble together the resources and knowledge to get them there before 2027. CIOs need to be a chameleon of sorts to champion change and motivate a wide range of both business and IT teams to support their efforts.

FIGURE 1



Why The Focus on Business Processes?

Gone are the days when massive IT infrastructure and software migrations could pay for themselves. Now business leaders and CFOs want more. They want to see a demonstrable impact. And what better way to show this than by improving those core business processes?

“At Maersk, we decided to embark on a Greenfield SAP S/4HANA journey. The primary reason is to fully realize the potential of a new generation ERP system. Simply migrating to a new SAP solution without reimagining and optimizing processes is a completely missed opportunity. To unlock the full potential of SAP S/4HANA, we focused on business process innovation across three of our core processes – Order to Cash, Procurement to Pay, and Accounting to Reporting,” comments Tapan Dash, Head of Corporate Applications, Maersk.

Many companies see the necessitated technological and infrastructure move as a

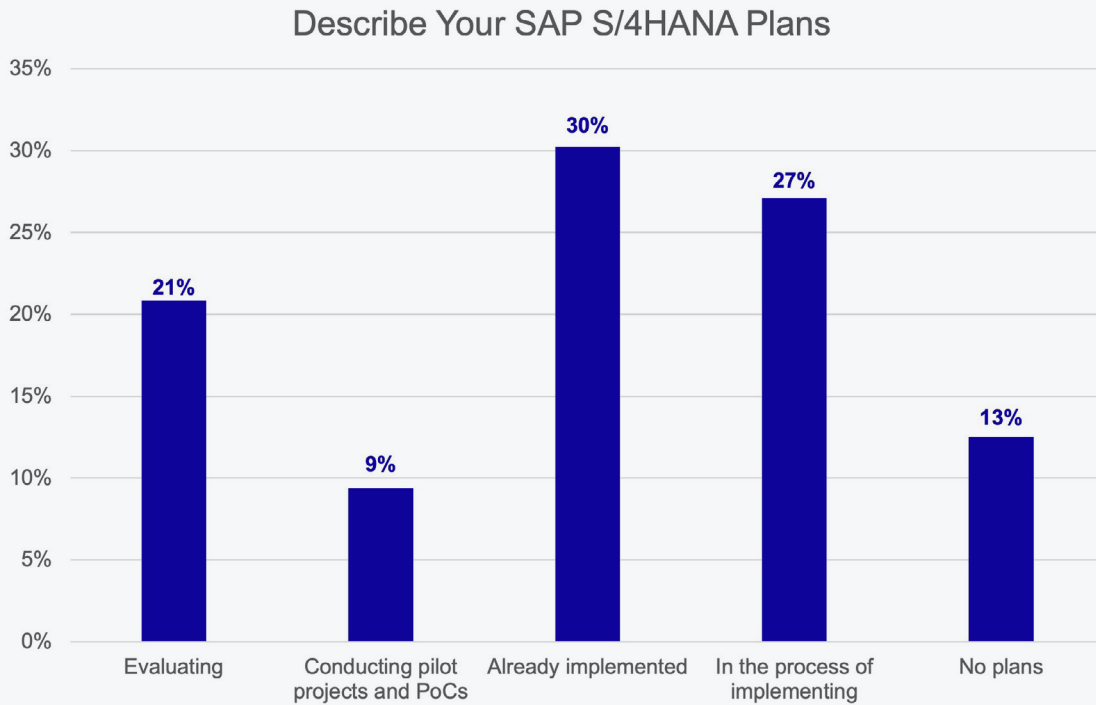
catalyst for business change. This presents the opportunity to examine the massive customizations that characterize most legacy ERP environments and pursue standardization, automation, and redefinition as part of the process. Never has there been a better opportunity to rethink and redesign your business.

March to SAP S/4HANA Continues

Impending deadlines and the end of support have put additional emphasis and focus on the migration to SAP S/4HANA. That is why it remains the second-most important transformation initiative named by our respondents.

When we look closer at SAP S/4HANA adoption, we see that most respondents (57%) have implemented or are in the process of implementing SAP S/4HANA (Figure 2). Activity continues to rise as 2027 fast approaches. Just over one-fifth of respondents (21%) are in the

FIGURE 2

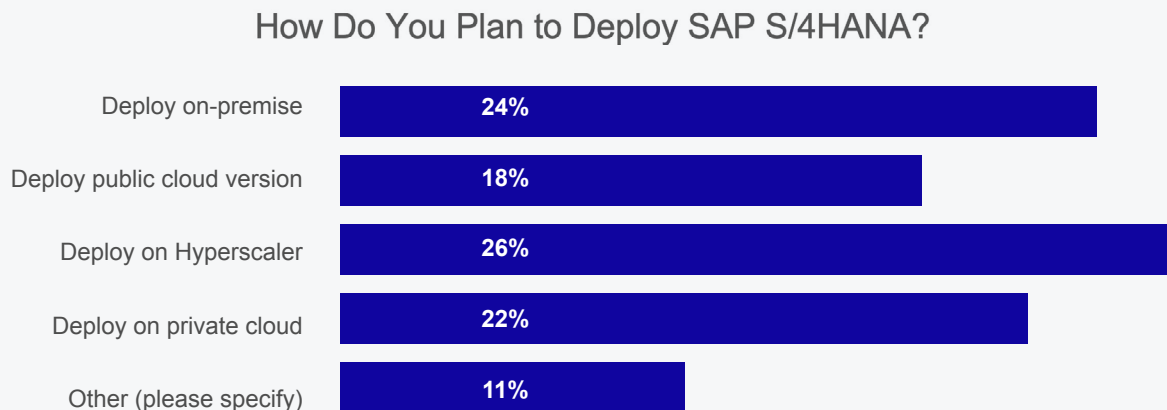


evaluation phase while another 9% are conducting pilot projects and proof of concepts. Only 13% of respondents are staying put and report that they have no plans to upgrade. Many of these organizations will either bite the bullet and pay for extended maintenance or examine other options.

Cloud is certainly the prominent choice for SAP S/4HANA deployments (**Figure 3**). 66% of

executives in our study are pursuing a flavor of cloud with hyperscalers leading the way (26%). Nearly a quarter (22%) are choosing private cloud for security and control objectives while 18% are opting for software-as-a-service. SAP, through its RISE with SAP and GROW with SAP offerings, is looking to make cloud the more attractive option for its customer base.

FIGURE 3



The Pace of Cloud Application Adoption Continues to Climb

More and more organizations are adopting new, best of breed cloud applications to help transform their business. The adoption of new applications has taken over the third spot in how customers characterize their major transformation projects, garnering 38% of responses. With the advent of the cloud, it is much easier for businesses to roll out new applications that meet their needs. We are also seeing an end of life and end of maintenance for a host of applications that go beyond just core ERP. This is forcing leaders' hands and generating wider momentum for "best of breed" solutions to be implemented and deployed along with ERP. The modernization of a business's application landscape is inclusive but goes beyond the scope of an ERP migration.

"We have kicked off two initiatives including an RFP for Advanced Planning system. We are upgrading, updating, or replacing a number of applications that are at end of life this year, including our homegrown WMS system, Forecasting and Budgeting tools and Data Warehouse," reports a business process executive from an Industrial Manufacturer.

AI Asserts Itself in the Transformation Mix but Lack of Skills and Education Remain Challenges

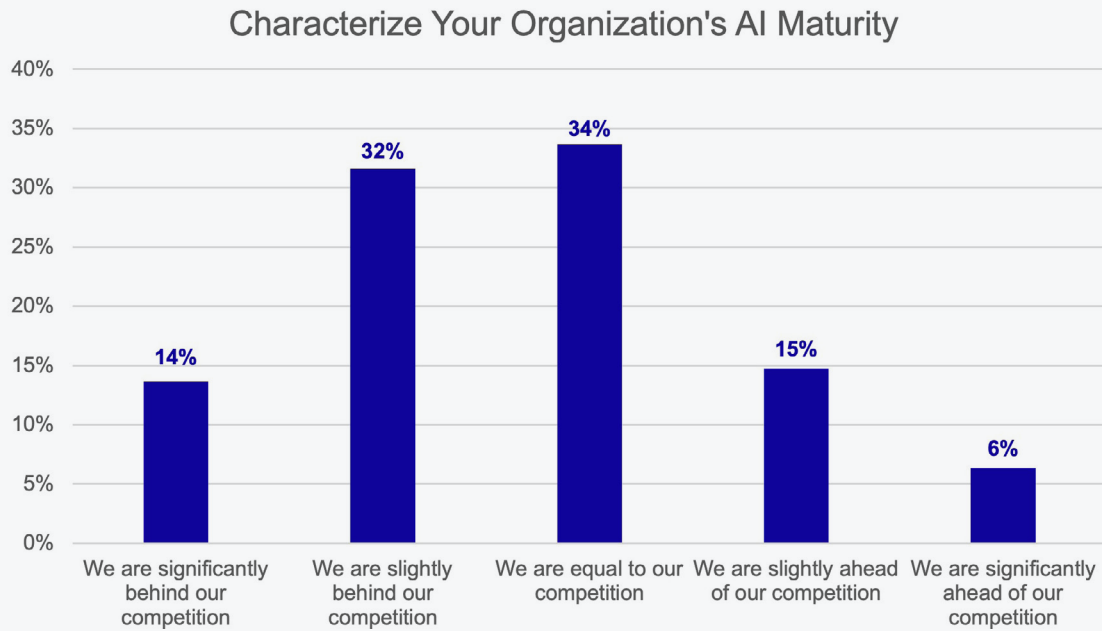
While Artificial Intelligence and Machine Learning are generating tremendous hype, just a quarter of companies say that AI has been a major part of the transformation in 2024. Companies have yet to leap over the learning curve and assemble the right tools and knowledge to build real-world applications as of late. But that does not mean that momentum will not pick up shortly.

We also asked leaders in the study to self-assess their AI maturity. Not surprisingly, nearly half (46%) of customers report that they are either slightly or significantly behind their competition (**Figure 4**). In some of our previous studies such as The CIO's 2024 Agenda for SAP, SAP S/4HANA, the Cloud, and Beyond, we found that a lack of knowledge and practical experience are among the top impediments holding companies back. Preparing and securing data to support AI models also came up quite often in interviews and surveys.



"Cloud applications outside of ERP are critical in filling gaps or enhanced capabilities in our integrated processes. Being a cloud application, if the vendor offers modern integration such as API, it simplifies integration architecture to the point plugging a cloud application into S/4 becomes seamless to the user."

MARK SLATER, VP OF DIGITAL
BUSINESS SOLUTIONS,
REYNOLDS CONSUMER PRODUCTS

FIGURE 4

One Digital Transformation Leader at a high-tech organization characterized the AI barriers very well and we captured their sentiment below:

- “The barriers to AI adoption fall into three main categories: organizational, technical, and cultural.
- **Organizational:** A lack of clear strategy often prevents companies from scaling AI initiatives. Many organizations start with isolated use cases but struggle to embed AI across their operations.
- **Technical:** Poor data quality and a lack of robust data governance hinder the effectiveness of AI models. Additionally, integrating AI into legacy systems can be a complex, resource-intensive process.
- **Cultural:** Resistance to change, often driven by fear of automation replacing jobs, creates pushback from employees. Strong change management programs are needed to ensure AI is seen as an enabler, not a threat.”

This year's survey also revealed other trends, including:

- The top driver for transformation continues to be the business need for greater flexibility and innovation as a majority of leaders (53%) selected this as their top option. Highly customized, manual ERP environments must be updated to compete in today's modern business and economic climate.
- Leaders are mixed on the success and progress of their existing transformation initiatives. In this, our fourth year of the study, scores are falling and not rising. Executives face a host of challenges including massing resistance to change, lack of budget and resources and a continued disconnect between IT and business.
- Most executives (56%) in our study continue to see SAP as both a core back-end solution as well as an innovation platform. This sentiment has steadily increased year-over-year as SAP rolls out new solutions such as the SAP Business Technology Platform and Business AI offerings.

Required Actions

Based on the survey responses, organizations should consider the following when optimizing their Transformation Strategies:

- **Leverage the SAP S/4HANA Transition as an Opportunity for Business Transformation.** The opportunity to rethink and reinvent your business process landscape does not come around very often. Do not just think of your SAP S/4HANA migration as strictly an IT exercise or your ROI will fall significantly short of expectations. Apply SAP and other tools to analyze customizations and explore what if scenarios. Deploy process modelling and intelligence tools to give you options for improvement and establish metrics to measure both as is and to be environments.
- **Be aggressive and creative in skills acquisition.** SAP S/4HANA, Cloud, Artificial Intelligence, Business Process Analysis, all require that you expand the skillsets of your organization. Actively explore training and education but do not make that your only route for expanding skills. Hire and partner with different organizations to climb the learning curve more rapidly. But make sure you retain and grow your core business process knowledge because that will separate success from failure when it comes to your transformation objectives.
- **Prioritize education and change management initiatives at the outset of your Transformation Planning.** Resistance to change continues to be the number one challenge that our leaders grapple with when it comes to transformation. Most people do not like change, and the current transformation landscape certainly introduces more change than most IT and business professionals have seen in a long while. It is important that executives stay ahead of this by educating not just at the outset but throughout the project. Listen to your employees but also maintain a firm hand with expectations and do not be afraid to oust naysayers from the organization if they prove to be disruptive.



CHAPTER 1

Drivers and Challenges to Transformation



“We operate in a business environment which is fast-paced, dynamic with ever changing rules of global trade and supply chain disruptions. In that respect, the visibility of events, flow of goods and information is key to customer success. An agile ERP enables us to adapt quickly without requiring extensive reconfigurations and downtime. Flexible ERP also helps to operate with 150+ countries with various local regulations, tax laws and compliance standards.”

TAPAN DASH, HEAD OF CORPORATE APPLICATIONS, MAERSK.

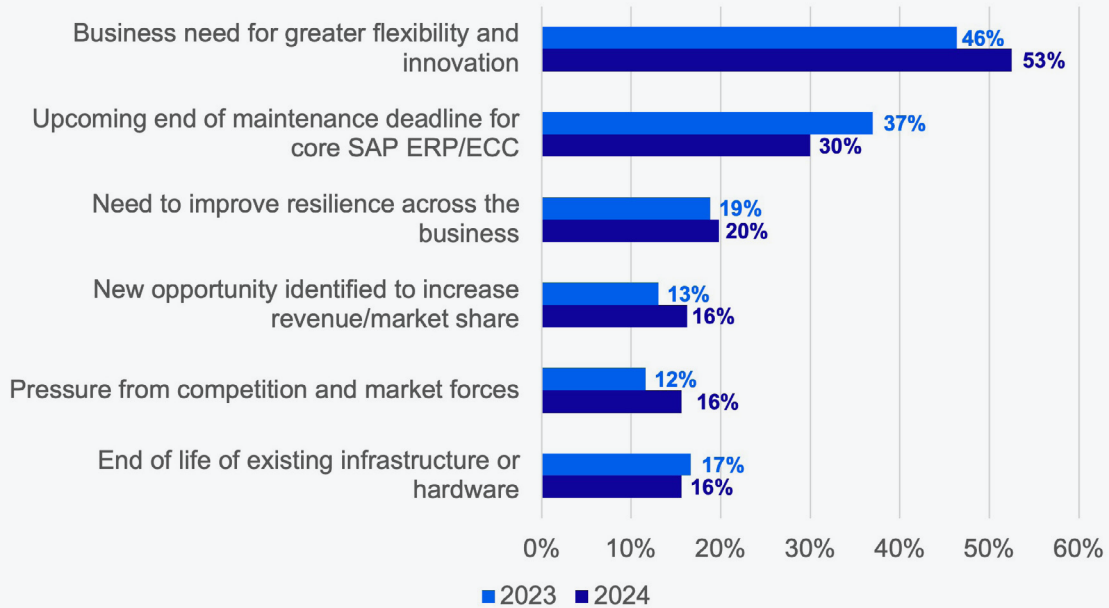
Drivers of Transformation and What Separates Success from Failure

The business need for flexibility and innovation continues to be the top driver for change and has been so over the past 3 years of the study (**Figure 5**). A majority (53%) of leaders surveyed rated this as the most important driver for transformation. The percentage of those leaders choosing this response even rose 6% year-over-year. Highly customized and manual systems cannot adapt quickly to changing economic and business environments. Just as important, these antiquated systems provide little real-time visibility into what is going on within your various operations which are now a must-have for stakeholders and operators.

The upcoming end of maintenance for core SAP ECC earned the second greatest number of responses (30%). Rounding out the top three drivers was the need to improve resilience, which garnered 20% of responses. Resilience is defined as the ability to bounce back and weather challenges. Most businesses face a host of impediments when it comes to business success and with rapid changes in pricing, consumer behavior, and regulatory environments it is no wonder why leaders are valuing this trait within their systems.

FIGURE 5

Core Drivers of Transformation



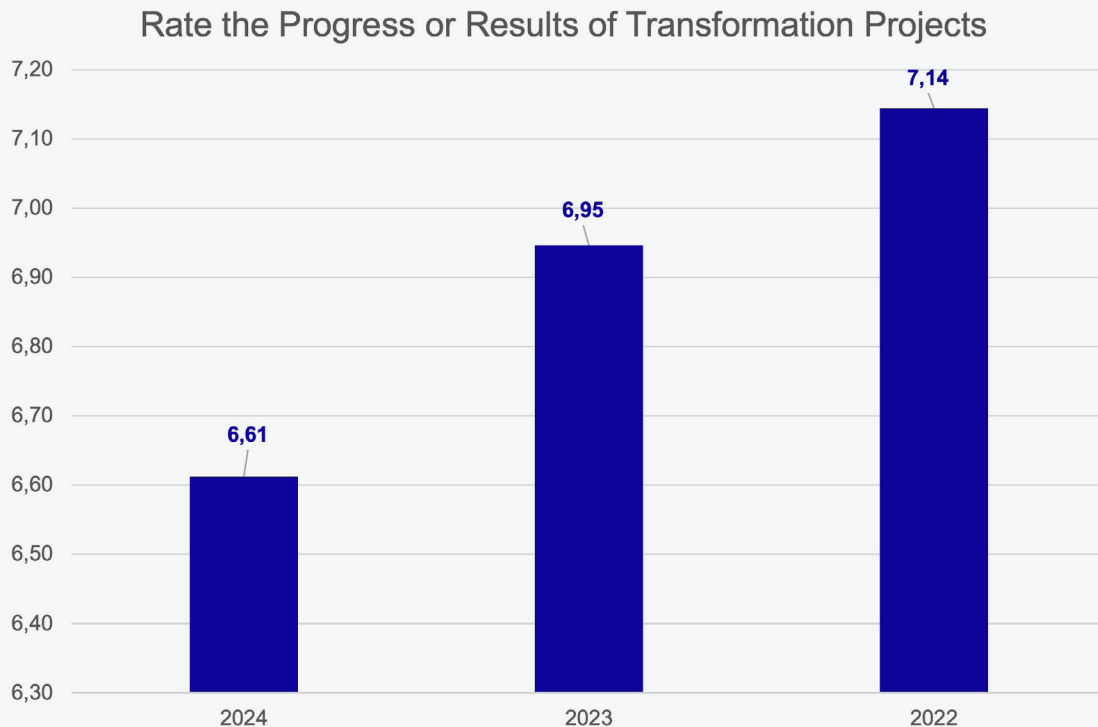
Progress and Results of Transformation Remain Underwhelming for Many

Leaders have become more dissatisfied with the progress and results of their transformation projects, finds this year’s study (**Figure 6**). We asked leaders to grade the progress and results of their transformation on a scale from 1 to 10, where 10 is exceeding expectations and 1 is not meeting expectations at all. The good news is that few respondents are giving themselves outright failing grades. The average for 2024 is 6.61. However, this grade has fallen in each year of the study, showing that most companies are making limited progress in the success of their initiatives.

“Technically, the projects have progressed and delivered on objectives. The difficulty in some areas is obtaining business resources sufficiently skilled to fully leverage the new technologies,” comments one IT leader.



FIGURE 6



Top Challenges to Transformation Success

Resistance to change continues to be the top barrier for transformation success where nearly half of leaders (44%) in our study cited this as a top challenge. This response grew nine percentage points year-over-year. **(Figure 7)**.

The move to SAP S/4HANA touches all facets of IT and business. If teams do not understand the impact and the reason behind what they are doing, you will encounter resistance and lack of knowledge on how to contribute in the most effective ways possible. That is also why we're seeing the disconnect between IT and business teams come up as the second greatest challenge, increasing by 10 percentage points year-over-year.

In order to tackle these significant hurdles, most transformation projects have forced

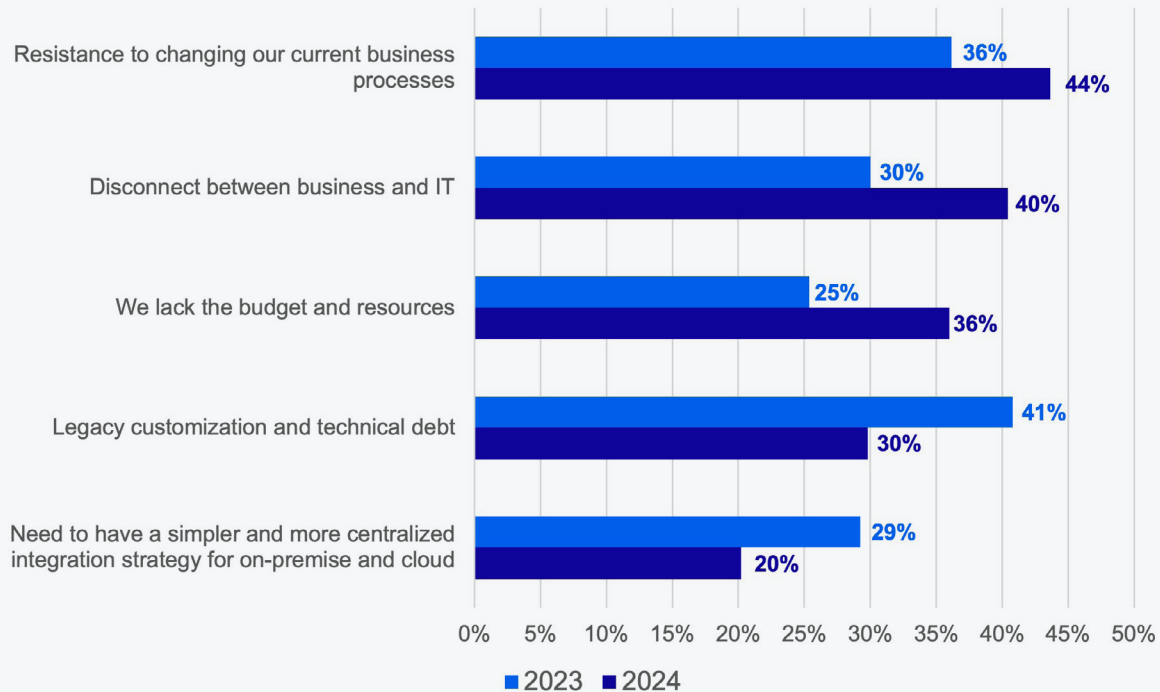
leaders to think differently about their approach, skills, and structure. Those leaders that have been open to training and reorganization have had greater success than those that are trying to impose the same structures and methodologies as they always have without accommodating for a level of flexibility. Building trust and leading with a positive, but firm attitude is essential.

"Our business and IT teams have had to build a mutual mindset and trust-based collaboration between multiple teams that is lead and well organized by a positive attitude of management," reports a CEO of IT Delivery at a Financial Services Organization.

Many of the executives in our study have come to the realization that they do not need to do the entire transformation on their own. They need to deputize their teams right at the outset to do the research, build the business case, and establish measures for

FIGURE 7

Top Challenges to Transformation Success



improvement and success. That helps instill important communication and ownership right from the kickoff of the project. One of the final steps is to ensure feedback and training continue throughout the entire lifecycle of the project.

And of course, there are “tried and true” approaches that need to be part of any transformation initiative and that involve having clear requirements and scope and getting business buy-in on the approach that IT is taking.

“We have started with the right objectives addressing business needs. We are still driving the transformations towards the business goals set, while we are learning we are trying to reduce the gaps through communities of practice, Cross skilling the resources, introducing agile practices for focused initiatives etc.”

reports an Enterprise Architect at a Software and Technology Organization.

Key Takeaways

Do not be afraid to reinvent your team and your management style: Most transformation projects require knowledge, skills, and experience that are likely new to the organization. Do not be afraid to think differently about your team, especially when it comes to incorporating more business knowledge. Also be self-reflective on your own management style. You may have led many IT projects, but today’s transformation environments go far beyond the traditional scope and may require an update of your own skills and perspectives.

Understand and communicate the why: Understanding the why is a key factor in motivating individuals and this has been widely researched and written about in particular by business thought leader Simon Sinek. By helping your entire team understand the objectives and the why behind your transformation you will be able to turn naysayers and generate support for your project from within the ranks. You will need a chorus of internal advocates to make any transformation project a success.

Deputize and distribute control, decision making, and leadership. You will need help in executing and motivating beyond your executive circle. The best way to get people involved is to instill a sense of ownership and control right at the outset. From the evaluation stage get a variety of roles involved from both business and IT. Grant them some decision-making authority and room to experiment. Still be firm with upholding the framework and principles of your transformation initiatives and do not be afraid to settle disputes with authority.



“As CIO, I facilitated the formation of a team of functional stakeholders, empowering them to conduct research, engage with potential partners, and develop both a business case and budget. Their findings are now progressing to a board-level presentation for further evaluation.”

**CURT HAPNER, CIO OF
ALTENLOH, BRINCK & CO.**



CHAPTER 2

Risks, Measures, and Investments for Transformation Success



“Business process improvement is the most tangible and measurable outcome of any transformation project. It reflects real operational gains, such as faster cycle times, fewer errors, and improved compliance. These improvements are not just metrics; they directly impact the bottom line, employee productivity, and customer experience, making them an essential KPI for transformation success.”

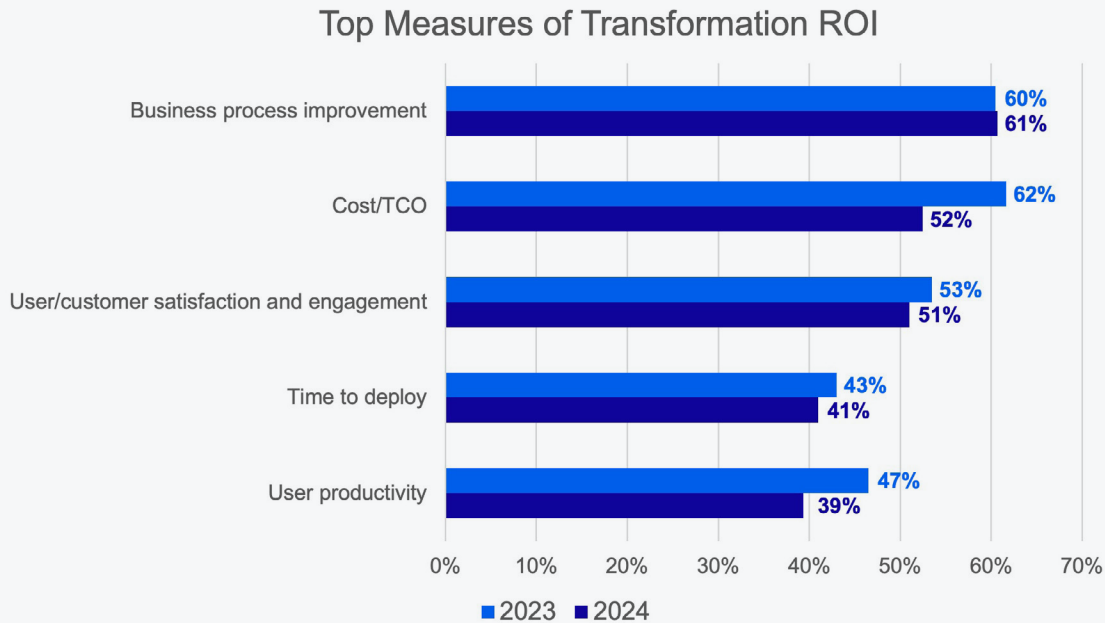
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Surprisingly not all executives have concrete measures for their project. Nearly one quarter of respondents (22%) say that they do not have any concrete KPIs. Instead, these organizations look at catalyst type events, such as the end of maintenance, to justify their spending and then do not follow the impact in a measurable way.

Business process improvement continues to be the top measure for transformation success, as leaders continue to focus on business impact as a way to justify investment **(Figure 8)**. Cost and TCO remain at number two although falling ten percentage points in the year-over-year comparison. User satisfaction was the third most popular response with over half of our respondents (51%) selecting this as their top KPI for success.



FIGURE 8



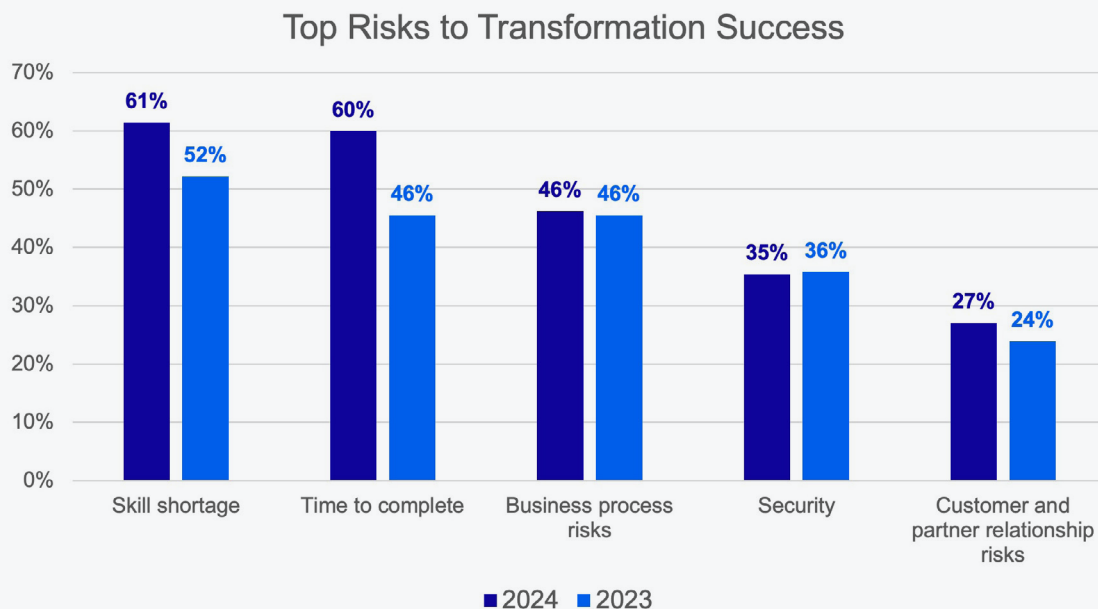
Where Do Transformation Risks Lie

Given the major changes in technology and business processes that most transformation projects entail it is no wonder why ‘skills

shortages’ has become the top risk on the minds of leaders. This took a 9% jump compared to last year. **(Figure 9).**

‘Time to complete’ comes in as a strong number two with 60% of respondents as the impending 2027 deadline for migration to SAP S/4HANA creeps closer. This answer option

FIGURE 9



leaped 14% in our year-over-year comparison.

When we drilled into specific skills that executives are looking to acquire we saw the biggest jump in data management skills which climbed to 32% of respondents from 19% the year before. The executives we interviewed stressed the importance of data management to support greater visibility into the business as well as to serve as an important requirement for both SAP S/4HANA and AI projects. **(Figure 10).**

SAP S/4HANA remain the top skillset that decision makers crave followed by business process modeling and optimization. The findings are in alignment with the prioritization we are seeing around business process transformation as a guidepost for transformation success. The skill sets needed to analyze “as is” states and determine future acceptable performance are critical for those companies that are making this a priority. That is why business modelling and the use of tools such as SAP Signavio are critical to support this approach.

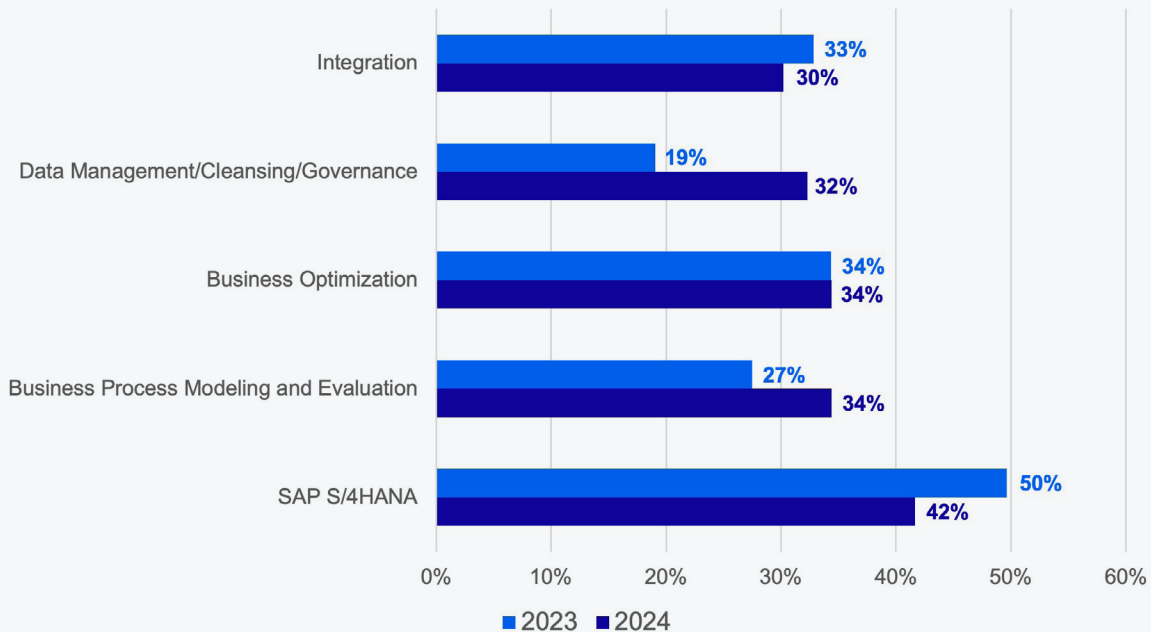


“AI is sometimes seen as a quick fix that will magically automate business processes. However, the reality is that you need good data for a lot of the AI use cases. Data Governance and Data Quality often fall to the bottom of the list, and they are not quick fixes.”

**DIRECTOR OF ANALYTICS,
MAJOR UTILITY**

FIGURE 10

Critical Skillsets Needed For Transformation



Executives Turn to Partners to Fill Knowledge Gaps and Solution White Space

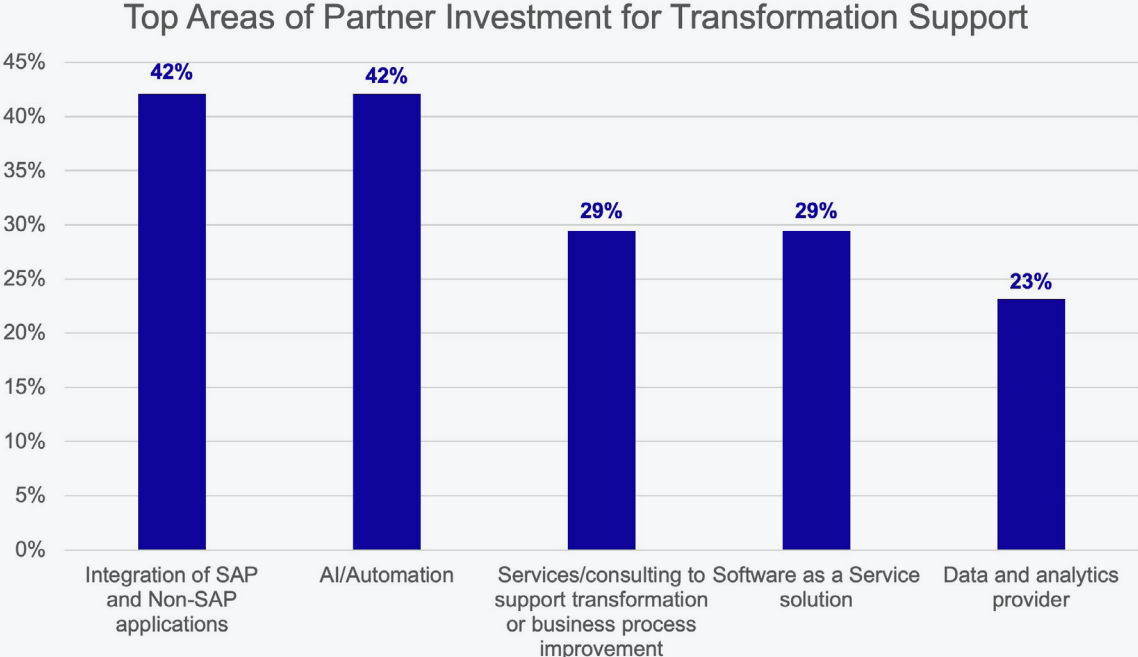
Most organizations use partners in their overall transformation to help fill knowledge gaps and access experienced guidance and best practices for transformation success. Outside of knowledge, they are also looking at particular hardware and software solutions that fill the white spaces that SAP does not touch. They also compare competitive solutions to get the right offering that is tailored for their business.

The areas where they seek the greatest support are not surprisingly focused on integration and AI/Automation capabilities. Nearly half of organizations in our study (42%) are looking to evaluate or make investments in the coming year **(Figure 11)**.

Services and consulting to support the transformation of business processes rounded out the top three with a third (29%) of leaders in our survey indicating that they will be making investments in this partner category.



FIGURE 11





“We are evaluating RISE with SAP and GROW with, but slowly so that we can make a really informed decision. For companies that are still on ECC it should be the first option to consider.”

MARTY MENARD, CIO PACIFIC COAST COMPANIES INC.

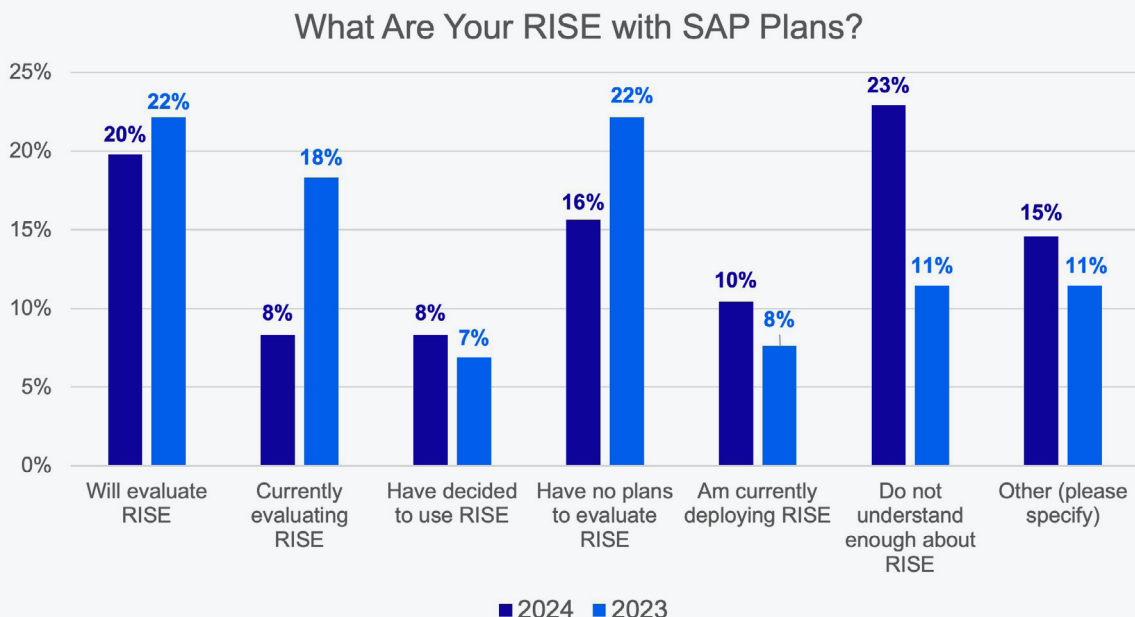
Is RISE on the RISE?

RISE with SAP along with GROW with SAP continue to be the packaged set of solutions and services SAP is advocating to help customers simplify and advance their transformation efforts. We have been tracking executive knowledge when it comes to this offering and adoption continues to move slowly. In this year’s study 8% of leaders have decided to use RISE which is a 1% increase year-over-year. Similarly, 10% are in the middle of RISE deployment which is a 2% increase year-over-year **(Figure 12)**.

The pipeline does not seem to be ramping up significantly. 28% of respondents are currently evaluating RISE or indicate that they will evaluate RISE. This represents a 12-percentage point drop from the 40% of leaders who were evaluating or about to evaluate RISE in 2023. The barrier to adoption remains education as nearly a quarter of respondents in this year’s study say they do not understand enough about RISE yet to move their plans forward.

SAPinsider maintains that even though you may not be a great fit, it is a solution that you must consider if for no reason than to take advantage of the discounts SAP is offering on various add-on solutions such as SAP Business Technology Platform or SAP Signavio. According to several executive interviews we have conducted, the difference between the licensing of some of these products with RISE is exponentially cheaper than contracting for this software without RISE.

FIGURE 12



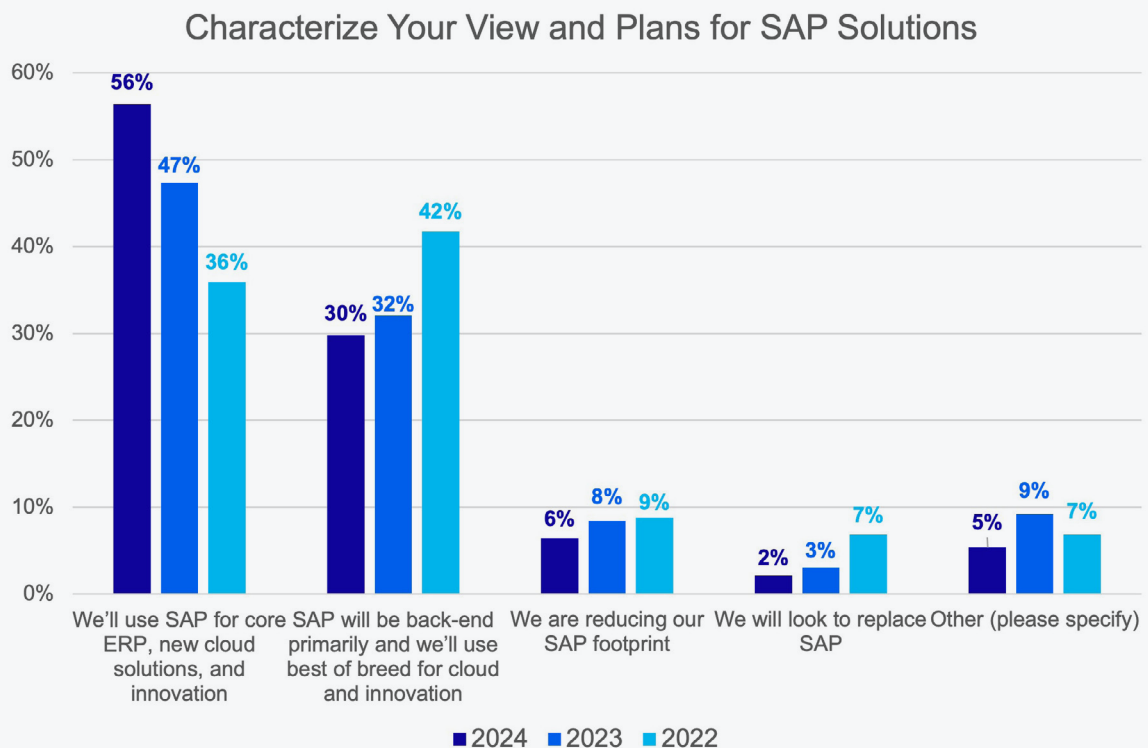
SAP Continues to Make Steady Progress Establishing itself an Innovation Platform

Perception is difficult to change in a day, but SAP has worked hard and diligently to position its innovation capabilities and that has manifested itself in our survey results. When we first asked respondents to “characterize your plans and view of SAP,” just over one third of leaders in our 2022 study indicated that they would use SAP for cloud and innovation. For many (42%), SAP would remain primarily a backend offering.

Cut to our 2024 results and we see that 56% of executive respondents say that they will use SAP for not just core ERP but for new cloud solutions and innovation (**Figure 13**). This represents a 9% increase from 2023 and a whopping 20% increase from 2022.



FIGURE 13

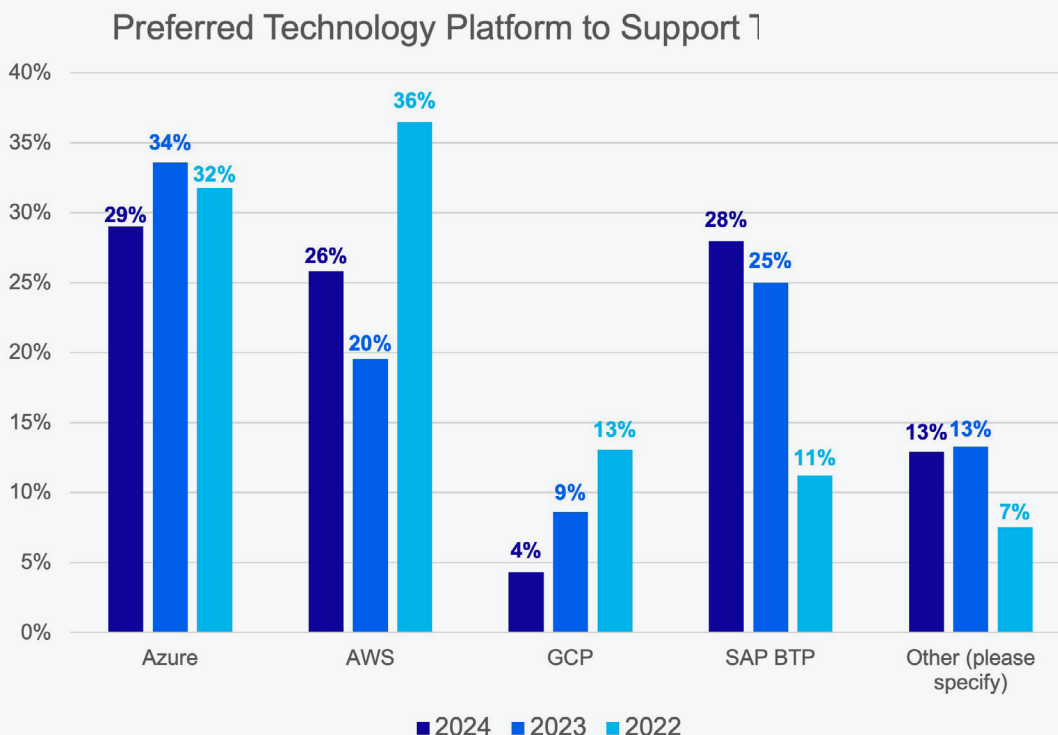


SAP’s focus around the SAP Business Technology Platform and Practical AI for business has helped pay dividends. Our research shows that SAP BTP is the second-most popular preferred technology platform to drive transformation, behind only Microsoft Azure with 28% of responses (**Figure 14**). This is a three-percentage point jump from 2023 and a 17-percentage point jump from 2022. The hyper-scalers still carry heavy weight but the competition is still wide open with many organizations choosing a combination of solutions.

“We see BTP being the mortar in our SAP ecosystem foundation. Being able to leverage it for integration and analytics, as well as automation and low-code options as an extension across the SAP suite, is where we have realized value. Centralized integration, data and analytics, process insights (through Signavio), and identified automation and innovation capabilities are areas we have leveraged to date.”

STEVE BIRGFELD, VP OF IT,
BLUE DIAMOND GROWERS

FIGURE 14



Key Takeaways

Perform a thorough investigation and comparison of RISE with SAP or GROW with SAP:

SAP is making this a sweetheart deal for many companies and without it you may be paying excessively for your software subscriptions. You need to at least have a good working knowledge of this offering so that you can weigh it as a serious option or dismiss its alignment with your transformation plans.

Establish concrete as is and to be KPIs for measuring a wide range of business processes:

The time and investment the move to SAP S/4HANA requires is significant and most CFOs and CEOs will want assurance of business impact. Plus, it just makes good sense to truly understand how your ERP transformation is impacting your business. SAP and third parties offer a host of solutions to help you model and analyze existing processes and to forecast the impact on various business scenarios.

Invest in data management skills:

Most CIOs and executives that we spoke with mentioned that in addition to skillsets, clean and reliable data is the number one barrier to adopting AI, not to mention that it is critical to support any enterprise-wide data and analytics projects. Acquire the skills that will help you implement cloud-based data solutions and take full advantage of advanced and predictive analytics capabilities.

Keep an open mindset when it comes to innovation platforms:

Whether you are an SAP, Microsoft, or Google shop we are finding that many organizations are implementing a combination of cloud-based platforms to support development, integration, and innovation. If you plan to continue leveraging SAP for back-end business solutions you must at least explore SAP Business Technology Platform and understand its capabilities and potential fit. This does not have to replace your hyperscaler solution but can work in conjunction.

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Worksoft helps businesses perform at their best, ensuring that processes are not just running but driving success, regardless of the complexity

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