

Technology Executive Insights

2021 CIO Perspectives: Strategic Business Priorities and the SAP Agenda

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While the ongoing COVID-19 global pandemic has disrupted nearly everything, the crisis also has worked to crystallize CIO priorities. The complexities of conducting work and school remotely, the increased volatility of supply chains, and drastic changes in consumer habits are just a few factors driving a surge in demand for new and different products and services. Operating on Winston Churchill's advice to "never let a good crisis go to waste," CIOs are leveraging the disruption and chaos to push for greater enterprise agility and business and technology scalability, not only to meet current demands but to position their companies for greater success – as well as more inevitable unknowns – down the road.

Our research shows that the CIO's top priorities for 2021 are (1) increasing process efficiencies (62%) and (2) supporting new business models (61%), both of which point to an overall strategy of growth and innovation as opposed to one of constraint (see **Figure 1**). Companies are assessing their operations worldwide, finding and plugging gaps in supply chains, streamlining traditional order-to-cash processes and adopting new ways for teams to communicate and collaborate.

To accomplish these top goals, CIOs are leaning on their leadership, communications, and change management skills. In addition to aligning with business objectives and priorities, the CIO's greatest challenges include keeping far-flung staff motivated, managing change, and leading remotely during disruption. As Holman Enterprises CIO Steve Haindl put it, "The ability to pivot during

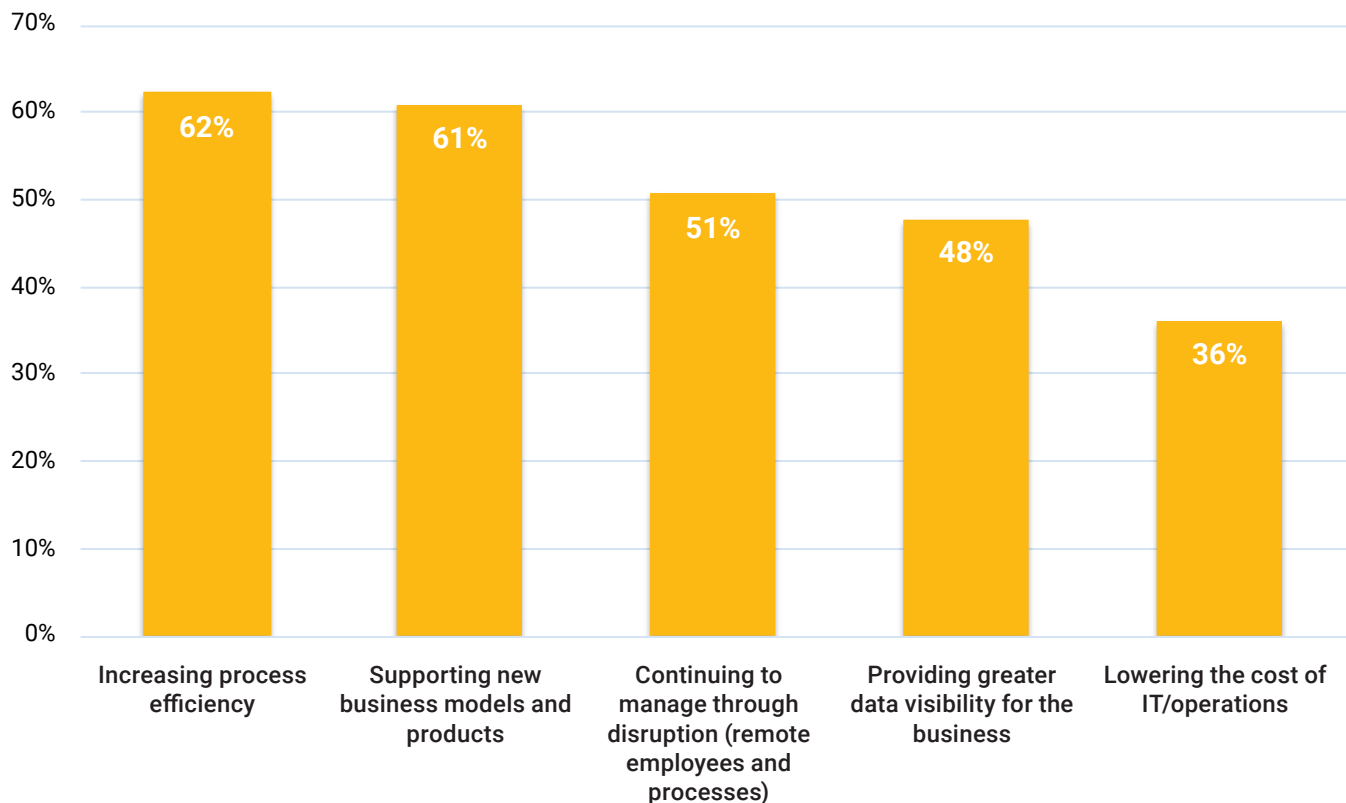
the pandemic is less about technology, and more about culture and communication."

Yet, expanding digital capabilities remains at the heart of business transformation. On the technology front, CIOs are driving harder than ever to migrate systems to the cloud and to streamline their enterprises' digital operations by integrating disparate systems and data.

Technologists with deep expertise in developing application programming interfaces are in high demand. Planned new investments in artificial intelligence and machine learning confirm the high priority status of projects and technologies that afford greater visibility into the business. Faster, more informed decision-making is always a business priority, yet the pandemic has reinforced its critical importance when it comes to enterprise flexibility and responsiveness to partners and customers. "These are all things that companies should be driving toward anyway, yet COVID just highlighted and accelerated them," notes Lance Ralls, CIO at Pelican Products, Inc. in Torrance, CA.

CIOs' top SAP-related priorities and investments for 2021 center on SAP S/4HANA, although interviews with CIOs signal a growing preference for evaluating and implementing the latest version of the ERP business suite as business objectives dictate, rather than choosing SAP S/4HANA to support all functional areas across the board. This is in line with what appears to be an emerging trend toward leveraging best-of-breed solutions that sit atop a state-of-the-art digital core.

Figure 1: What are the top business priorities you will be working on in 2021?



Here are some other highlights from our research and interviews with executives:

- Over half of leaders (51%) in our study say that SAP S/4HANA will be their most strategic investment in the coming year, followed by analytics (30%), artificial intelligence (28%), and hyperscaler migrations (26%).
- Two thirds of executives (66%) report that the budgets for SAP related projects are increasing or staying the same.
- An overwhelming majority of our respondents (94%) say that their SAP teams will stay the same or increase in size. Executives will expand skill sets in the area of SAP S/4HANA, artificial intelligence, and user experience.

“

What does the data tell us now? It's challenging us to look at our historical biases about going to market the same way or selling through the same channels.”

Tony Costa
CIO

Bumble Bee Foods



Unforeseen and catastrophic disruption certainly makes business priorities crystal clear. Less than a year into the COVID-19 pandemic, our research found that increasing process efficiencies and supporting new business models topped the list of CIO priorities for 2021 (see **Figure 1**). Translation: Change nearly everything and execute those changes faster than ever before. That includes enabling legions of remote workers while anticipating and accommodating abrupt shifts in supply and demand worldwide. In other words, create and immediately begin operating according to a set of processes and technologies in line with the new, continually unpredictable, and highly volatile normal.

For Blue Diamond Growers, a grower-owned cooperative and the world's leading almond marketer and processor, 2020 brought COVID-19 as well as trade wars, port-related shipping disruptions, market price corrections, and foodservice shutdowns. It also brought a 30% uptick in ecommerce sales through retailers like Target and Walmart, which explains the company's intensive focus on improving supply chain efficiencies in 2021. Two of the company's biggest operating changes were reducing its number of SKUs (Stock Keeping Units that internally track retail inventory) and accelerating supply side planning from a monthly to a weekly basis. Successfully making both shifts will require deeper analytics and greater visibility into overall operations, says Steve Birgfeld, VP of IT at the Sacramento-based cooperative. As a result, Blue Diamond's emphasis this year will be on bolstering machine learning and AI ca-

Additional Insights from Our Executives

There are many factors that influence a leader's ability to meet strategic goals. We asked our executive survey respondents what was required for them to effectively manage their top business priorities in 2021. Their top 4 answers were:

1. Clear communication of strategic goals
2. Culture that embraces change and innovation
3. New partner relationships and expertise
4. Strategic technology investments

pabilities. "The priority is to extract [from our systems] good information so that we can make solid decisions faster and not just run a report to see what has sold."

That need to bolster smart business decisions with supportive data is not lost on Tony Costa, CIO of San Diego-based Bumble Bee Foods. "What does the data tell us now? We learned a lot about SKU rationalization during the pandemic," he says, explaining how Bumble Bee produces and markets all types of tuna products.

Yet supply chain constraints meant winnowing all those products down to the top six best-selling and highest value SKUs – a difficult decision that wouldn't have been considered pre-pandemic, he notes. "Once sales gets a SKU (placed) in a supermarket, it is hard to let it go," Costa says. "It's challenging us to look at our historical biases about going to market the same way or selling through the same channels."

As a CIO who champions change – not just in technology and business processes but the status quo in go-to-market strategies – Costa acknowledges how hard it can be for an iconic brand like Bumble Bee "to come together and embrace change."

62%

of executives and leaders surveyed
report that process efficiency is their
top business priority in 2021.

“

What I wonder is that while [many of the] changes from Covid are here to stay, how do we not lose what makes our IT department special?”

Sanjay Shringarpure
CIO
E&J Gallo Winery



One third of CIOs say staying aligned with business objectives and priorities is their highest hurdle to clear in 2021, followed closely by managing change (28%), keeping up with technology (28%), balancing the different priorities (26%), and leading remote workforces (24%). The one lesson continually reinforced for them throughout 2020 was to expect the unexpected – even the unfathomable – and to respond by pivoting as fast as possible.

“What we thought we’d be doing in 2020 and now in 2021, and what we actually did are very different,” notes Michele D’Alessandro, VP and CIO of Manufacturing IT at \$48 billion Merck & Co., Inc. Among other urgent business priorities, Merck greatly accelerated implementation and adoption of augmented and virtual reality technologies to enable managers, engineers, and other specialized workers forced by the pandemic to work from home “to walk the floor of the manufacturing facilities when they couldn’t be there.” The VR initiative, known as Remote Assist, was up and running at fewer than a dozen locations last year. Today, the system is implemented at more than 50 different locations and has more than 3,000 active users. “It’s a great byproduct of the pandemic,” D’Alessandro says.

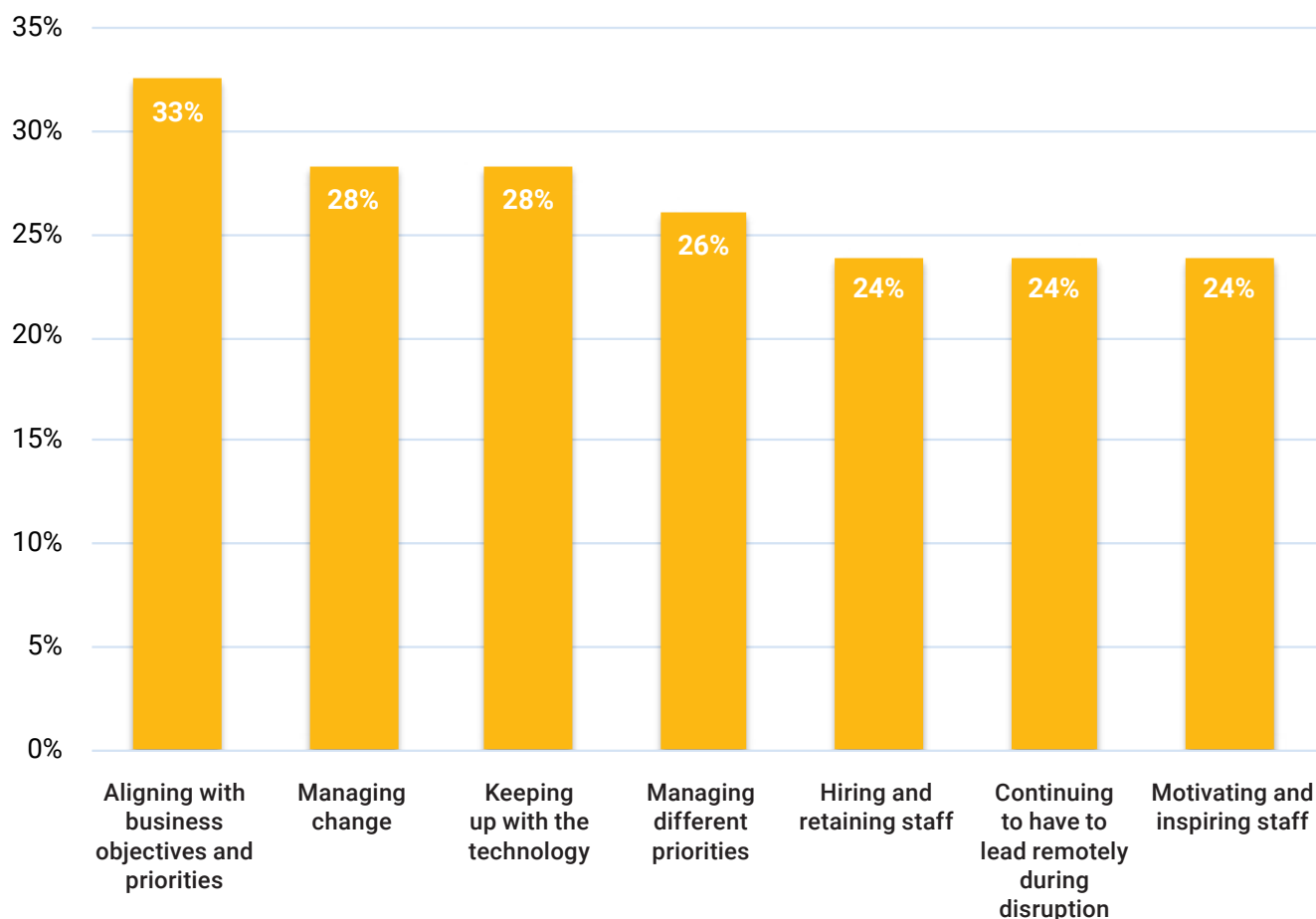
Yet at the same time, she remains attuned to the much larger, more complicated challenge associated with managing change and working remotely — employee health and well-being.

A largely remote workforce is something “none of us were prepared for, and in 2021, we are still a virtual workforce,” with employee

health one of her biggest challenges, D'Alessandro says. One of the most baffling conundrums is the disparity between productivity levels of at-home workers and their mental state. “In 2020, productivity levels were really high, but it has been less than ideal in terms of human interaction,” she explains. “Work and home is so integrated that you can’t draw healthy boundaries and it’s easy to get into a situation where neither are healthy.”

Sanjay Shringarpure, CIO of California-based E&J Gallo Winery, laments the pandemic-induced loss of spontaneous collaborations among team members. “The accelerated use of video and online collaboration tools did lead to an increase in productivity [in 2020] at Gallo,” he adds, noting that the downside is that virtual collaboration “forces a more formal kind of interaction” that eventually can have a negative affect on “the uniqueness of your company culture.” In the past, Gallo’s workplace

Figure 2: What are your top 2 challenges as a leader in 2021?



culture relied on continuous interactions with others and an ability to exchange ideas, not just in formal meetings but during offline activities as well. “What I wonder is that while [many of the] changes from COVID-19 are here to stay, how do we not lose what makes our IT department special?” the CIO asks. “We have to figure out how to continually engage our cross-functional teams in ways that aren’t just about transactional work, but about coming together for a greater purpose.”

How One CIO is Managing His Transformation Remotely

Michael Mullis, CIO of Ingevity, has been helping lead the company’s global business transformation project for the past year, based on SAP S/4HANA, whose first phase will go live this September. In order to do this more effectively, Ingevity has added an operational steering committee to its traditional steering committee that meets weekly (virtually) to discuss progress and issues. The steering committee is made up of important LoB heads across their various functional groups.



“One thing we learned very quickly is that there are disadvantages of not being able to gather people face to face at the onset of the project. You lose a lot of critical team dynamics, and then you have project members that also get burned out in isolation, said Mullis. “You have to check in more regularly, and we realized early on there was a layer missing between the top executives and the project execution team. That’s why we formed this operational steering committee,” added Mullis.

COVID-19 ravaged the backbone of every enterprise – people. Recognizing this, CIOs across the board are intently focused on the welfare and well-being of their teams. In the coming year, they anticipate most heavily leveraging their communications and people-related leadership skills.

An “intentional approach” to more frequent communication is the leadership skill most needed going forward, according to Twila Day, VP and CIO of Huntsman Corp., a Houston-based manufacturer of chemical products. “You cannot be a leader today sitting in an office and not talking to people,” Day says. “You have to be more purposeful about connecting to people and keeping up with them, not just from a business perspective but personally.” Like so many companies where employees were slow to adopt video meetings and online collaboration tools, the pandemic changed that overnight at Huntsman. “Everyone saw that these tools were a foundational mainstay of the business,” she adds.

CIO Brook Colangelo of Waters Corp., a Massachusetts-based provider of lab technologies, consumables, and software, now makes a point to start off many of his team meetings by encouraging staff to share good news — unrelated to work — that everybody can celebrate. “It’s the emotional connection,” says Colangelo, who finds himself drawing heavily on communication skills to deepen his engagement with cross-functional business and technology teams. “We’re having more open conversations around managing stress,” he says, echoing the concerns of many CIOs about the long hours and the mounting stress of working at home. “There’s no buffer anymore. It’s a 7 a.m. to 7 p.m. schedule,” he adds. Before the pandemic, “I rarely had a 7 a.m. meeting, but now they’re super common.”

Additional Insights from Our Executives

Executives face many challenges when managing people, processes, and technology. When asked to identify what they needed – as a leader – to meet the challenges they expect to face in 2021, the top responses were:

1. Strong people management skills
2. Clear direction from top management
3. Cultural awareness and change management
4. Constant communication and coordination among teams
5. Clear vision for internal staff
6. Stay healthy

“

You cannot be a leader today sitting in an office and not talking to people. “You have to be more purposeful about connecting to people and keeping up with them, not just from a business perspective but personally.”

Twila Day
CIO
Huntsman Corp



Nearly one fourth of executives surveyed (24%) said motivating and inspiring staff was one of their top two challenges this year. Roughly the same number identified “continuing to manage through disruption” among their top challenges.

Since the pandemic started, CIOs say work hours have been significantly extended, due in part to the necessity of scheduling video meetings across time zones and navigating the lives and schedules of employees working from home. Like so many leaders who have grown more attuned to employees’ morale and mental state, Gallo CIO Sanjay Shringarpure worries about the erosion of work-life balance. “You have to continually tell your employees to take a break, and you have to create a non-work environment on some calls,” he advises.

Most CIOs have adopted a “video on” policy for online meetings as a way for people to feel somewhat more connected, and they typically allow time for non-work-related conversations and catching up among colleagues. “The pandemic has really just amplified the importance of communication and transparency. We all had to learn to communicate well and differently,” says Tony Costa of Bumble Bee Foods.

Once the newness of working from home wore off, he adds, he missed that “people-first culture” where walk-by meetings and hallway discussions happened all the time. “I came out real early saying to my team: ‘Hey, I’m struggling too,’” Costa recalls. “As a good leader, you have to recognize that we’re all going through the same thing, the same struggles.”

Chapter 4: Reinforcing Key Technology Investments

On the technology front, technology executives in our survey are driving harder than ever to migrate systems to SAP S/4HANA and the cloud, and to streamline digital operations across the enterprise by integrating disparate systems and data.

For more than half of the CIOs in our survey, the most strategic SAP investments for the coming year center around SAP S/4HANA. Likewise, SAP S/4HANA was cited as the most important SAP skillset (48%) that they needed to add to their teams.

For many leaders, a highly customized and difficult-to-change ERP system is seen as an impediment to being able to react quickly to change and provide deep and meaningful visibility into business operations. Many see SAP S/4HANA as a way to meet the new business models and process efficiency objectives cited in previous chapters.

“We had an antiquated platform that was limiting our ability to do new and innovative things with SAP. For us to implement new functionality, it requires significant effort and testing just to do something new. We cannot support the level of innovation we want with that, and that drove us to build a new digital platform with SAP S/4HANA,” said Ingevity’s Mullis.

Several IT leaders indicate a growing preference for evaluating and implementing the latest version of the ERP business suite as business objectives dictate, rather than committing to SAP S/4HANA as a single solution across the board. The more measured pace of implementing select portions of the SAP S/4HANA suite is in line with an apparent trend toward mixing and matching software solutions that sit atop a state-of-the-art digital core. As Gallo’s Shringarpure, who favors a “best-of-suite” approach to evaluating new IT capabilities, puts it: “Just because it’s there doesn’t mean we have to implement it.”

It also may help explain why over the course of this year, twice as many CIOs will be evaluating and/or conducting proof-of-concept projects on SAP S/4HANA, while just 20% will be implementing. Still, it’s important to note that SAP S/4HANA is clearly on the CIO’s planning horizon to implement eventually. At Merck, for instance, CIO Michele D’Alessandro says, “We do have major priorities around SAP S/4HANA, but our work in that space now is more about defining the roadmap than implementing.”

94%

of executives report that their
SAP teams will stay the same or
increase in 2021.

“

Adopting a product model and moving away from IT project teams delivers “a more modern operating model that IT-focused companies like Facebook and Amazon use. We know we can have a greater return and better [IT] architecture.”

Michele D'Alessandro
VP and CIO of Manufacturing IT
Merck



On the investment side this year, two thirds of the leaders (66%) in our survey are either increasing or keeping their SAP budgets the same, while 34% were expecting smaller expenditures.

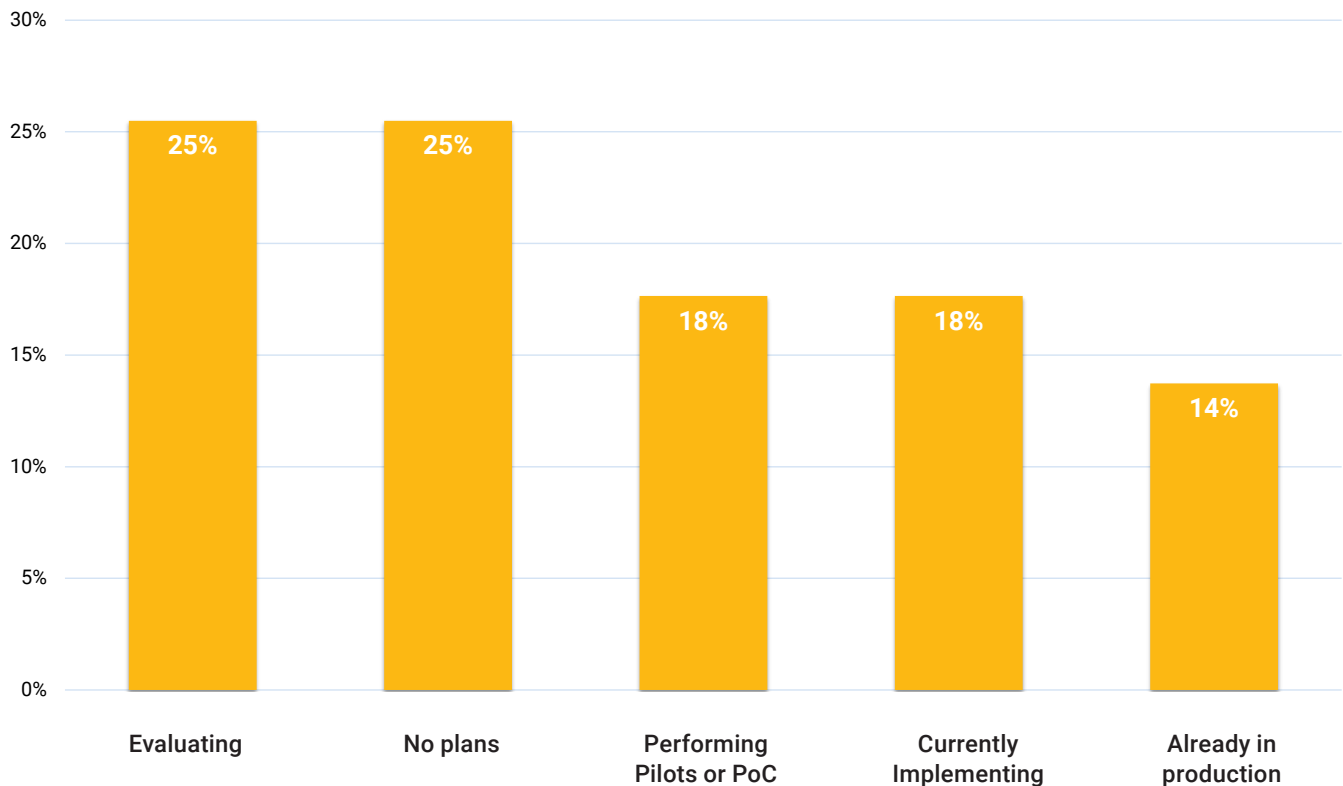
This trend is supported by leaders' outlook on their teams and skill sets. Nearly all of the executives in our research (94%) say that their SAP teams will either stay the same or grow this year. Over one third (36%) report that their team will increase headcount in 2021. Executives say that they will expand their teams' roles and skill-sets to support their SAP S/4HANA evaluations and migrations, and also to improve their use of data, analytics, and cloud technologies.

Outside of SAP S/4HANA, the top technology investments cited by our executive respondents relate to analytics and data warehousing solutions (30%), artificial intelligence (28%), moving workloads to the cloud (26%), and integration (23%).

Nearly half of executives (47%) say they will invest in Software as a Service (SaaS) offerings in the coming year, followed by Platform as a Service (PaaS) and cloud-based artificial intelligence and machine learning capabilities (39%).

Technology chiefs say planned new investments in artificial intelligence and machine learning confirm the high-priority status their companies are placing on projects and products that afford greater visibility (and predictability) into the business. Faster, more informed decision-making is a classic business priority, yet the

Figure 4: Describe your plans for SAP S/4HANA in 2021.



pandemic, and the volatility it has created for most markets, has reinforced its critical importance to enterprise flexibility and responsiveness to partners and customers.

The pandemic also has worked to erode resistance at companies that didn't have a significant cloud presence and to accelerate adoption at companies already moving in that direction. "You start realizing that not only is location irrelevant for your labor force, but also for the infrastructure," says E&J Gallo's Shringarpure. Moving to cloud ultimately "creates greater resilience in your enterprise fabric that wasn't as

66%

of leaders say that their SAP budget will increase or stay the same.

important [before the pandemic],” he adds. Whereas cost and capability were the main cloud decision drivers in IT, Shringarpure sees an emerging “third pillar”: resiliency. “Cloud is a mechanism to increase your resiliency.”

Another notable trend is emerging in how teams accomplish enterprise technology initiatives. CIOs are experimenting with different IT operating models, with tech professionals embedded on cross-functional teams focused on completing work in very short-term sprints and using more Agile approaches as opposed to traditional waterfall project methodologies. At Merck, D'Alessandro is adopting a product model and moving away from IT project teams. “It’s a more modern operating model that technology-focused companies like Facebook and Amazon use,” she notes. “There is a set of products/platform and people wake up every day thinking about (the) business needs of that product/platform. If they’re focused on the continuous evolution of the platform — with partners focused on deriving value — we know we can have a greater return and better [IT] architecture at the same time.”

One unforeseen yet positive upshot of the pandemic is IT’s increased visibility. “With the pandemic, there’s a renewed emphasis on innovation and technology’s role,” says Costa at Bumble Bee Foods. “All of a sudden, IT groups are emerging as strategic and important. We’re re-introducing ourselves to the conversation.”

CIOs agree that across enterprises of all sizes, the sudden and overwhelming reliance on video meetings, online collaboration tools and remote access essentially changed perceptions of IT overnight. At Huntsman, “everyone saw that these tools were a foundational mainstay of the business,” says CIO Twila Day. “This was probably the only time in my career that I actually felt like everyone understood what IT was contributing. It was a year for IT to shine.”

42%

of leaders say that Artificial
Intelligence and Machine Learning
skillsets are critical to add in 2021

Summary & Takeaways

Enterprise CIOs are leading their companies through pandemic-era business disruptions on multiple fronts today. Their change management initiatives are being accelerated by urgent business needs for greater IT resiliency and flexibility to respond swiftly to supply chain challenges, emerging customer demands and a volatile market. Here are four practical takeaways and CIO strategies to consider.

Change Fast and Move Forward

- Take advantage of market chaos by pushing for change initiatives and supply chain efficiencies
- Example: Blue Diamond Growers and Bumble Bee Foods both turned to advanced data analytics to rationalize SKUs and prioritize higher-value products
- “The priority is to get out [of our systems] good information so that we can make good decisions fast,” says Blue Diamond’s CIO Steve Birgfeld, “and not just run a report to see what has sold”

Readjust Your Company Culture to New Realities

- Recognize and then openly address the disconnect between higher employee productivity and the increasing stress of remote work on your unique company culture
- Example: Bumble Bee CIO Tony Costa realized how much he missed a “people-first culture” with daily walk-by meetings and hallway discussions. “I came out real early saying to my team: ‘Hey, I’m struggling, too’”
- “We have to figure out a way to continually engage our cross-functional teams in ways that aren’t just about transactional work,” agrees Gallo Winery CIO Sanjay Shringarpure, “but about coming together for a greater purpose”

Reinforce Investments in Cloud Technologies

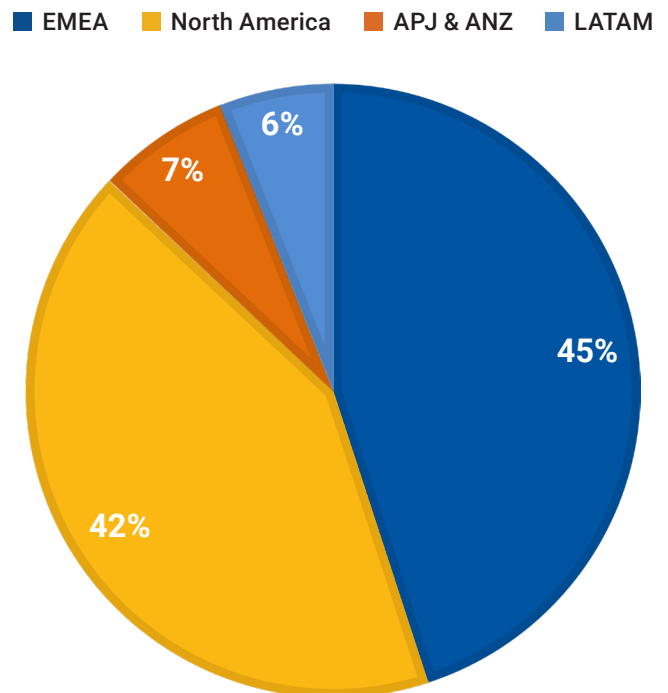
- Take advantage of IT’s greater strategic value today to underscore how migrating systems and applications to the cloud can deliver greater infrastructure resiliency
- Example: The sudden onset of overwhelming reliance on cloud-based video and collaboration tools changed perceptions of IT overnight at some companies. At Huntsman Corp. in Houston, “Every one saw that these tools were a foundational main stay of the business,” says CIO Twila Day
- Moving to cloud ultimately “creates greater resilience in your enterprise fabric that wasn’t as important [before the pandemic],” says Gallo CIO Sanjay Shringarpure. While cost and capability were once the main cloud decision drivers, “Cloud is a mechanism to increase your resiliency”

Communicate with Purpose and Compassion

- Taking an intentional approach to more frequent communication with staff and colleagues is the most important leadership skill CIOs need going forward
- Example: While most companies use virtual collaboration tools for meetings now, CIO Brook Colangelo of Waters Corp. makes a point of doing regular ‘good news’ check-ins with his team to reinforce the emotional connections
- “Work and home is so integrated that you can’t draw healthy boundaries and it’s easy to get into a situation where neither are healthy.” – Michele D’Alessandro, VP and CIO of Manufacturing IT at Merck

In January and February of 2021, SAPinsider examined the agenda and priorities of top technology executives whose organizations run SAP. Our survey was administered to 70 members of the SAPinsider Executive Community 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. SAPinsider also conducted a series of in-depth interviews with CIOs and other executives to provide a deep level of context around this directional data. The combined survey and interview process delved into questions such as the following:

- What are your top SAP-related priorities or projects for the coming year?
- Is your SAP budget increasing, decreasing, or staying the same, and why?
- What are your key leadership challenges 2021?
- What specific technologies are you investing in and why?
- What are the most important skills and roles you need to add to your team and why?
- How has the recent economic disruption impacted your projects, priorities, and leadership approach?



- The demographics of the respondents included the following:
- **Market sector:** The survey respondents came from every major economic sector, including: High Tech (44%), Industrial (35%), Financial Services (10%), Retail, Distribution & CPG (6%), Public Services & Health Care (4%), Hospitality, and Transportation, and Travel (2%).
- **Geography:** Of our survey respondents, 42% were from North America, 45% were from Europe, the Middle East, and Africa, 7% were from Asia-Pacific, Japan, and Australia, and 6% were from Latin America.



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