ERP ABC Solutions
Small Business Market Study
Prepared for ABC Company

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Table of Contents

- Study focus and methodology

- Demographics

- Business Profile

- Accounting/Financial solutions currently used

- Plans for ERP

- Perceived Benefits of ERP

- Segmentation
  o Industry

Survey Objectives

Small business environment:
- Key business challenges and opportunities that small businesses (1-50 employees) in this segment are facing.
- Key trends in managing their businesses from a software perspective, challenges, obstacles and factors in decision-making.
- Key business decision-makers/influencers.

Adoption of business software:
- Use of business software by small businesses in targeted segments: what solutions they use, what role these solutions play in overall strategy, is business software considered a key strategic tool for the organization?
- Top business benefits that businesses get from business software solutions.
- Budgets for business management/accounting/ERP solutions.
- Added capabilities that could make a solution more attractive to users and non-users.

Current and Planned adoption:
- What solutions they use/plan to use; key decision making criteria.
- How long have they used their current solution; level of satisfaction; likelihood of switching brands?
- Understanding of cloud-based solutions, perceived issues and benefits.
- Understanding of the benefits and value of integrated "one version of the truth" suite solutions.
- Planned business management/accounting/ERP solutions (timeframe, brands considered, etc.)

Information and purchase sources:
- What are the best online channels to reach small Businesses - what are their online habits?
- Media/influencer sources that prompt company consideration/purchase of business management/accounting/ERP solutions.
- Purchase channels for business management/accounting/ERP solutions.
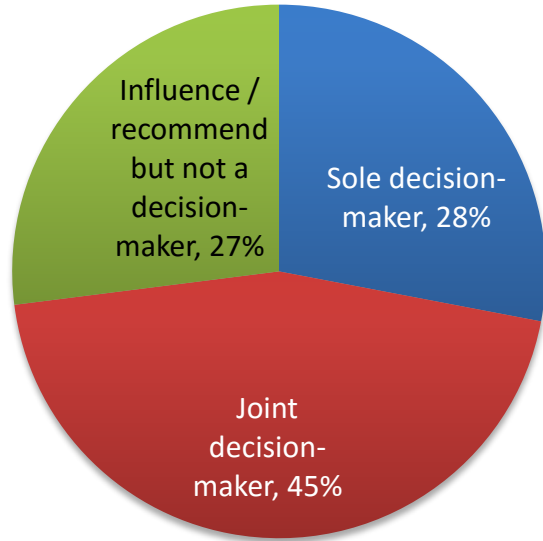
Survey Definitions

- **On-premises solution:** often abbreviated as on-premises software, this means that you install and run the software computers on your company's premises.

- **Cloud-based or software-as-a-service (SaaS) solutions:** Applications that you access from a service provider, over the Internet via a web browser.

- **Business management/enterprise resource planning (ERP)** solutions help you manage financial resources, human resources, logistics, distribution, purchasing, supplier and customer relationships, and/or other operational functions in your company.

- **Business intelligence and analytics:** solutions that help you access, view, organize and analyze data to gain insight and drive business planning.

- **Inventory planning:** including purchase advice, stock positions, purchase analysis.

- **Logistics**: managing the process of supply and demand.

Study Focus and Methodology

- Web-based survey

- Data collected in October 2013

- Random sample of small businesses

- 40 questions

- 399 respondents/completed interviews covering six segments:

  o Very small business (1-4, 5-9, 10-19 employees)

  o Small business (20-49 employees)

- Respondents are responsible for making/influencing company's strategy and plans for business solutions and services

Role and Title of Respondents

Role

Influence / recommend but not a decision-maker, 27%

Sole decision-maker, 28%

Joint decision-maker, 45%

Title

CIO/IT Manager 1%

Office Manager 12%

Accountant/bookkeeper 13%

Owner/President/CEO/Partner 38%

Controller/Chief Operating Officer 11%

General Manager 14%

Vice President 11%

Sample Size = 399
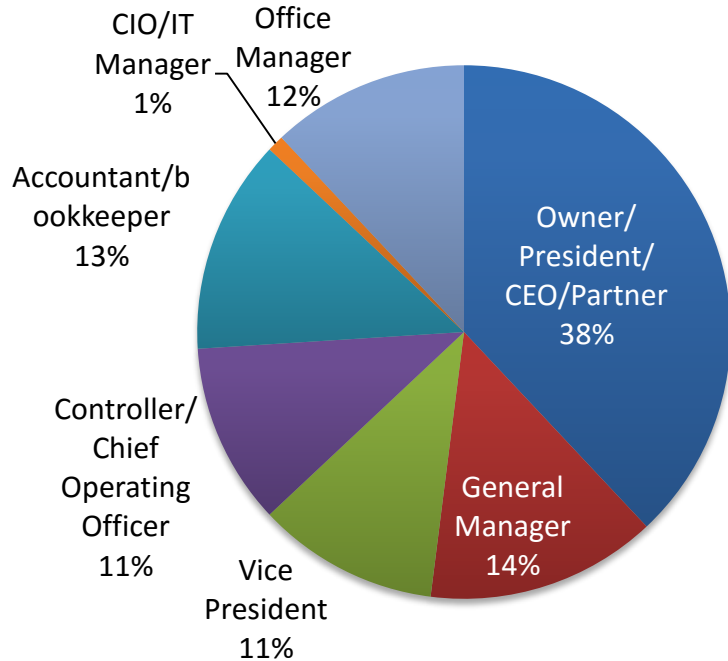
6) Which of the following best describes your job responsibilities with respect to determining your company's strategy and plans for business management solutions and services?

5) What is your job title?

Employee Size and Number of Locations

SMB Group
Actionable Market Insight

Number of Employees

- 1-4 empl. 22%
- 5-9 empl. 26%
- 10-19 empl. 26%
- 20-50 empl. 26%

Number of Locations

- More than 2 locations (commercial) 8%
- One location (home based) 14%
- Two locations (at least one of which is commercial) 24%
- One location (commercial not home based) 54%
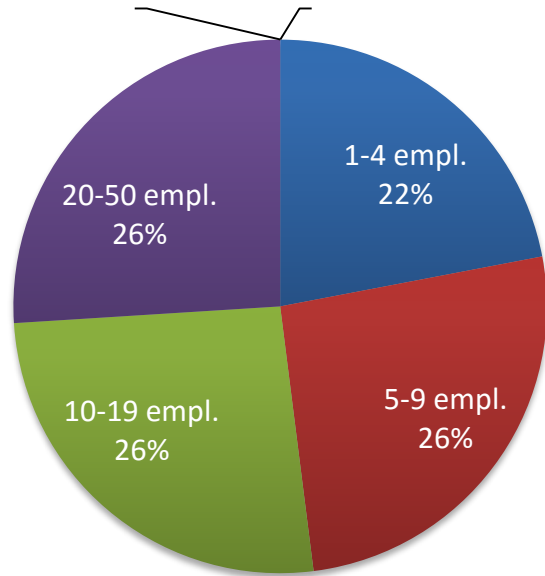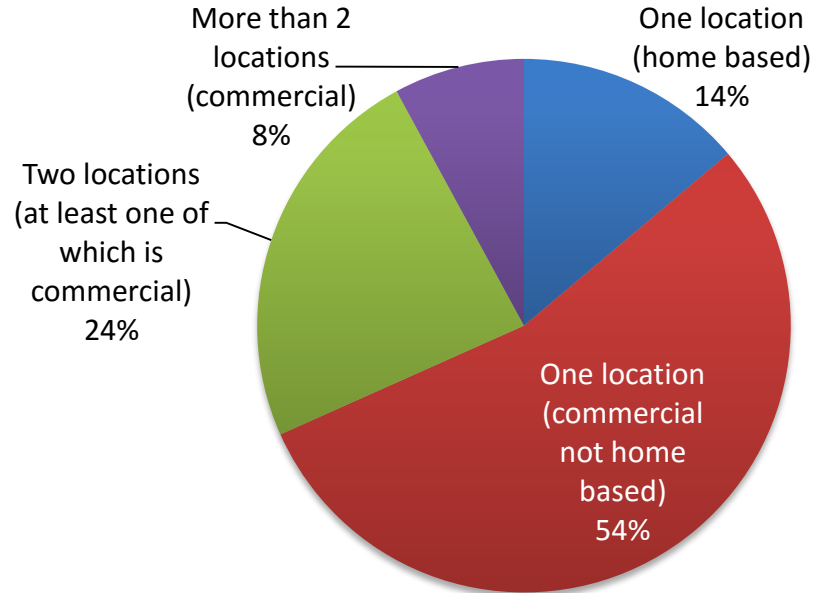
Sample Size = 399

2) How many full-time employees, including yourself, are in your company in total (not including contractors)?

7) How many location or office sites does your company have?

Industry and Accounting/Financial Application Distribution

Industry

Wholesale/distribution 45%

Manufacturing 55%
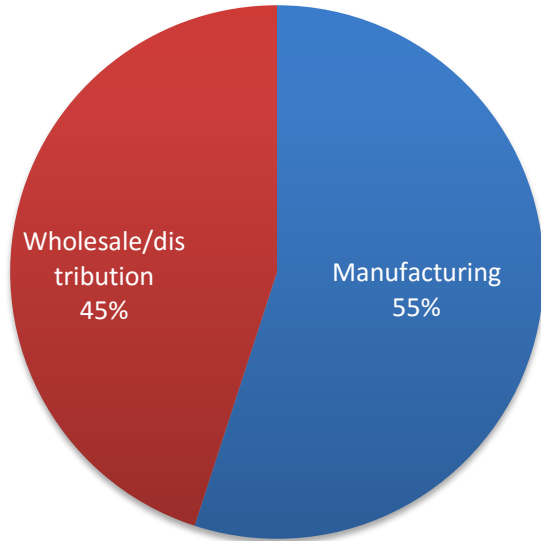
Accounting/financials currently used

Acumatica 1%

Xero 2%

Intacct 2%

Sage Software 17%

Microsoft Excel 23%

Intuit QuickBooks 55%
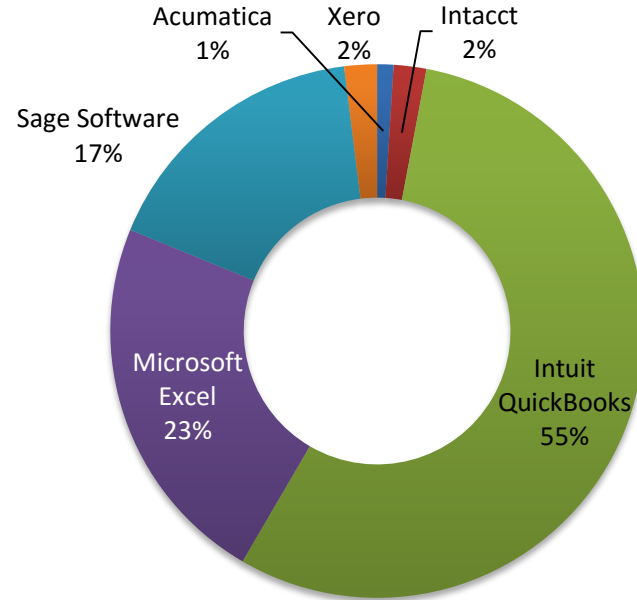
Note: Acumatica, Intacct, and Xero have low sample size and should be used only for rough guidance purposes

1) What industry is your company in?

Sample Size = 399

4) What brand of accounting/financials software does your company currently use?

Annual Revenues for Current Fiscal Year

Revenue distribution

Don't know 2%

$25,000 to $49,999 3%

More than $100 million 1%

Prefer not to say 5%

Under $25,000 3%

$50,000 to $100,000 4%

$50 million to $99.9 million 1%

$100,000 to $249,999 3%

$25 million to $49.9 million 2%

$10 million to $24.9 million 9%

$250,000 to $499,999 12%

$5 million to $10 million 11%

$1 million to $4.9 million 30%

$500,000 to $999,999 14%
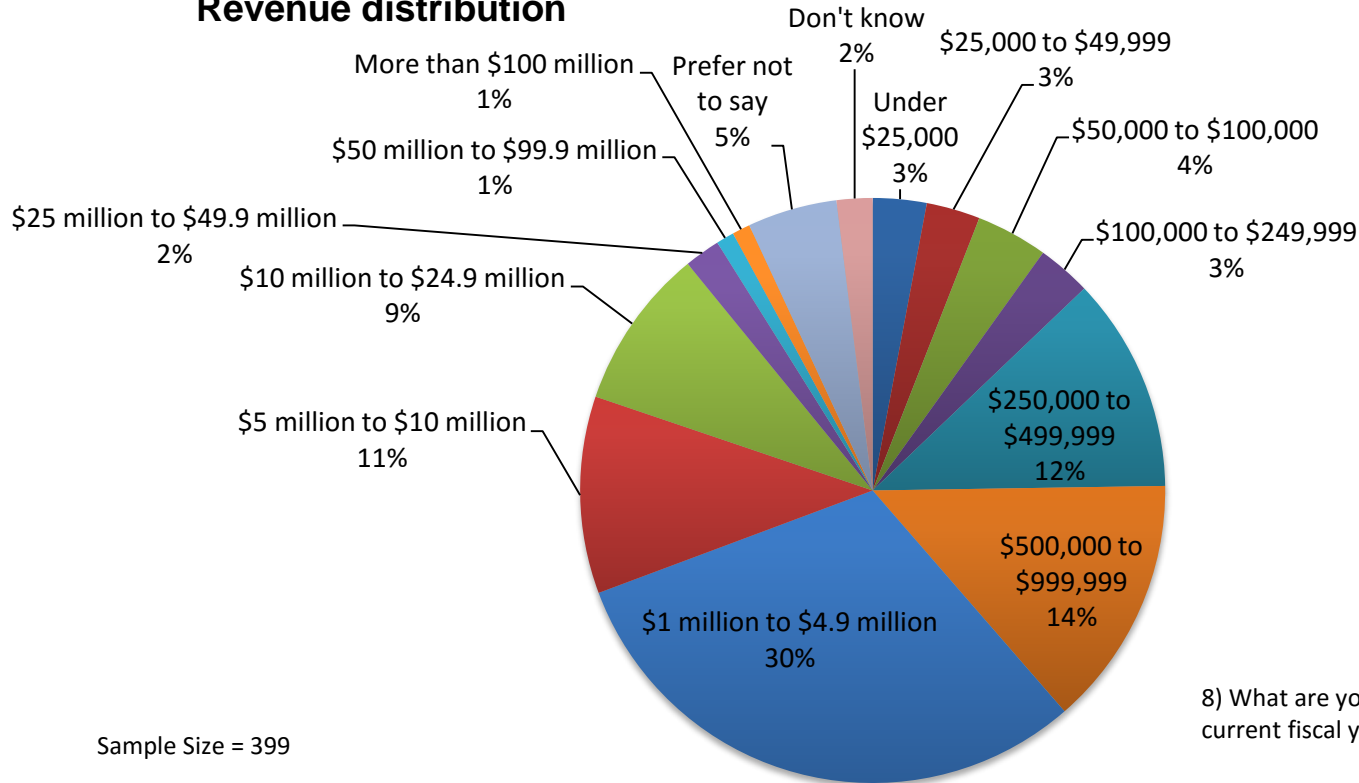
8) What are your company's annual revenues for the current fiscal year?

Sample Size = 399

Projected Revenue Change and Hiring Outlook

Projected revenue change next fiscal year

- Increase: 61%
- Remain flat: 27%
- Decrease: 6%
- Don't know: 5%

Hiring Outlook

- Hire, 39%
- Layoff, 3%
- No change, 49%
- Don't know, 9%
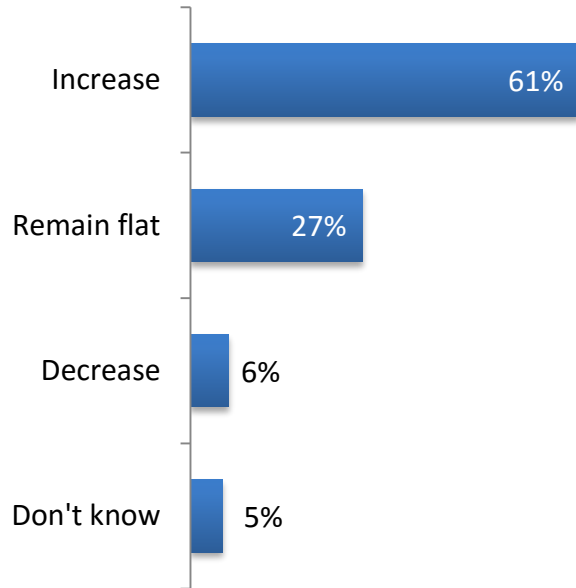
8_1) Projected change (in percentage) in revenues for next fiscal year
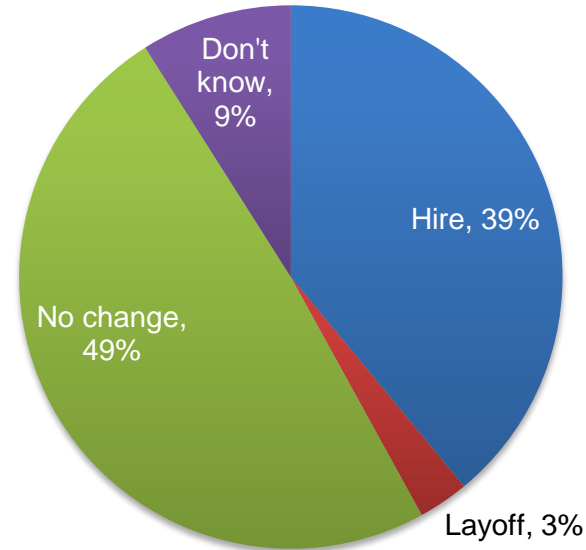
9) Does your company plan to hire or layoff additional salaried employees within the next 12 months?

Sample Size = 399

Top Business/Market and Financial Challenges

Top Business/Market Challenges

- Attract new customers — 72%
- Deal with changes in the economy — 57%
- Competition from other companies — 45%
- Attract and keep quality... — 34%
- Better manage pricing — 32%
- Provide better customer service... — 30%
- Improve our understanding of... — 27%
- Other

Top Financial Challenges

- Grow revenues — 75%
- Improve operating margins — 70%
- Improve cash flow/increase cash on hand — 64%
- Manage rising health care costs — 46%
- Manage rising energy costs — 23%
- Obtain financing — 20%
- Other (please list)

Sample Size = 399

10) What do you view as the top 3 business/market challenges facing your company?

11) Please select the top 3 financial challenges facing your company?

Top Operational Challenges

Challenge	Percentage
Improve sales efficiency	62%
Improve employee productivity	46%
Better manage supplier relationships	39%
Finding skilled workers	34%
Improve manufacturing process	33%
Find/deploy new technology solutions that will help our…	32%
Improve delivery process	28%
Manage compliance with federal, state and local regulations	24%
Other (please list)	3

Sample Size = 399

12) Please select the top 3 operational challenges facing your company?

Percentage of Inaccurate Job Estimates and Invoices

SMB Group
Actionable Market Insight

% Inaccurate Job Estimates

- Don't know, 11%
- More than 50%, 6%
- 40% - 49%, 1%
- 30% - 39%, 2%
- 20% - 29%, 9%
- 10% - 19%, 16%
- Less than 10%, 55%

% Inaccurate Invoices

- More than 50%, 4%
- 40% - 49%, 1%
- 30% - 394, 1%
- Don't know, 3%
- 20% - 29%, 4%
- 10% - 19%, 6%
- Less than 10%, 82%
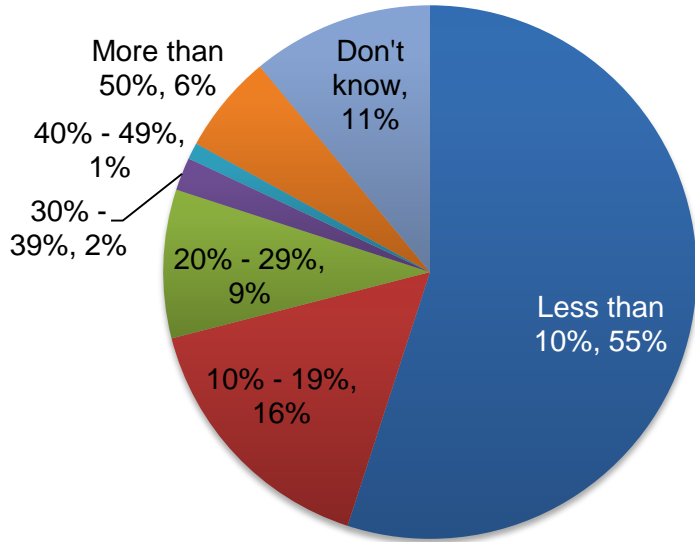
13) Approximately what percentage of your company's job estimates are inaccurate?

Sample Size = 399
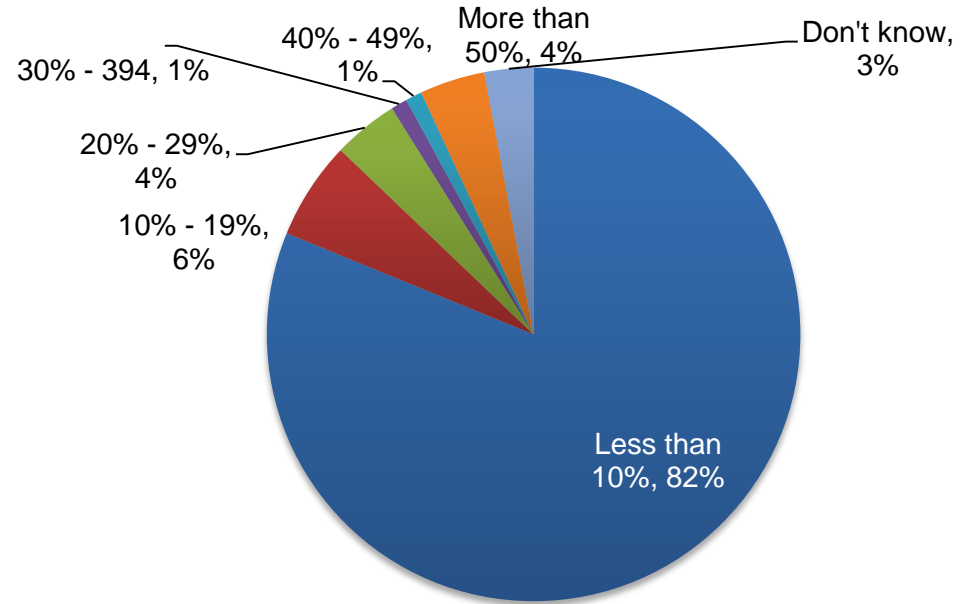
14) Approximately what percentage of your company's invoices are inaccurate?

Years Accounting Application Used and Deployment Method

Years using application

Legend: ■ Less than 1 year ■ 1 to 4 years ■ 5 to 9 years ■ More than 10 years

Application	Less than 1 year	1 to 4 years	5 to 9 years	More than 10 years
Xero	33%	67%		0%
Sage Software	4%	18%	37%	41%
Microsoft Excel	8%	33%	21%	38%
Intuit QuickBooks	2%	29%	34%	35%
Intacct	33%	67%		0%
Acumatica	75%	25%		0%
Total	6%	29%	30%	36%

15) How long has your company used this application?
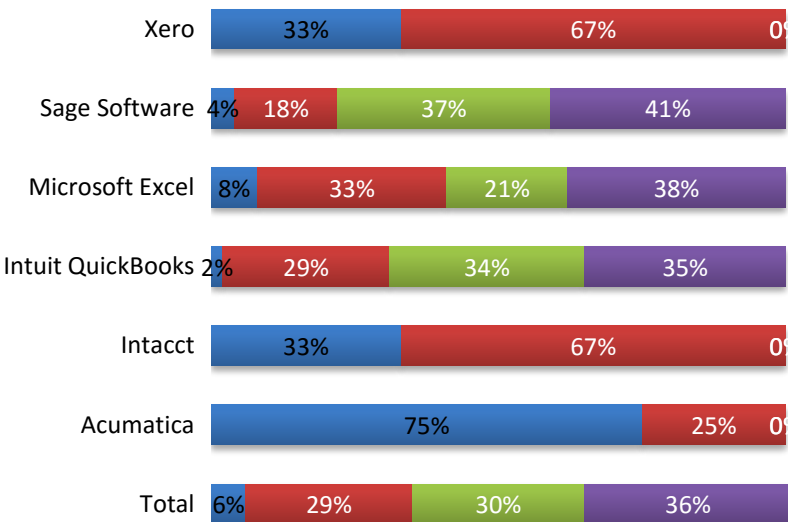
Sample Size = 399

Deployment method

Cloud/software-as-a-service (SaaS) that we access over the internet, 9%
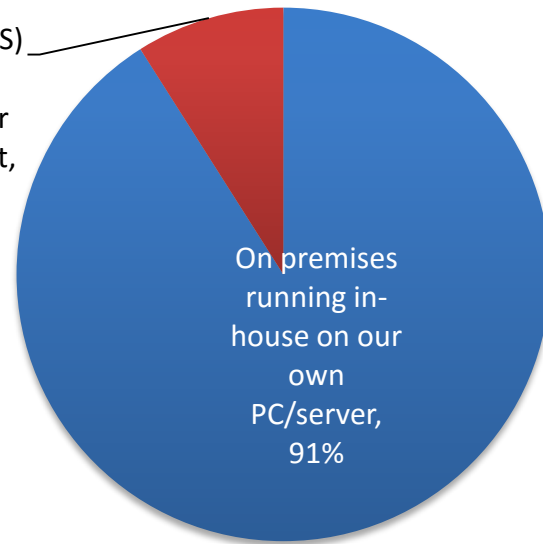
On premises running in-house on our own PC/server, 91%

16) Which type of accounting/financial application deployment method does your company currently use?

Accounting Features Currently Used

Manage and pay bills — 75%

Manage customer accounts — 68%

Create estimates and invoices — 67%

Track sales — 63%

Track inventory — 45%

None of the above — 6%
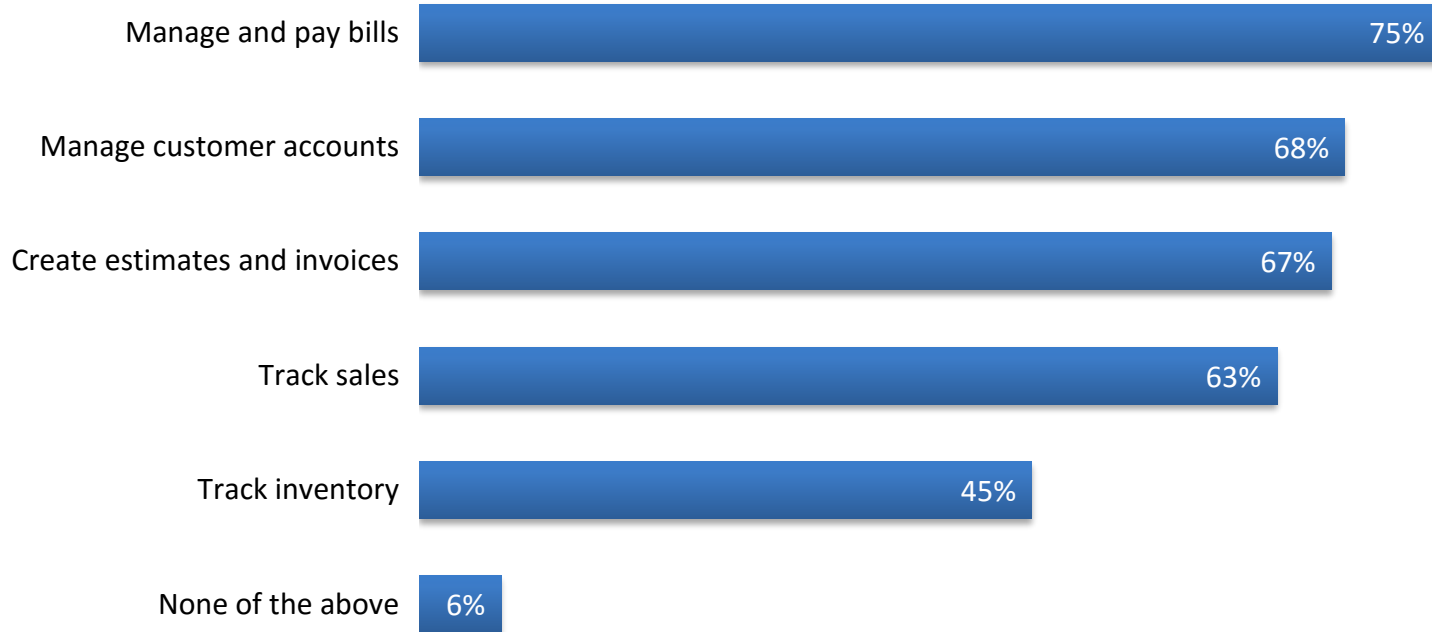
Sample Size = 399

17) Which accounting features does your company currently use?

Features Used and Importance

Accounting features used?

Legend:
- ■ Create estimates and invoices
- ■ Manage and pay bills
- ■ Track inventor
- ■ Track sales
- ■ Manage customer accounts
- ■ None of the above

	Create estimates and invoices	Manage and pay bills	Track inventor	Track sales	Manage customer accounts	None of the above
Xero	67%	67%	50%	33%	33%	0%
Sage Software	82%	88%	56%	76%	79%	1%
Microsoft Excel	44%	38%	48%	57%	48%	18%
Intuit QuickBooks	74%	88%	40%	64%	75%	2%
Intacct	33%	50%	33%	17%	33%	0%
Acumatica	%	50%	25%	50%	25%	0%
Total	67%	75%	45%	63%	68%	6%

Importance of Features

Legend:
- ■ Very important
- ■ Important
- ■ Neutral
- ■ Somewhat not important
- ■ Not important at all

	Very important	Important	Neutral	Somewhat not important	Not important at all
Manage customer accounts	65%	28%	5%	1%	1%
Track sales	67%	22%	9%	1%	0%
Track inventory	62%	28%	10%	0%	0%
Manage and pay bills	74%	21%	4%	1%	0%
Create estimates and invoices	74%	19%	5%	1%	0%

Sample Size = 399

17) Which application features does your company currently use?

17_A) How important are the accounting/financial application features that you currently use?

Third Party Add-on Solution Use
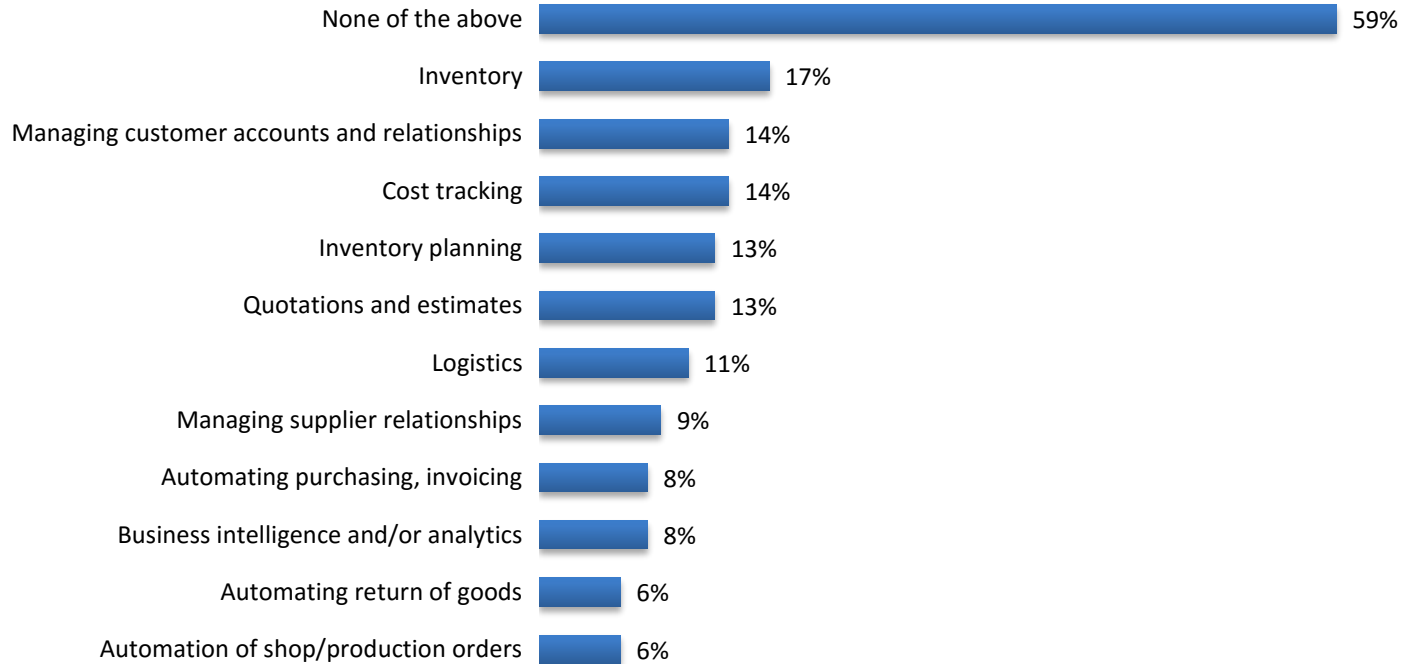
None of the above	59%
Inventory	17%
Managing customer accounts and relationships	14%
Cost tracking	14%
Inventory planning	13%
Quotations and estimates	13%
Logistics	11%
Managing supplier relationships	9%
Automating purchasing, invoicing	8%
Business intelligence and/or analytics	8%
Automating return of goods	6%
Automation of shop/production orders	6%

18) Do you use third-party, add-on solutions in addition to accounting/financial for any of the following functions:

Sample Size = 399

Third Party Add-on Solution Use

Legend:
- ■ Business intelligence and/or analytics
- ■ Quotations and estimates
- ■ Cost tracking
- ■ Automation of shop/production orders
- ■ Inventory planning
- ■ Logistics
- ■ Inventory
- ■ Managing customer accounts and relationships
- ■ Managing supplier relationships
- ■ Automating purchasing, invoicing
- ■ Automating return of goods
- ■ None of the above

	BI/analytics	Quotations	Cost tracking	Automation of shop/production	Inventory planning	Logistics	Inventory	Managing customer accounts	Managing supplier	Automating purchasing	Automating return of goods	None of the above
Xero	50%	0%	67%	33%	83%	17%	33%	0%	33%	0%	17%	0%
Sage Software	7%	13%	7%	1%	3%	10%	13%	6%	4%	9%		63%
Microsoft Excel	11%	14%	21%	8%	21%	12%	25%	16%	14%	13%	7%	47%
Intuit QuickBooks	5%	12%	11%	5%	8%	12%	14%	12%	6%	7%	4%	67%
Intacct	17%	33%	17%	17%	0%	33%	50%	50%	17%	17%		17%
Acumatica	25%	25%	50%	25%	50%	75%	50%	50%	25%	25%	25%	0%
Total	8%	13%	14%	6%	13%	11%	17%	14%	9%	8%	6%	59%

18) Do you use third-party, add-on solutions in addition to accounting/financial for any of the following functions:

Sample Size = 399

Purchase Channel for Add-on Applications

Legend: Intuit App Center · Direct from third-party applications vendor · Local reseller · National retailer/etailer (e.g. Staples, CDW) · Other

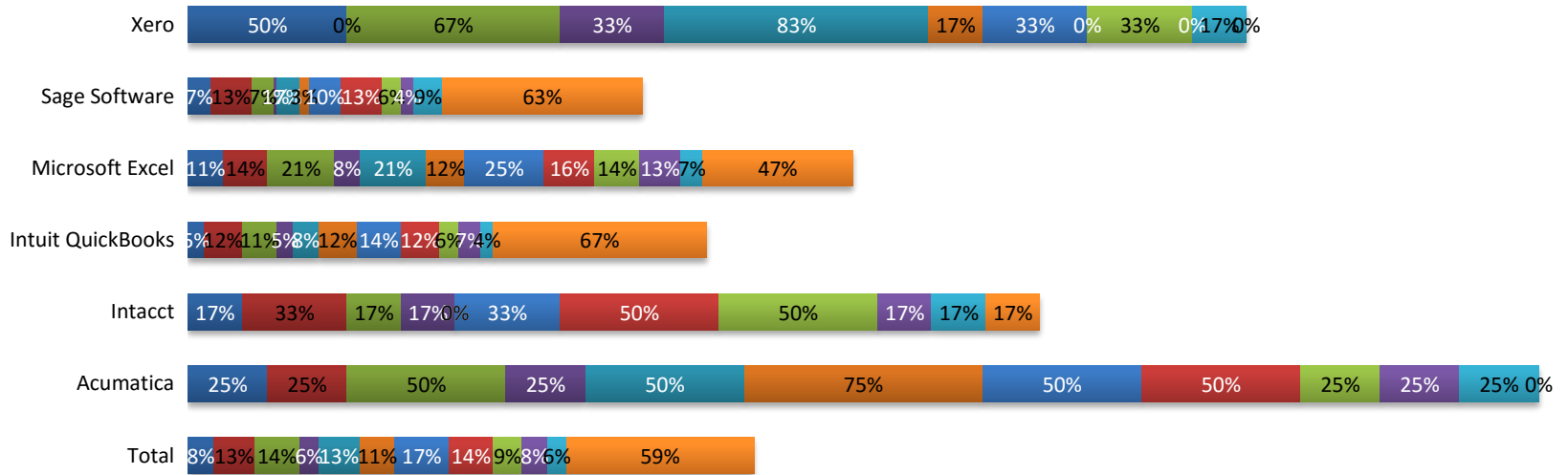| Category	Intuit App Center	Direct from third-party applications vendor	Local reseller	National retailer/etailer	Other
Automating purchasing, invoicing	9%	67%	12%	6%	6%
Quotations and estimates	12%	51%	10%	14%	14%
Managing customer accounts and relationships	13%	50%	16%	8%	13%
Managing supplier relationships	11%	49%	20%	14%	6%
Inventory planning	20%	48%	2%	12%	18%
Inventory	14%	43%	7%	12%	24%
Business intelligence	20%	43%	13%	10%	13%
Cost tracking	8%	42%	17%	21%	12%
Automating return of goods	7%	41%	28%	10%	14%
Logistics	22%	41%	7%	16%	14%
Automation of shop/production order	15%	31%	15%	23%	15%

Sample Size = Variable

18_A) Where did you purchase the solution?

Add-on Application Deployment Method

Legend: ■ On premise ■ Cloud/SaaS

Application	On premise	Cloud/SaaS
Automation of shop/production orders	73%	27%
Logistics	74%	26%
Automating return of goods	76%	24%
Managing customer accounts and relationships	76%	24%
Managing supplier relationships	80%	20%
Business intelligence	80%	20%
Cost tracking	81%	19%
Inventory	83%	17%
Automating purchasing, invoicing	85%	15%
Inventory planning	92%	8%
Quotations and estimates	94%	6%

Sample Size = Variable

18_B) How have you deployed these applications?

Level of Integration Between Add-On Applications and Accounting

Legend: ■ Seamlessly ■ Some of it works automatically ■ Not well we are looking to replace it ■ Not integrated

Category	Seamlessly	Some of it works automatically	Not well we are looking to replace it	Not integrated
Automating return of goods	45%	31%	7%	17%
Automating purchasing, invoicing	45%	21%	3%	30%
Managing supplier relationships	40%	31%	6%	23%
Managing customer accounts and relationships	29%	32%	3%	35%
Inventory	34%	24%	5%	36%
Logistics	34%	29%	5%	31%
Inventory planning	28%	35%	10%	28%
Automation of shop/production orders	38%	31%	8%	23%
Cost tracking	38%	29%	4%	29%
Quotations and estimates	25%	37%	4%	33%
Business intelligence	33%	47%	3%	17%

Sample Size = Variable

18_C) Is this solution integrated with accounting/financial application and how well does the integration work?

Adoption of Mobile Solutions
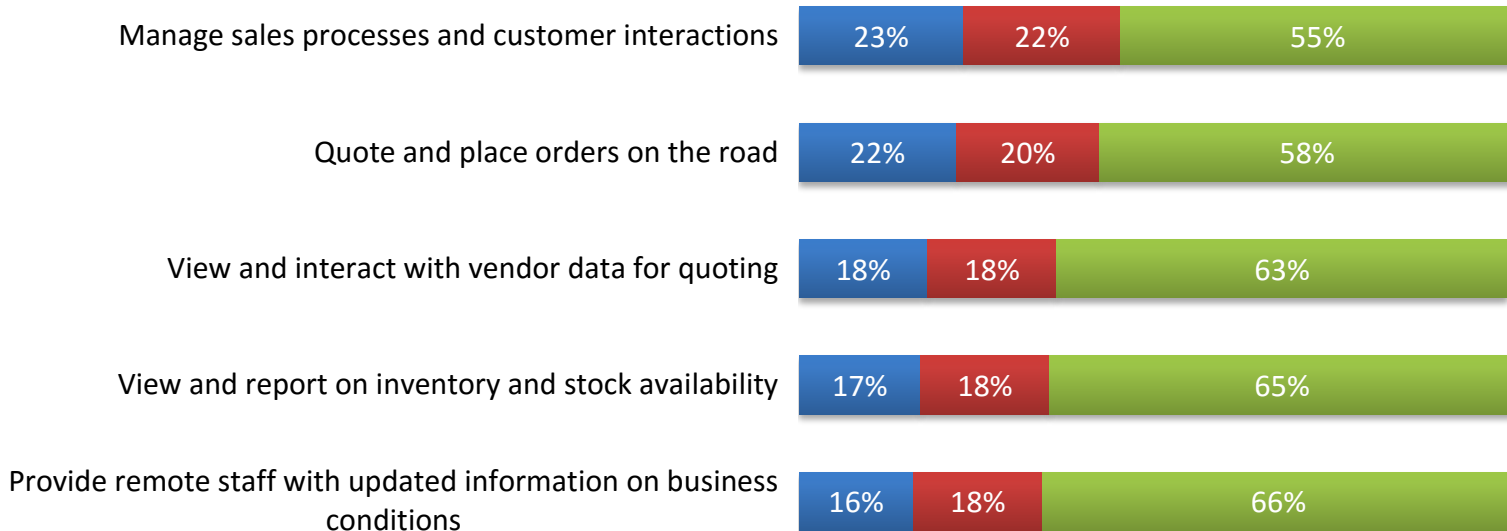
■ Currently equip staff with mobile solution ■ Plan to equip staff with mobile solution
■ No plans to equip staff with mobile solution

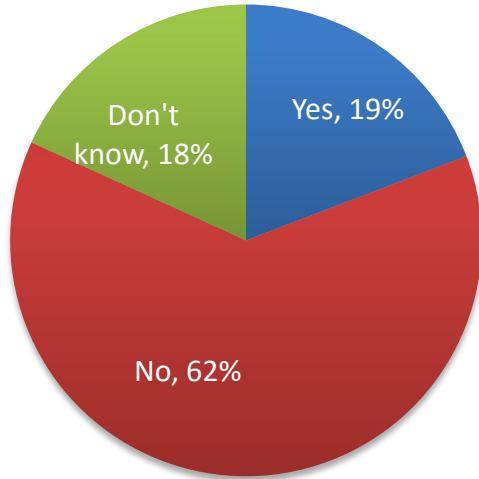|			
Manage sales processes and customer interactions	23%	22%	55%
Quote and place orders on the road	22%	20%	58%
View and interact with vendor data for quoting	18%	18%	63%
View and report on inventory and stock availability	17%	18%	65%
Provide remote staff with updated information on business conditions	16%	18%	66%

Sample Size = 399

19) Does you company currently equip/plan to equip staff to use mobile solutions (e.g. perform these functions on a mobile device, such as a smartphone or tablet) for any of the following functions/tasks?

Interest in Evaluating ERP and Integration Preferences

Evaluate ERP

■ Yes ■ No ■ Don't know

Yes, 19%

No, 62%

Don't know, 18%

■ Yes ■ No ■ Don't know

Currently used application

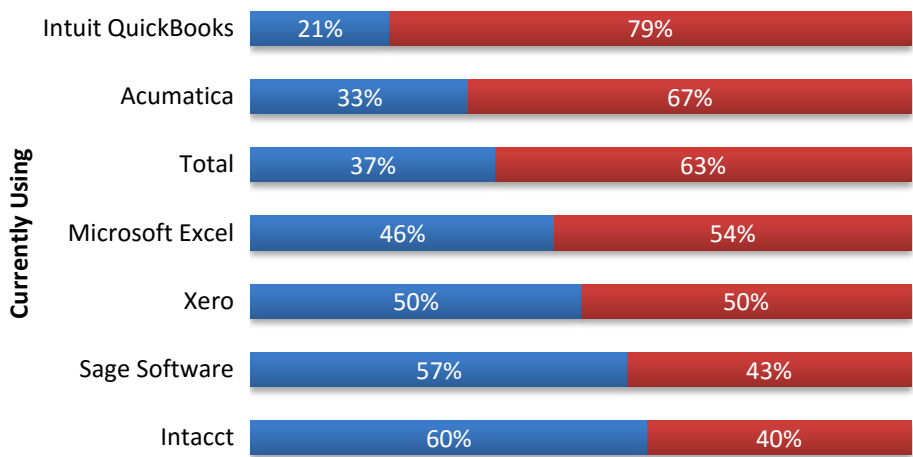| Application	Yes	No	Don't know
Intacct	83%	17%	0%
Acumatica	75%	25%	0%
Xero	67%	33%	0%
Microsoft Excel	29%	47%	24%
Total	19%	62%	18%
Intuit QuickBooks	14%	68%	18%
Sage Software	10%	74%	16%

Sample Size = 399
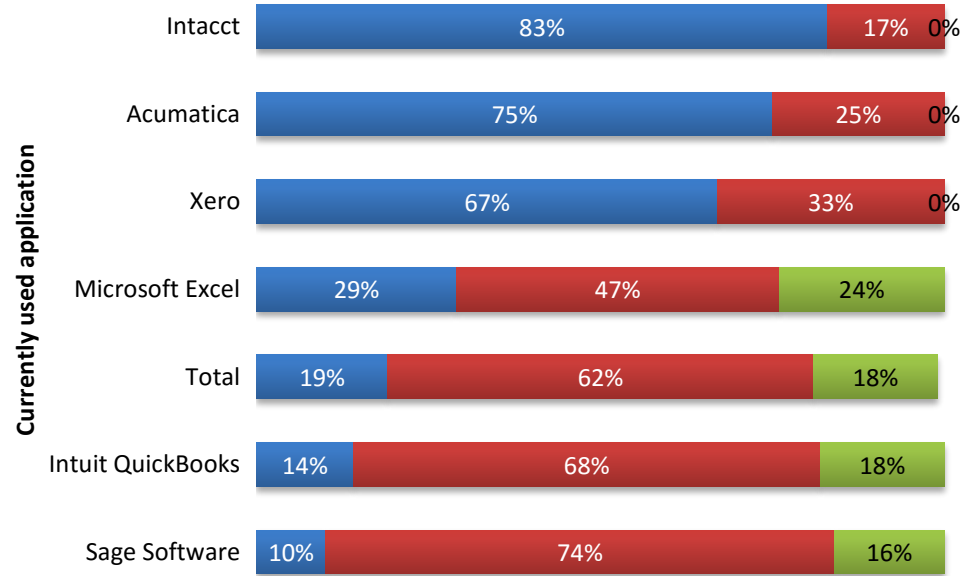
20) Is your company currently evaluating or planning to evaluate a business management/enterprise resource management (ERP) solution for deployment within the next 12 months?

Integration and Deployment Preferences (Respondents interested in evaluating ERP)

Integration preferences

- ■ Prefer to integrate additional business management capabilities with the above application
- ■ Prefer one solution that provides both accounting functionality and added business managements

Currently Using

Intuit QuickBooks	21%	79%
Acumatica	33%	67%
Total	37%	63%
Microsoft Excel	46%	54%
Xero	50%	50%
Sage Software	57%	43%
Intacct	60%	40%

Deployment preferences

■ On-premises deployment ■ Cloud/SaaS deployment ■ Not sure

	On-premises	Cloud/SaaS	Not sure
NetSuite		100%	
Microsoft	22%	67%	11%
MiSYS	33%	67%	
Sage	33%	58%	8%
Other	44%	56%	
Fishbowl	45%	55%	
SAP	41%	53%	6%
Epicor	50%	50%	
Total	47%	45%	8%
Epicor	49%	42%	9%
Acumatica	50%	38%	12%
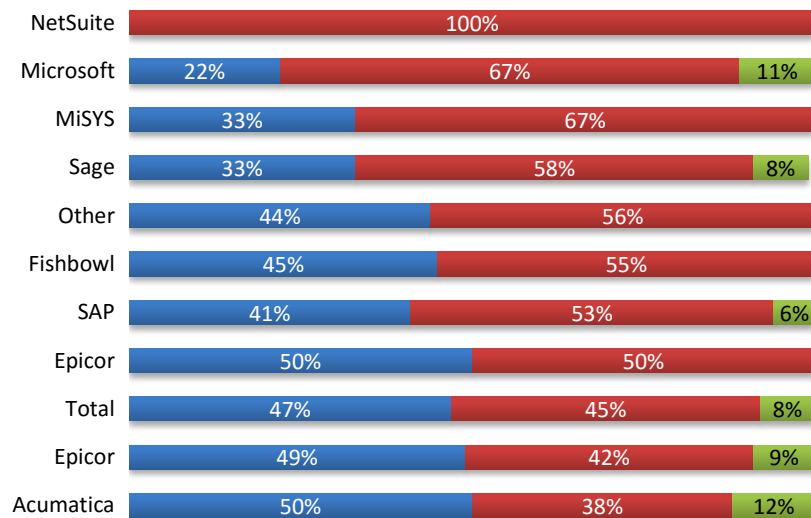
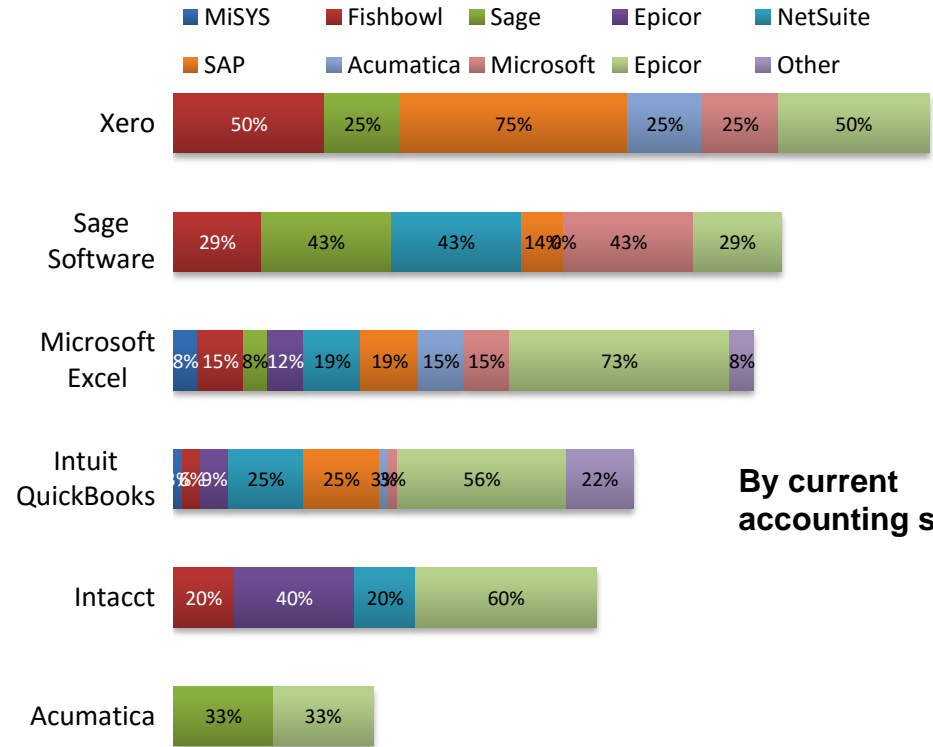21) Given a choice, would you prefer to integrate additional business management capabilities with [accounting/financial application, or use one solution that provides both accounting functionality as well as added business managements?

Sample Size = 77

23) Are planning to deploy ERP on premises at your site, or using a cloud-based software-as-a-service solution?

ERP Solutions Being Considered

For all respondents considering ERP

Epicor	58%
SAP	22%
NetSuite	22%
Sage	16%
Fishbowl	14%
Other	12%
Microsoft	12%
Acumatica	10%
Epicor	10%
MiSYS	4

Legend: MiSYS, Fishbowl, Sage, Epicor, NetSuite, SAP, Acumatica, Microsoft, Epicor, Other
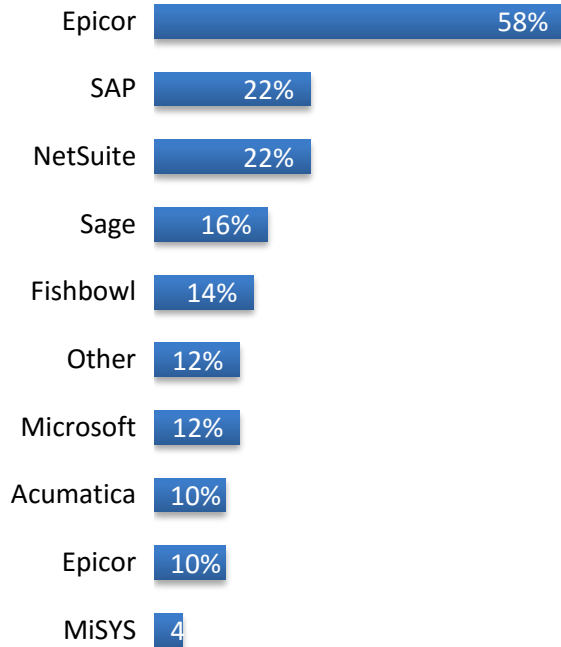
By current accounting solution

Xero	50%	25%	75%	25%	25%	50%
Sage Software	29%	43%	43%	14% 0%	43%	29%
Microsoft Excel	8% 15% 8% 12%	19%	19%	15% 15%	73%	8%
Intuit QuickBooks	7% 9%	25%	25% 33%	56%	22%	
Intacct	20%	40%	20%	60%		
Acumatica	33%	33%				

Sample Size = 77

22) Which ERP solution brand(s) are you considering?

Top Benefits Expected From ERP Solutions
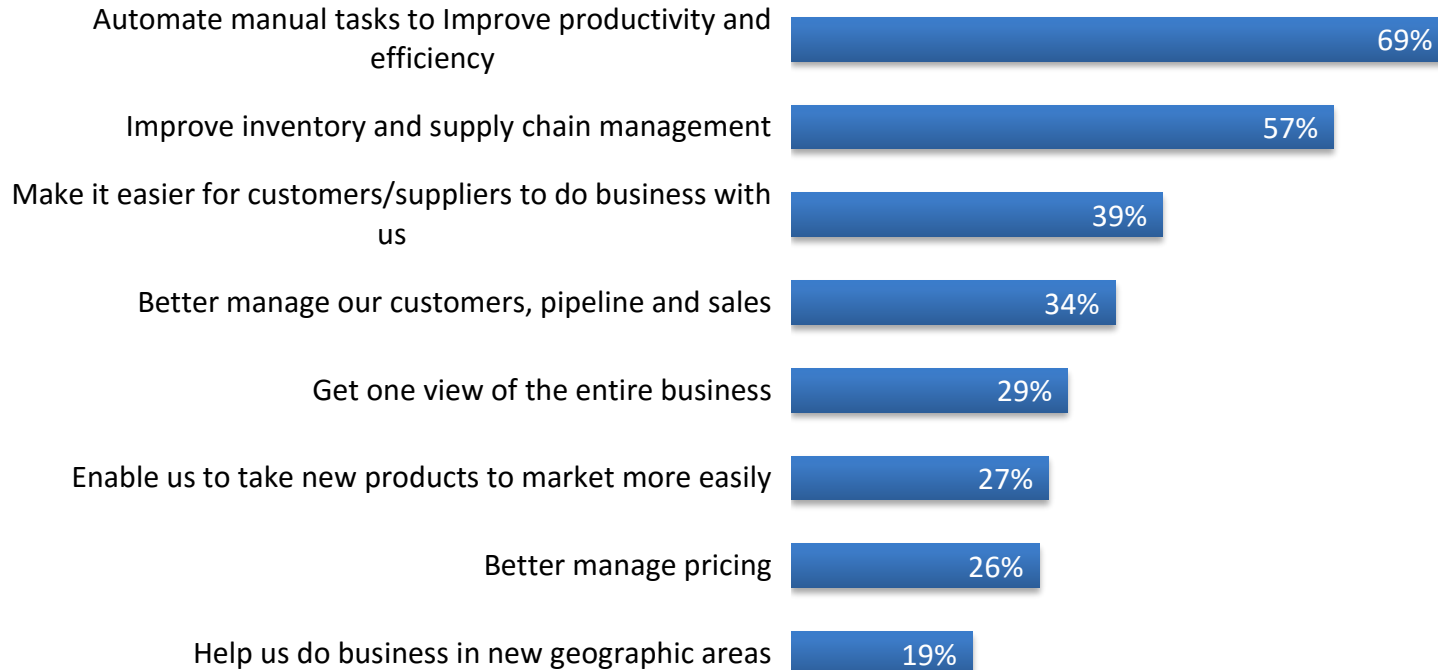
Benefit	Percentage
Automate manual tasks to Improve productivity and efficiency	69%
Improve inventory and supply chain management	57%
Make it easier for customers/suppliers to do business with us	39%
Better manage our customers, pipeline and sales	34%
Get one view of the entire business	29%
Enable us to take new products to market more easily	27%
Better manage pricing	26%
Help us do business in new geographic areas	19%

Sample Size = 77

24) What are the top 3 business benefits that you expect business software to deliver?

ERP Solution Being Considered
Top Benefits Expected

Legend:
- ■ Automate manual tasks to Improve productivity and efficiency
- ■ Improve inventory and supply chain management
- ■ Make it easier for customers/suppliers to do business with us
- ■ Better manage pricing
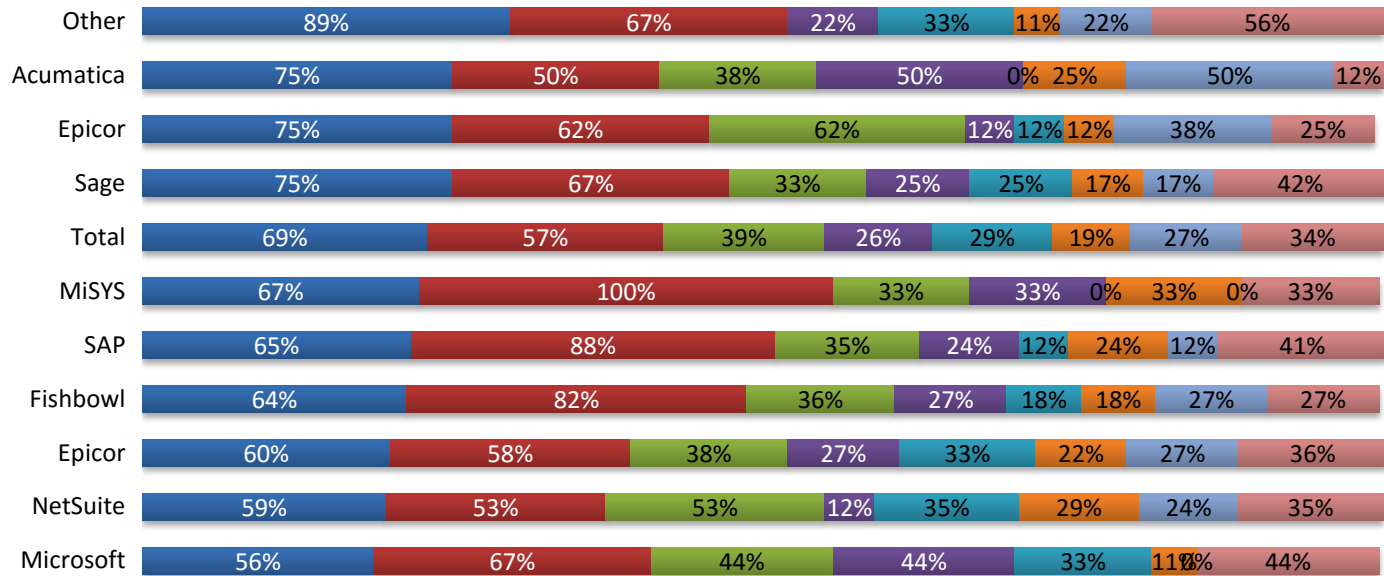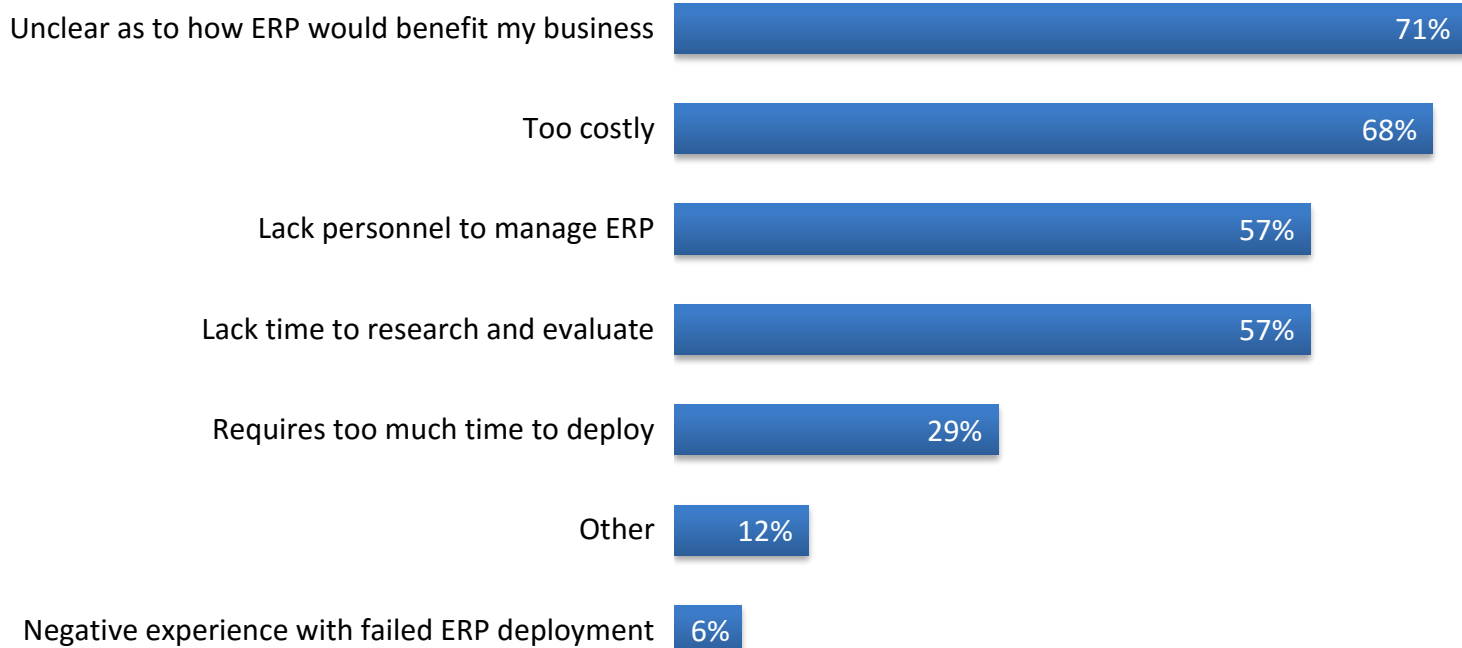- ■ Get one view of the entire business
- ■ Help us do business in new geographic areas
- ■ Enable us to take new products to market more easily
- ■ Better manage our customers, pipeline and sales

	Automate manual tasks	Improve inventory and supply chain	Make it easier for customers/suppliers	Better manage pricing	Get one view of the entire business	Help us do business in new geographic areas	Enable us to take new products to market	Better manage customers, pipeline and sales
Other	89%	67%		22%	33%	11%	22%	56%
Acumatica	75%	50%	38%	50%	0%	25%	50%	12%
Epicor	75%	62%	62%	12%	12%	12%	38%	25%
Sage	75%	67%	33%	25%	25%	17%	17%	42%
Total	69%	57%	39%	26%	29%	19%	27%	34%
MiSYS	67%	100%	33%	33%	0%	33%	0%	33%
SAP	65%	88%	35%	24%	12%	24%	12%	41%
Fishbowl	64%	82%	36%	27%	18%	18%	27%	27%
Epicor	60%	58%	38%	27%	33%	22%	27%	36%
NetSuite	59%	53%	53%	12%	35%	29%	24%	35%
Microsoft	56%	67%	44%	44%	33%	11%	0%	44%

Sample Size = 77

24) What are the top 3 business benefits that you expect business software to deliver?

Top Reasons for Not Considering an ERP Solution

SMB Group
Actionable Market Insight

Unclear as to how ERP would benefit my business — 71%

Too costly — 68%

Lack personnel to manage ERP — 57%

Lack time to research and evaluate — 57%

Requires too much time to deploy — 29%

Other — 12%

Negative experience with failed ERP deployment — 6%

Sample Size = 322

25) What are the top 3 reasons that you are NOT considering using an ERP solution?

Views on Technology IT Support Responsibilities

Technology views

- Technology solutions help us run the business better — 39%
- Technology solutions help support basic business needs, but don't have a significant impact on… — 34%
- Technology solutions help us to significantly improve business outcomes — 21%
- Technology solutions fail to deliver the business results we need more often than not — 6%

Principally responsible for technical support

- Full time salaried employees who support IT, 22%
- Salaried employees who help support IT but also have other role(s) in the company, 33%
- External IT consultant, 33%
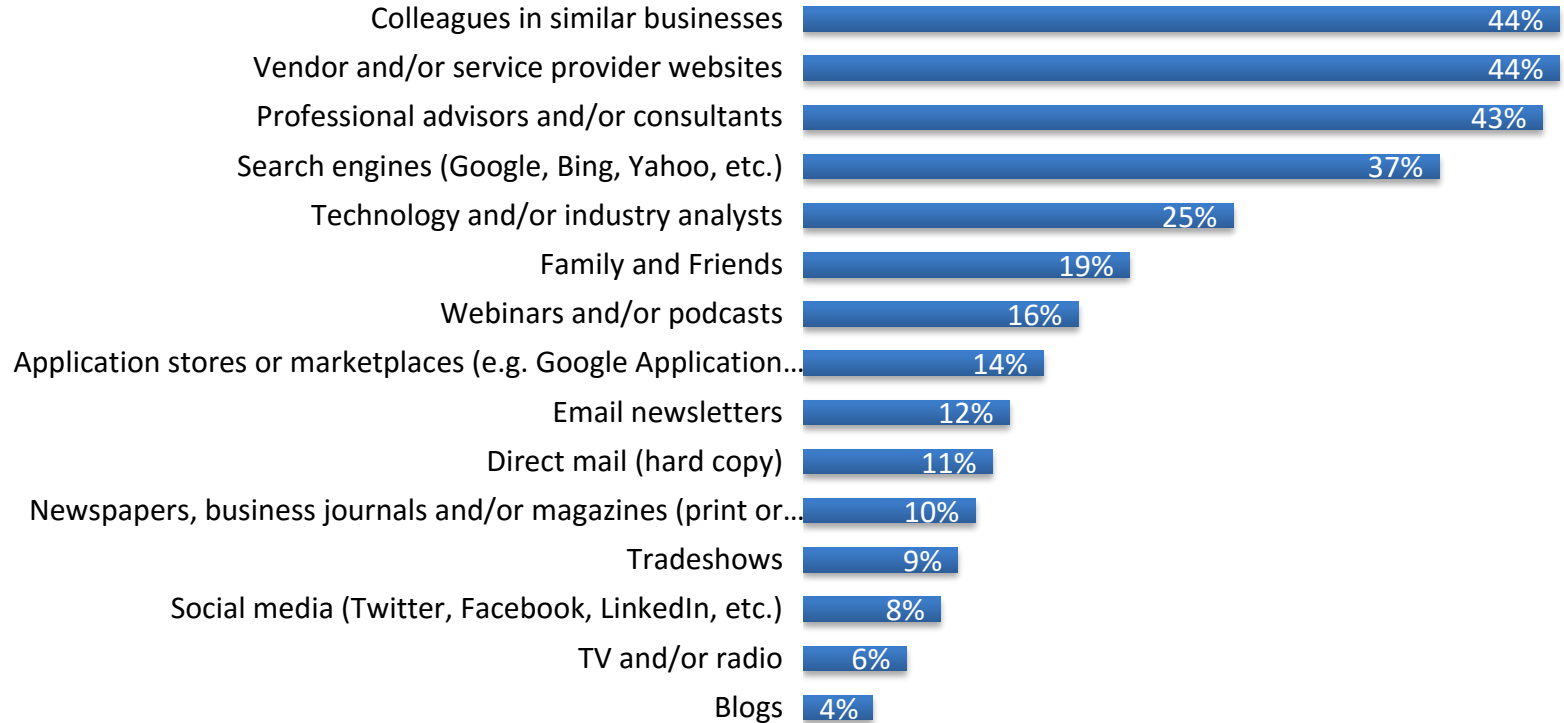- No IT support, 13%

Sample Size = 399

26) Which statement most closely reflects your company's view of how technology relates to your business?
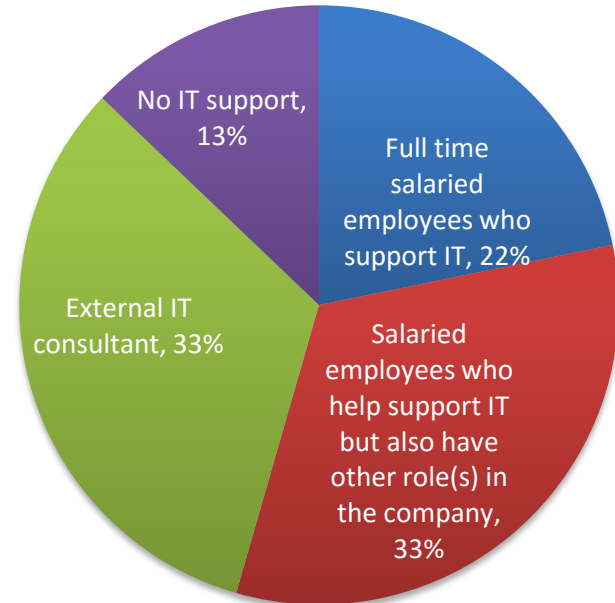
29) Who is principally responsible for supporting technology solutions used at your company?

Top Sources of Information for Learning About Business Solutions and Services

SMB Group
Actionable Market Insight

Source	Percentage
Colleagues in similar businesses	44%
Vendor and/or service provider websites	44%
Professional advisors and/or consultants	43%
Search engines (Google, Bing, Yahoo, etc.)	37%
Technology and/or industry analysts	25%
Family and Friends	19%
Webinars and/or podcasts	16%
Application stores or marketplaces (e.g. Google Application…	14%
Email newsletters	12%
Direct mail (hard copy)	11%
Newspapers, business journals and/or magazines (print or…	10%
Tradeshows	9%
Social media (Twitter, Facebook, LinkedIn, etc.)	8%
TV and/or radio	6%
Blogs	4%

Sample Size = 399

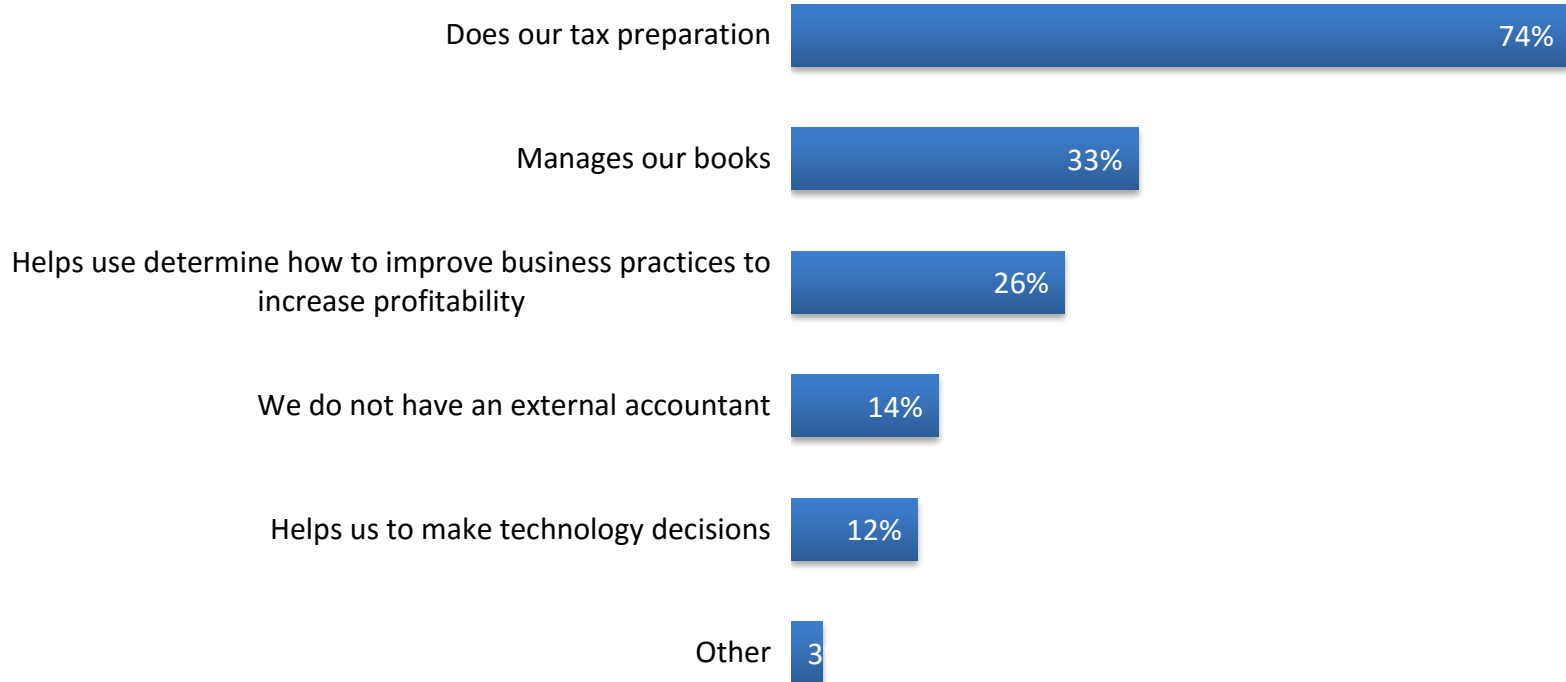30) What are the top three most important information sources for learning about business solutions and services?

Top Advisors For Evaluating Business Solutions and Services

Advisor	Percentage
Colleagues in similar businesses	66%
Professional advisors and/or consultants (other than accountant)	65%
Accountant	62%
Local technology advisors	39%
Family and Friends	27%
Personnel at retailer/etailer sites (Best Buy, Staples, PC Connection, etc.)	23%
Social media/internet sites with digital reviews and ratings	18%
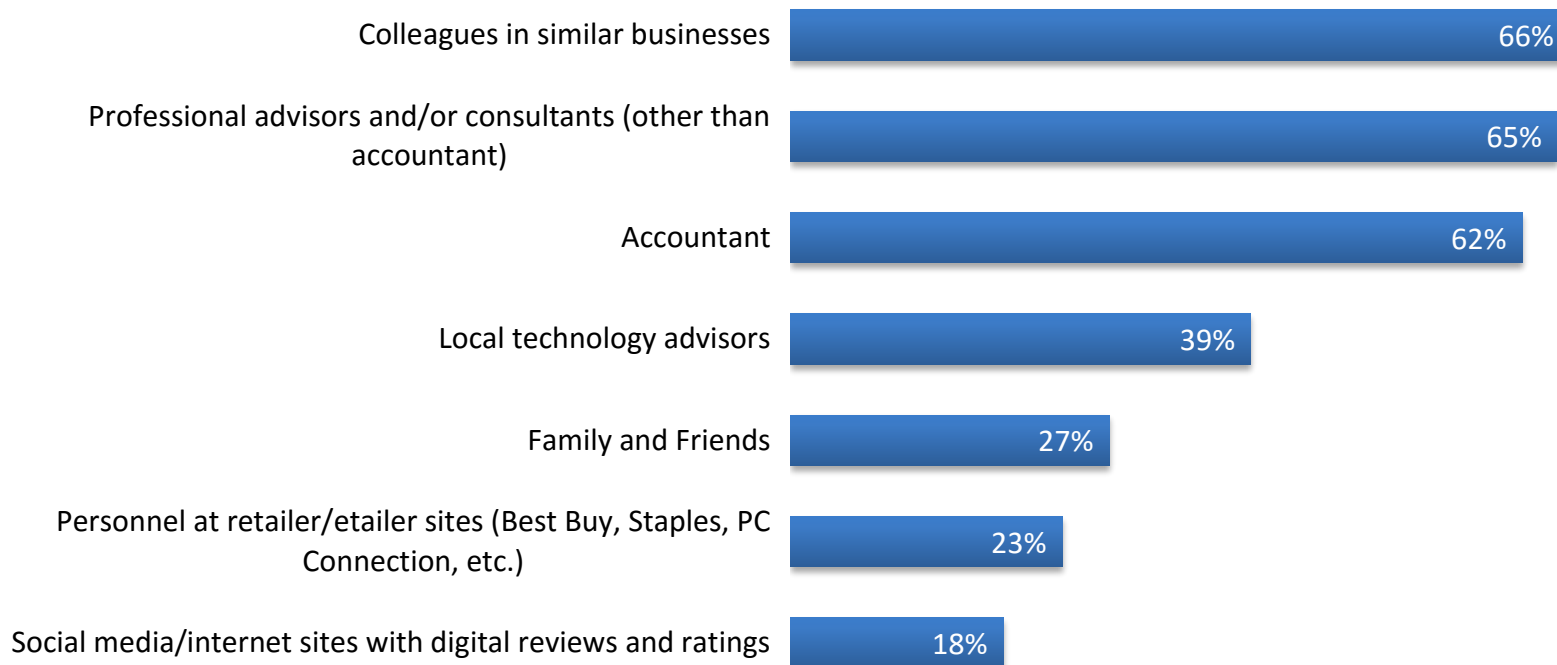
33) Who are the top three most important advisors to you when evaluating business solutions and services?

Sample Size = 399

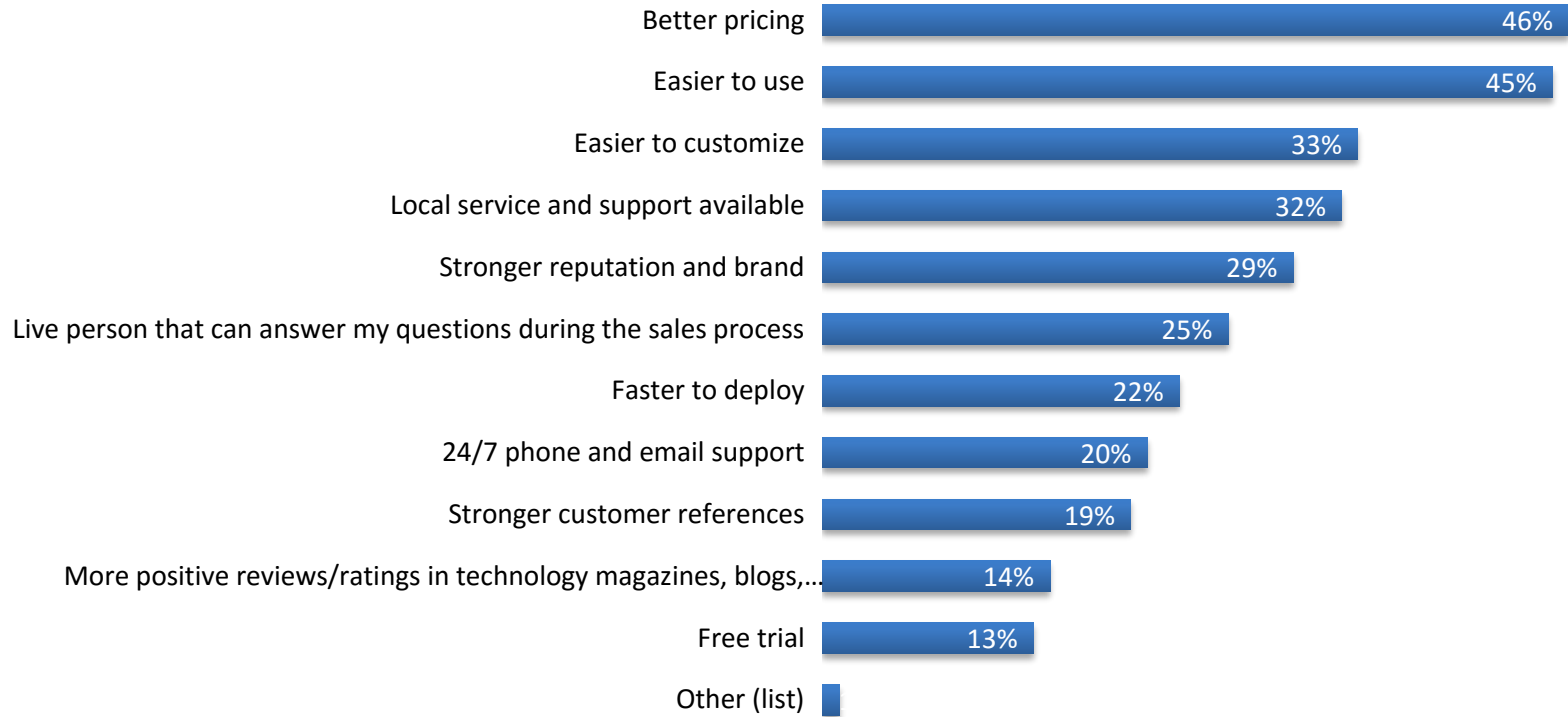# Role of Accountant in the Business

Does our tax preparation — 74%

Manages our books — 33%

Helps use determine how to improve business practices to increase profitability — 26%

We do not have an external accountant — 14%

Helps us to make technology decisions — 12%

Other — 3

Sample Size = 399

34) What role does your external accountant play in your business?

Top Reasons Solutions Get On the "Short List"

Reason	Percentage
Better pricing	46%
Easier to use	45%
Easier to customize	33%
Local service and support available	32%
Stronger reputation and brand	29%
Live person that can answer my questions during the sales process	25%
Faster to deploy	22%
24/7 phone and email support	20%
Stronger customer references	19%
More positive reviews/ratings in technology magazines, blogs,…	14%
Free trial	13%
Other (list)	

Sample Size = 399

35) What are the top 3 reasons a specific solution typically gets to your "short list" over other competing solutions?
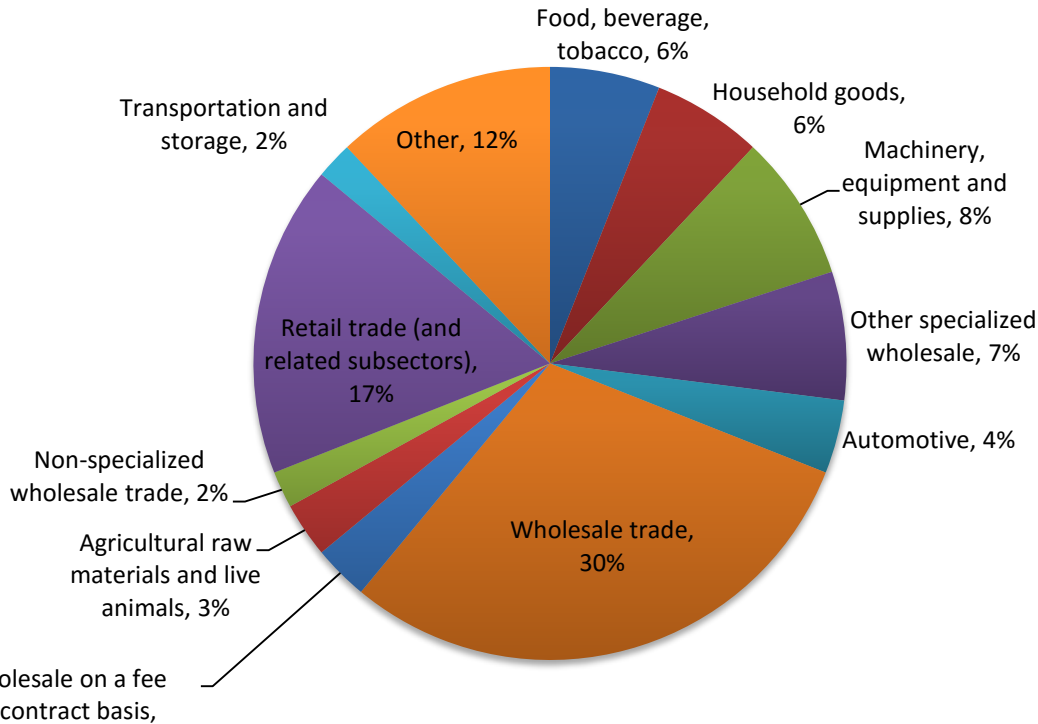
Manufacturing Industry Micro-Verticals

Sample Size = 221
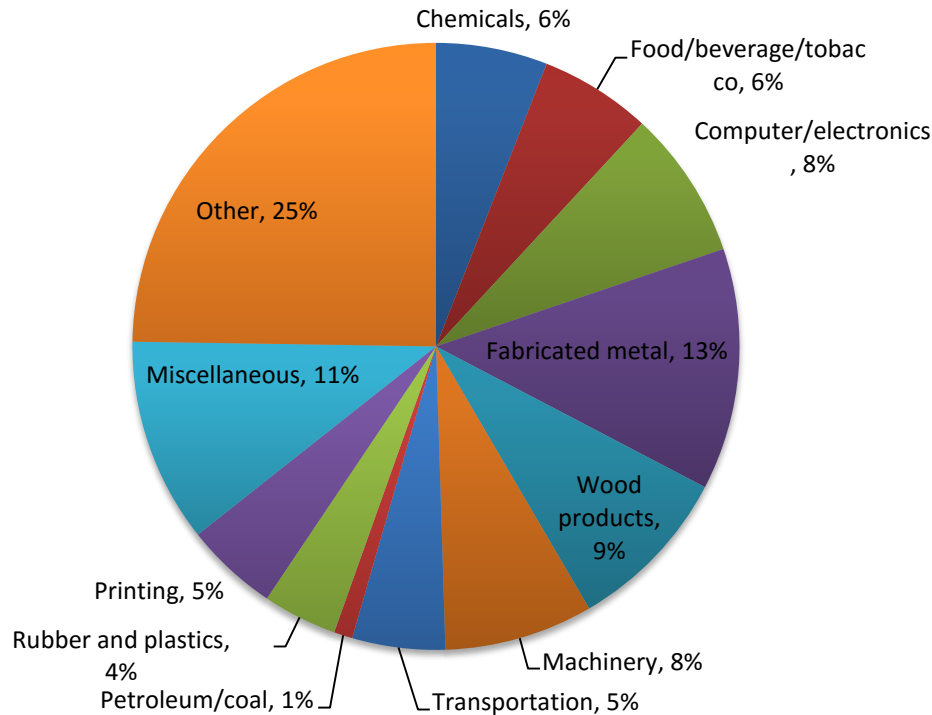
Other (list)

2: Maunfacturing sub-industry - Other (list)	
home decorators	frame construction
PCBs	Defense/Aerospace
fasteners	Skylights
Gift Shops	Energy
Medical	Electrical equipment
Automotive	housewares
Medical	technology
government	hotels
furniture	Marine Dredging
Technology	funeral
scenery, staging	wastewater treatment
Pet Products	Pet Products
custom homes	crafts
Home Goods	clothing
Rental	Military
jewelry	steel and aluminum products
Ceramics	cards
natural fiber	Rodeo Equipment
autobody painters	safety
Any manufacturing facility	Sports Nutrition
public safety, fire, police etc	glass scultpure
Municipal	HEADSET/INTERCOM
Pumps	stones and gems
AUTOMOTIVE	Hair-Care Production
Paint	textile
Sporting Goods	Yacht builder
Sone	

Wholesale/distribution Micro-Verticals

Food, beverage, tobacco, 6%

Household goods, 6%

Machinery, equipment and supplies, 8%

Transportation and storage, 2%

Other, 12%

Other specialized wholesale, 7%

Retail trade (and related subsectors), 17%

Automotive, 4%

Non-specialized wholesale trade, 2%

Agricultural raw materials and live animals, 3%

Wholesale trade, 30%

Wholesale on a fee or contract basis,

Sample Size = 178

Other (list)

DIamonds
ski industry
Textile
all industries
healthcare
mining
landscaping
Racing electronics & Access
Construction
hospitality
Construction Aggregates
sports
Graphic arts
industrial electronics
Fastening and Packaging
Nutrition
aerospace export
herbalife products
Custom made Products

Years in Business and Location

Years in business

Location

20 years or more — 49%

11-19 years — 16%

6-10 years — 17%

1-5 years — 15%

Less than 1 year — 3%

Major metropolitan area — 41%

Small city or town — 27%

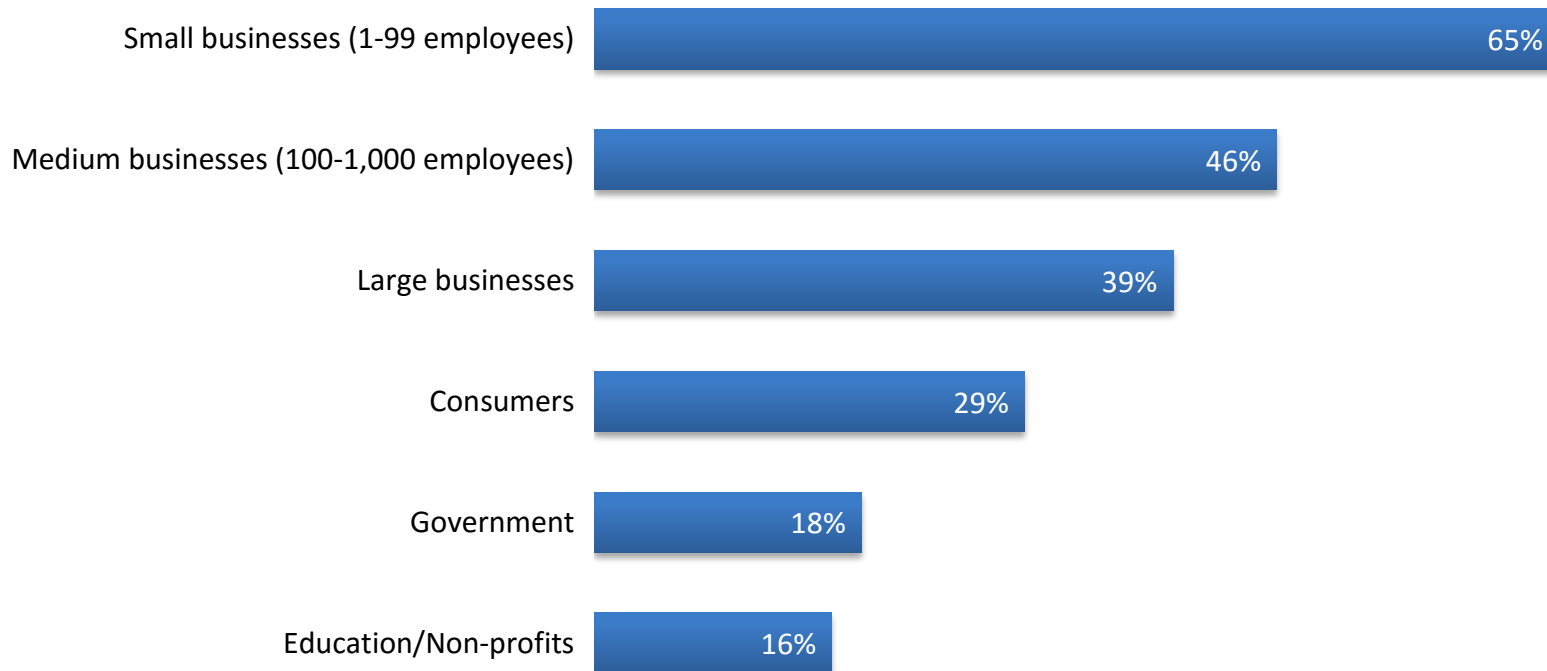Midsize city — 27%

Rural — 6%
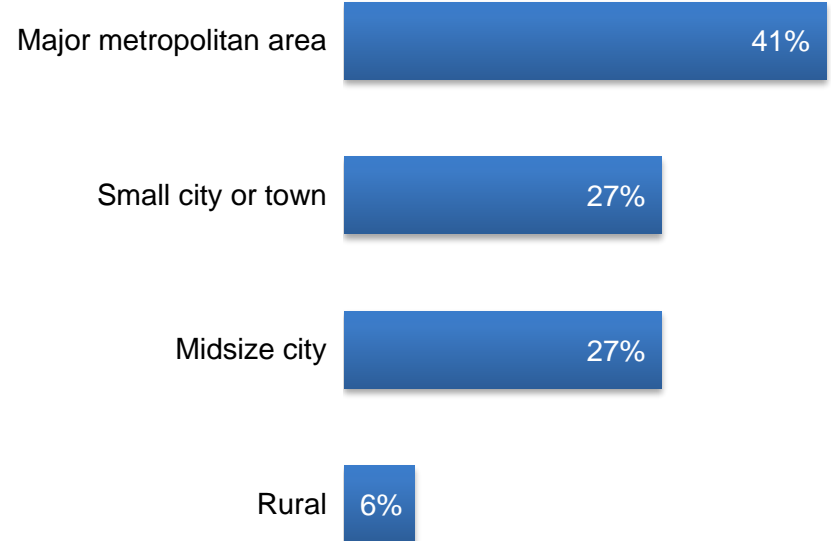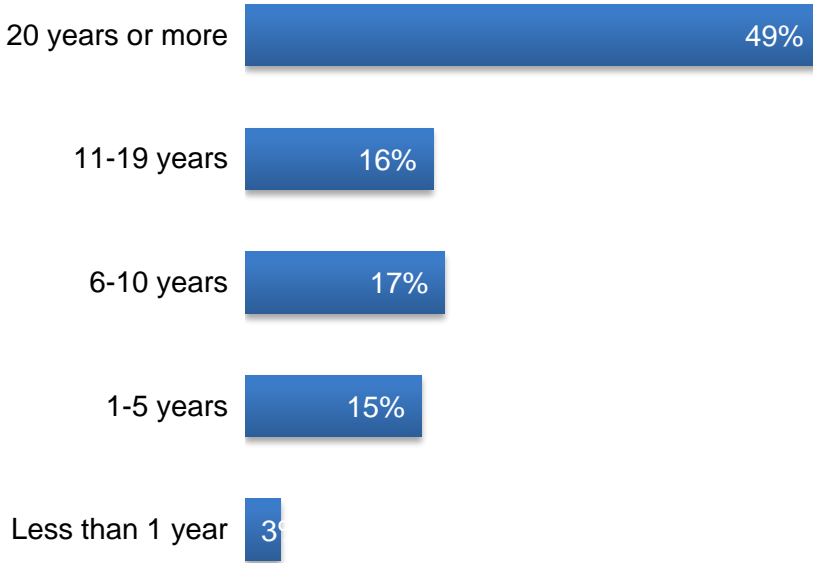
Sample Size = 399

39) Which of the following best describes your company's current location?

38) How many years has your organization been in business?

Primary Customers

Small businesses (1-99 employees) — 65%

Medium businesses (100-1,000 employees) — 46%

Large businesses — 39%

Consumers — 29%

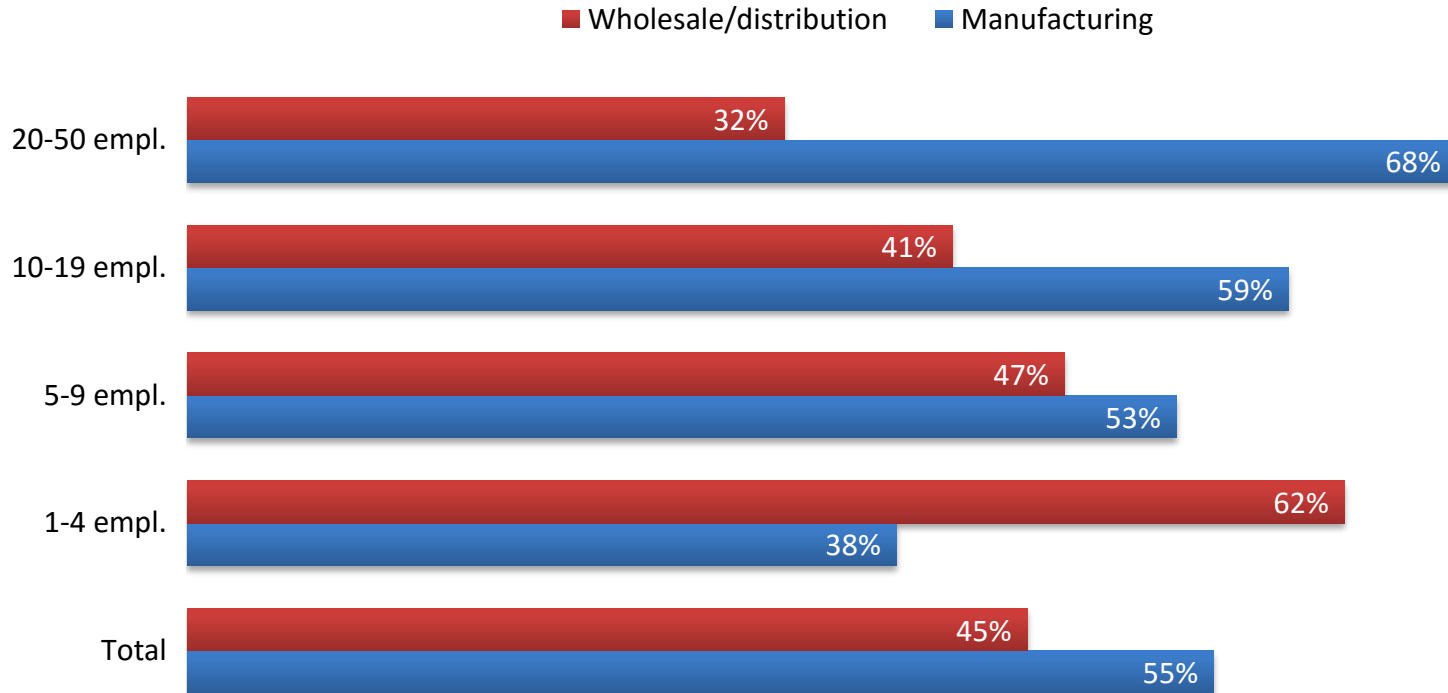Government — 18%

Education/Non-profits — 16%

Sample Size = 399

40) What type of companies do you primarily sell your products/services to?

Segmentation

Industry Distribution by Employee Size

Legend: Wholesale/distribution, Manufacturing

20-50 empl.: Wholesale/distribution 32%, Manufacturing 68%
10-19 empl.: Wholesale/distribution 41%, Manufacturing 59%
5-9 empl.: Wholesale/distribution 47%, Manufacturing 53%
1-4 empl.: Wholesale/distribution 62%, Manufacturing 38%
Total: Wholesale/distribution 45%, Manufacturing 55%

Sample Size = 399
1) What industry is your company in?

Accounting/Financial Solution Used by Employee Size
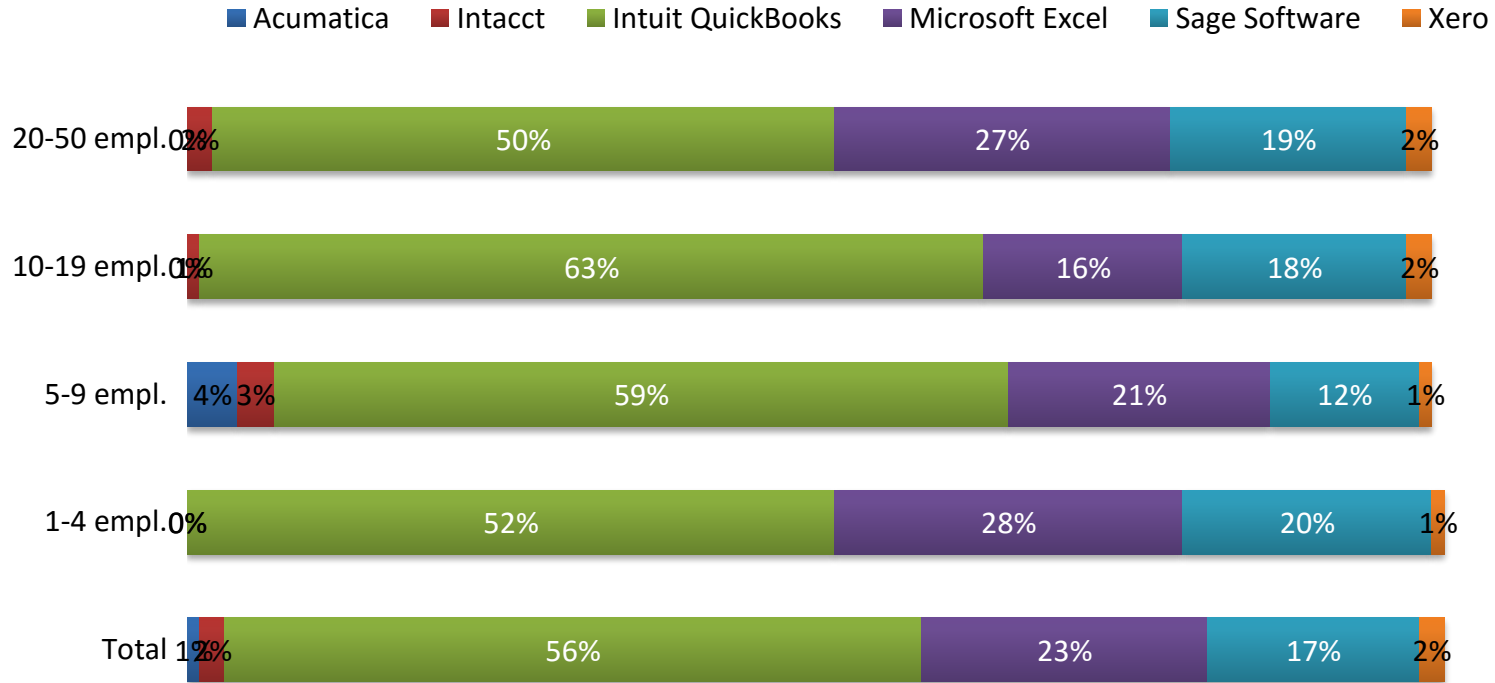
Legend: ■ Acumatica ■ Intacct ■ Intuit QuickBooks ■ Microsoft Excel ■ Sage Software ■ Xero

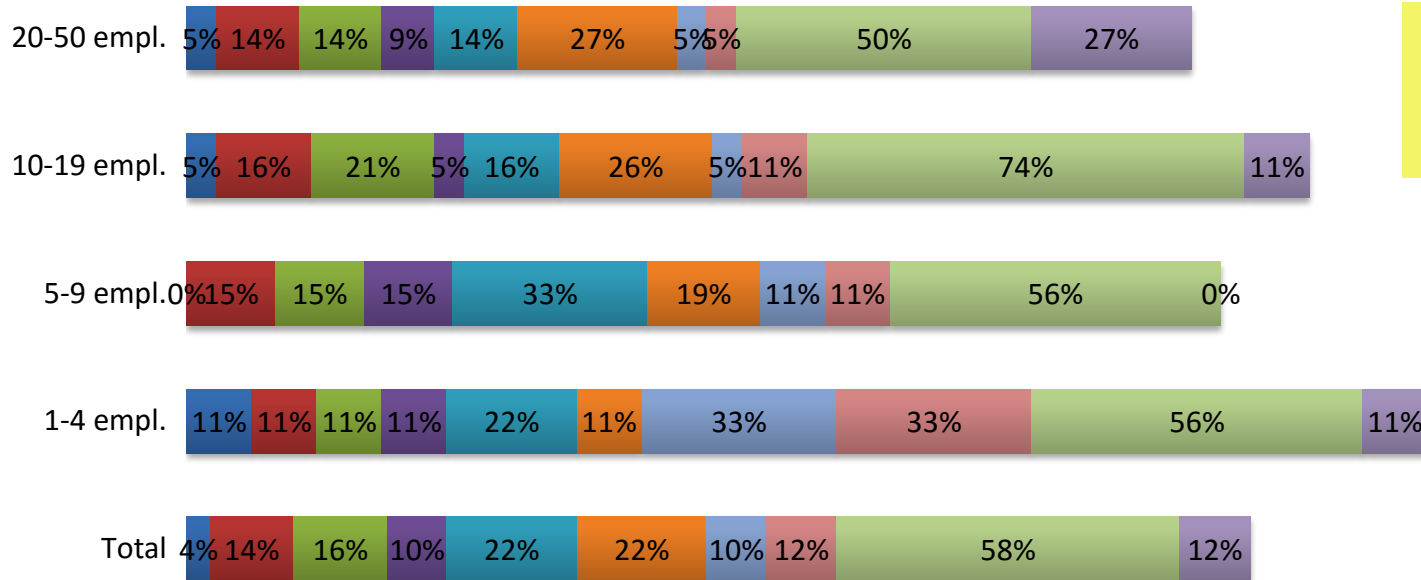| Employee Size	Acumatica	Intacct	Intuit QuickBooks	Microsoft Excel	Sage Software	Xero
20-50 empl.	0%	2%	50%	27%	19%	2%
10-19 empl.	0%	1%	63%	16%	18%	2%
5-9 empl.	4%	3%	59%	21%	12%	1%
1-4 empl.	0%	—	52%	28%	20%	1%
Total	1%	2%	56%	23%	17%	2%

Sample Size = 399

4) What brand of accounting/financials software does your company currently use?

ERP Solution Planned by Employee Size

Legend: MiSYS, Fishbowl, Sage, Epicor, NetSuite, SAP, Acumatica, Microsoft, Epicor, Other

20-50 empl.: 5% 14% 14% 9% 14% 27% 5% 5% 50% 27%

10-19 empl.: 5% 16% 21% 5% 16% 26% 5% 11% 74% 11%

5-9 empl.: 0% 15% 15% 15% 33% 19% 11% 11% 56% 0%

1-4 empl.: 11% 11% 11% 11% 22% 11% 33% 33% 56% 11%

Total: 4% 14% 16% 10% 22% 22% 10% 12% 58% 12%

Note: low sample size by employee size band. For directional use only.

Sample Size = 77

22) Which ERP solution brand(s) are you considering?