



RISE with SAP 2025

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Executive Summary

The last year saw an acceleration in the way organizations are adopting cloud ERP. SAPinsider started to see this shift in our [Deployment Approaches to SAP S/4HANA 2025](#) report, which was published in July. From that research, two major changes became obvious. The first is organizations are looking to accelerate their move to SAP S/4HANA as the end of maintenance deadline in 2027 approaches. The second is the number of organizations planning on using a cloud-based ERP deployment has doubled.

This research shows that those trends are continuing.

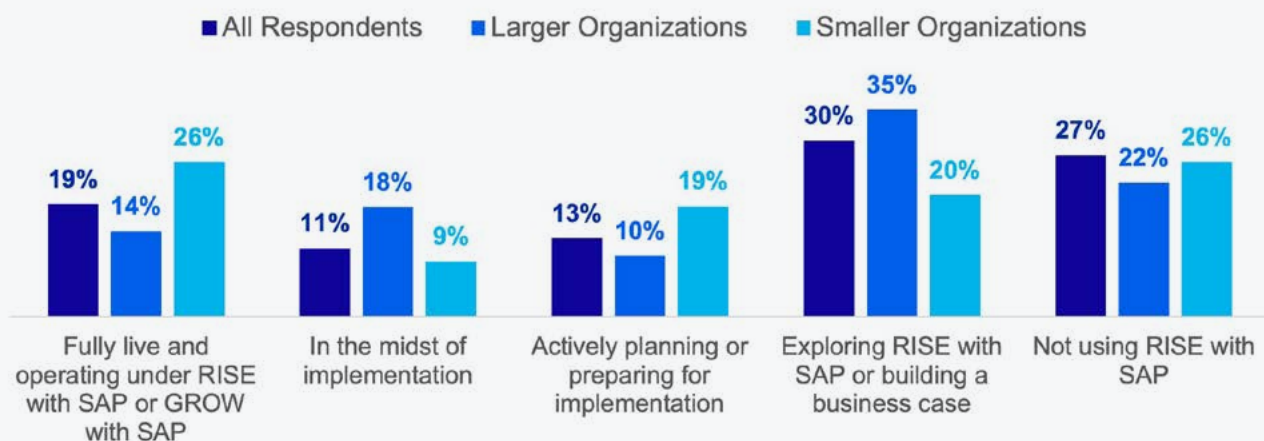
To provide insights into thinking around RISE with SAP, SAPinsider surveyed 122 members of its community between August and November 2025. While the survey referenced RISE with SAP, that package is now called SAP Cloud ERP Private by SAP, and RISE with SAP now refers to the broader journey from SAP ECC to SAP Business Suite. This report will thus follow SAP Cloud ERP Private naming convention as that is the package being sold by SAP today.

The first topic to examine is the current adoption of SAP Cloud ERP Private (**Figure 1**). Given that most organizations report having at least some knowledge of SAP Cloud ERP Private, this year's survey focused on adoption and use of the offering. While only one in five respondents say they are live and operating on SAP Cloud ERP Private or SAP Cloud ERP Public (GROW with SAP), nearly two thirds (65%) state they are already running SAP S/4HANA, SAP S/4HANA Cloud, or SAP Cloud ERP.

65%
of respondents
report that they are
running SAP S/4HANA,
SAP S/4HANA Cloud,
or SAP Cloud ERP
even if they have
not switched.

FIGURE 1

Adoption of SAP Cloud ERP Private by Organization Size



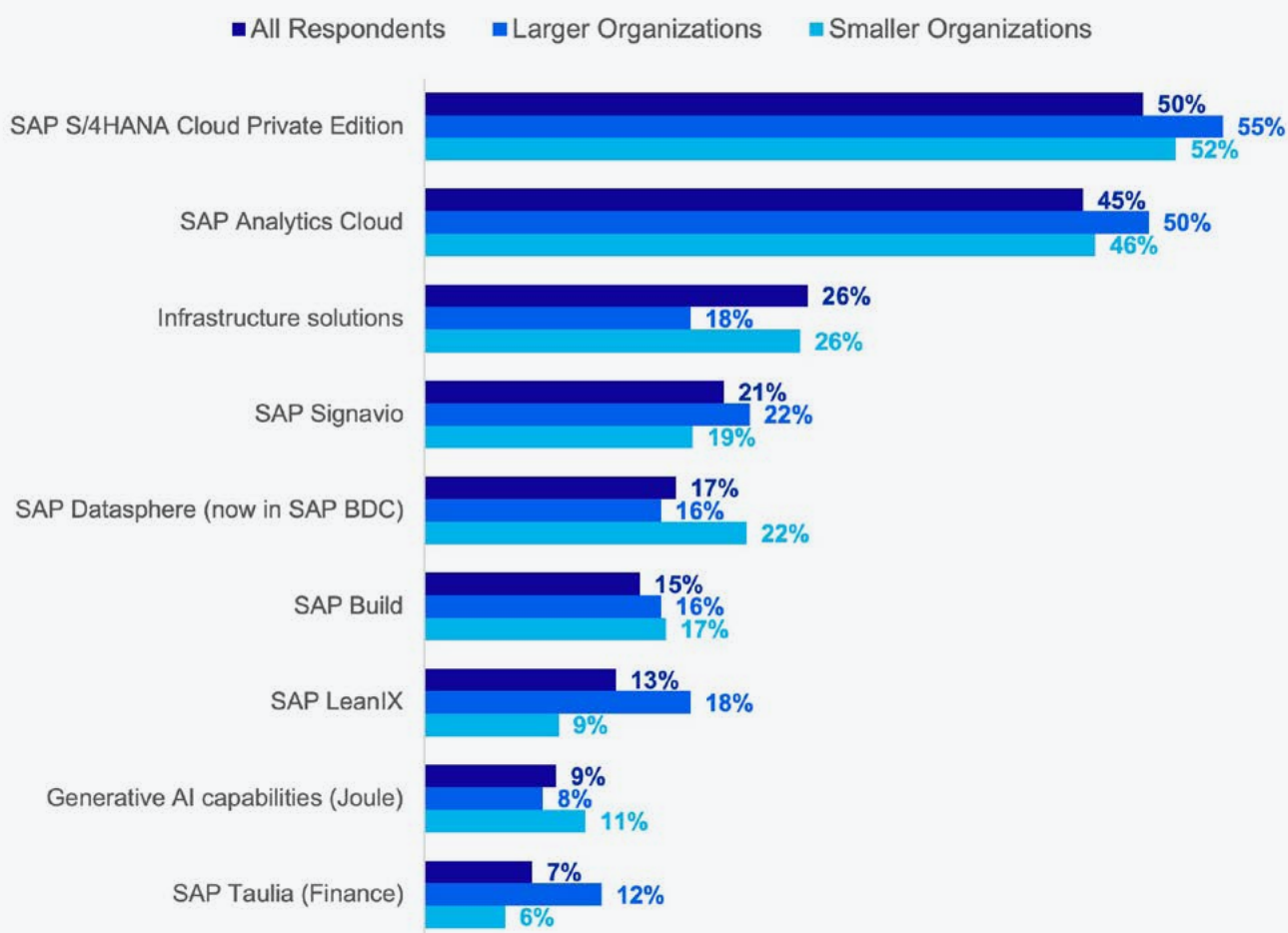
What is notable in this adoption is that smaller organizations with annual revenues below \$2 billion are more likely to report they are live and using SAP Cloud ERP (26%), either Private or Public, than those with revenues above \$2 billion (14%). This difference in adoption aligns with the fact that many large organizations may have initially been reticent to move to SAP S/4HANA due to the size and complexity of their existing ERP implementations. While these organizations have now started the transition, which for some can be considerable, it is not surprising that fewer are already operating under SAP Cloud ERP.

Conversely, respondents from larger organizations are more likely to be in the middle of an implementation (18%) than smaller organizations (9%). Similarly, larger respondent organizations are more likely to be exploring RISE or building a business case (35%) than smaller organizations (20%). This continues to support the idea that larger organizations were slower to start but are now starting to move towards SAP Cloud ERP Private.

Although they may have been slower to start moving to SAP Cloud ERP Private, larger organizations are more likely to be running some of the core components of the RISE with SAP package (**Figure 2**). This includes SAP S/4HANA Cloud Private Edition and SAP Analytics Cloud, although it is SAP Analytics Cloud for planning that is part of the SAP Cloud ERP Private package.

FIGURE 2

SAP Cloud ERP Private Components Currently in Use



Not surprisingly, those who report using SAP S/4HANA Cloud Private Edition are much more likely to have completed their move to SAP Cloud ERP Private (96%). Meanwhile, 44% of those in the planning or exploration process also report they are running the solution. This is likely part of their transition, as 65% of these respondents also report they are still running SAP ECC.

Other offerings in SAP's Business Transformation Management solutions are seeing less adoption, although the number of respondents who say they are using SAP Signavio or SAP LeanIX is gradually

increasing. With these solutions being part of SAP's integrated toolchain for innovation, in conjunction with SAP Cloud ALM and WalkMe, that adoption should continue to increase.

The most important conclusion is that adoption of SAP Cloud ERP Private is accelerating as organizations face the growing challenge of needing to move away from their legacy ERP systems over the next few years and increasing pressure from SAP to make that move to cloud ERP.

➔ Next Steps

Our research reveals that SAPinsiders should apply the following key steps related to their plans for ERP, innovation, and SAP Cloud ERP Private.

- **Plan for the move to cloud ERP.** Organizations are under increasing pressure from SAP to move to cloud ERP. For some, this aligns with plans they already had in place, while for others the transformation may not be straightforward. Regardless of the status of their current ERP environments, SAPinsiders should be planning for the move to cloud ERP. Whether this happens over the next few years or sometime after 2030, this is the only way organizations are likely to be running SAP ERP systems in the future.
- **Utilize other capabilities in the SAP Cloud ERP Private package.** For most, the move to SAP Cloud ERP Private is about the transition to SAP S/4HANA Cloud Private Edition. However, that is just part of what SAP Cloud ERP Private offers. Beyond the ERP system, the package includes SAP Analytics Cloud for planning, SAP Enterprise Service Management, SAP Taulia solutions, SAP Business Network Supplier Portal, SAP Signavio, SAP LeanIX, SAP Build, and master data governance capabilities. SAPinsiders should look to leverage these capabilities to maximize the benefits of their investments.
- **Plan for future and ongoing innovation.** SAP Cloud ERP Private is just the start of an ongoing transformation. But deploying cloud ERP is only the beginning. While updates are not as frequent when running SAP Cloud ERP Private as they are in SAP Cloud ERP Public, the ability to leverage them for new features and capabilities is significant. Adding the capabilities of SAP's integrated toolchain for innovation further supports this. SAPinsiders should be ready for this ongoing innovation and have the capabilities in place to support it.

INSIDER PERSPECTIVE

“RISE with SAP (SAP Cloud ERP Private) provides us with a single source for hosting, support, and subscriptions, something that was previously managed through three different sources and agreements and economically is slightly lower cost for like-to-like capabilities. RISE with SAP has also aligned us with the SAP strategy on Joule and embedded AI.”

STEVE BIRGFELD,
VICE PRESIDENT, INFORMATION
TECHNOLOGY & SERVICES,
BLUE DIAMOND GROWERS

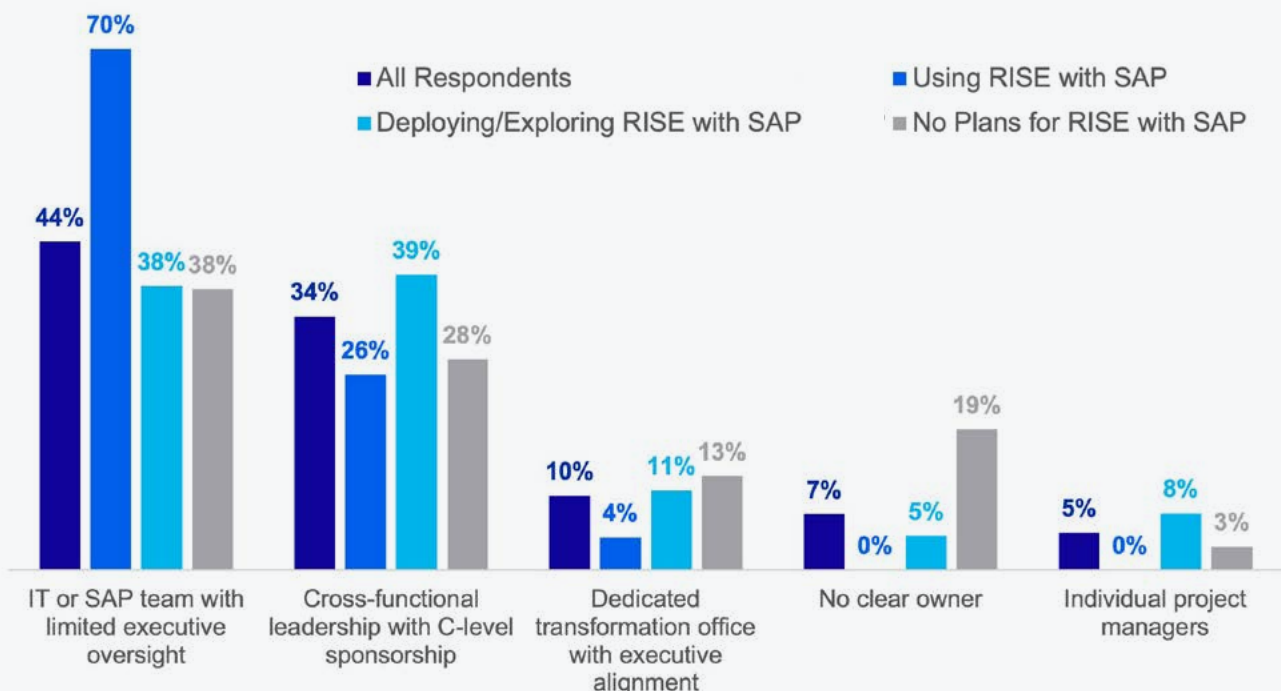
Factors Impacting SAP Cloud ERP Decisions

The start of the move to SAP Cloud ERP Private begins with a strategic direction. The business case must be assembled and plans for the project put in place. The composition of the teams involved in these strategic decisions can vary depending on the size of the company. Smaller organizations may not have the resources to form cross-functional teams and may rely more on IT teams with some executive oversight.

What is notable is that, for a plurality of respondents, the team responsible for governing direction for ERP and Innovation Strategy is an IT or SAP team with limited executive oversight (**Figure 3**). For those already actively using SAP Cloud ERP Private, it is significantly more likely the team driving their decision making was an IT or SAP team. Empowering a dedicated team who will then work with leadership to secure the appropriate support for the project may offer advantages over a cross-functional leadership team due to the complexity of putting that broader team together.

FIGURE 3

Teams Governing Direction for ERP and Innovation Strategy

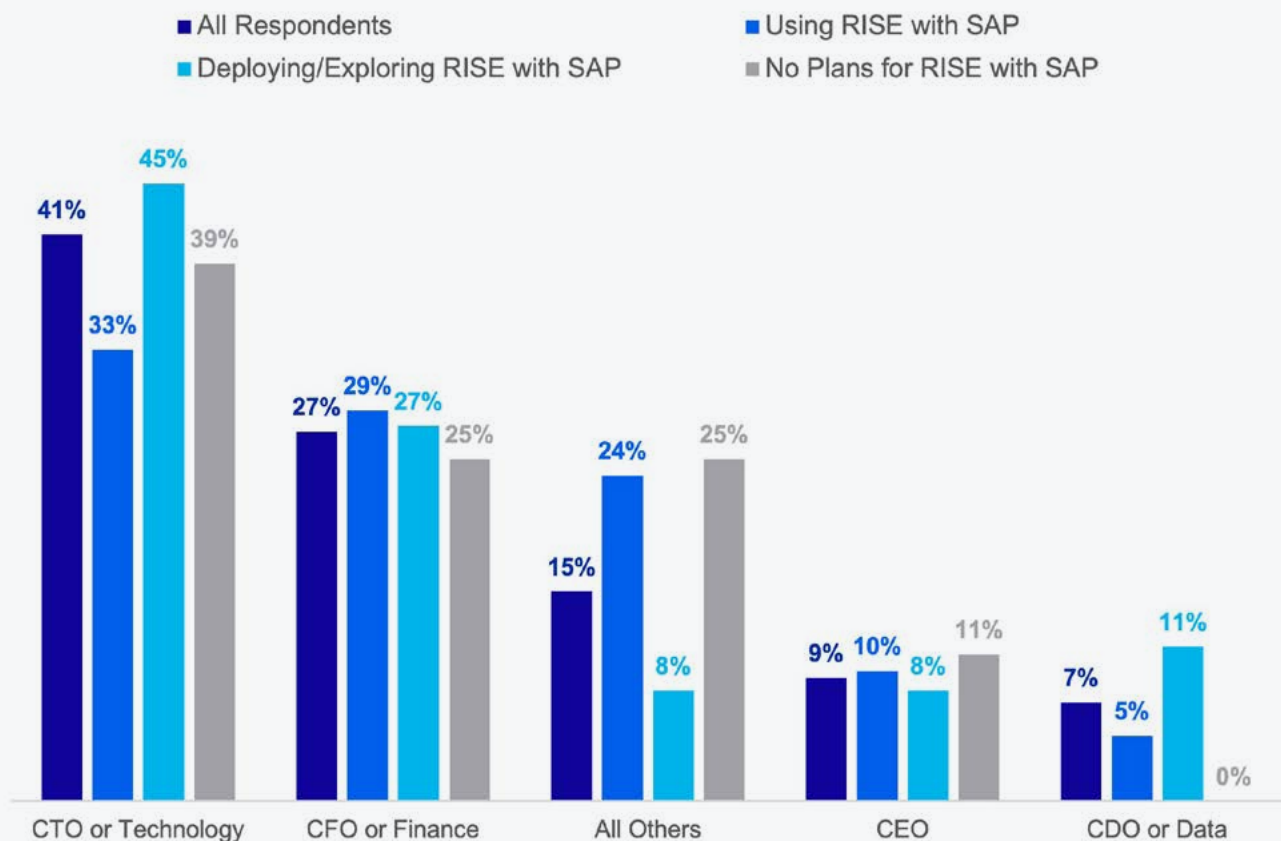


Another point to examine is that one in five (19%) of those with no plans for RISE with SAP report they have no clear owner of their direction of ERP and innovation strategy. This may be part of the reason why these respondents are less likely to be embarking on a major project like SAP Cloud ERP Private, although these organizations are still as well represented as other groups when it comes to those responsible for strategy.

While the teams driving the strategy may come from different parts of the organization, and it is crucial that business teams are involved in projects of this nature or adoption may be less successful, executives are typically those making the final decisions. This involvement with executives from other parts of the business is most closely seen with those who are currently using SAP Cloud ERP Private (Figure 4).

FIGURE 4

Executives Involved in Making Decisions on ERP Strategy



While those in the process of deploying or exploring SAP Cloud ERP Private are most likely to rely on their CTO or another technology executive in making decisions on ERP strategy, those who have already transitioned are less likely to entirely rely on these executives. At the same time, those already using SAP Cloud ERP Private are slightly more likely to have involved finance executives or their CEO than those who are in the deployment or evaluation phase.

Engaging with other parts of the business is a vital part of ensuring project success past the initial deployment. Those who treat their ERP transformation as primarily an IT project are likely to run into issues post deployment. Business teams may find that the processes they use have changed in the new system or may be unhappy with transformations that have been made if they are not involved from the start of the project. This may be reflected in how those with more business involvement have been able to transition to SAP Cloud ERP Private more quickly.

For those that have already moved to SAP Cloud ERP Private, one of the biggest reasons behind this decision is support from SAP in making that transition (**Figure 5**). This is different from license conversions and more likely related to the resources that SAP dedicates to ensuring the success of each project. For example, any SAP Cloud ERP Private implementation has a client delivery manager and technical service manager assigned in addition to an enterprise architect who ensures that SAP systems are correctly integrated into the new environment. This is in addition to other resources that come from the SAP Enterprise Cloud Services (ECS) team.

51%

of respondents report that the biggest reason for them moving to SAP Cloud ERP Private is support from SAP in making that move.

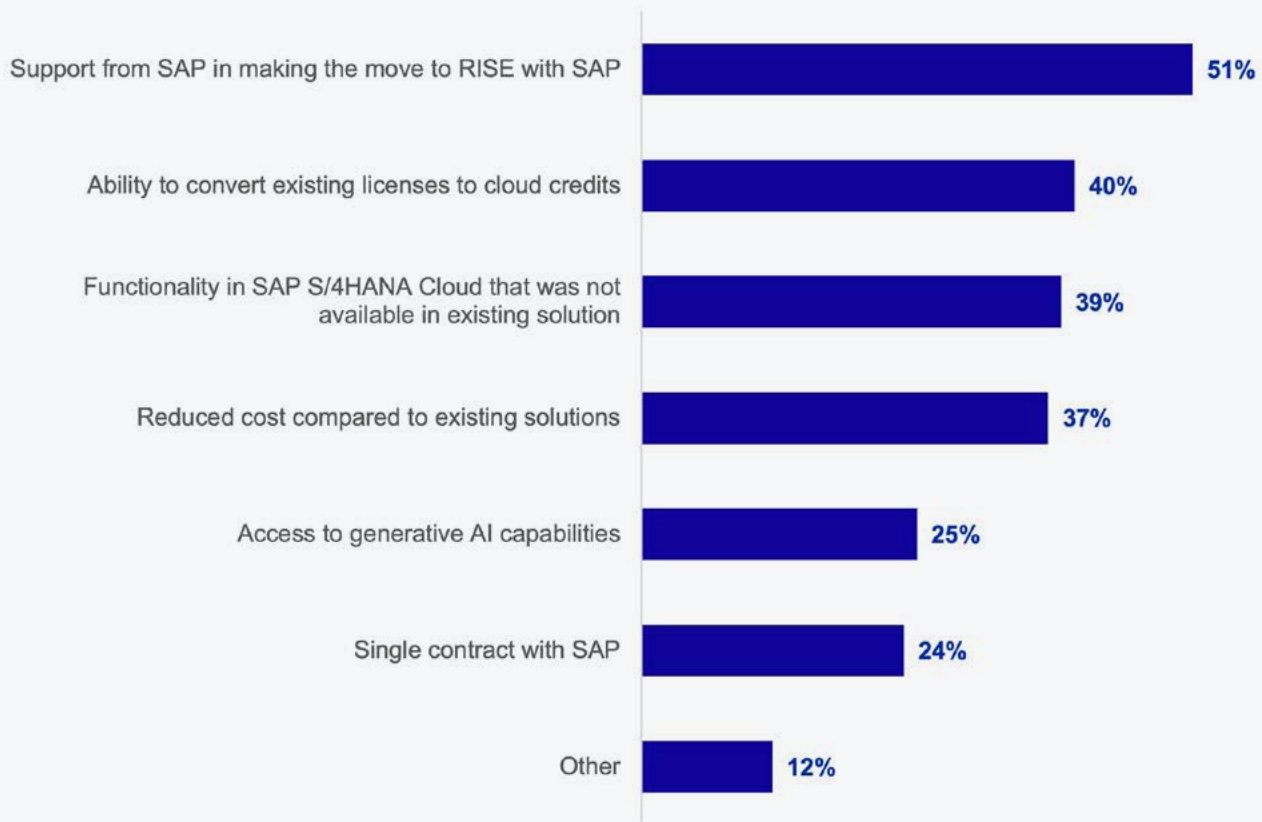
INSIDER PERSPECTIVE

“RISE with SAP (SAP Cloud ERP Private) brings value in two ways. First, it lets us move our existing ERP into the cloud while keeping critical processes and selected customizations, avoiding a risky replacement of the entire environment. Second, it shifted the infrastructure and technical operations to SAP so our internal team can focus more on integration, data quality, and improving how our people use the system.”

ENTERPRISE ARCHITECT,
GOVERNMENT AGENCY

FIGURE 5

Reasons Behind the Decision to Move to SAP Cloud ERP Private



* Respondents that are running, deploying, or exploring SAP Cloud ERP Private

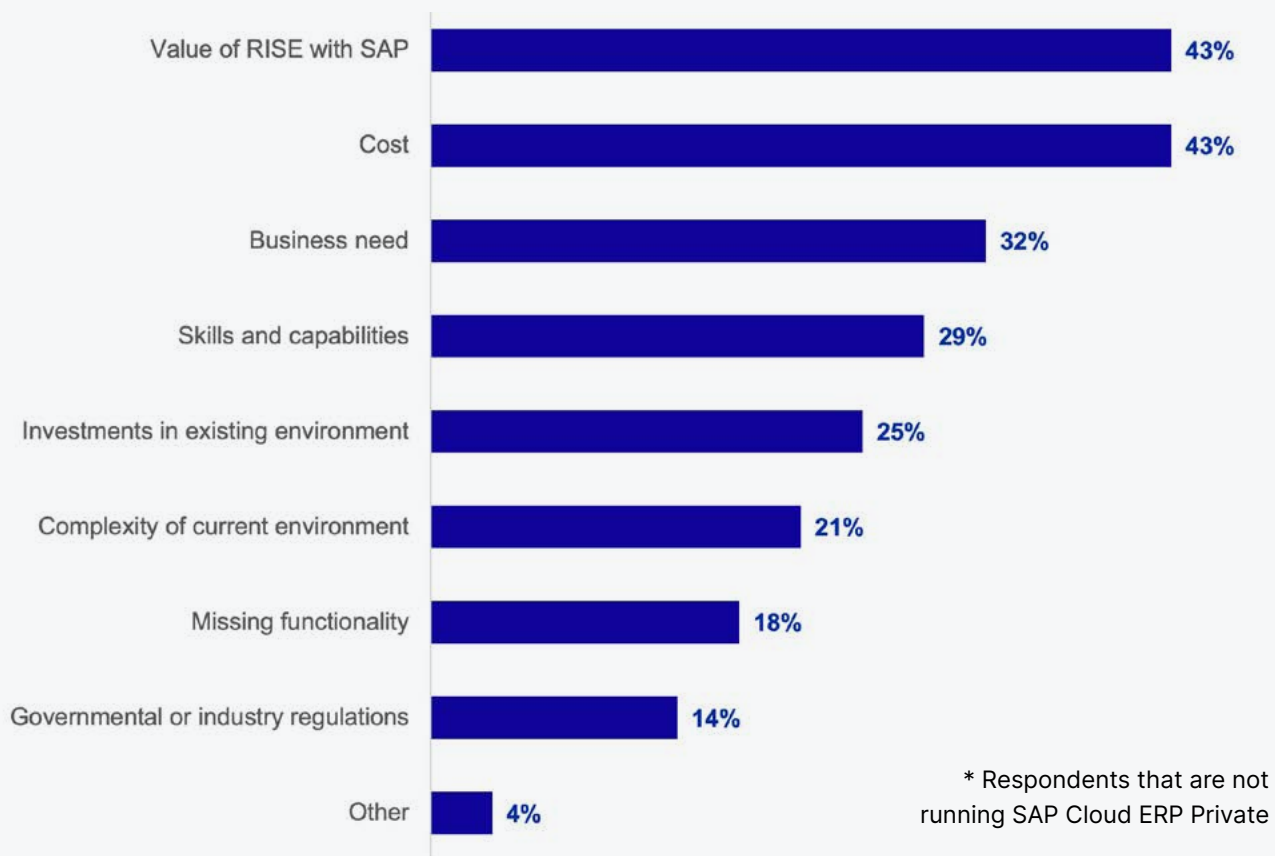
While assistance from SAP is important, there are cost-related reasons for moving to SAP Cloud ERP Private as well. For example, two in five (40%) respondents report the ability to convert existing licenses to cloud credits was a major factor. In addition, nearly as many (37%) report there was a reduced cost in moving to SAP Cloud ERP Private compared to existing solutions. That organizations do not have to make significant initial capital expenditure investments at the start of the project may also be a significant advantage, although any cost comparison needs to be carried out over more than just the initial contract length. As a subscription-based offering, organizations will be tied to renewing their SAP Cloud ERP Private contract at the conclusion of their contract unless they want to move to an entirely different ERP system.

Functionality that is available in SAP S/4HANA Cloud that was not available in existing solutions was the other major factor reported by respondents behind their move to SAP Cloud ERP Private. Those running even the most recent enhancement packages for SAP ECC will find there is significant new functionality in SAP S/4HANA. While many organizations may not be leveraging the standard functionality in an ERP deployment and are instead using customized interfaces, the ability to move away from these customizations can be a huge advantage if feasible.

Those that did not move to SAP Cloud ERP Private have not done so primarily for two reasons: the value seen in the package and the cost (**Figure 6**). Despite SAP regularly talking about the offering since early in 2021, it took the best part of four years before most SAP customers had at least a basic understanding of RISE with SAP (SAP Cloud ERP Private). The fact that a significant proportion continue to struggle with the value of the offering should not be surprising. This will take additional effort from SAP to percolate through the community, and those who have reservations will need to see the benefits and not simply face pressure to move.

FIGURE 6

Reasons Behind the Decision to Move to SAP Cloud ERP Private



From a cost perspective, the initial investment in a move to SAP Cloud ERP Private can be significant. While there is not the same capital outlay for licenses and infrastructure as was the case in the past, internal teams must be upskilled on managing new infrastructure and environments like the cloud. The remediation and re-engineering of aging customizations and business processes will take time and engagement from multiple parts of the organization. The extent of these costs should not be dismissed. The larger and more complex the initial environment, the greater the cost involved in a large-scale ERP transformation project.

Beyond value and cost, two other significant challenges for those moving to SAP Cloud ERP Private are business need and skills and capabilities. Many SAP customers have stated that the system they have today works for their organization and there is no reason to move. This may be true in places where the initial ERP implementation was only completed in the last few years—a move to SAP S/4HANA, for example—but most SAP ERP customers have been running those systems for a decade or longer. These companies must ensure they take the time to consider whether what they have today truly supports their needs, or if the business has changed since that initial implementation.

The skills and capabilities challenge is more difficult to address. Many organizations look to recruit the right skills into a specific project. That is difficult today due to the number of organizations in the midst of transformation and the dearth of resources the transformation is creating. Ramping up internal teams can not only take time, but existing staff may not have the right background to adjust to environments like the cloud or creating cloud-based extensions. SAP partly offsets this with the resources it brings to each project, but organizations must be ready for ongoing maintenance and administration of the systems once deployed.

INSIDER PERSPECTIVE

“RISE with SAP (SAP Cloud ERP Private) enables us to focus on the data and analytics without the burden of maintaining underlying infrastructure. This makes us more agile and scalable.”

SENIOR DIRECTOR OF IT
OPERATIONS, GLOBAL MEDICAL
TECHNOLOGY ENTERPRISE

Key Takeaways

When it comes to ERP transformation and innovation, consider the following:

- **Start preparing for the transformation today.** Even if the move to cloud ERP, or just SAP S/4HANA, is still several years away, the more work that is done up front, the smoother the transformation will be. None of that preparation work will be wasted, especially if it involves removing customizations or code paths no longer in use. The same is true of cleansing and harmonizing data, which will be crucial for organizations that want to leverage AI as part of their landscape.
- **Thoroughly weigh the pros and cons of moving to SAP Cloud ERP Private.** While many flag the cost of the transition as a major factor in not moving to SAP Cloud ERP Private, a significant number of those that already transitioned recognize it as a benefit. While there is a significant cost involved in the transformation project itself, especially when it comes to tasks like remediation and data preparation, these costs are not wasted. In addition, there can be significant longer-term benefits from any transition as organizations can streamline administration and maintenance costs and reduce the need to support large data centers. This makes it important for any organization to do a thorough evaluation of both pros and cons and revisit that evaluation in the future.
- **Expect a resource bottleneck over the next few years.** With many organizations now planning, exploring, or deploying SAP Cloud ERP Private specifically, and SAP S/4HANA in general, there will be resource shortages in the coming years. Even the largest SAP implementation partners will struggle to provide resources for hundreds or thousands of concurrent projects as 2027 and then 2030 approach. SAPinsiders should prepare for this by ramping up internal teams and working with implementation partners about project timelines.

Recommendations and Required Actions

More organizations are moving to cloud ERP. A significant number of those who were early adopters of SAP S/4HANA are now shifting to SAP Cloud ERP Private, while 70% of those that are running SAP ECC today are either exploring, planning, or conducting a deployment of the offering. While a significant portion of these organizations will not complete their transition prior to the end of 2027, the fact that they are moving and their numbers are growing shows that this shift will eventually happen.

While there has been a change in the number of organizations focusing on moving to SAP S/4HANA as rapidly as possible rather than as part of broader transformation, those who have completed a move to SAP Cloud ERP Private report that Cloud ERP has played a significant role in their modernization and transformation plans (**Figure 7**). Two thirds report that role has been at least a moderate enabler for those plans, with a third reporting that role has been a significant accelerator or core to their digital transformation strategy.

With 20,000 or more customers still needing to move to SAP S/4HANA over the next five years, and with increased pressure from SAP to make that move, the strain is on organizations. However, SAP continues to offer significant incentives to customers willing to make the transition. This ranges from license credits to implementation assistance, all of which make the move easier.

However, it is vital to remember that SAP Cloud ERP Private is not a truly cloud-native offering. It is a platform-as-a-service, and organizations must plan accordingly. The single contract with SAP does simplify some things, but that may not be the case with everything. The key is planning. Organizations that prepare appropriately for the move, from a skills, technology, and business engagement standpoint, can reap significant benefits from the move.

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

- The impact of AI on the decision to move to SAP Cloud ERP Private continues to grow. In 2023, just 14% of respondents reported that getting access to generative AI capabilities, likely in SAP S/4HANA Cloud, impacted their thinking on SAP Cloud ERP Private. Last year that number grew to 42%; this year, it is 43%. At the same time, only 31% say it did not impact their thinking, down from 39% in 2024 and 43% in 2023.
- While SAP has worked hard to communicate the security needs for SAP Cloud ERP Private, less than half (45%) of respondents report being aware of and actively following the shared responsibility model for SAP Cloud ERP Private. Although another third are aware of the model, these respondents are not following it rigorously. Failure to effectively follow both the shared

responsibility model and the mandatory security parameters and hardening requirements for ABAP systems running in SAP ECS, as documented in SAP Note 3250501, leaves systems open to attack.

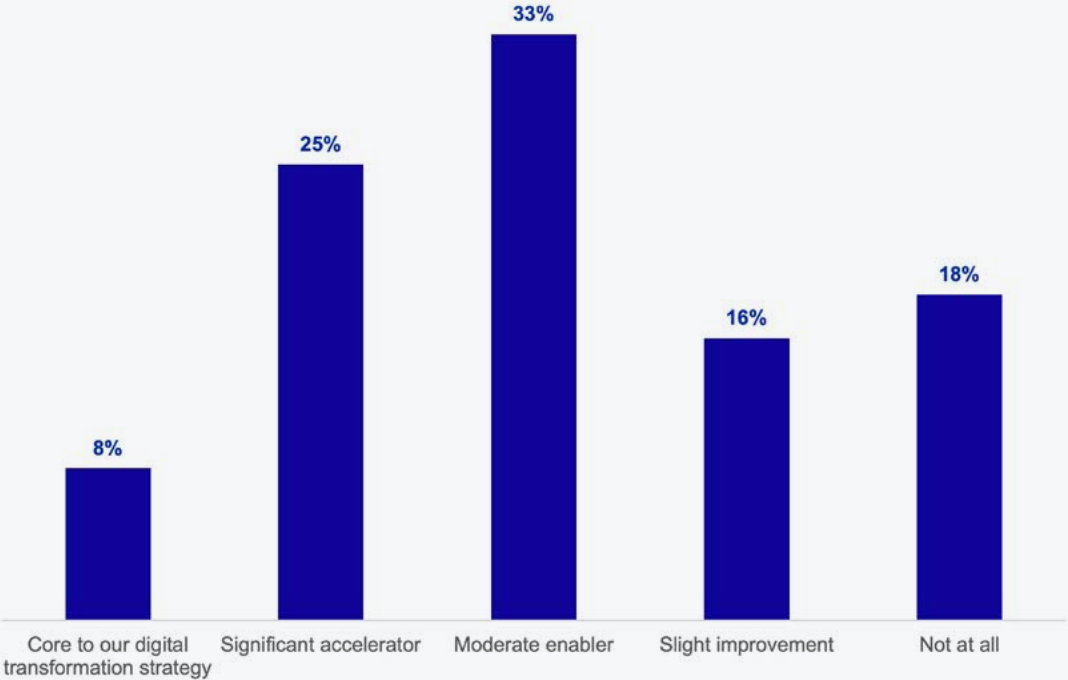
- Respondents plan to take a hybrid approach in moving other SAP workloads to SAP Cloud ERP Private following their deployment. The largest group (35%) plans to adopt a hybrid approach and move some workloads to the new environment while others remain outside. A quarter (25%) would move all their SAP workloads to SAP Cloud ERP Private in a phased manner, while 20% plan to move all their other SAP workloads immediately. The smallest group (19%) only plans on moving their ERP to SAP Cloud ERP Private.

43%

of respondents say that access to generative AI capabilities is changing their thinking on SAP Cloud ERP Private.

FIGURE 7

Role Played by Cloud ERP in Modernization and Transformation Plans



* Respondents that are running, deploying, or exploring SAP Cloud ERP Private

Required Actions

Based on the survey responses, organizations should consider the following when making their SAP S/4HANA deployment plans:

Ensure that security is at the forefront of any cloud, and SAP Cloud ERP Private, deployment

With attacks on SAP systems becoming increasingly common, SAPinsiders must do everything they can to ensure their SAP systems are properly secured. For SAP Cloud ERP Private, this starts with the shared responsibility model for security. While this can be an intimidating list, failure to understand these responsibilities may result in a system being vulnerable to attack. Similarly, organizations running SAP S/4HANA Cloud in an ECS environment also need to make sure they understand and follow the security parameters and hardening requirements listed in SAP Note 3250501. Both are crucial to ensuring the security of SAP Cloud ERP Private.

Include business teams early in any plans for ERP innovation.

Business teams are the users of any ERP system. Involving these groups in any transformation project is vital. Failing to do so can have a post-deployment impact on adoption and acceptance of any transformation project. In addition, respondents who included non-IT executives in their decision-making process are more likely to already have switched to SAP Cloud ERP Private. This makes including business teams early, and keeping them included throughout the project, critical to success. Given the time commitments involved, this will take strong executive commitment and should be factored into the cost of transformation, but failing to do so reduces the likely success of the project.

Leverage the capabilities offered by SAP to streamline transformation

SAP offers much to organizations embarking on a transition to SAP Cloud ERP Private. This starts with the RISE with SAP Methodology. Based on SAP's Activate Methodology, the RISE with SAP Methodology includes a standardized framework, integrated toolchain, and expert guidance. In addition, a growing number of validated partners are now following this methodology in all their SAP Cloud ERP Private deployments. SAP also offers delivery managers, technical service managers, and enterprise architects to work with customers and help ensure the success of any deployment project. Using these resources is not only sensible, it will help build a much stronger foundation for the project and increase the likelihood of success.

INSIDER PERSPECTIVE

“There are tangible benefits from moving to RISE with SAP (SAP Cloud ERP Private) including a lower cost on the subscription model, the huge benefit of access to upgrades in a timely manner, and the use of Joule out of the box. However, migrating from one hyperscaler to another is not trivial. It is expensive, and is also disruptive to the business. This has made it important for us to consider if the cost outweighs the benefits.”

MARTIN MENARD, CIO,
PACIFIC COAST COMPANIES

STRATEGY AND NEEDS FOR ERP AND INNOVATION



DRIVERS

- Upcoming end of maintenance of core SAP ERP systems (40%)
- Need to update and improve existing business processes and create new operational efficiencies (29%)
- Pressure to replace legacy infrastructure while reducing costs and limiting capital expenditure (28%)
- Business demands updated systems and processes that better fit current needs and regulatory requirements (27%)



ACTIONS

- Redesigning IT platform and architectures to lower costs and increase flexibility (47%)
- Implementing transformed and standardized end-to-end processes for core ERP users (44%)
- Architecting a unified IT landscape to provide better movement and integration of data (44%)
- Updating and redesigning processes as part of a new ERP implementation (42%)



REQUIREMENTS

- A partner with experience migrating and managing transactional and historical data (81%)
- Comprehensive monitoring to ensure system health and security (80%)
- Business process models that meet regulatory requirements for data management (79%)
- Best practice compliance checks that avoid outages (79%)
- A proven partner with experience implementing cloud ERP (77%)



TECHNOLOGIES

- High Availability and Disaster Recovery (48%)
- Cloud-based platforms and infrastructure (43%)
- Managed infrastructure environments on-premise (39%)
- Software-as-a-Service deployments (32%)
- Cloud-based ERP (30%)
- Business process transformation tools (28%)
- Custom code lifecycle management (27%)
- Data cleansing tools (25%)
- SAP managed and tuned infrastructure (22%)
- Infrastructure automation (21%)

APPENDIX

THE DART™ METHODOLOGY

SAPinsider has rewritten the rules of research to provide actionable deliverables from its fact-based approach. The DART methodology serves as the very foundation on which SAPinsider educates end users to act, creates market awareness, drives demand, empowers sales forces, and validates return on investments. It is no wonder that organizations worldwide turn to SAPinsider for research with results.

The DART methodology provides practical insights, including:

DRIVERS	These are macro-level events that are affecting an organization. They can be both external and internal, and they require the implementation of strategic plans, people, processes, and systems.
ACTIONS	These are strategies that companies can implement to address the effects of drivers on the business. These are the integration of people, processes, and technology. These should be business-based actions first, but they should fully leverage technology-enabled solutions to be relevant for our focus.
REQUIREMENTS	These are business and process-level requirements that support the strategies. These tend to be end-to-end for a business process.
TECHNOLOGY	These are technology and systems-related requirements that enable the business requirements and support the company's overall strategies. The requirements must consider the current technology architecture and provide for the adoption of new and innovative technology-enabled capabilities.

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Layer Seven Security is an SAP Services Partner and a leading provider of security services and solutions for SAP customers. It's SAP certified Cybersecurity Extension for SAP automates vulnerability management, custom code security, and threat detection as part of the shared model of responsibility in SAP RISE / Cloud ERP. The solution also supports automated compliance monitoring for SAP ECS security requirements. The Cybersecurity Extension for SAP ensures your SAP systems are compliant, protected and equipped for audits and certifications. Flexible licensing options are available for both one-time assessments and sustained monitoring.

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