

# Simplicity Is Golden

Heeding customer demands, sellers of planning software aim to make their products easier to use.

[John Edwards](#), CFO Magazine

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It's not all fun and games in the amusement-park business.

Just ask Gary Neveras. As senior director of financial planning analysis at Universal Orlando, Neveras is responsible for tracking and forecasting the numbers on more than 1,000 different ventures and projects at the theme park. "We have tons of information," he says. "But being able to mine that information and make business decisions — that's a challenge."

Like financial managers at a lot of other businesses, Neveras uses software to foretell an array of financial trends. And like financial managers at a lot of other businesses, he cringes at the effort needed to use the software. "Many modeling products just don't offer a good mix of usability and flexibility," he says.

You get that a lot. While makers of planning applications have come a long way with their products, they've tended to overlook one small item: most users of computer programming aren't, in fact, computer programmers. Says John Hagerty, a financial software analyst at AMR Research, a technology market research firm in Boston: "The focus so far has primarily been on providing products that deliver the most analytical power."

That's understandable. Given the competition in the budgeting-and-planning software sector, B&P vendors have had little choice but to trick out their programs with all sorts of bells and whistles. But after prodding from customers — many of which rely on entry-level workers to input data into modeling programs — most vendors are at least beginning to address the issue of usability. Such established vendors as Business Objects, Cognos, Hyperion, and Geac Computer are attempting to design modeling apps that are simpler and more straightforward. Says Lee Geishecker, a corporate performance management analyst at Gartner Inc., a technology research firm in Stamford, Connecticut: "They've all become quite sensitive about usability."

## Cell Hell

Of course, the most popular modeling software in the business galaxy hardly qualifies as user-friendly. While Microsoft Excel does provide a formidable amount of analytical muscle, the advantage tends to fade as models grow more complex. That's particularly frustrating for power users.

In fact, the well-documented limitations of Excel have opened a selling opportunity for rival vendors, eager to nick their share of what's estimated to be a \$4 billion industry.

## The Templates of Doom

Customer interest in less-daunting planning programs has not escaped the notice of more-established B&P vendors. John O'Rourke, senior director of product marketing for Santa Clara, California-based Hyperion Solutions Corp., believes that added functionality shouldn't complicate a program's structure or adversely affect its overall look and feel. He notes that despite numerous additions over the years, his company's Hyperion Strategic Finance has retained its familiar spreadsheet-style interface and hasn't forced users to adapt to any radical changes.

Still, it appears Hyperion is heeding customer calls for simpler software. The vendor is planning to improve Strategic Finance's ease of use by providing more wizards and improving integration with Microsoft Office. Hyperion developers are also working on a feature that will enable users to attach notes to models. Says O'Rourke: "The annotations will allow team members to see the assumptions behind each model."

Likewise, market leader Business Objects SA, based in San Jose, California, and in Paris, is tweaking its array of modeling applications. Peri Pierone, vice president of vertical markets, notes that the company's goal, with all of its software, is to help customers create plans they can trust. Says Pierone: "It's remarkable how much time companies spend on planning, but the plan that results really isn't very believable."

## Easy For You

As they attempt to advance both capabilities and usability, modeling developers find themselves walking a thin and perilous line. Customers may be demanding easier-to-use products, but they're reluctant to trade away any modeling functionality. "They don't want the applications dumbed down," says Business Objects's Pierone.

Consultants say finance managers who yearn for usability need to be wary of purchasing modeling software that is light years beyond their needs or abilities. "You don't buy a cannon to shoot a rabbit," says Guillermo Kopp, vice president of the cross-industry practice at Tower Group Inc., a financial-services research and consulting firm in Needham, Massachusetts.

The goal, then, is obvious: to maximize performance while minimizing confusion. But as vendors and users of planning software are discovering, that's no small trick. "Simplicity," says Neveras, "is sometimes the least simple thing to achieve."

*John Edwards is author of The Geeks of War.*

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