

Distribution Industry Insights 2023

Discover how companies that move goods leverage ERP solutions and partnerships to elevate performance.



EPICOR

How Loyalty and Trust Elevate ERP Relationships in Distribution

BY LISA POPE, EPICOR PRESIDENT

Last year the ERP market *grew an astounding 12.3%*, as businesses confronted new challenges.¹ Many struggled to adapt to economic uncertainty, unreliable supply chains, and labor shortages. Integrated ERP solutions help distributors keep pace with today's shifts, changes, and disruptions.

But cloud ERP is the real game-changer. Distributors rely on its cost-effective flexibility and scalability to become more agile, resilient, and competitive. Now that the next normal is here, it's time to chart a new course for the future.

The 2023 Distribution Industry Insights Report shows that although loyalty and commitment to ERP partners remain high, distribution business leaders expect significant support in return. Enterprise and small business (SMB) distributors alike look to ERP partners to help them throughout the purchase journey—from pre-sale through go-live. Many also use software selection consultants to help them

identify and buy an ERP that gives them the most value for their specific business needs.

Distributors also understand the value of the cloud to enable and control their unique business flows. At the same time, they want assurance that cloud ERP solutions will include robust security features that protect their data and business.

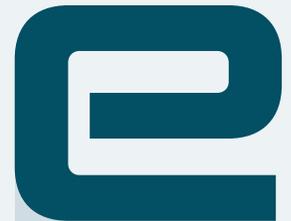
More transparency is important to distributors as well, particularly during planning, implementation, and go-live—but also when considering the security of a cloud-based ERP solution.

This year's report is packed with rich information and insights. The bottom line? Distribution business leaders want to partner with an experienced ERP company dedicated to supporting them through the entire purchase journey, well beyond go-live.

With best wishes,



LISA POPE
President, Epicor



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Who We Surveyed

In fall 2022, we surveyed 1,350 enterprise technology decision-makers to gain insight into their views on cloud ERP. Of those, 482 represent the distribution industry. The respondents represent distribution organizations generating annual revenue of over \$250 million.

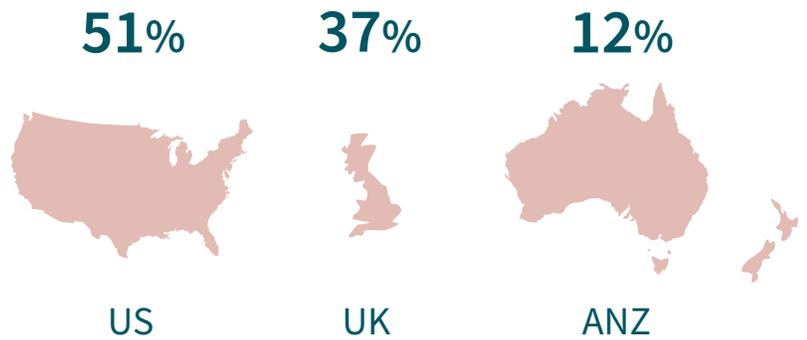
We also compare this enterprise data with an identical survey conducted in spring 2022 with 1,350 technology decision-makers from small and midsize businesses (SMBs). In this survey, 237 were distribution industry leaders working in SMB organizations generating \$20-\$250 million in annual revenue.

We interviewed businesses across multiple continents and with all deployment types, from private off-site and on-premises servers to hybrid and fully cloud-based environments. In this report, we share our latest findings on the current state of cloud ERP adoption in the distribution industry and reveal how ERP solutions and partnerships need to evolve to meet distributors' changing needs.

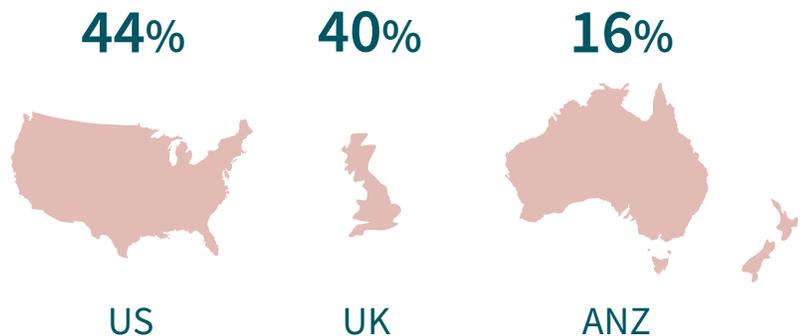
Less than half of all **distributors** are primarily or entirely **on the cloud.**

This year's distribution research participants:

SMB distributors



Enterprise distributors



Distributors Want More Cloud Solutions

Most distribution businesses are interested in using cloud solutions. While just under 25% of distributors still use on-premises ERP solutions with at least some cloud solutions, 39% of enterprise and 43% of SMB distributors depend primarily or entirely on cloud-based solutions. Many more plan to expand their use of the cloud this year.

81%
of enterprises and
79%
of SMB distributors
plan to migrate most or all of their
business solutions to the cloud in 2023.

Across all industries, cloud-based ERP solutions are increasingly important to businesses that want to innovate, diversify their business offerings, and identify new growth opportunities. Within distribution, 88% of enterprises and 85% of SMBs recently diversified their offerings.

Distribution businesses that migrate to a cloud ERP solution must depend on it to strengthen their core business without disrupting operations—while also empowering business growth, expansion, and elevation in new ways.

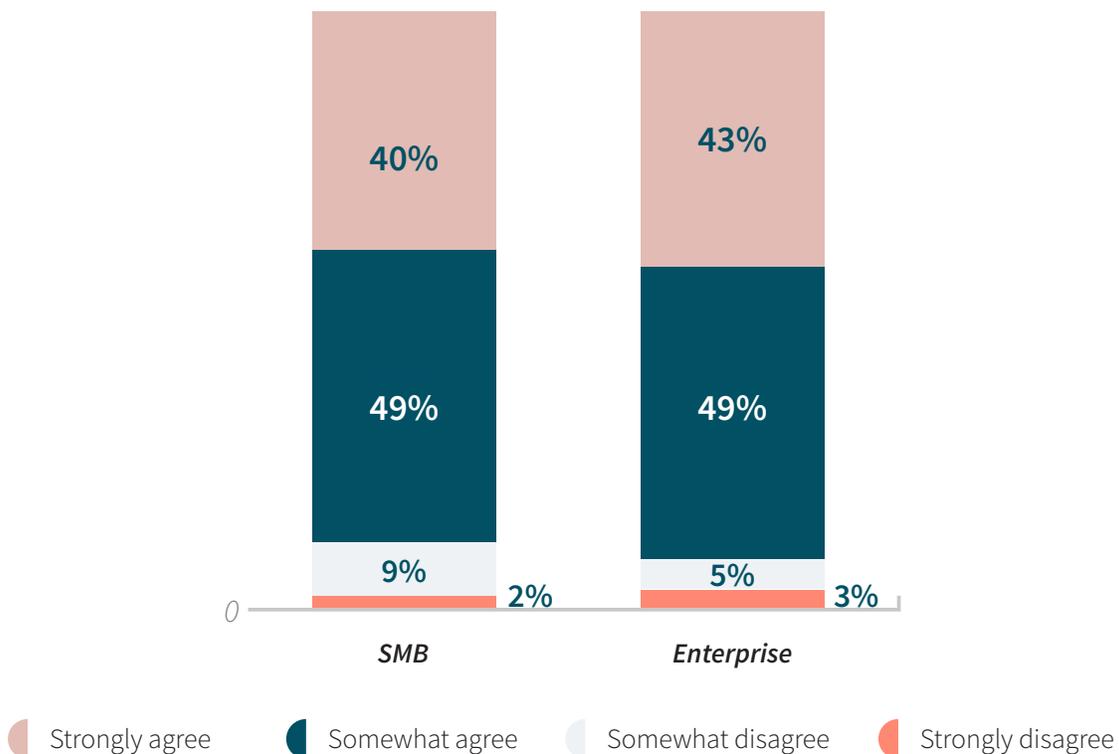
¹Christoph Böhm interview, “The cloud as a strategic ecosystem for innovation and growth,” McKinsey, June 21, 2022. <https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/the-cloud-as-a-strategic-ecosystem-for-innovation-and-growth>

Distributors are Loyal to ERP Providers, but Better Scalability, Functionality, and Services Could Sway Them

92% of enterprise and 89% of SMB distributors feel loyal to their ERP providers.

Though distribution leaders are loyal to their ERP solution provider, if they were to consider other solutions, 41% of enterprise and 46% of SMB distributors would choose an ERP that's primarily or entirely in the cloud.

Loyalty to current ERP provider



Distributors are Loyal to ERP Providers, but Better Scalability, Functionality, and Services Could Sway Them

Regardless of business size, growth is a top priority for distributors. With cloud-based solutions, they know they can increase their agility, efficiency, and scalability—with lower upfront costs and lower maintenance costs down the road. Because the cloud can manage large workloads while scaling up and down with business needs, it has greater potential to improve performance and increase revenue while reducing the complexity associated with maintaining on-premises systems. This allows distributors to focus on business growth knowing their applications and systems will grow with them.

The automated capabilities of cloud-based ERP solutions are built to enhance business performance and growth. Automation reduces the time and investment required to manually execute processes, improving productivity, eliminating tedious tasks, and allowing distributors to quickly scale operations. This increased agility, coupled with broad visibility into data and processes, helps distribution businesses make better decisions that can ease today's supply chain pressures.²

Every one to three years, distributors consider changing their ERP solution. If enterprise distributors could switch more easily to a new ERP solution, they would. They want to find a scalable system that can be easily deployed in the cloud. In contrast, SMBs would quickly switch to an ERP solution that gives them increased functionality and a superior user experience.

The desire for better functionality, support, and easier integrations causes distributors to consider a new ERP.

²Elena Dumitrescu et al., "A better way to drive your business." McKinsey, May 25, 2022.
<https://www.mckinsey.com/capabilities/operations/our-insights/a-better-way-to-drive-your-business>

“Move to the cloud, I will be telling everyone.

Don't be afraid of the initial cost. I don't have to buy new servers every 5 years, I don't have to maintain the servers, and the software maintenance is rolled into the monthly cost. It may seem like a lot when you first look at the per-user cost, but when you factor it all in, it just makes sense.”

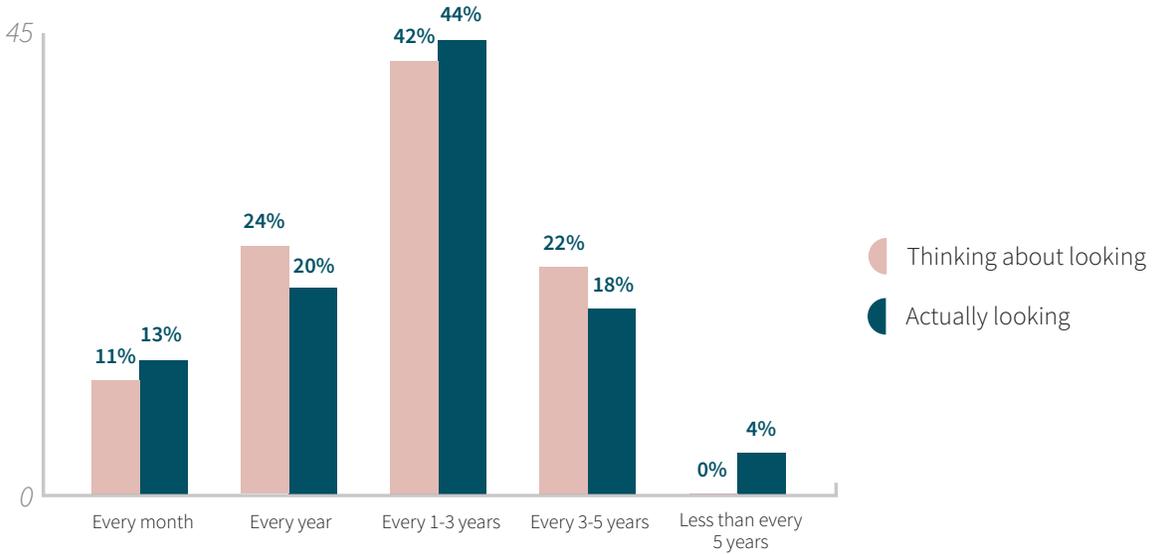
Keith Nowak, President, MPT Drives

Distributors are Loyal to ERP Providers, but Better Scalability, Functionality, and Services Could Sway Them

Integration challenges and better functionality and support are often the catalysts that initiate the search for a new ERP.

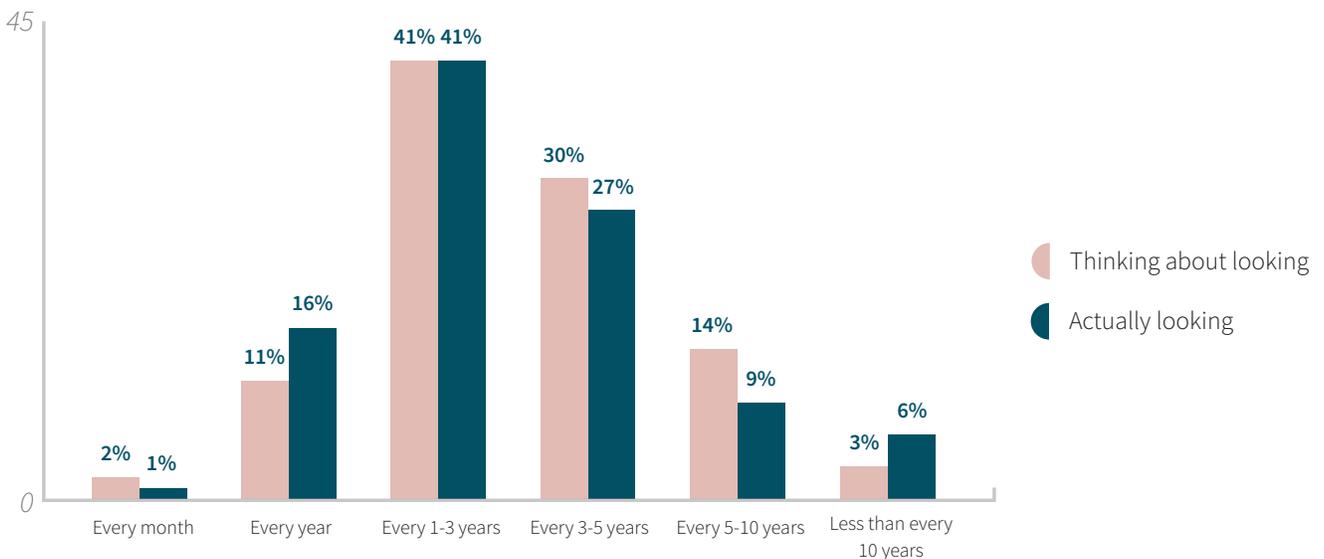
How frequently do you think about changing your ERP solution?

SMB



How frequently do you actually look into changing your ERP solution?

Enterprise

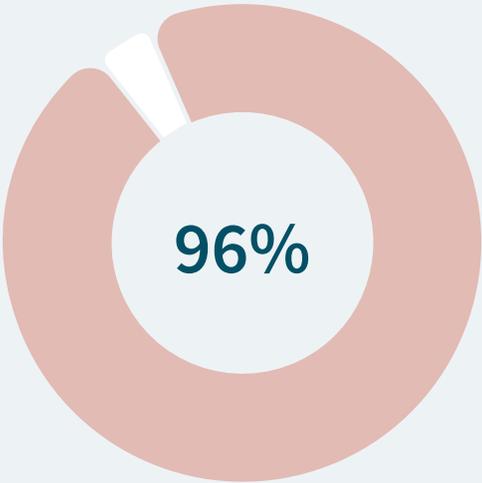


Distributors are Confident Making ERP Purchases, but Require Supportive Partnerships

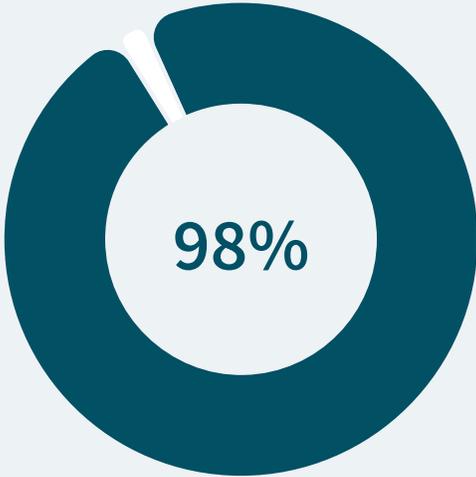
The research shows that the vast majority of distribution leaders are highly confident when navigating the ERP journey. Because enterprise and SMB distributors explore changing their ERP solution every one to three years, they likely already have a level of comfort with the ERP purchase journey.

98%
of enterprises and
96%
of SMB distributors
feel confident
navigating their ERP
purchasing journey.

Customer confidence in the ERP purchasing journey



SMB



Enterprise

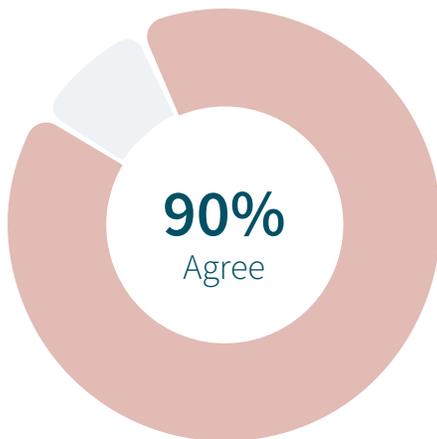
Distributors are Confident Making ERP Purchases, but Require Supportive Partnerships

Distributors place significant value on partnerships with their ERP providers. To inspire more confidence during the purchase process, both enterprise and SMB business leaders want to establish rapport with a single team that exhibits specialized industry knowledge and leads with transparency. Enterprise distributors, in particular, prioritize the need to know exactly what they're purchasing and what effect it will have on business continuity.

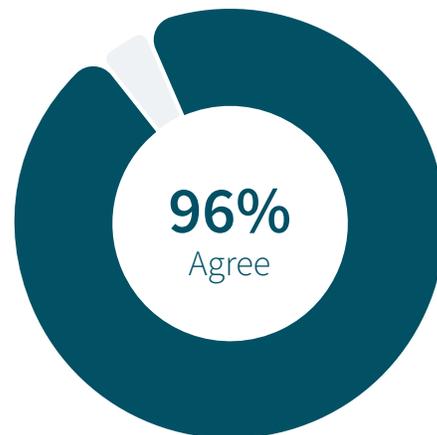
96% of enterprise and 90% of SMB distributors view their ERP vendor as a partner throughout the purchase process.

To what extent do you agree with the following statement:

"I feel that my ERP provider is a partner throughout the purchasing process (up to going live)"?



SMB



Enterprise

Distributors Need More Support During Implementation and Go-Live

Some glitches are to be expected with any new ERP system, but post-purchase planning, implementation, and go-live are especially challenging for distributors.

Nearly **25%** of the surveyed distribution businesses indicated security and risk mitigations as their top concerns when implementing a new ERP solution.

What phases of the ERP purchase journey does your business find the easiest or most difficult?

	SMB	Enterprise
Initial approach	Easy - 28%	Easy - 37%
	Medium - 18%	Medium - 14%
	Difficult - 17%	Difficult - 15%
Evaluation	Easy - 11%	Easy - 13%
	Medium - 25%	Medium - 30%
	Difficult - 16%	Difficult - 13%
Configuration and planning	Easy - 7%	Easy - 7%
	Medium - 38%	Medium - 32%
	Difficult - 15%	Difficult - 12%
Implementation	Easy - 16%	Easy - 11%
	Medium - 15%	Medium - 20%
	Difficult - 16%	Difficult - 25%
Go-live/completion	Easy - 38%	Easy - 33%
	Medium - 5%	Medium - 5%
	Difficult - 36%	Difficult - 34%

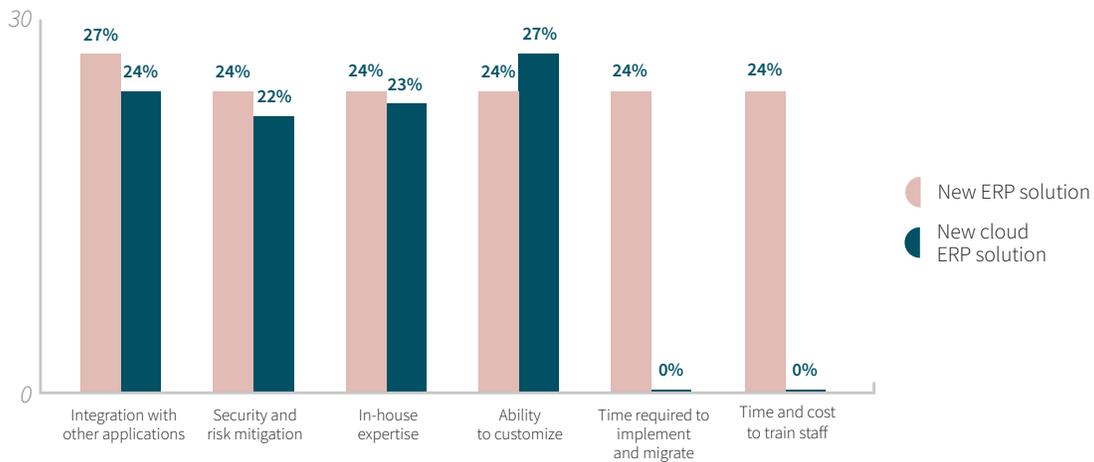
Distributors Need More Support During Implementation and Go-Live

When implementing a new ERP, distributors of all sizes question whether they have the right level of in-house expertise to manage the new system, how well it will integrate with other applications, and how comprehensive the security and risk mitigation will be. Enterprises give additional consideration to customization capabilities and the time and cost required to implement, migrate, and train employees.

With cloud-based ERP solutions, specifically, SMBs and enterprises share similar concerns about customization and in-house expertise. However, for SMBs, the biggest cloud ERP challenges are the time required to implement and migrate along with the time and cost to train staff.

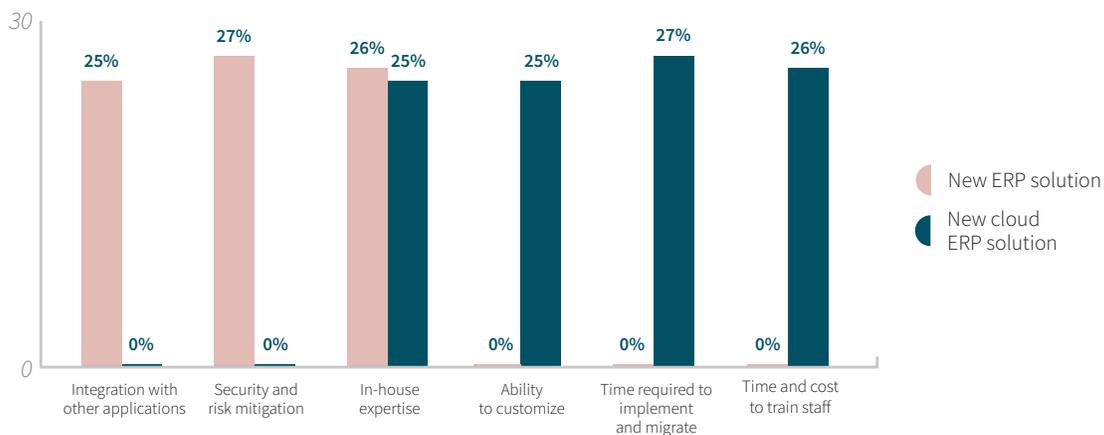
What do you perceive to be the biggest challenges with onboarding and implementing new ERP solutions?

Enterprise



What about specifically for cloud-based ERP solutions?

SMB



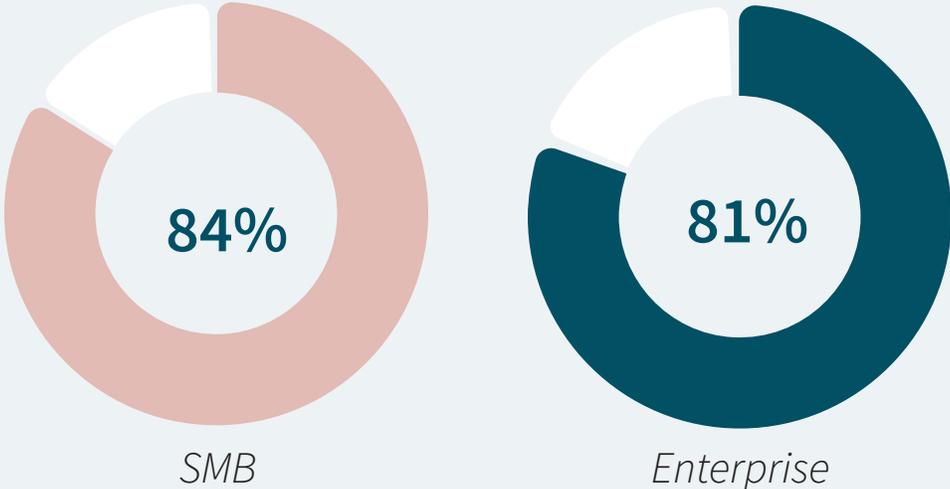
Distributors Need More Support During Implementation and Go-Live

To ease these concerns, distributors expect their ERP partner to pay specific attention to the most challenging phases of the journey by offering support with data migration, training, beta testing and dry runs, and education on data best practices to help fill in any in-house knowledge gaps.

Given the complex nature of enterprise businesses, onsite consultants may also be necessary to support enterprise leaders more fully and effectively.

When choosing a new ERP solution, over 80% of distributors rely on the advice of software selection consultants and other intermediaries.

When considering new ERP solutions, do you use software selection consultants (or other intermediary companies who give advice on which ERP providers to use)?

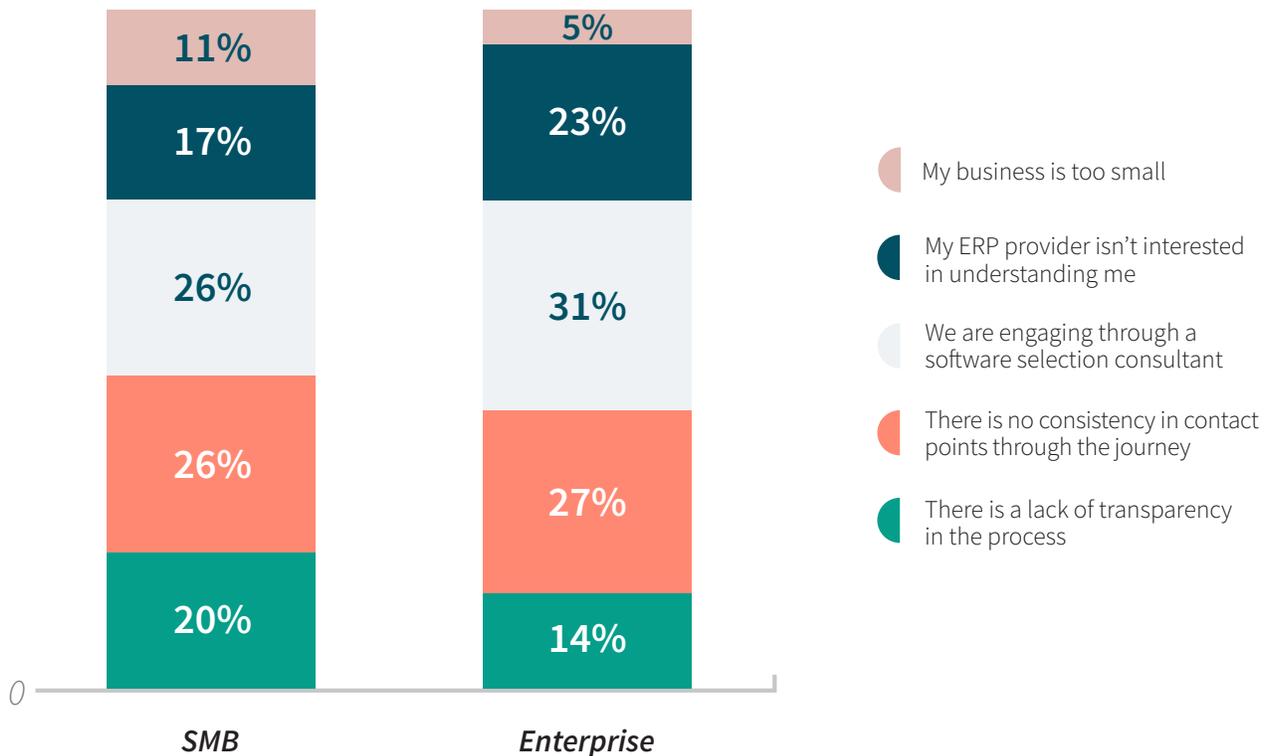


Distribution leaders need their ERP partners to recognize the unique challenges of implementation and provide the support they need most.

Distributors Need More Support During Implementation and Go-Live

This emphasizes the importance distributors place on selection consultants during the evaluation phase. It also underscores the need for ERP providers to bridge the gap when selection consultants and other intermediaries limit their contact with distribution businesses. Other barriers to partnership for both enterprises and SMBs include inconsistent contact with the core team and a lack of transparency.

What are the barriers to making you feel like you have a partnership in the ERP purchase process?



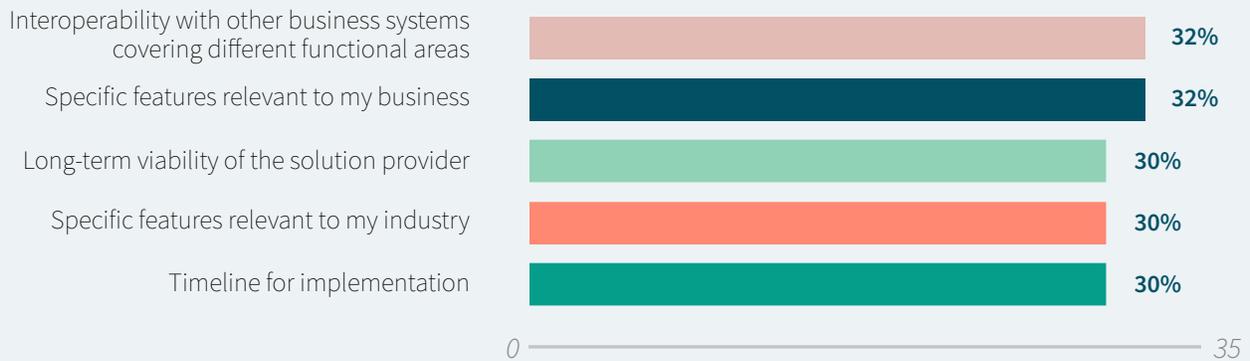
Security is an ERP Priority for Distributors

When distributors specifically consider a cloud ERP purchase, they want to address a variety of areas first, including security. Security is critical, especially with today's heightened risk of cyberattacks. Enterprise distributors consider security the top area to address before purchasing a cloud-based ERP solution. They rank interoperability with other business systems a close second, as well as features that apply specifically to their business.

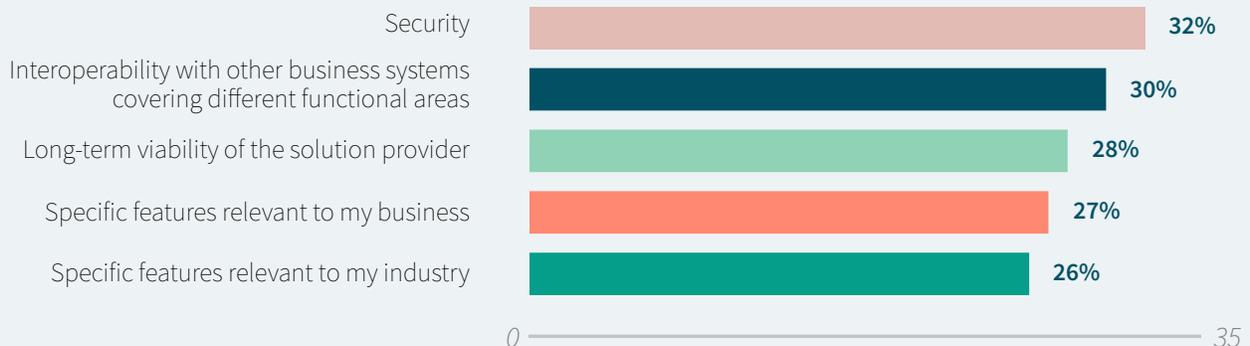
For enterprise distributors, cybersecurity is the primary consideration when purchasing cloud ERP.

What are the areas you think should be addressed about potential cloud ERP solutions before the purchase?

SMB



Enterprise



Security is an ERP Priority for Distributors

For distributors of all sizes, security is inherently linked to business continuity. In the event of a breach, a secure ERP protects a distributor's data so there won't be disruption to their operations, causing serious downtime.³

Compared to their on-premises counterparts, cloud ERP solutions do a better job of securing and managing distributors' data effectively—in a highly stable environment that protects against security threats of all types.⁴

“The cloud was an important decision. Not only from a management standpoint, but cybersecurity is such a dynamic and critical issue. Our insurance depends on a robust business continuity plan, and it's impossible to keep pace with the security landscape unless you have dedicated people.”

Rodney Huber, President, Huber Supply Company

Regulatory compliance goes hand-in-hand with security concerns. During the evaluation phase of the ERP journey, distributors need to know their new system can make it easy to comply with rapidly changing regulations. Industry-specific ERP systems help distributors keep up with local, national, and international laws and documentation requirements—specific to the distribution trade itself with financial functions and critical data governance and security.

³Mitch Lewis, “Where does security fit into a business continuity plan?” TechTarget, Sept. 26, 2022. <https://www.techtarget.com/searchdisasterrecovery/answer/Where-does-security-fit-into-a-business-continuity-plan>

⁴“How does Epicor Cloud Solution provide for business continuity and disaster recovery?” <https://www.epicor.com/en-us/resources/videos/distribution/how-does-epicor-cloud-solution-provide-for-business-continuity-and-disaster-recovery/>

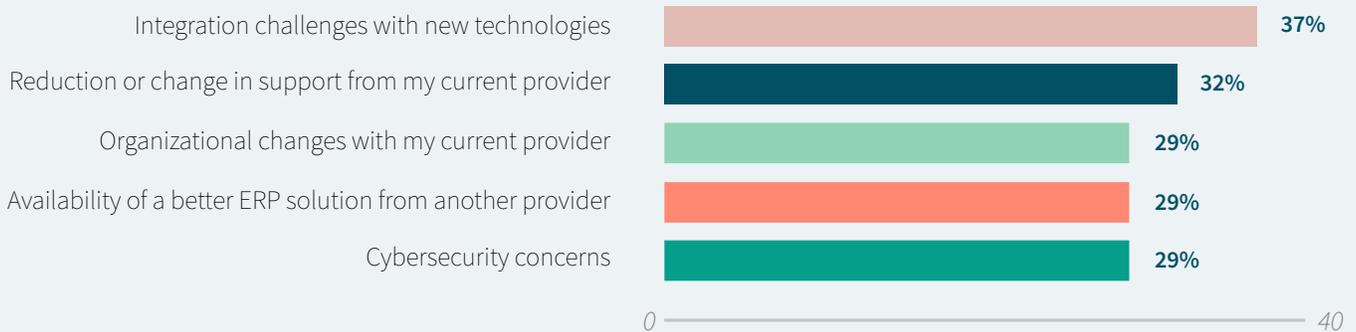
Ease of Integration and Better Functionality Matter

While distributors might consider a new ERP solution for a variety of reasons, enterprises put the availability of an overall better solution at the top of their list, followed by integration challenges with new technologies. Other major considerations include the need for richer functionality and response to organizational change, such as a merger or acquisition that might require a new or integrated system.

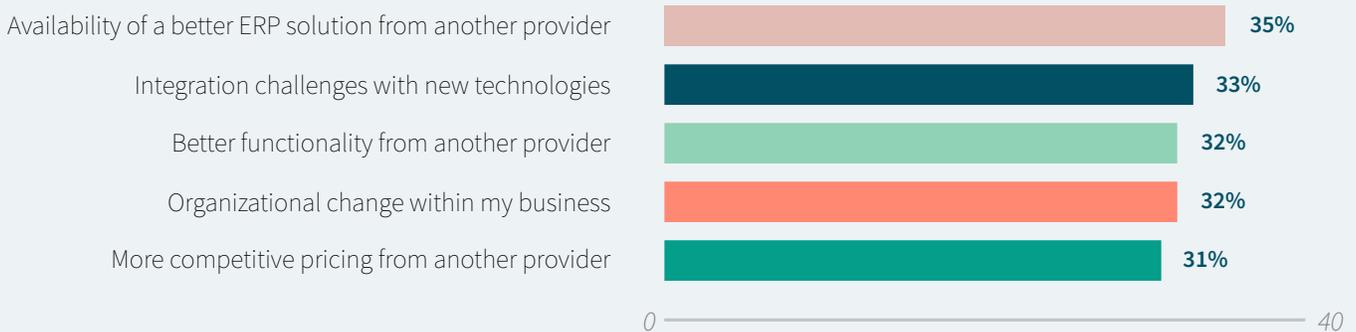
A better solution from another provider is a key reason why enterprise distributors consider an alternative ERP, while SMBs are motivated to evaluate another ERP that simplifies integration with new technologies.

What has compelled you, or might make you decide to, think about re-evaluating and/or purchasing a new ERP solution?

SMB



Enterprise



In contrast, SMBs rank integration challenges as their top reason for considering a new ERP, followed by a reduction or changes in support from their current provider.

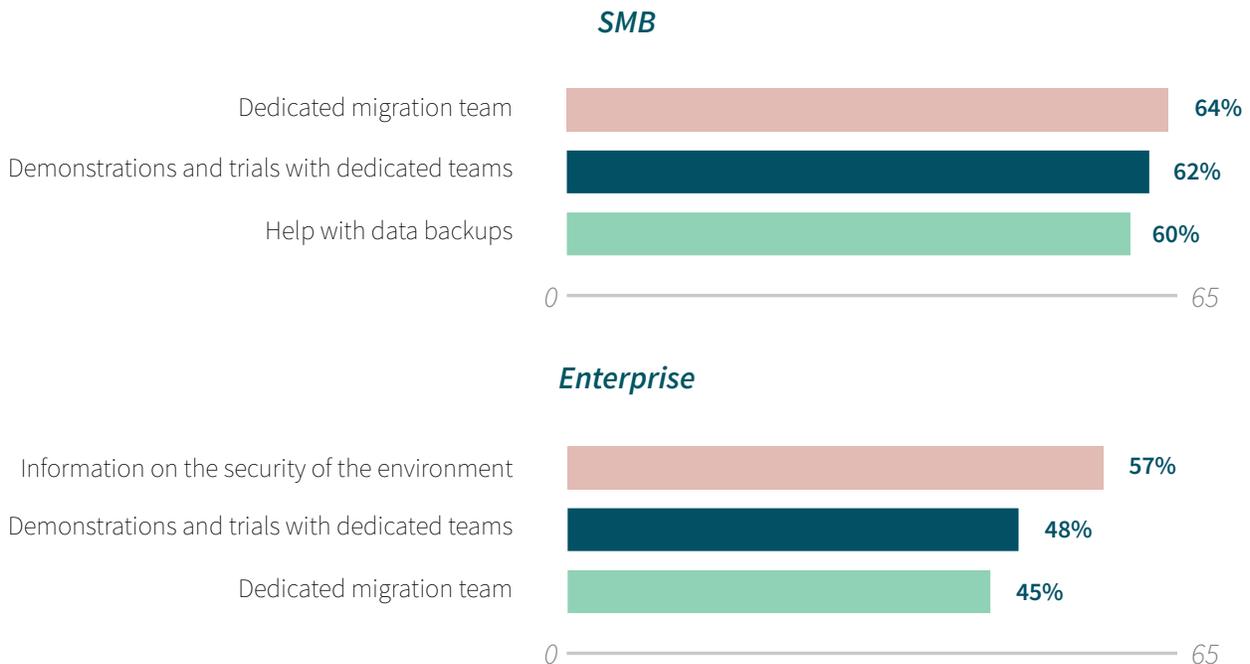
Distributors Value Cloud Solutions but Require Guidance While Migrating

The vast majority of distribution businesses are comfortable with cloud solutions, but a few factors would further reassure them when transitioning to a cloud ERP.

Enterprise distributors prioritize information about security above all else when assessing their comfort level. They also believe that a dedicated migration team and product demos and trials would increase their comfort. SMBs would feel more comfortable transitioning to a cloud-based solution if their ERP provider delivered dedicated migration teams, demos, and help with data backups.

94%
of enterprise and
89%
of SMB distributors
are comfortable with
cloud-based business solutions

Which of the following would make you feel most comfortable as you make the journey to the cloud?



Despite the value they see in cloud solutions, 93% of enterprise and 87% of SMB distributors understand the potential for disruption when migrating from an on-premises ERP to a cloud-based solution.

Best Practices

During Cloud Migration

Some distribution businesses already made the switch from on-premises to cloud ERP and gained valuable insights during the migration process. Drawing on lessons learned, enterprise leaders use certain strategies to ensure a smooth migration process—whether to a hybrid environment or an entirely cloud-based one.

Enterprise leaders start the process by surveying their entire business application landscape and identifying any dependencies, usually with the help of IT employees who intimately understand what they are. They consider open source software wherever possible. They also take care to communicate with key IT stakeholders, so their internal teams understand how daily workflows will change and how roles will be impacted.⁵

Even though enterprises have more internal resources than SMBs, both need effective migration support from ERP providers in the form of consistent collaboration and communication. This emphasizes the need for ERP providers to help businesses successfully use the solutions they purchase, addressing any challenges as they arise.

⁵“How to Develop a Hybrid Cloud Migration Strategy,” Epicor Blog, March 19, 2020.
<https://www.epicor.com/en-us/blog/how-to-develop-a-hybrid-cloud-migration-strategy/>

Key strategies for an effective migration to the cloud include:

Internal evaluation of critical dependencies and input from key stakeholders



Impact on daily workflows and effective communications



Cross-functional collaboration

Best Practices During Cloud Migration

To what extent do you see the following as drawbacks to migrating to the cloud?

	SMB	Enterprise
Integration with other applications	44%	38%
Security and risk migration	42%	39%
Data consumption	41%	41%
Pricing structures	41%	41%
Incompatibility of data software/programs	40%	32%
Time required to implement and migrate	39%	41%
Data consumption	38%	36%
Maintaining data quality	38%	39%
Pace of upgrades	38%	41%
Regulatory compliance	38%	40%
Security in transfer	38%	37%
Training staff	38%	40%
Data overages	36%	37%
Configuring to fit unique business needs	36%	38%
Data sovereignty	35%	36%
Data loss	33%	35%

It can be particularly difficult for distribution business leaders to anticipate effects of ERP cloud migration on end users from a business continuity and regulatory compliance standpoint. Enterprises are more visible to regulatory bodies. And as demand for faster, more convenient product delivery solutions escalates, enterprise leaders must find a way to meet customer expectations while complying with changing standards like the GS1 supply chain standards and international export controls.

Best Practices During Cloud Migration

In addition, business leaders must consider how day-to-day operations and distribution timelines may be impacted by any internal change. Business continuity, attention to detail, and a supportive ERP partner are non-negotiable during an ERP cloud migration. Leaders must be ready to work through a wide range of challenges relating to scalability, consistency, and potential expansion of the business.

*“We really like that we can quickly talk to people who understand our business and our marketplace, not another help desk. **Epicor’s support network gives us confidence in the product and fantastic customer service when we have queries or need to escalate a matter. Epicor feels like they are our partners — that they are invested in our business.**”*

Craig Ogilvie, IT Manager, P&R Electrical

One such challenge is when a distributor must integrate their ERP system with new business systems and technologies during a merger or acquisition. Distributors need to rely on their cloud ERP partners for support to help them navigate complex changes, reduce disruption to the business, and bring as much standardization and consistency as possible.

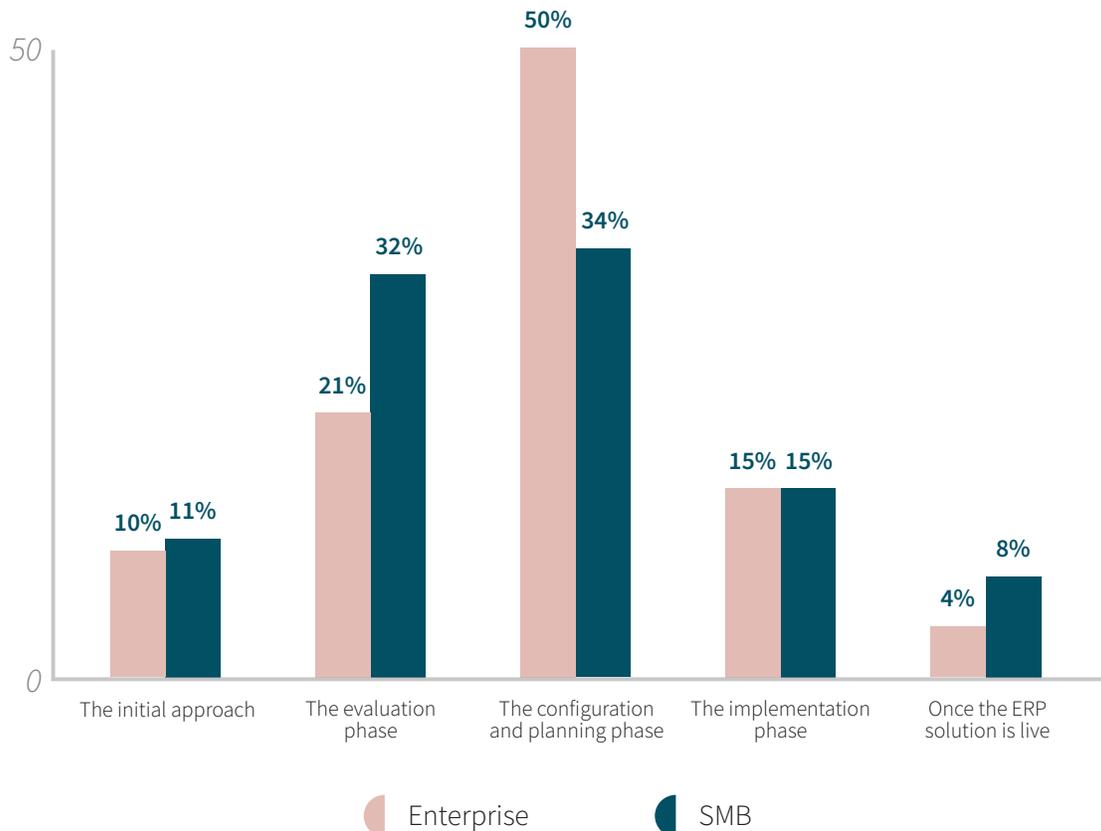
Distributors expect their ERP providers to help them successfully use the solution they purchased and to navigate complex changes in the business environment.

Distribution Leaders Seek Greater Visibility into the Cloud Migration Journey

Distribution businesses across the board expect complete transparency from their ERP supplier during the entire journey from purchase through go-live. However, enterprise and SMB distributors both feel that having greater visibility, specifically during the evaluation and configuration phases, is the most valuable.

98%
of enterprise and
96%
of SMB distributors
say greater transparency
would increase their
confidence in the
ERP journey.

In which part of the purchase process would you be most interested in gaining greater transparency?



Distribution Leaders Seek Greater Visibility into the Cloud Migration Journey

Information and visibility regarding the security of the cloud environment are also critical because they are the primary drivers for increasing the comfort of enterprise distributors when considering cloud adoption.

Enterprises also want detailed information on pricing, security, data migration, release cadence, and features. In addition, our research finds that distribution leaders want ERP partners to be more transparent about any disruptions to their business during the migration.

Support is another major factor in the success of an ERP solution. The type of support distributors seek depends on the phase of the ERP journey. During implementation, ERP providers can best support distribution leaders with data migration, training, beta testing and dry runs, and education on data best practices.

Useful support types when onboarding or implementing ERP

	SMB	Enterprise
Support in data migration	40%	32%
Trainings and run-throughs with super users	36%	39%
Beta testing and dry runs	31%	30%
Education on data best practices	29%	29%
Staff training	29%	32%
Onsite consultants	28%	30%
Key contact	27%	19%
On-hand support	24%	28%
Key content	22%	22%
Roll-out materials	22%	29%

Distribution Leaders Seek Greater Visibility into the Cloud Migration Journey

Once the new ERP is live, enterprise distributors primarily lean on their internal IT teams for support. However, the ERP partner still plays an important support role after go-live, especially by providing technical documentation and conducting ongoing training. SMB distributors with fewer internal resources also look to their ERP partner for training and technical documentation, while relying on peer knowledge for an additional layer of support.

Where do you look for support once your ERP is live and the project is complete?

	SMB	Enterprise
ERP partner training	35%	32%
Technical documentation on the vendor's website	32%	34%
Peer knowledge from other users of the same solution	31%	29%
ERP provider blogs	29%	25%
Internal tech or IT teams	29%	37%
External third-party training	27%	24%
The help section of the application	27%	30%
External third-party analysis	25%	25%
My account manager	20%	23%
User communities	20%	27%
ERP forums	16%	19%

“With Epicor, it’s never a ‘no’.

If the solution doesn’t support a request, the Epicor team will integrate with one that does ... not only does Epicor design specifically for distributors, but the company actively solicits our feedback and input in product development.”

Joseph Hampton, Director of Information Technology, Top Notch Distributors, Inc.

Distribution Leaders' Wish List for the Cloud Journey

This year's research brings to the fore the importance of strong partnerships between distributors and ERP partners. Here's what ERP distribution leaders value:

A strong partnership and ongoing contact with the same core support team.

Distributors want consistent contact points throughout the entire journey, from the initial purchase through go-live and beyond.

1**2**

Increased support. Distributors require the most help in the planning, implementation, and go-live phases of the ERP journey. Enterprise and SMB distribution leaders look for increased support during these phases with a variety of tools and methods.

3

Robust cloud security. With cyberattacks becoming increasingly sophisticated and widespread, the risk of threats is a growing concern. When considering cloud technology, enterprise distributors, in particular, need assurance their cloud-based business solutions enable strong security features that reduce vulnerabilities and prevent data loss.

4

Enhanced functionality.

Distribution decision-makers regularly compare the features and functionality of competitive offerings. Because they want deep functionality, they look for the latest features and expect ERP partners to continuously develop greater functionality.

5

Greater transparency.

Transparency is always a high priority, but even more so during the evaluation and configuration phases of the journey. Business leaders cited a desire for greater transparency and clarity, particularly regarding security issues when migrating to the cloud.

Partnering with Epicor: We Champion Every Step of Your ERP Journey

Ready to help you lean into the future of distribution.

Transform your business by leveraging the power of a modern ERP solution that's tailored to your business's needs. Tap into our deep industry knowledge and support across every step of your journey to the cloud.

“Epicor’s cloud-based ERP software delivers the modern, cloud-based platform that we need to support our business and drive our digital transformation. Developed specifically for the distribution industry, it was clear that Epicor was the solution of choice to help us streamline business process, meet our business goals, and drive further improvements in efficiency.”

Graham Allcroft, Head of IT, PJH Group

Epicor is dedicated to our customers for the long haul. We understand the critical role distributors play in the economy as the backbone of the supply chain. We work to help ensure the curated solutions we deliver address their unique business challenges. Our distribution-specific ERP platform empowers distributors with modern tools, so they can stay agile and focus on growing, diversifying, and elevating their businesses.

Partnering with Epicor: We Champion Every Step of Your ERP Journey

From evaluation and purchase through implementation, go-live, and beyond.

Robust Security

We know cybersecurity is always a big consideration. Our security suite is backed by knowledgeable industry experts who work hand-in-hand with your security team. With our cloud-based ERP solution, your software is automatically updated to the most current version, providing the highest security standards and reducing your vulnerability to risk.

Superior Functionality

Our solutions are designed specifically for the distribution industry and include features and functionality that address your industry-specific processes. We offer scalability and a wide range of configuration options. With our standard APIs, you get controls that provide extensive connectivity to the database. You benefit from our ongoing effort to increase database accessibility.

Greater Transparency

Transparency is our priority from the very beginning of your journey with us, and we continue to give you the clarity you need throughout the entire process. With our allegiance to transparency, you avoid the surprises that can derail progress. You always know what to expect regarding cost, scheduling, data migration, implementation, training, business continuity, and more.

Comprehensive Training and Support

When you need tech support, you get it directly from us. As an enterprise distribution customer, you have 24/7 support available, including a dedicated team for technical issues and a customer account manager who stays in regular contact during every phase of your journey. We also help provide onsite and online education, so your teams feel comfortable and confident using and managing your solution.

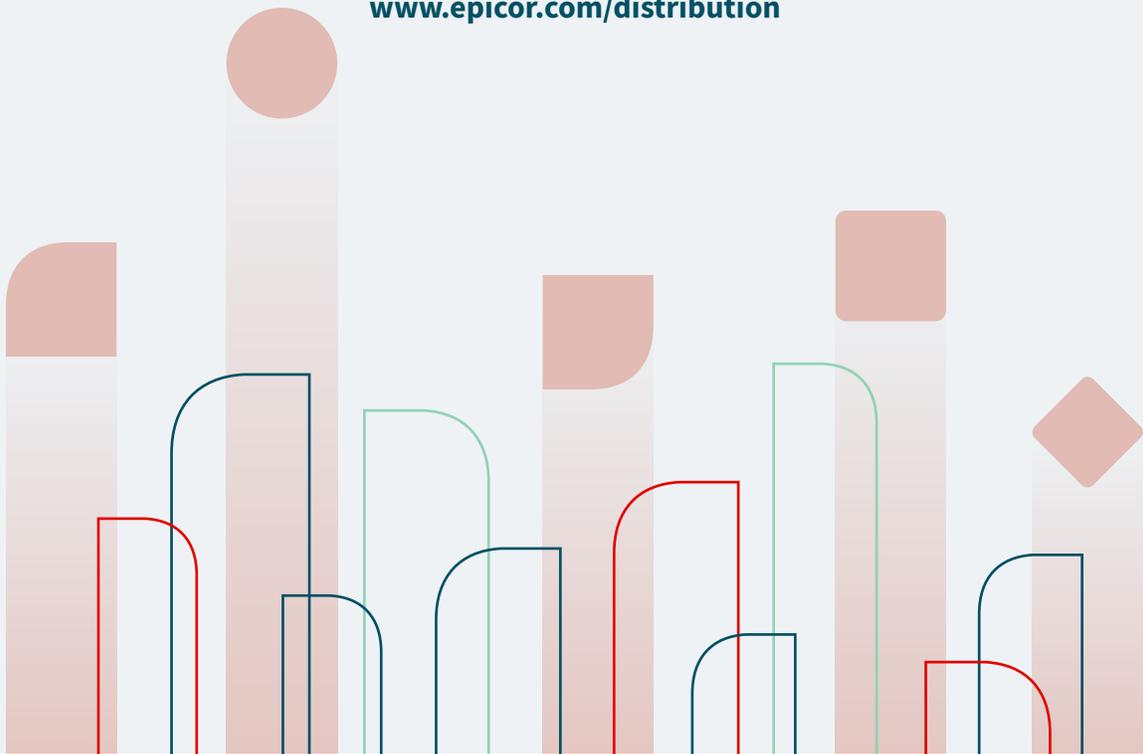
Strong Partnership

Epicor is a trusted partner and advisor supporting every step of the way—from pre-sales through implementation and go-live, and long after. Our team of experts ensures all stakeholders get involved and stay involved from the start, helping you navigate the implementation of a new ERP solution or migrate to the cloud. During your entire ERP journey, we support you and translate your unique distribution business needs into actionable intelligence.

Get in Touch

Let our experts show you how our leading industry productivity solutions can help your distribution business thrive well into the future with cloud ERP.

www.epicor.com/distribution



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