Essential Questions To Ask During Your Search For A VMS Provider
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Essential Questions To Include in a Vendor Management System RFP
Understanding each phase of the process

Evaluating a vendor management system (VMS) can be an overwhelming process if you don’t know the right questions to ask in a request for proposal (RFP). You will want to conduct a thorough review of the vendor’s business model, core functionality and differentiating offerings such as business intelligence, integrations and customer service. As you begin to assess different vendors, this document can help guide your RFP and ensure the most important areas to your business are addressed sufficiently.

Company background

Understanding a company’s background, viability, market strength and overall strategy is the first step toward choosing a solution. The inquiries below can help benchmark VMS providers against one another and provide insights into a company’s industry standing and experience.

1. Is your organization owned or affiliated with a staffing company? If so, which one?
2. How does your organization’s technology enable managed service providers (MSPs)?
3. Provide detailed financial information about your company and parent company, if applicable.
4. What is the background of the management team? How many years of industry-specific expertise do they have, and how many years have they been with the company?

“A VMS should provide a process that is cost effective, efficient, ensures quality and certifies compliance. When selecting a VMS, it’s important to understand how each phase of the process will work.”
Program structure
Because each organization has as a different structure and management, it’s imperative to determine if the solution has the ability to work with a variety of MSPs or if capabilities are limited within the platform.

1. Can your product support programs managed by multiple MSPs or a combination of MSP-supported programs and self-managed programs? Do you allow for multiple MSPs or a combination of self-managed/MSPs?
2. Please provide examples of clients who have employed a multi-MSP model successfully.
3. Please provide an overview of additional services (outside of the VMS program) your company can provide to our organization that will reduce our overall cost and improve performance.
4. Can you describe how workflows are set up and sustained?

Product information

External workforce management
From the initial requisition to invoice, a VMS should provide a process that is cost effective, efficient, ensures quality and certifies compliance. When selecting a solution, it’s important to understand how each phase of the process will work. The questions below will help determine how a VMS will help streamline workflow and provide visibility into your workforce.

Requisitions
Please describe the automated processes available for the end user. How does your application allow for easy adoption and simplified processes?

Requisition distribution
How are requisitions distributed to suppliers? Can the distribution list be composed of “tiers” with preferred suppliers getting requisitions first, followed by second and third tier suppliers? What criteria or business rules can be used to define when information is passed to subsequent tiers?
Interview process
What is the process for using the application to schedule and track interviews?

Hiring process
- Does your solution allow for rate negotiation? How is the onboarding process handled?
- Is the application flexible to support multiple hiring practices in different countries and unique processes across the organization? Please provide examples of both scenarios.
- Do you have clients in the same regions where our organization does business?

Timesheets
- How do you assist with time entry to ensure hours are categorized properly?
- Please describe the process for addressing complex rates and tax rates in various countries and provide specific examples of how this has been accomplished.

Invoicing
- How do you make sure invoicing data is correct and immediately available to the client?
- When an MSP is involved, how does the application create the three-way invoice?
- How do changes to a large number of worker assignments happen all at once, such as when the company re-organizes or a cost center is closed and a new one must be assigned to many workers?
- Can the final invoice and any applicable taxes be generated within the system without any external processing or input? Does this also apply to a Statement of Work (SOW)?

Services procurement
In addition to external workforce management, a VMS should be capable of handling the sourcing and procurement of service providers, including multi-bid SOW processes, creation of an SOW and its distribution to suppliers and vendors. Each services engagement is different so the solution must allow for various levels of configuration.

1. Does the solution offer multi-bid SOW capabilities? If so, how can you control the suppliers authorized to respond to a multi-bid SOW? Can you ensure that only approved suppliers receive the multi-bid SOW?
2. Can I utilize a library of terms and templates when creating a contract or SOW? Can I inherit terms from previous contracts or SOWs and reuse?
3. Are RFP templates available so that users do not have to start from scratch? Can portions of the template be marked as required?
4. Describe the different payment structures that can be utilized within an SOW.
5. How can multiple people (internal and external) come together to negotiate an SOW?
Product administration

Matching VMS capabilities with your specific needs can help streamline business processes and ensure every step of the supply chain is managed effectively. Because no two programs are alike, the questions below help clarify the configuration options and how the solution might provide the end user insight and data.

1. Has the solution been created using third-party software (for instance, report writers, etc.)? If third-party software is required, please describe any additional licenses or infrastructure required, as well as how third-party software releases are introduced to the users.
2. How configurable is the workflow embedded within the system? Can the workflow be configured to support data-driven events, such as the cost of a transaction, overtime entered on a time sheet and the value of a customer-defined field on the transaction?
3. Does your solution allow program offices to upload and download tools?

“ The ability to derive intelligence from a VMS can help you make more informed business decisions that will improve efficiency and lessen costs down the road. ”
Business intelligence and reporting

The ability to derive intelligence from a VMS can help you make more informed business decisions that will improve efficiency and decrease costs. **Users should be able to access reports easily and these reports should be configurable to your business needs.**

1. Describe the architecture of the reporting system. Are third-party tools used?
2. How does the application support customized or ad hoc queries?
3. Can report definitions be saved for future use?
4. What user types can create ad hoc reports? Is there an additional fee?
5. Is it possible to create role-based dashboards to report more data besides basic functions, such as scorecards and KPIs? If so, please describe this process.
6. Can clients working locally download and email reports?
7. Describe the process for benchmarking and if it’s possible to benchmark against market data.

Technology

As with any technology solution, security is an ongoing concern with any VMS and should be addressed during the RFP process. Among the issues to address are architecture, hosting and recovery processes.

1. Describe the computer system security, intrusion detection, audit procedures, backup procedures, fault recovery procedures and disaster recovery plans.
2. Where do you host the system and what level of security is provided at the center?
3. Please give an overview of the technical architecture of the system.
Implementation and integration

Once you’ve decided on a VMS, the next steps are deploying the solution and integrating it into existing technologies. **Make sure these are streamlined processes that will provide your users an optimal experience using the VMS.**

1. What are the key elements required in order to assure a smooth and successful implementation?
2. What ERP, e-procurement or HR systems have been integrated with the system? (You can customize this question by asking for specific examples of integrations with the systems your company uses today.)

Customer support

Your program office and end users shouldn’t be left stranded once the solution has been implemented — they need to be supported regularly with a variety of training tools and guided resolution management. **You’ll want to verify that the VMS is transparent about software releases as well as any additional costs these services might incur.**

1. Please describe any assistance available to users such as self-help tools, user guides, tutorials and customer service support lines.
2. How will future releases be made available to us? Approximately how often is the solution upgraded? Are the upgrades considered part of our maintenance package or are there additional fees?
3. Can you describe any sort of assistance, such as a decision wizard or similar feature, that can help end users determine the type of work required?

Consultative services

Outside of technical customer support, program sponsors and program office staff can benefit from best practice expertise and benchmarking to craft strategy and define larger long-term goals. **Access to this sort of knowledge base can be a key differentiator in the RFP process.**

1. What expertise can you provide regarding industry best practices?
2. Describe the rate, supplier and performance benchmarks that can be made available.
3. Do you provide supplier support and training?

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Essential Questions To Ask During a Vendor Management System Demonstration

SAP Fieldglass Whitepaper
Introduction

The product demonstration is where the rubber meets the road for a Vendor Management System (VMS) provider. After the arduous Request for Proposal (RFP) process, the demonstration is an opportunity for you to see the user interface, learn how to manage specific tasks and get questions answered. More complex issues such as integration and implementation can be touched upon as well. As each organization has its own unique processes and business needs, how can you be assured you’re asking the right questions?

This is the second whitepaper in a series of three focusing on the essential questions to ask during your search for a VMS. Read it to understand how to manage the demonstration process and be better equipped to take the next step.

Success starts with you

Question yourself first

Before you ask questions of the solution provider, first ask questions of your own organization. What are you hoping to gain from this initiative? How big is your current program? What labor categories and types of services would you like to include? Will you roll out the program all at once in a “big bang” or in phases? Is your program global?

If you come into the demonstration armed with answers to these questions, you’ll be better equipped to evaluate the solution. Before the demonstration, give the vendor as much information as possible about your current processes and program to guide the discussion and push the vendor to show specific solutions.
Who should attend?
Program sponsors and other internal stakeholders should attend the initial demonstration but that doesn’t mean other departments shouldn’t have a voice. Meeting with decision makers from the procurement, HR, legal, finance and IT teams can help you define pain points and business objectives to be discussed during the demonstration.

Comparing solutions
Many organizations create a scorecard and assign actual point values to features and functionality. Oftentimes certain areas are weighted differently to give extra value to items addressing specific business objectives brought forward by stakeholders. For example, a company in the insurance industry created its scorecard based on recommendations from key departments including HR and procurement. After seeing demonstrations from multiple vendors, they said almost 95 percent of the final decision was based on those scorecard results.

We’ve outlined several key areas that are important to address during the demonstration including the login, determination of labor type, requisition and SOW creation, candidate selection, work order, approving timesheets and invoicing, social collaboration, reporting, global and administration. These functional areas cover the essentials and can act as a springboard to evaluate more complex features of a VMS. Addressing the areas below will broaden your understanding of a solution’s capabilities and how it can automate and improve your external workforce program.

Login
The login is the first impression you’ll get of the user interface — and first impressions matter. A guided, highly personalized and familiar experience is imperative for users who might be hesitant to adopt the new technology. Keep an eye out for features and functionality that will help your users feel at home and reassure them that help is readily accessible.

1. What is the first page users see when they log in? Can it be easily navigated and understood?
2. Do users have to remember a username and password or can a single sign-on be used?
3. What features are built into the solution to assist first-time users?
4. How can the interface be configured and customized for different users such as hiring managers or program sponsors?

“A guided, highly personalized and familiar experience is imperative for users who might be hesitant to adopt the new technology.”
Determining labor type

The type of labor used — either external or SOW — governs the workflow within the VMS and the demonstration should address both these labor types. If you’re unsure of the kind of labor needed, the application should be capable of determining whether a job requisition should be created for a flexible worker or if the multi-bid SOW and SOW processes should be initiated.

A thorough walk-through of the job requisition and SOW creation processes will give you a sense of how everyday users, such as hiring managers, will experience the interface. If you’ve touched base with your internal stakeholders beforehand, you’ll know their specific pain points and what features would be most appealing to them.

For example, one customer determined that the end-user experience would factor largely into its final decision. This organization was particularly interested in the candidate vetting and interviewing processes, as they were previously manual. As a result the customer required its potential VMS vendors to demonstrate how they could provide more self-service and visibility into where users were in the process.

Requisition

1. Demonstrate decision support capabilities that assist with the classification of labor.
2. How does a hiring manager request an external worker?
3. What type of comparison rate data is available to hiring managers when creating a requisition?
4. How much information do the hiring managers have to provide in order to create a requisition?
5. How are approval workflows set up? Can we have different approval workflows set up by business unit or by geographical location?
6. Does the application support conditional approvals? In other words, can rules can be built into the system so approvals are specifically routed based on certain conditions?
7. In some areas of the business where there are rapid hire needs, how can we accommodate for a shortened process?
8. Can we add ad hoc approvers on the fly?
9. How are suppliers set up and tiered depending on the job title or location?
Statement of Work (SOW)
1. Please show how the application can support the multi-bid SOW process.
2. How are different payment structures utilized in an SOW?
3. Demonstrate how internal and external resources come together to negotiate an SOW.
4. Do you have the ability to track resources or workers within the SOW?
5. How are rate cards managed?
6. Can capital expenses be tracked?

Candidate selection
A VMS can help ensure the best candidate gets through the door as quickly as possible. During the demonstration, the VMS provider should explain how candidates are submitted and vetted. Think about how you currently source and review candidates and measure the solution in its ability to streamline those processes.

1. What tools are available to assist suppliers with finding and submitting quality talent for a position?
2. How do you uniquely identify a candidate with past experience, one marked as a "do not rehire" or a duplicate submittal?
3. What features are available to assist the hiring manager in reviewing, interviewing and selecting a candidate?
4. If I want to collaborate with other managers/users on the review of candidates, how can I do this in the system?
5. How do you support an environment (such as light industrial or manufacturing) where a hiring manager simply creates a requisition and all candidate qualification is handled by the supplier?

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Work order

The work order is essentially the “handshake” between the buyer and the supplier with specifics such as the start date, end date, rate and site, among other details. A VMS not only automates the creation of a work order and assists the hiring manager with onboarding processes; it should also be capable of integrating with an HR Information System (HRIS) in order to tie the data captured in the VMS with existing processes for provisioning, identity management and invoice payment.

1. Does this tool eliminate the need for a purchase order? Can the creation and approval of a purchase order be incorporated into the process?
2. How is tenure policy tracked and enforced through this process?
3. How does the tool assist the hiring manager with the onboarding and induction process to ensure the contract worker has the proper background check, screenings, badging, equipment provisioning and training in place prior to the start date?
4. What if we have resources that we want to track, but are not required to submit time/expenses?
5. How are new contract workers fed to downstream HRIS tools or identity/asset management tools?

Approving timesheets and invoices

Your users need an approval process that is easily accessible and quickly understandable. A VMS can automate processes related to time entry and can automatically alert hiring managers when workers have reached tenure or are approaching overtime. Issues such as tax adjustments and budget considerations that can become complicated through manual processes can be simplified and automated in the solution.

The timesheet and invoicing processes are opportunities for confusion. In many organizations, diverse tracking systems are already in place, timesheets are often submitted with possible discrepancies, approval procedures are time-consuming, and compound budget and tax considerations are difficult to calculate accurately. The demonstration should walk through how these issues might be resolved with a VMS in place.

1. Describe the options available for time entry. Can workers continue to enter time into existing time tracking systems such as punch clocks, project management tools, etc.?
2. What type of alerts notify the hiring manager if the contractor has entered time incorrectly?
3. Can suppliers or the Program Office (PMO) review timesheets for accuracy prior to the hiring manager?
4. Do hiring managers need to approve timesheets via the VMS tool only or can they do so via mobile devices, email approvals, etc.?
5. Can the VMS ensure invoices have the proper taxes and adjustments applied? How?
6. Can you show where invoicing data is located?
7. When an Managed Service Provider (MSP) is involved, how does the application create the three-way invoice?
8. How does your system track budgeted spend versus actual spend?
Reporting

Talking about automation and reporting can demonstrate how the VMS could improve visibility into your external workforce and services procurement program. Inquire about standard reports available out-of-the-box and the ability to create custom reports tailored to your organization’s unique goals.

While one customer was building its business case for a VMS, it determined that cost was a significant pain point and wanted a solution capable of providing high-level reporting. During the demonstration, the customer made sure to ask questions specific to this type of reporting and scored each vendor on its ability to produce it.

1. What types of reports are available out-of-the-box?
2. What level of training is required to use the custom reporting engine? Is there a charge to create custom reports?
3. Can reports be scheduled to run and sent to a user automatically?
4. Show what types of drill-down reporting and graphs are provided to end users.
5. What type of out-of-the-box business analytics are provided?

“

Inquire about standard reports available out-of-the-box and the ability to create custom reports tailored to your organization’s unique goals.

”
Social collaboration
Social capabilities within a VMS can offer collaboration tools to ease the burden for everyone from the hiring manager, to the PMO, staffing company and even the external worker. If a solution comes equipped with social features, it can provide immediate access to tribal knowledge and peer-to-peer assistance in real time. Because not all VMS solutions offer social capabilities, the demonstration can show how one VMS utilizes these tools to improve efficiency and enhance communication and collaboration.

1. Does your solution offer any type of chat functionality, similar to popular consumer tools?
2. Is there any type of messaging system in place for users to ask questions if they need assistance?
3. Can users attach notes to individual items directly within the VMS that they can later reference?
4. What usability features are available to hiring managers for marking an item as a favorite for future reuse?
5. What type of search capability is available to hiring managers?
6. What type of online help is available to users?

Administration
The day-to-day management of the tool is often handled by the PMO and with the right VMS in place, it can focus on strategic initiatives rather than administrative duties. The VMS provider should demonstrate how the tool can be configured, how data is managed in bulk and if it offers any supplier qualification solutions. Whether or not the program has a MSP or is “self-managed,” you’ll want a thorough walk-through of how the VMS can support these different models. You should consider any and all possibilities for the future such as program growth and business changes, and anticipate how the VMS might grow with you.

1. Show how the PMO can configure the tool. What type of changes must be done by the VMS provider?
2. How can the PMO upload or download data in bulk, such as when a re-organization occurs or when rate cards are modified?
3. What tools are available to help make the PMO more efficient in managing the day-to-day activities of the program?
4. Show how suppliers are set up within the tool. Are there any features to assist with the vetting and qualification of suppliers or independent contractors (ICs)?
5. Does your platform support the management of additional talent pools such as retirees and alumni?
6. Do we have access to system audit trails?

“Whether or not the program has an MSP or is “self-managed,” you’ll want a thorough walk-through of how the VMS can support these different models. ”
Globalization is the new reality and a VMS should be capable of handling complexities such as global pay rules and rate components across a variety of countries and regions. Make providers aware of your current and desired global state so you can be assured your program can grow with the tool. The provider should be able to help guide your program expansion and answer questions about different languages, rate structures and local support.

1. Demonstrate how the solution handles rate structures and pay rules in local environments.
2. Can you detail how the platform handles complex regulatory requirements to ensure invoice accuracy in foreign countries?
3. Is the application available in other languages?
4. Can global users access help in their own language and in their own time zone?
5. Does the provider have “feet on the street” or local partners in your areas or those to which you’re expanding?
6. Can the system handle Collective Bargaining Agreements and other mandatory, site-specific legislative requirements?
7. Can the system handle monthly timesheets?

Summary

While there will likely be more than one demonstration during your VMS selection process, it’s important to ask the questions outlined above to ensure you’re covering a wide breadth of topics and addressing basic functionality.

Learn more

The world of work is changing, and SAP Fieldglass is leading the way with innovative solutions that harness the power of the external workforce in driving the digital economy. Explore additional resources on www.fieldglass.com/resources to learn more about the external workforce and the way work gets done.
Essential Questions To Ask During a Reference Check

SAP Fieldglass Whitepaper
The reference check is the home stretch in your effort to secure a Vendor Management System (VMS). After the Request for Proposal (RFP) process and product demonstrations, you’re nearing a final decision and honest feedback from other users will help you further compare the differentiators that make one provider stand out from another.

Having conversations with the provider’s other customers gives you an objective perspective on its ability to maximize the benefits of an external workforce program. Make sure you’ve got a solid understanding of whether or not the reference deals with the strategic, tactical or operational aspects of a program — having this baseline knowledge will give context to the reference’s responses and maximize the experience.

During this process, you should inquire about the company background, the relationship with the provider, functionality and features, implementation and integration, and the type of ongoing support offered. As you connect with other users, come prepared with a list of questions to ensure you’re making an informed and well-rounded choice.

This whitepaper outlines the essential questions to ask during a reference check and includes a checklist outlining the topics to discuss.

“Having conversations with the VMS’ other customers gives you an objective perspective on its ability to maximize the benefits of an external workforce program.”
Background

Before asking questions about the provider and the solution itself, inquire first about the referring company’s background so the reference’s responses are in clearer context. Understand the scope of the program, the amount of spend going through the system and strategic goals. You can also clarify if the reference works in procurement, HR or another department to set the stage for their responses. Answers from a fellow procurement professional might resonate more than those from a HR professional, and vice versa.

1. What is your company’s industry?
2. How long has your program been in place? Can you talk about the program’s scope, headcount and spend?
3. Does your program encompass both external labor and Statement of Work (SOW) projects?
4. In how many countries is your program currently deployed? How many currencies and languages are included in your program?
5. Do you have a Managed Service Provider (MSP) or is your program self-managed? How many dedicated resources manage the program?
6. How did you select your VMS and what differentiated it from the others?
The complexities of implementation and integration can seem overwhelming, but the VMS provider who makes these processes as seamless as possible will truly stand out.

Relationship with provider
After you have a better grasp on the program’s structure and history, you can delve into the relationship with the provider. The reference can detail the evolution of their interactions with the vendor and what to expect after you’ve signed on the dotted line. If the reference’s program has an MSP in place, you can also discuss the provider’s role in that relationship as well.

1. What about the vendor’s culture made it different from the others?
2. Did your company contract with the VMS provider directly or through the selected MSP? What does the contractual agreement look like?
3. Do you still have a relationship with your salesperson?
4. Is there a dedicated, reliable support team available for your program?
5. Do you have access to the executive team?
6. Do you feel like the provider delivered on what they promised? Do they deliver on their Service Level Agreements (SLAs)?

Functionality and features
Although the provider has already shown specific functionality and certain features during the product demonstration, references can provide “insider” knowledge that the demonstration might not address. Each customer uses the solution in different ways, and a reference call can help show how an actual customer uses certain features in real-life scenarios.

1. What did processes – such as job requisitions, approvals, timesheets, etc. – look like before they were automated through VMS use?
2. What is your new process flow now that the solution is in place?
3. How easy is it to configure/administer the application?
4. What sort of reporting does your organization use?
5. Do you find the solution easy to use?
6. Can you speak to its performance?
Implementation and integration

The complexities of implementation and integration can seem overwhelming, but the VMS provider who makes these processes as seamless as possible will truly stand out. Inquire about each reference program’s type of rollout, number of integrations and length of deployment to gauge how your own implementation might look with the provider.

1. What was the timeline for implementation, from the contract signature to deployment? How engaged was the provider in the process?
2. Did you deploy with a “big bang” approach – a large, simultaneous deployment across multiple business units, geographic borders and/or languages – or a phased rollout?
3. Are you utilizing an ERP solution and if so, which one? Is the provider integrated with the ERP? Were there any other integrations and when were they rolled out?
4. Were you able to use the provider’s standard integrations or did you use a custom integration? If it was customized, how long did it take?
5. How engaged were you in the implementation process?
**Ongoing support**
After implementation, the VMS provider’s work should not be done. References can help you vet the provider’s ability to offer continuing support and expertise as the program evolves. If the reference is regularly engaged with other users and is kept up-to-date on product releases through consistent communication, the VMS provider will likely have a vested interest in doing the same for you.

1. How did the VMS provider manage the transition from the implementation stages to ongoing account support?
2. What services are offered to the Program Office (PMO)?
3. Does the vendor provide a dedicated team of support staff who can answer questions and help troubleshoot any issues on a regular basis?
4. Is there a user community? Is networking with other customers encouraged?
5. How are you notified about new features? How are releases communicated?
6. What expertise does the VMS provider offer to ensure the program continuously improves?

**Take External Workforce Management to the next level**
Connecting with current customers can augment the insights you obtained during the RFP process and product demonstration. This is the opportunity to vet the VMS provider’s ability to not only provide a reliable product, but sustain a lasting, collaborative relationship. If you address these topics and get the answers you want, you’ll be one step closer to selecting a solution and taking the management of your external workforce to the next level.

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