

# Adaptive Insights Business Planning Cloud

Adaptive Insights is powering a new generation of business planning for businesses of all sizes with the Adaptive Insights Business Planning Cloud. Addressing the need for greater business agility in a world that moves fast, Adaptive Insights' hallmark easy-to-use planning solutions are available to everybody in an organization. Our Business Planning Cloud delivers a new way for people in companies to collaborate, gain business insights, and adapt with agility.

## Everybody Plans

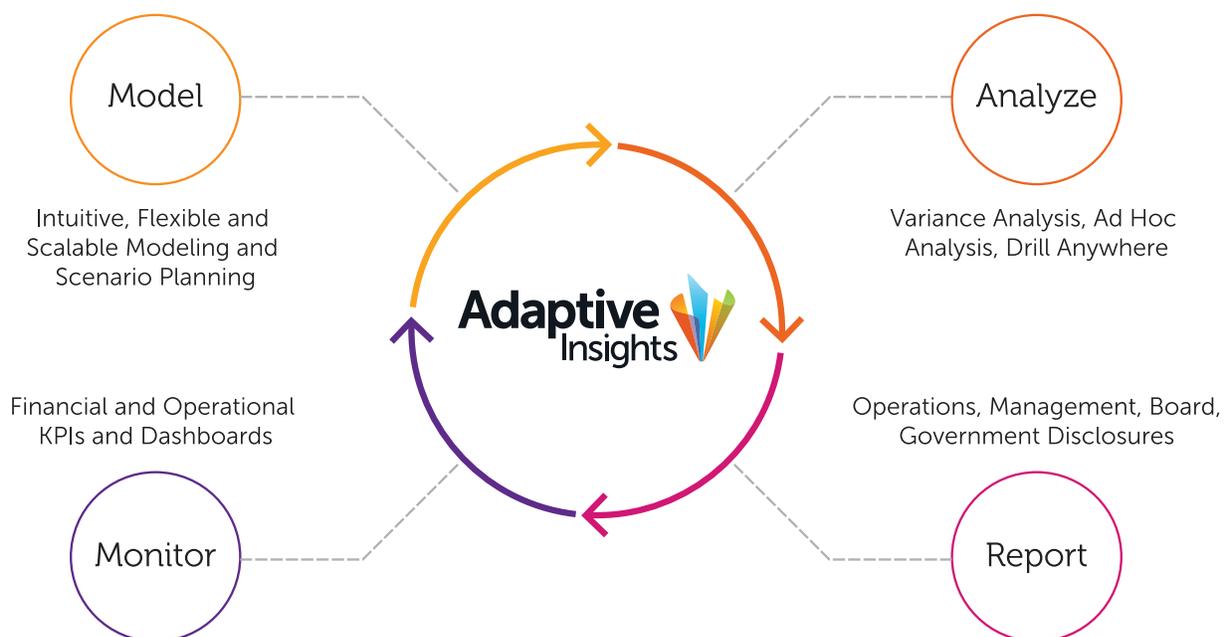
Our experience serving over 3,800 customers of all sizes, in a variety of industries, around the world has led to our observation that everybody plans. No matter the size of the organization, in every function, every industry, and every geography—everyone engaged in running a business is involved in the planning process.

The observation that everybody plans informs our business strategy and how we develop our products. Our strategy is to enable all the different functions that plan. To do this, we build products that make it easier for everybody to plan together. Our goal is to provide the kind of ease of use that invites everybody's participation in the planning process.

We all know that the pace of change in the world is accelerating. But in most companies, slow, static manual planning processes inhibit the kind of informed, rapid decision-making needed to be agile and navigate today's changing world.

We believe you can break free of static planning with an active planning process that is collaborative, comprehensive, and continuous—one that results in a better business plan. You'll get greater visibility into business performance, build confidence in the numbers, make data-driven decisions, and increase buy-in and accountability throughout the organization.

Active planning requires a software solution that is easy, powerful, and fast. Our Business Planning Cloud is easy, so you can plan as a team. It's powerful, so you can model anything and analyze everything. And it's fast, so you can model rapidly and adapt quickly.



## Plan and Adapt Without Compromise

Our Business Planning Cloud enables the entire business planning process. We've embedded reporting and analytics so you can plan the business, monitor and analyze performance, test scenarios to select course correction to achieve your goals, and report your results to your internal and external stakeholders.

The patent-pending Elastic Hypercube Technology supercharges our Business Planning Cloud platform with the power, scalability, and performance companies of all sizes need to model the complexities of their business and to report on and analyze results – without compromising ease of use.

Our Elastic Hypercube Technology enables companies to manage large, data-intensive models. It enables modeling with:

- Extremely large-scale models with quintillions (10<sup>18</sup>) of cells
- Unlimited dimensions and unlimited dimension values
- Unlimited planning scenarios
- Rapid analysis, comparison, reporting without cumbersome setup or additional cubes

Whether you're planning an entire business's financial plan at a corporate level, the financial plans for a single division, or operational plans for a single function or department, we enable the continuous planning process. Individual groups can plan and model their own aspects of the business at the needed level of detail, on their own cadences, and then these plans can be federated into an integrated corporate plan, orchestrated by finance.

And best of all, because the Business Planning Cloud comes from Adaptive Insights, users don't have to compromise between power, ease of use, or ease of deployment and ongoing adaptability.

### Adaptive Insights

- Reduces time spent on budgeting, planning, consolidation, reporting, and analytics by over 50%
- Increases cost efficiency by more than 75% compared to legacy on-premises solutions

The Adaptive Insights Business Planning Cloud is a complete set of software capabilities, platform, and solutions that enables the next generation of business planning for organizations of all sizes.

# Adaptive Insights for Finance

The Adaptive Insights Business Planning Cloud provides budgeting, forecasting, reporting, and analytics for organizations of all sizes. Our Business Planning Cloud combines industry-leading usability with the security, scalability, and flexibility required for complex planning. We help people do their best work and help teams operate with agility. Innovators including P.F. Chang's, Boston Scientific, and American Family Insurance, to name a few, rely on Adaptive Insights to make their businesses more agile, efficient, and competitive.

Recognizing that the best plans involve the people closest to the day-to-day business, we built a powerful planning platform so you and your colleagues can gain deep insights, make more timely decisions, and manage with solid, integrated plans. We enable complex financial models without the burden of managing legacy on-premises systems and without massive spreadsheets. And we rescue finance teams from the mind-numbing, error-prone drudgery of manually consolidating data.

Our Business Planning Cloud makes it easy for people across the business to manage, report, and analyze business performance. This platform is powered by our patent-pending Elastic Hypercube Technology, delivering unprecedented scale and flexibility without sacrificing our trademark ease-of-use.

## Outdated Planning Tools Lead to Static Planning

Too many Financial Planning & Analysis (FP&A) organizations use outdated tools for planning. Legacy planning systems have limits that tend to keep planning stuck in finance alone, with just a few power users able to use them. To make matters worse, they are costly to own, difficult to learn, and overly dependent on IT support. So enterprises saddled with these systems develop workarounds, most typically spreadsheet planning. Unfortunately, this does not set FP&A up for success, because the manual processes of spreadsheets and

the poor usability and inadequate collaboration of legacy systems mean countless hours are wasted gathering data, reconciling numbers and plans, and managing reports. Finance is left with little opportunity to analyze and understand the story behind the numbers and to engage strategically with their business partners. Even worse, inadequate planning environments can force a costly compromise – finance struggles just to get the plan done, rather than having the time and resources to get the plan done right.

## Static Planning Constrains Performance

Organizations that use legacy on-premises planning solutions or manual spreadsheet planning grapple with a static planning process. Static planning is characterized by siloed teams operating on data and models, manual data manipulation leading to long planning and reporting cycles, and too many errors. Not only are static planning processes slow, with limited engagement between finance and business users, but data and insights are neither timely enough nor trusted for agile decision-making. Static planning takes so much time that it limits the ability to provide the strategic leadership the organization expects finance to provide.

## The Cure for Static Planning is Active Planning

There's a solution to static planning: it's a process we call active planning. Active planning is collaborative, because it deeply involves the people closest to customers and operations. It's comprehensive with fully linked plans producing insights informed by data. It's continuous—ongoing instead of periodic. Active planning accelerates and improves the quality of decision making across, up, and down the organization, leading to informed, timely decisions that fuel a truly agile business. When the market or business changes, active planning gives you the flexibility to course correct in time to adapt, and to still achieve departmental and corporate goals.

We enable active planning via our Business Planning Cloud, designed to free people to do their best work and empower teams to better manage their business.

## Industry-Leading Usability

Everybody in business plans. In large corporations, planning processes need to span a broad range of finance and operations teams, and across a complex ecosystem of departments,

business units (BUs), regions, and countries. Unfortunately, planning software historically has been too expensive and too complicated for anyone beyond a few power users in the corporate finance function—and often with heavy support from IT. In these environments, the rest of the organization is left relying on spreadsheets to plan their own functions and to provide input to the corporate financial plan. Adaptive Insights broadens planning with industry-leading ease of use that accelerates adoption and drives broad engagement across finance teams, operational departments, and business units. We believe the teams closest to the market and to your operations should be engaged in the planning process. By engaging finance and non-finance business users in a collaborative, active planning process, you can create high-fidelity plans aligned with your organizational goals, which ultimately delivers better and more timely decisions.

### **Built for Business**

Most business teams are accustomed to planning systems that take a long time to implement and stabilize. Once deployed, changes to structures, reports, and analysis typically require dedicated IT resources to support business users' requests. This over-dependence on IT limits team's agility and consumes IT resources. We've changed this business/IT paradigm. Adaptive Insights is a modern, cloud-based solution built for greater self-sufficiency for finance teams and their business partners. Finance and operations teams can control and share their own models, reports, and dashboards with less IT dependence. Models, processes, and reporting design, builds, and change—the business can manage them all using a drag-and-drop user experience that never requires coding or scripting, thus freeing IT resources to focus on other strategic initiatives.

### **Adaptable to Change**

In business, adapting to change is a constant need, but traditional planning systems aren't flexible enough to enable that kind of agility. The Adaptive Insights Business Planning Cloud is designed for flexible modeling of functional planning and easy scenario planning so models and plans can continuously evolve as markets and the business changes. This flexibility lends itself to modeling, reporting, and analytics both within corporate finance and beyond. Now companies can unify workforce planning, operations planning, project-based planning, and financial planning all within a single active planning environment.

### **Faster Time to Value**

Using Adaptive Insights' intuitive interface and drag-and-drop modeling and reporting interface, companies can implement their new planning environment quickly and achieve value sooner. Most enterprise-scale customers implement their first phase within six months. These rapid implementation cycles reduce project risk and free teams to develop more sophisticated models. Our approach includes end users to validate along the way so that user acceptance testing (UAT) is a non-event.

### **Trusted, Scalable Platform**

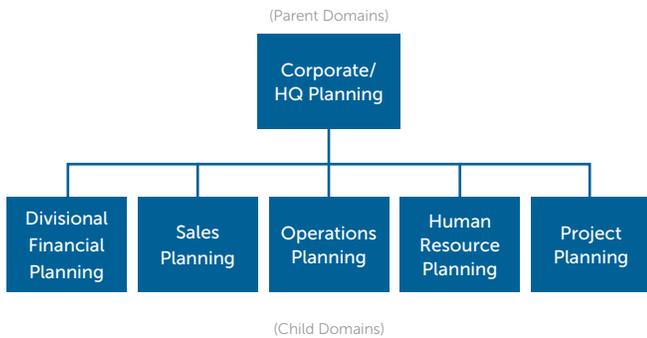
The Adaptive Insights Business Planning Cloud is an in-memory computing platform designed for large scale multi-dimensional modeling, reporting, and analysis. Supercharged with the patent-pending Elastic Hypercube Technology, it enables granular and complex planning and reporting by any number of critical business dimensions (customer, channel, product, regions, rep etc.), and by day, week or other time period. The platform also enables unlimited what-if analyses to assess opportunities and the impact of potential changes to the business.

Our Elastic Hypercube Technology enables companies to manage large, data-intensive models without compromise. It enables modeling with:

- Extremely large-scale models with quintillions (10<sup>18</sup>) of cells
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### **Federated Planning Domains**

From corporate finance through operating departments to business units, Adaptive Insights enables groups to plan their own domains. Individual plans come together into a holistic, fully linked corporate plan. What's more, each planning domain can have its own comprehensive model based on the planning cadence of their part of the business. This architecture of federated planning domains mirrors the organizational structure of complex enterprises, aligning well to how organizations manage data access and control. Federated planning domains enable corporate finance to orchestrate planning and performance at the local and corporate level. This empowers departments and business units to model, plan, and report at levels specific to their needs.



**Seamless Integration for Unified Planning**

Adaptive Insights is an essential part of the business management software stack. We integrate with systems of record to provide a unified view of business planning and performance. We are ERP agnostic, seamlessly integrating with ERP, CRM, HCM, and BI systems so planners can not only see key business metrics to understand how they got here and why, but also use this past performance to drive plans and forecasts for where they're going.

**Enterprise-Class Security**



Adaptive Insights provides enterprise-class protection, service, and resiliency you can rely on and trust. Adaptive Insights is SOC 2, Type II compliant. SOC 2 is the AICPA standard for reporting on controls at

service organizations, including Software-as-a-Service providers (SaaS). The SOC 2 attestation covers the security, confidentiality, processing integrity, and availability trust service principles.



With customers in more than 50 countries, data privacy and adherence to regional regulations is of the utmost importance to Adaptive Insights. TRUSTe performs annual certification of our services to ensure



compliance with EU-US Privacy Shield, US/Swiss Safe Harbor framework, and APEC Cross Border Privacy Rules (CBPR) system covering the collection, use, and retention of data. Our practices are also consistent with Canada's PIPEDA and the Australian Privacy Principles.

We maintain an exhaustive security program aimed at securing and maintaining the integrity of our customer's data via physical and logical security and data encryption. Our security program covers both the technology platform itself and how we develop, test, and deploy software. We obtain third-party security audits for our SOC 2, Type II certification relating to security and data privacy. We protect our platform through rigorous backup processes, built-in redundancy, and disaster recovery mechanisms. We provide role-based security and an audit trail of user actions. Adaptive Insights provides the high availability demanded by global operations and performance transparency you can trust.

<sup>1</sup> Association of Finance Professionals Benchmarking Survey October, 2016.

<sup>2</sup> 2017 Adaptive Insights CFO Indicator.

Learn more at [www.adaptiveinsights.com](http://www.adaptiveinsights.com)

Financial Planning & Consolidation – Sales Planning – Workforce Planning – Operations Planning – Project Planning



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# Dashboards & Analytics

The Adaptive Insights Business Planning Cloud enables companies of all sizes to collaboratively plan and model, easily access real-time analytics, and streamline complex reporting. You get easy, powerful, and fast software that empowers finance and operational teams everywhere to better manage the business. It's easy, so you can plan as a team. It's powerful, so you can model anything and analyze everything. And it's fast, so you can model rapidly and adapt quickly. With this best-practice active planning process, you can plan and adapt without compromise.

Adaptive Insights puts the power of self-service interactive dashboards, visualizations, and charts into your hands to monitor and drive business performance. Visualize numbers and charts side by side while you plan, easily see variances in a waterfall chart, personalize dashboards with your own KPIs, and perform period-over-period analyses. You'll get greater visibility into business performance, confidence in the numbers, data-driven decision-making, and increased buy-in and accountability throughout the organization.

## Interactive Visualizations

Visualizing data is often the fastest way to identify trends and patterns that lead to insights. With real-time data that reveals itself in layers, you can select and personalize information to quickly understand and compare performance over time, identify root cause, and course-correct to achieve goals.

- Create, personalize, and share powerful interactive dashboards in minutes
- Create, analyze, drill down, and share interactive charts and visualizations



- Analyze data over different time periods and hierarchies from the chart itself
- Quickly access the underlying model directly from a chart
- Compare results period-over-period with comprehensive scorecards
- Focus on select information by choosing data elements to show or hide on a chart
- Drill across different dimensions to analyze results
- Easily identify variances and perform period-over-period analyses
- Share up-to-the-minute information by displaying visualizations and charts in Presentation mode from the dashboard, or add them to documents as .PNG files for easy distribution and collaboration
- Utilize Bar, Column, Line, Area, Pie, Doughnut, Gauge, KPI Gauge, Pyramid, Funnel, Crosstab and Waterfall charts and Scorecards

## In-Context Analytics

In-context analytics let you select ranges of data in the planning environment and chart them with a single click. Since all elements of our Business Planning Cloud share the same underlying data, visualizations are always in real time.

- Create charts out of sections of your plan with a click

“Adaptive Insights’ dashboards and analytics allow instant access to easy-to-understand metrics on the fly. Not only has this allowed us to make quicker and more informed decisions, but also freed up time to focus on analysis that can drive the business.”

– THE MOTLEY FOOL

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- Choose from a bar, column, line, pie, doughnut, and waterfall format
- Layer in other plan versions to perform variance analysis in the context of planning
- Publish findings to interactive dashboards for easy sharing and collaboration
- Use visual analytics in the context of planning

### Adaptive Insights

#### Purpose-Built for Finance and Business Users

Built for the needs of finance and business users, capabilities like scorecards, period-over-period analysis, cross-plan, and variance analysis are all available out of the box.

- Create waterfall charts with variance analysis and dimensions to understand plan-to-actual revenue and cost variances broken down by sub-accounts, dimension, or time
- Explore changes in KPIs over time
- Perform ad hoc analytics and slice and dice your data, leveraging all the dimensions and hierarchies of your model
- See what data stands out from the norms with conditional formatting
- Add your own calculations to a chart

#### Business Users in Control

Anyone can create, personalize, and share powerful interactive dashboards, visualizations, and charts.

- Drag and drop interactive visualizations and real-time data onto the workspace to quickly analyze results
- Move charts and graphs around the workspace with ease to design personalized interactive dashboards
- Visualize information across different time ranges and dimensions to distinguish patterns
- Share dashboards with just a few clicks
- View your top and bottom performers

#### Powerful Integration

Adaptive Insights’ integration framework enables business analysts and IT to extract and combine data from sources including spreadsheets, databases, customer relationship management (CRM), and enterprise resource planning (ERP) systems into a single source of truth available throughout our Business Planning Cloud.

- Manage data integration across multiple data sources into interactive dashboards
- Efficiently integrate, transform, schedule, and merge data from spreadsheets, databases, ERP, CRM, human capital management, and other systems
- Unify data for analytics from both cloud and on-premises data sources
- Empower data analysts with a click-not-code experience