

## ADAPTIVE PLANNING RECESSION SURVIVAL KIT

Fall 2008

A volatile economy demands superior financial planning and management. Our Recession Survival Kit provides the tools to successfully manage through a downturn and emerge stronger and more competitive. And it goes live in under a week, so you can have an immediate impact on your business.

### In Volatile Times, Planning is Paramount

In a recession, superior financial planning and management are required for survival. Normal planning cycles are thrown out the door, and rapid scenario analysis becomes essential. Companies that do not plan well risk failure. But companies that understand the impacts of potential scenarios and make informed decisions can emerge stronger and more competitive when the economy recovers.

Adaptive Planning's Recession Survival Kit is designed for planning during difficult times. It allows companies to quickly and successfully gain control of their financial outlook, evaluate the potential business and cash impacts of strategic and tactical actions, and reset financial plans to deal with a global downturn.

The package allows finance executives to easily create and compare multiple top-down planning scenarios to understand how changes in key drivers would impact their business. With powerful "what-if" modeling capabilities, executives can analyze how varying sales volumes, expense levels, capital expenditures, and other considerations would impact cash flow by modeling their income statement, balance sheet, and cash flow statements -- allowing them to make rapid and thorough operational decisions.

In addition, the kit provides visibility into revenue and expense forecasts by capturing collaborative, real-time inputs from managers throughout a company. For example, companies can poll their sales organizations for up-to-the-minute perspectives on pipelines, or gather input from cost center managers on opportunities for further expense reductions.



### On-Demand Software—The Best Choice for a Recession

In a volatile economic environment, spreadsheet-based planning is simply insufficient—it is far too slow, error-prone, and non-collaborative. Nor are enterprise software packages viable alternatives, since they are too costly and take too long to implement and learn. Adaptive Planning's on-demand solution is the ideal choice, since it is:

- **Affordable** Priced at just \$9,750, it fits within a restrained spending environment
- **Rapidly Deployable** Go live in under a week, so you can have an immediate impact on your business
- **Easy to Learn** Training takes 4 hours or less
- **Low Risk** Dial usage up or down as economic conditions require

## The Recession Survival Kit

Priced at \$9,750, the Recession Survival Kit includes:

- 10 full user seats for Adaptive Planning Enterprise Edition · software with unlimited access to all capabilities
- 6-month subscription
- Top-down, driver-based integrated Financial Statements (income statement, balance sheet and cash flow) designed specifically for your business
- Sales, Expense, and Capital templates to allow collaboration
- Integration of one year of historical data and import of your current budget data into the system
- Ability to create unlimited scenarios
- Comparative scenario reporting
- Full training for Administrator users

### Key Benefits:

- Take control of your financial future
- Quickly create top-down plans
- Easily compare what-if scenarios
- Understand the impact on cash
- Get visibility into current revenue and expense forecasts
- Make rapid, well-informed strategic decisions

### Additional Terms:

Model will include up to 50 key drivers. Accounts will be summary level only, and up to 50 summary accounts will be included (not a complete Chart of Accounts). One year of prior actuals data, and one current budget, to be imported at the summary account level. Plan tree will include up to 100 departments/ cost centers. Compensation will be done at the account level; no personnel detail will be created. Package includes up to 28 hours of consulting time; additional time will be billed on a T&M basis. Additional seats can be added for additional fees.



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"As a provider of investment solutions, our business is influenced by macro-economic forces. Based on recent events in the markets, we needed to create plans for several potential economic scenarios, including re-forecasting our overall business—all in a very short period of time. We simply could not have been flexible or agile enough to do this without Adaptive Planning."

—Lee Chertavian, Chairman and CEO of Placemark Investments

For more information, call Adaptive Planning today at +1.800.303.6346 or email us at [info@adaptiveplanning.com](mailto:info@adaptiveplanning.com)