

ADAPTIVE PLANNING OVERVIEW

Adaptive Planning, the worldwide leader in on-demand corporate performance management (CPM) solutions, provides a complete set of capabilities for budgeting, forecasting, reporting, consolidation, and visual discovery.

Introduction

Companies that automate their corporate performance management cycle – setting budgets, monitoring and reporting on variances, analyzing options, and re-forecasting accordingly – can dramatically improve execution and decision making, and drive a real competitive advantage. But the vast majority of companies have not achieved this – they still rely on spreadsheets, since the alternatives have been too costly and complex.

Adaptive Planning provides a unique new CPM solution that's ideal for companies and nonprofits of all sizes. An alternative to manual spreadsheets and expensive enterprise software, our award-winning, cloud-based solution is affordable, easy-to-use, and rapidly-deployable.

In addition to providing a breakthrough solution, we are committed to being an exceptional business partner. We strive to be open, transparent, and easy to do business with, and are highly focused on customer service. And it shows – we are proud to have been named #1 in customer satisfaction by both Gartner and BPM Partners, two leading analyst firms.



Adaptive Discovery

Budgeting, Planning & Forecasting

With an automated planning solution, finance professionals no longer need to manage multiple versions of spreadsheets and complex consolidations of data, or worry about version control. You can focus on strategic analysis and higher-level business decisions – turning a low-value process into a true competitive differentiator.

- Dramatically reduce budgeting and forecasting cycle times – by up to 90%
- Decrease errors and improve accuracy
- Easily and automatically integrate data from your GL and other systems
- Deliver timely and thorough reporting and analysis, including what-if scenarios
- Deliver more complete and frequent forecasts, including rolling forecasts
- Make faster, more informed, and better business decisions
- Improve company wide alignment

Reporting, Analysis & Visual Discovery

Adaptive Planning provides business users with a multitude of ways to report on, visualize, and analyze financial and non-financial information, both actual and plan. Our drag-and-drop report builder puts powerful yet easy-to-use web-based reporting in the hands of finance, budget managers, and executives. Adaptive Discovery provides personalized business intelligence, so that business users can easily compile, display and explore data from multiple systems and lines of business with highly visual, interactive dashboards and scorecards.

- Make better, faster business decisions
- Report on and visualize data from your GL, CRM and other systems
- Drill-down into transaction-level detail
- Easily create reports, dashboards, and scorecards with drag-and-drop interface
- Visually present data in ways people can easily grasp
- Work smarter and faster, spending less time creating reports and more time gaining important insight from data

Consolidations

Adaptive Planning automatically consolidates data in real-time, eliminating the complex, time-consuming and error-prone systems inherent with spreadsheet-based processes.

- Automatically consolidate data across multiple entities, accounts, dimensions, currencies, and fiscal years
- Facilitate intercompany adjustments and elimination and minority interest calculations
- Expedite multi-currency, multi-location consolidated reporting

Multiple Instances

The Multiple Instance functionality is designed to support the complex planning and reporting requirements of companies that manage autonomous organizations or functions.

The Multiple Instance functionality enables companies to set up, link together, consolidate, and manage multiple Adaptive Planning instances, each a self-contained and unique model.

- Greatly improve coordination of planning, reporting and analysis in complex organizations, and smaller companies with disparate planning requirements
- Preserve organizational autonomy, eliminating need for one-size-fits-all approaches
- Automatically consolidate data across multiple entities, even with different structures and planning cycles

- Decrease planning times by up to 90% – freeing time for better business decisions
- Decrease risk by deploying in phases to ensure success

Model Building & Administration

Adaptive Planning's intuitive modeling environment makes it easy for administrators to create and maintain their business models, including assumptions and formulas, data from other systems, and permissions and access rights of end users.

- Easily build, modify, and maintain multi-dimensional financial models – without programming experience or help from IT
- Create driver-based plans for greater accuracy and integrity
- Ensure consistency and make rapid changes via centralized assumptions and formulas
- Customize data entry sheets for end-users – without consolidation headaches
- Build different models for different functions
- Plan in multiple currencies and languages
- Centrally control user permissions and access rights
- Use workflow to manage submission process and control data availability

The Software as a Service Advantage

Compared with on-premise alternatives, Adaptive Planning's SaaS solution offers numerous advantages, including:

- Lower costs – 77% less expensive than comparable on-premise solutions
- Faster deployments – rolls out in just weeks
- Greater ease of use
- Decreased risk
- Higher customer satisfaction
- No IT support required

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