

MULTI-ENTITY PLANNING & ANALYSIS

The Multi-Entity Planning & Analysis Solution is the ideal starting point for deploying Adaptive Planning's powerful multi-instance capability within large, complex organizations.

Multi-Organization Planning Challenges

Spreadsheet-based budgeting, forecasting, and reporting processes create significant challenges for companies of all sizes – they're extremely slow and error-prone, result in numerous version management problems, and are inherently non-collaborative. These challenges increase exponentially in large, complex, multi-organization corporations, which typically have multiple sub-organizations with different structures, hierarchies, business cycles, and reporting and planning needs. In such an environment – with hundreds or thousands of participants and spreadsheets – consolidating, reporting on, and analyzing actual and plan data becomes extremely challenging.

KEY BENEFITS

- Greatly improve coordination of planning, reporting and analysis in large, complex organizations and smaller companies with disparate planning requirements
- 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

The Adaptive Planning Multi-Entity Planning & Analysis Solution

The Multi-Entity Planning & Analysis solution is ideal for companies that need to coordinate planning, reporting, and analysis among a complex set of organizational entities, such as:

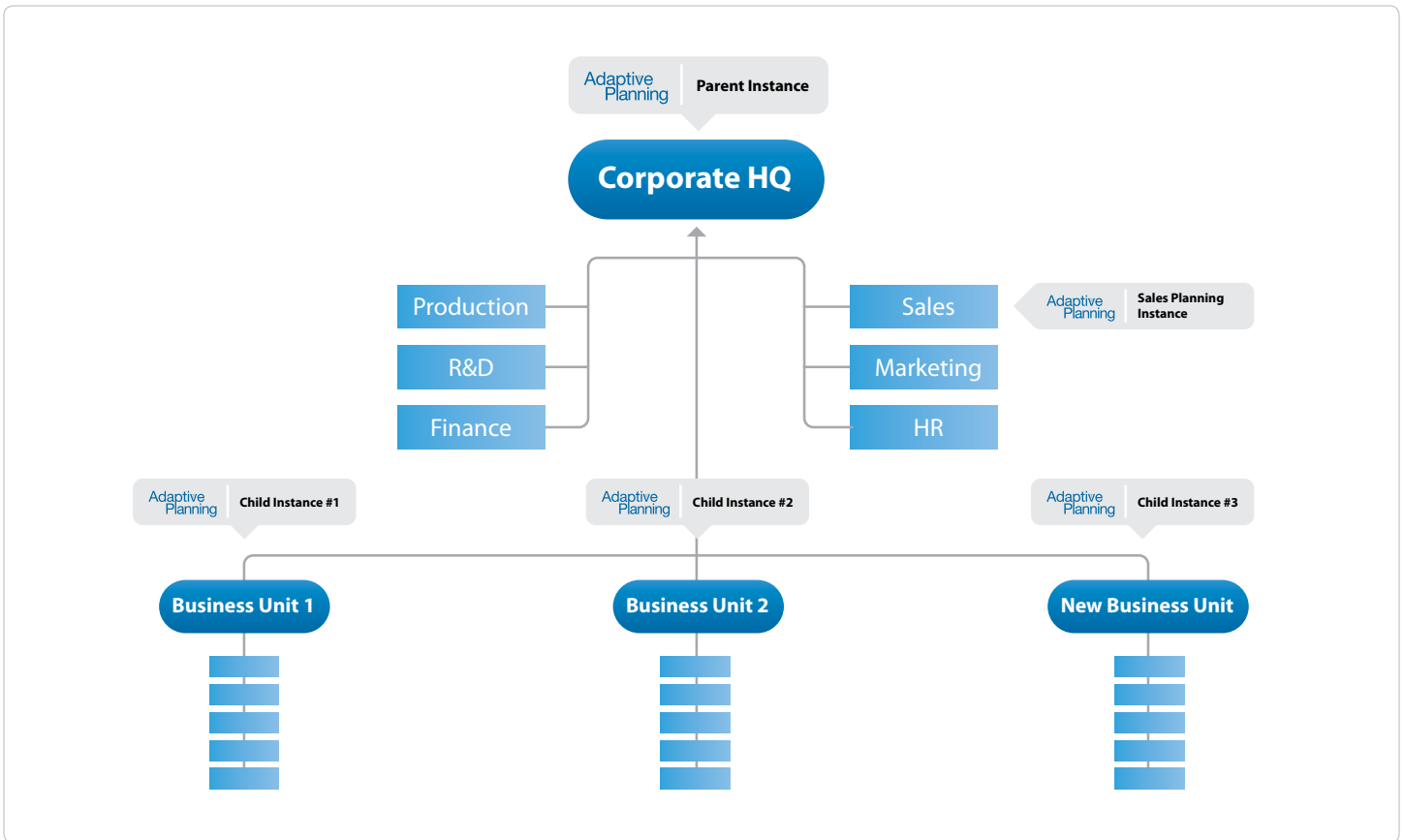
- Global companies
- Complex enterprises with multiple independent lines of business
- Companies analyzing and integrating M&A targets
- Holding companies and investment management firms that manage a portfolio of operating companies
- Companies with independent functional processes, such as sales planning and analysis, and HR planning and analysis
- Companies with separate planning processes, such as long-range, top-down strategic planning, and shorter-term, bottom-up budgeting and forecasting

"In today's age with all the web-based technology available, it doesn't make any economic sense to stick with Excel; in fact spreadsheets can have a negative impact on your business in terms of employee productivity and accuracy and they are a huge headache."

– Steve Stein, FP&A Manager, DemandTec

"Adaptive Planning continues to leverage the SaaS model to deliver innovative solutions in the BPM space. These solutions are attractive alternatives to improve planning, reporting, and analysis within corporate sales teams and large, complex, multi-division organizations."

– Craig Schiff, CEO of BPM Partners



Adaptive Planning Multi-Entity Planning and Analysis

How It Works

The Multi-Entity Planning & Analysis solution leverages Adaptive Planning's breakthrough Multiple Instance functionality. An Adaptive Planning instance is a self-contained financial model that includes all elements necessary to plan, report on, and analyze a business. The Multiple Instance capability enables companies to set up, link together, and manage multiple Adaptive Planning instances, and to coordinate planning and reporting among multiple autonomous organizations. This solution is a discounted bundle of instances and user seats, offered as a starting point to make it easy and affordable for companies to get started with deploying multiple instances.

Using Multi-Entity Planning & Analysis, a centralized headquarters organization of a complex company can provide each entity with an individual Adaptive Planning instance. Each entity can then create and administer its own independent model, complete with its own unique organizational hierarchy, chart of account structure, user community and data entry requirements, and back-end integration.

Within the broader organization, multiple instances can be linked together. Data designated as to be shared automatically consolidates from "child" instances to the "parent" instance. Unshared data remains private at the child instance.

Key Features

- Independent or unique organizational structures, cyclicity, fiscal years, charts of accounts, dimensions, versions, users, permissions, data entry templates, and integration with other systems, for each instance
- Specification of which data is shared or kept private to the instance
- Unlimited number of instances and levels of hierarchy within each
- Automatic consolidation of data from child instances to parent
- Data drill-down from parent to child instance, with ability to toggle seamlessly between instances

Streamline Planning and Analysis in Complex Organizations

The Multi-Entity Planning & Analysis solution allows complex organizations to fundamentally transform their financial planning, reporting, and analysis, and decrease their planning times by up to 90%. They can dramatically decrease planning and reporting cycle times throughout the entire organization – at the headquarters level, and within each organization. They can simplify headquarters administration by eliminating the need to coordinate and consolidate large numbers of spreadsheets. And they can make better decisions, based on more accurate and timely information.

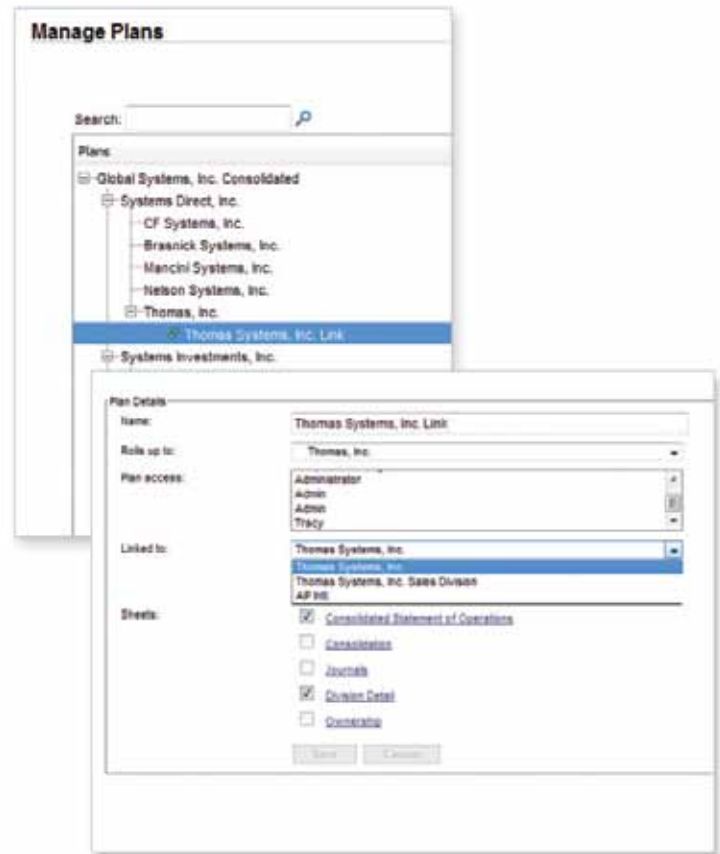
Preserve Organizational Autonomy

Different and autonomous organizations within a complex organization can meet their own planning and reporting requirements, eliminating the need for one-size-fits-all approaches and unnecessarily complex all-inclusive models. Organizations can determine how much information needs to be shared with other organizations, and with the parent company. Different lines of business can have their own timelines for re-planning, re-forecasting, and creating what-if scenarios.

Even within smaller companies, different functional organizations such as Sales and HR may have completely different planning needs. For example, the Sales organization's plan may be driven from top-down sales targets, sales reps' individual quotas, or historical detail of sales by product and customer. HR planning typically focuses on headcount detail and benefits choices. Treasury planning may include detailed debt schedules. In such an organization, each function can plan in its own unique instance, and they can be quickly consolidated at the parent instance level.

Deploy in Phases to Ensure Success

Companies can deploy this solution in phases, breaking what may be a complex challenge into manageable pieces, and decreasing risk by rolling out to various business units over time. They can also develop new instance models for unique business units without affecting existing business unit models.



Linking Child Instance to Parent Instance

Customizable Configurations

The Multi-Entity Planning & Analysis solution provides the ideal starting point for deploying the Adaptive Planning multiple instance capability within a large, complex organization. The solution is available in customizable configurations, which include a core set of instances, administrators, and users that are typically required for managing multi-organization planning and reporting processes.



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