

## PROFESSIONAL SERVICES & SUPPORT DATA SHEET

Adaptive Planning is proud to deliver top-rated customer service, with a Professional Services and Support team staffed with seasoned finance professionals.

### Overview

As the leading on-demand Corporate Performance Management (CPM) provider, Adaptive Planning recognizes that delivering great software is only part of the equation – we are also committed to delivering top-rated customer service throughout the stages of your life cycle with us. Our Professional Services and Support team brings deep product expertise, best practices knowledge, and practical real-world budgeting, forecasting and reporting experience that is a real asset to our customers. We have completed and support thousands of customer projects across many industries, in companies and nonprofits of all sizes. We strive for excellence and it shows – we are proud to have been ranked #1 in customer satisfaction in industry surveys conducted by both Gartner and BPM Partners. Adaptive Planning provides a full range of professional services, including:

**Implementation and Application Consulting.** We deliver a range of implementation and ongoing application consulting services designed to fit your organization's business planning processes, as well as your budget requirements and timeline.

**Training.** Our customers tell us that Adaptive Planning is easy to learn, with an intuitive web-based interface that looks and feels like a spreadsheet. Administrator and end-user training is designed so that our customers can be completely self-sufficient. We provide formal classes complemented by open access to product documentation, self-paced videos, no-cost refresher sessions, and new feature training. We also provide customized and advanced expert training and certification.

**Support.** Adaptive Planning's world-class Support team is staffed by highly qualified finance professionals who combine deep application knowledge with strong domain expertise in financial planning and analysis.

### Implementation and Application Consulting

Adaptive Planning's implementation and application consulting services are highly flexible and designed to meet the needs and resources of each customer. Customers can choose from among the following implementation and application consulting services options:

**Self-Implementation** is a good fit for customers who prefer to be self-sufficient from the beginning. Many customers have implemented without formal consulting services. We provide multiple training choices to help these customers get started and gain a solid understanding of the fundamentals of Adaptive Planning, and provide full support to ensure their ongoing success.

**Advantage Packs** are designed for customers interested in application design guidance and focused hands-on assistance with their implementation. These service packages include a set number of consulting hours (which can be increased as needed), and are designed to give customers the appropriate balance of consulting expertise and advice, tools, and best practices to successfully complete their implementation.

**The Full Service Implementation** approach is used by customers wanting to take full advantage of Adaptive Planning's Professional Services.

*"The training was web-based and the application was very intuitive to users who were familiar with Excel, but not accustomed to financial applications. Managers who were not numbers people also felt comfortable with the tool."*

—Kate Dass, Finance Manager, WestHealth

With each new customer, we review and discuss customer requirements and our implementation process. We then prepare a Scope of Work, which details our proposed consulting services, project timeline and cost. Once approved by the customer, this Scope of Work becomes the basis for managing the engagement through to successful completion.

Adaptive Planning consulting is highly collaborative with active customer participation. Our project management includes regular calls with the customer for knowledge transfer and to report progress, and for timeline updating and alerting. This ongoing communication also ensures that everyone on the implementation team is informed of their open, dependent, and completed tasks. As each project deliverable is completed, we request customer review and approval. We also request that customers formally sign off the entire completed project (this includes requesting customer feedback on our performance).

A Full Service Implementation can be delivered using two approaches:

- **Time & Materials** projects give customers access to our consultants' expertise and guidance as needed, for an hourly rate. This arrangement is a good fit in many circumstances, including new customers who want to actively participate in the implementation, or existing customers requesting assistance with expanding their use of Adaptive Planning.
- **Fixed Bid** projects are a good fit for customers with tight timeframes and/or limited staff. Our Professional Services team and partners can perform the upfront design work, complete the implementation quickly and efficiently, and train you how to use your new model.

## The 4D Professional Service Methodology

Adaptive Planning uses our structured and proven 4D methodology for implementation and application consulting. We have successfully implemented thousands of projects worldwide using the latest internet-based document exchange and meeting technology, and our cloud-based application, which can be accessed anywhere with a web-browser. Our professional services can be delivered remotely and/or on-site, as preferred.

### Discovery

To assist customers in determining the appropriate implementation approach, we use a combination of questionnaire and discussion regarding all aspects of their planning needs and process. We review all potential options, and then recommend a level of service that meets the customer's budget and availability. The final comprehensive Scope of Work becomes our mutual agreement regarding the services that we will deliver.

In preparation for the engagement, we review the customer's existing and available data and documentation (e.g. chart of accounts, current spreadsheets, etc.). At this point, customers begin preparation for the implementation by attending Administrator Training. This is designed to provide them with fundamental skills to support their participation, and to ensure that the optimum Adaptive Planning solution is delivered.

### Design

The next step is a project kickoff with key participants in the customer's organization and the Adaptive Planning project manager. During this meeting we:

- Discuss what we learned in the Discovery project phase
- Review and confirm customer expectations, project goals, deliverables and timeline
- Discuss overall design
- Make recommendations regarding best practices

While the application design agreed upon at this time provides a roadmap for project completion, the design is highly flexible and can be changed during the implementation as needed, dependent upon approval by the project team.

*"I appreciated that Adaptive Planning was very accessible and flexible. I could begin working on building our model immediately, with no start-up costs, and no IT infrastructure required. The documentation and training were excellent."*

—Stephen Smith, Finance Director, Johnson Matthey Fuel Cells



## Development

Our project managers are now ready to guide the customer through the development of the company model in Adaptive Planning. Depending upon which implementation option has been chosen, the project manager's role ranges from providing guidance and project leadership (Advantage Pack projects) to also completing some or all of the hands-on model-building work (Time & Materials and Fixed Bid projects.)

The breadth and order of tasks within this phase depends upon the customer's Scope of Work, priorities, project timeline, and availability to participate as needed. Phases of the project may include some or all of the following:

- Structure build (e.g., departments, accounts, projects, etc.)
- Revenue modeling
- Expense modeling
- Personnel modeling
- Capital modeling
- Allocations modeling
- Balance sheet and cash flow modeling
- Report building
- Data integration (importing actual data from GL and other enterprise systems)

Delegation of tasks to the customer depends on the type of project selected – Advantage Pack versus full implementation – and the professional services hours included in the Scope of Work. Regardless of the project type, a key element of the implementation is regularly scheduled weekly meetings with the Adaptive Planning project manager and the customer to ensure ongoing knowledge transfer and data exchange.

During this Development project phase, customer administrators have frequent opportunities to view model progress and to learn about how it is being built. They are typically encouraged to login to the model in progress to begin their hands-on experience, and to start to take ownership as the model is developed.

Detailed written documentation describing the customer's model may also be provided, if this is included in the Scope of Work.

## Deployment

Our customers' administrators are typically trained by this point, both via the Administrator training classes attended at the beginning of the implementation, and training that occurs during the weekly project meetings. If the project Scope of Work includes end-user training, our Professional Services team prepares and delivers this.

Once the Adaptive Planning project manager and the customer agree that all implementation work and training has been completed per the signed Statement of Work, we send the customer a project close-out letter, which includes a project satisfaction survey.

## Training

Adaptive Planning offers several training options, including free live group online training sessions, free pre-recorded video training, and custom personal training. Training is delivered either over the web, using the latest internet-based meeting technology, or onsite.

Instructor-led training includes several classes for administrators, both for new customers and for customers who have new staff assuming the administration of an existing model. End-user training sessions are customized for each customer and are delivered using the customer's own model.

In addition, as part of our commitment to openness and transparency, we make numerous pre-recorded training videos available to customers, partners, and other parties interested in learning more about Adaptive Planning.

## Support

The Adaptive Planning Support team includes highly-trained financial analysts and expert administrators of the Adaptive Planning system. They are available by phone or email to help our customers resolve anything from technical issues to simple "how to" questions.

*"The Adaptive Planning professional services team was very impressive. We provided guidelines and they were able to understand the concepts, validate the information and develop the models in Adaptive Planning. They really got to the heart of the issues quickly and were able to customize the support departments and business units across multiple countries including Australia, France, Germany, UK, Spain, China, Italy, Mexico, Canada, Japan, and the US in a matter of weeks."*

—Wendy Baum, EVP, Finance, The NPD Group

## Ongoing Excellence

We strive for ongoing excellence in our relationship with our customers, throughout all the stages of their life cycle with us. We collaborate with our customers by providing them with a way to share their ideas for product enhancement from within the Adaptive Planning application – they can share ideas with Adaptive Planning and other users worldwide, request new features, vote for product capabilities, and stay informed of the status of suggestions. We strive for ongoing customer satisfaction by keeping customers informed of product and company news with regular newsletters, webinars, and free training on upcoming new features, and annual user conferences held in several different locations. We also survey our customers on a regular basis regarding their satisfaction with our product and our Professional Services and Support.

Adaptive Planning is very easy to use, and we provide our customers with the resources they need to be self-sufficient. But our Professional Services team is always available to help, and we welcome customers to re-engage with us at any time. Many customers return to us for additional services as their planning and reporting needs change over time, or to explore expanded uses of the application, or as their user community increases. They can leverage our deep application knowledge and our strong domain expertise in financial planning and analysis, including best practices.

“I really appreciated how structured the implementation process was. The statement of work, scoping document and detailed process for developing the budget model in Adaptive Planning enabled us to achieve the results we wanted.”

—Patrick Zurlinden, Vice President and CFO, Vista Maria



### Corporate Headquarters

2041 Landings Drive  
Mountain View, CA 94043  
Telephone: +1.800.303.6346  
Fax: +1.650.528.7501  
Email: [info@adaptiveplanning.com](mailto:info@adaptiveplanning.com)

### Sales

[sales@adaptiveplanning.com](mailto:sales@adaptiveplanning.com)

### Public Relations

[press@adaptiveplanning.com](mailto:press@adaptiveplanning.com)

### Product Support

[support@adaptiveplanning.com](mailto:support@adaptiveplanning.com)

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