

## Adaptive Suite

# Adaptive Planning

Adaptive Planning is the market leader in cloud-based budgeting, forecasting, and reporting. Take advantage of rich functionality and an easy-to-use interface with the world's most usable cloud corporate performance management (CPM) application—and elevate your CPM with Adaptive Insights.

## Drive Real Competitive Advantage With Adaptive

Companies still using spreadsheets for budgeting and forecasting are crippled by broken links, data integrity issues, and version control errors. But on-premises applications aren't the solution either—old tools like Hyperion, Cognos, and SAP are expensive and require skilled IT staff to manage and maintain.

There is a better way. Adaptive Insights' cloud platform enables rapid deployment at an affordable cost accessible anywhere—without the hassles of IT. Our high-performance modeling engine with real-time in-memory calculations and fast data access is a great solution for midsize businesses and enterprise organizations alike. Benefits include:

- Reduce cycle time by up to 90%
- Decrease errors and improve data integrity with automatic aggregation
- Improve transparency with audit trail, version control, and analysis tools
- Drive adoption and enhance business support with integrated workflow and process management
- Get insights faster with pervasive visual analytics throughout the planning and reporting process

**“With Adaptive Insights, our summer isn't consumed with the budget, but instead we are able to look at the big picture. What used to be a three-week process is now literally a three-second process.”**

– Lund Food Holdings

### PERSONNEL PLANNING

- Plan by individual, employee type, or group for true flexibility and ease of use
- Calculate detailed payroll taxes (FICA, FUI, SUI, Medicare)
- Allocate headcount and costs across departments or projects
- Set access control to salary detail for tight security

### OTHER EXPENSE PLANNING

- Track expenses such as project, fund, or program with unlimited custom dimensions
- Incorporate drivers such as cost per trip to plan expenditures
- Establish centralized assumptions and formulas that can be locked from user editing

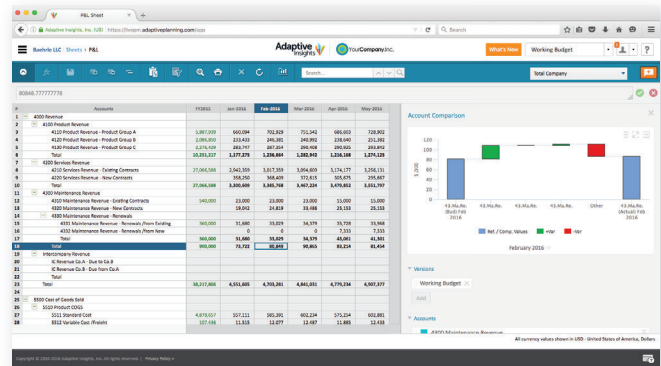
### SALES AND REVENUE PLANNING

- Integrate with CRM and enterprise resource planning systems (ERP) for real-time sales data
- Use spread tables to drive revenue recognition and deferred revenue
- Design your own custom sheets for multidimensional forecasting

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## ADDITIONAL BENEFITS

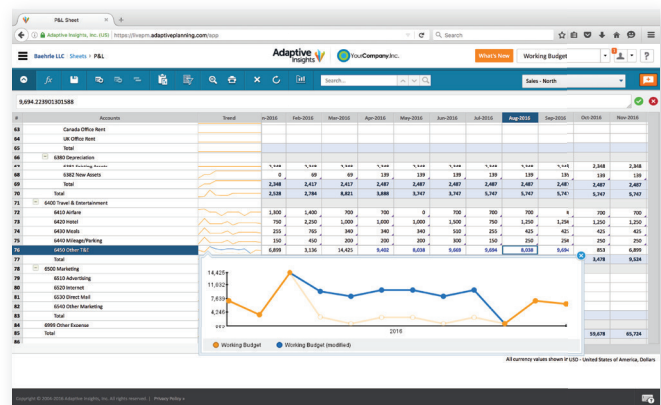
- Develop multiple plan alternatives and compare them to each other and to actuals to drive optimal business performance with confidence
- Replace complex allocation formulas with rules that are easy to create and understand
- Save time with automated currency exchange calculations and robust currency reporting capabilities
- Link other model elements for dynamic, integrated P&L, balance sheets, and cash flow statements
- Understand the impact of any change quickly with what-if scenarios



Planning enriched with visual analytics.

## WORK IN YOUR ENVIRONMENT

- Choose your experience: Adaptive Insights' responsive web interface or Excel, where you can leverage the full capabilities of Adaptive Insights' award-winning platform for planning
- Work offline and submit once your work is done and you're back online



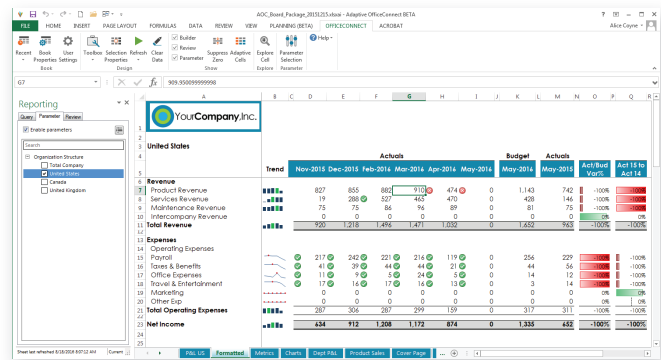
Visual data entry with Active Sparklines.

## PERVASIVE ANALYTICS

- Use Active Sparklines to spot trends and change forecasts with drag and drop functionality
- Select ranges of data and create charts with a single click—without leaving the planning environment
- Share fine-tuned graphs by creating snapshots or publishing to Adaptive Discovery dashboards

## SELF-SERVICE REPORTING & ANALYSIS

- Easily create reports with drag and drop—no scripting or technical skills required
- Slice and dice across dimensions, versions, departments, etc.
- Generate HTML reports and drill in to underlying detail for strategic analysis
- Create presentation-quality board packages dynamically linked across Excel, Word, and PowerPoint



Pixel perfect reporting in Excel, Word, and PowerPoint with OfficeConnect.

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