

Professional Services

Implementing a business planning solution is more than just streamlining processes, automating data integration, reducing the dependence on Excel, and simplifying reporting of monthly/quarterly results. Leveraging industry know-how, enhancing your utilization of Adaptive Insights beyond finance, measuring/tracking KPIs, driving adoption, integrating with additional corporate systems, providing more self-sufficiency through self-service reporting & analytics, and determining what success looks like are just some of the reasons to seek our expert advice.

Adaptive Insights Professional Services brings maximum value to our customers through best practices, vertical expertise, and by offering a complete set of services that spans the entire business planning lifecycle. Our services team is unmatched in expertise and brings decades of experience to ensure that implementations are done right, every time. Each engagement includes the resources and know-how to steer your organization through the three phases of a solution expansion: Strategize, Implement and Manage.

We strive for the highest quality and consistency of deliverables in our projects. We work hard to minimize risks and optimize the Adaptive solution to meet your desired business outcomes. Our success is your success, and because of that we have leveraged our experience in helping other customers to develop additional solution packages to help you as you take the next step on your Adaptive Insights Journey.

For further information on these packages, please reference the Services Offerings.

Service Offerings

PERSONNEL PLANNING

- **What we'll do:** During the engagement, the Adaptive Insights team will work with you to understand your personnel and employee model to determine the best way to plan for the largest investment of any corporation.
- **What you'll receive:** After the requirements analysis, we'll provide you with:
 - Up to 2 employee groups or 2 similar personnel sheets
 - Salary, benefits, tax and other headcount-based calculations
 - Links back to P&L
- **Why it matters:** People are the most important and most expensive asset to any corporation, so planning and accounting for them as part of your overall business plan is a vital aspect of enhancing your journey with Adaptive Insights.
- **How long it will take:** 2–3 weeks

BALANCE SHEET & CASH FLOW

- **What we'll do:** During the engagement, the Adaptive Insights team will work with you to understand your balance sheet and cash forecasting needs and will make recommendations based on experience with your industry and other customers.
- **What you'll receive:** After the requirements analysis, we'll provide you with:
 - Balance Sheet formulas for planning
 - Supporting schedules for Balance Sheet planning
 - Carry forward of other Balance Sheet Balances
 - Up to 5 Balance Sheet KPIs or metrics
 - Cash Flow statement using indirect method
 - Reports for both financial statements
- **Why it matters:** The Balance Sheet and Cash Flow Statements are important tools in measuring the strength and stability of your organization. Including these as part of your fully integrated model will help you see the full impact of changes and help drive informed decisions.
- **How long it will take:** 2–3 weeks
- **Assumptions:**
 - Does not include weekly cash forecast
 - Detailed inventory and bill of material (BOM) is out of scope

REVENUE PLANNING

- **What we'll do:** During the engagement, the Adaptive Insights team will work with you to understand the dimensions and drivers important to revenue planning, patterns for revenue recognition and reporting needs, combined with best practices, to create an integrated top line planning model.
- **What you'll receive:** After the requirements analysis, we'll provide you with:
 - Planning models for up to 2 revenue streams
 - Planning models for associated cost of sales/ Cost of Goods Sold
 - Modeled and imported KPI's
 - Imported historical revenue
 - Margin or other granular reporting
- **Why it matters:** A solid topline forecast sets the stage for decisions across your organization. It informs the need to increase production, change hiring plans, or accelerate initiatives. Bringing actuals into your model, by important dimensions such as customer or product, enables richer analysis, allowing you to identify trends earlier.
- **How long it will take:** 2–3 weeks

TIME GRANULARITY

- **What we'll do:** During the engagement, the Adaptive Insights team will work with you to understand the areas of your model that exist in more granular time scales and how those feed into your monthly financial statements.
- **What you'll receive:** After the requirements analysis, we will:
 - Plan or analyze historical data for one sheet by week/day/ semester, or the like
 - Create Planning accounts or KPIs by the same time granularity
 - Configure reports or dashboards on associated data
- **Why it matters:** Not all data is best planned and consumed in monthly time increments. For some organizations, sales by week or staffing by day is more relevant, and for others, the fiscal year may be based on periods rolling to semesters rather than quarters. Planning and analyzing data in the optimal time increment provides valuable insight and flexibility.
- **How long it will take:** 2–3 weeks

COLLABORATION

- **What we'll do:** During the engagement, the Adaptive Insights team will work with you to understand your processes and users, and recommend best practices to facilitate collaboration and adoption while making it easier for budget owners to contribute and consume data.
- **What you'll receive:** After the requirements analysis, we'll provide you with:
 - Set up of processes for 20 users and training on Process Tracker/Guide
 - Set up and training on Workflow
 - Training on the use of Process Notes and providing user access
 - Set up of users for your next budget/forecast cycle
- **Why it matters:** A truly active planning process depends on collaboration across the organization. Adaptive Insights enables organizations to collect input from all areas of the company, including those outside finance, and to distribute data quickly, increasing trust and accountability. Using tools within the application, driving participation, and promoting adoption is straightforward—and creates an easy-to-use experience for all participants.
- **How long it will take:** 2–3 weeks

TRAINING AND DOCUMENTATION

- **What we'll do:** During the engagement, the Adaptive Insights team will work with you to understand your existing model, the extent of user adoption, and areas for additional training and documentation specific to your configuration.
- **What you'll receive:** After the requirements analysis, we'll provide you with:
 - Comprehensive training on your existing model
 - Up to 3 exercises for trainees
 - 4 two-hour training sessions
 - Documentation of your existing models and maintenance
- **Why it matters:** Understanding what you have in your existing model is an important first step to planning your Adaptive Journey.
- **How long it will take:** 2–3 weeks

REPORTING & ANALYTICS

- **What we'll do:** During the engagement, the Adaptive Insights team will work with you to understand your key metrics and reports, your reporting audiences, and the cadence of data distribution. We'll then make best practice recommendations on the format and method for distributing plans and results.
- **What you'll receive:** Based on our experience working with many customers, we have defined a set of Success Packs to address the most common reporting and analytics requests. The following are available as Success Packs (streamlined execution of pre-defined scope):
 - **Reporting & Analytics Starter Success Pack**
 - Up to 6 charts and/or reports
 - 4 working sessions to teach you how to continue to build more charts and reports
 - **Reporting & Analytics Success Pack**
 - Up to 15 charts and/or reports
 - 4 working sessions to teach you how to continue to build more charts and reports
 - Development of the basic Planning structure which will be used for reporting and dashboarding
 - **Operational Reporting & Analytics Success Pack**
 - Up to 15 charts and/or reports
 - 4 working sessions to teach you how to continue to build more charts and reports
 - Development of the basic Planning structure which will be used for reporting and dashboarding
 - Manually import all the data required for Analytics
- **Why it matters:** One of the business outcomes benefitting Adaptive Insights customers is increased efficiency and reduction of low value tasks. This enables our customers to spend less time collecting data and more time analyzing it. Having reports and charts in place that showcase data, metrics and KPIs in easily consumed formats is key to enabling data-driven decision-making.
- **How long it will take:** 2–3 weeks

AUTOMATED INTEGRATION

- **What we'll do:** During the engagement, the Adaptive Insights team will work with you to understand your data sources and how that data will be used in your planning model. We will then work with your technical team to deliver an automated integration solution to bring source data in seamlessly on-demand or on a periodic schedule.
- **What you'll receive:** After the requirements analysis, we'll provide you with:
 - Fully automated data import (or export) into Adaptive Insights
 - Admin training and documentation on maintaining the integration on an on-going basis
 - Over 80% of source system integrations are available as streamlined, fixed-price success packs with pre-defined scope
 - Flat files import
 - NetSuite
 - Intacct
 - Microsoft Dynamics GP
 - Salesforce.com
 - SAP
 - Any on-premise system supporting the JDBC protocol (Dynamics, Sage, Oracle, data warehouse)
- **Why it matters:** With general ledgers, HR systems, and operational databases, you have a deluge of data. The challenge is combining disparate data into actionable insights. We can help automatically incorporate fresh financial and operational data into your Adaptive Insights model, allowing you to create powerful reports and dashboards that can inform planning and deliver insights to your organization.
- **How long it will take:** 4–10 weeks

MANAGED SERVICES

- **What we'll do:** During the engagement, the Adaptive Insights team will work with you to make updates, changes, and additions to keep your model running at the pace of your business.
- **What you'll receive:** After the requirements analysis, we'll provide you with:
 - A minimum of one scheduled monthly meeting or working session
 - Assistance with maintenance and budget preparation activities
 - Reviewing current models and providing recommendations on potential changes
 - Iterative meetings and working sessions to design and configure the software, as needed
 - Best practice guidance where appropriate
- **Why it matters:** Your business is changing, and managing your Adaptive Insights model to keep pace with the change is important. You may have the need for an extra set of hands during peak periods, want to make updates to structures or models, or extend your model to incorporate supplemental data. Additionally, with the pace of innovation from Adaptive Insights, you want to make sure you are getting the most out of the latest features. Leveraging the experts on the Adaptive Insights team can help.
- **How long we recommend:** 6 months

OTHER OPTIONS

- **What we'll do:** Have a specific need not addressed in one of the predefined packages? The Adaptive Insights team will work with you to scope a specific project or provide an ad-hoc Time and Materials contract.
- **What you'll receive:** After the requirements analysis, we'll provide you with:
 - A T&M SOW with a description of items to be addressed, an estimate of hours and associated cost
 - Access to an Adaptive Insights team member to assist with deliverables
 - Training and documentation
- **Why it matters:** While everyone plans, not everyone does it the same way. We want to make sure you have access to the resources to meet your business objectives in the timeframe you need. Engaging with the Adaptive Insights team allows you to leverage their expertise and best practices while providing your input to ensure alignment with your organization's unique requirements.



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