

Adaptive Insights for Finance— Enterprise

The Adaptive Insights Business Planning Cloud provides budgeting, forecasting, reporting, and analytics for organizations of all sizes. Our business planning cloud combines industry-leading ease of use with the security, scalability, and flexibility required for complex planning. We help people do their best work and help teams operate with agility. Innovators including P.F. Chang's, Boston Scientific, and American Family Insurance, to name a few, rely on Adaptive Insights to make their businesses more agile, efficient, and competitive.

Recognizing that the best plans involve the people closest to the day-to-day business, we built a powerfully simple planning platform so anyone can gain deep insights, make more timely decisions, and build solid, integrated plans. Everybody who plans can build complex financial models while remaining free from the burden of managing legacy planning environments and massive spreadsheets across different departments, and rescued from the mind-numbing, error-prone drudgery of manually consolidating data. Our business planning cloud makes it easy for people across the enterprise to manage, report, and analyze business performance.

Outdated Planning Tools Lead to Static Planning

Too many Financial Planning & Analysis (FP&A) organizations use outdated tools for planning. Legacy planning systems have limits that tend to keep planning stuck in finance alone, with just a few power users able to use them. To make matters worse, they are costly to own, difficult to learn, and overly dependent on IT support. So enterprises saddled with these systems develop work-arounds, most typically spreadsheet planning. Unfortunately, this does not set FP&A up for success, because the manual processes of spreadsheets and the poor usability and inadequate collaboration of legacy systems mean countless hours are wasted gathering data, reconciling numbers and plans, and managing reports. Finance is left with little opportunity to analyze and understand the story behind the numbers and to engage strategically with their business partners. Even worse, inadequate planning environments can force a costly compromise – finance struggles just to get the plan done, rather than having the time and resources to get the plan done right.

Static Planning Constrains Performance

Organizations that use legacy on-premises planning solutions or manual spreadsheet planning grapple with a static planning process. Static planning is characterized by siloed teams operating on data and models, manual data manipulation leading to long planning and reporting cycles, and too many errors. Not only are static planning processes slow, with limited engagement between finance and business users, but data and insights are neither timely enough nor trusted for agile decision-making. Static planning takes so much time that it limits the ability to provide the strategic leadership the organization expects finance to provide.

The Cure for Static Planning is Active Planning

There's a solution to static planning: it's a process we call active planning. Active planning is collaborative, because it deeply involves the people closest to customers and operations. It's comprehensive with fully linked plans producing insights informed by data. It's continuous—ongoing instead of periodic. Active planning accelerates and improves the quality of decision making across, up, and down the organization, leading to informed, timely decisions that fuel a truly agile business. When the market or business

changes, active planning gives you the flexibility to course correct in time to adapt, and to still achieve departmental and corporate goals.

We enable active planning via our business planning cloud, designed to free people to do their best work and empower teams to better manage their business.

Industry-Leading Ease of Use

Everybody in business plans. In large enterprises, planning processes need to span a broad range of finance and operations teams, and across a complex ecosystem of departments, business units (BUs), regions, and countries. Unfortunately, enterprise planning software historically has been too expensive and too complicated for anyone beyond a few power users in the corporate finance function—and often with heavy support from IT. In these environments, the rest of the organization is left relying on spreadsheets to plan their own functions and to provide input to the corporate financial plan. Adaptive Insights broadens planning with industry-leading ease of use that accelerates adoption and drives broad engagement across finance teams, operational departments, and business units. We believe the teams closest to the market and to your operations should be engaged in the planning process. By engaging finance and non-finance business users in a collaborative, active planning process, you can create high-fidelity plans aligned with your organizational goals, which ultimately delivers better and more timely decisions.

Built for Business

Most business teams are accustomed to planning systems that take a long time to implement and stabilize. Once deployed, changes to structures, reports, and analysis typically require dedicated IT resources to support business users' requests. This over-dependence on IT limits team's agility and consumes IT resources. We're changing the business/IT paradigm. Adaptive Insights is a modern, cloud-based solution built for greater business self-sufficiency. Business teams can control and share their own models, reports, and dashboards with less IT dependence. Models, processes, and reporting design, builds, and change—the business can manage them all using a drag-and-drop user experience that never requires coding or scripting, thus freeing IT resources to focus on other strategic initiatives.

Flexible to Change

In business, adapting to change is a constant need, but traditional planning systems aren't flexible enough to enable that kind of agility. The Adaptive Insights Business Planning Cloud is designed for flexible modeling and easy scenario planning so models and plans can continuously evolve as markets and the business changes. This flexibility lends itself to modeling, reporting, and analytics both within corporate finance and beyond. Now companies can unify workforce planning, operations planning, project-based planning, and financial planning all within a single active planning environment.

Faster Time to Value

Using Adaptive Insights' intuitive interface and drag-and-drop modeling and reporting interface, enterprises can implement their new planning environment quickly and achieve time to value sooner. Most enterprise customers implement their first phase within six months. These rapid implementation cycles reduce project risk and free teams to develop more sophisticated models. Our approach includes end users to validate along the way so that user acceptance testing (UAT) is a non-event.

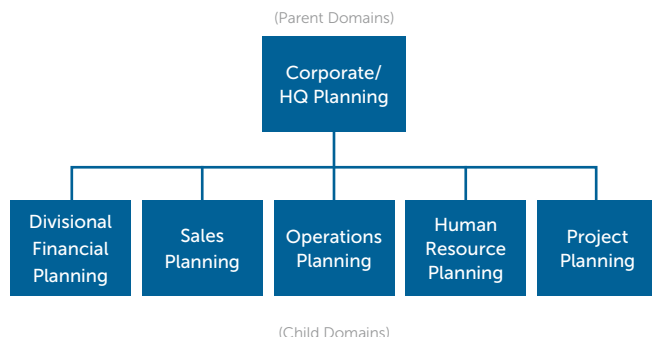
Trusted, Scalable Platform

The Adaptive Insights Business Planning Cloud is an in-memory computing platform designed for large scale multi-dimensional modeling. It enables granular and complex planning and reporting by many critical business dimensions (customer, channel, product, regions, rep etc.), by day, week or other time period. The platform also enables what-if analyses to assess opportunities and the impact of potential changes to the business.

Federated Planning Domains

From corporate finance through operating departments to business units, Adaptive Insights enables groups to plan their own domains. Individual plans come together into a holistic, fully linked corporate plan. What's more, each planning domain can have its own comprehensive model based on the planning cadence of their part of the business. This architecture of federated planning domains mirrors the organizational structure of complex enterprises, aligning well to how organizations manage data access and control. Federated planning domains enable corporate finance to

orchestrate planning and performance at the local and corporate level. This empowers departments and business units to model, plan, and report at levels specific to their needs.



Seamless Integration for Unified Planning

Adaptive Insights is an essential part of the business management software stack. We integrate with systems of record to provide a unified view of business planning and performance. We are ERP agnostic, seamlessly integrating with ERP, CRM, HCM, and BI systems so planners can not only see key business metrics to understand how they got here and why, but also use this past performance to drive plans and forecasts for where they're going.

Enterprise-Class Security



Adaptive Insights provides enterprise-class protection, service, and resiliency you can rely on and trust. Adaptive Insights is SOC 2, Type II compliant. SOC 2 is the AICPA standard for reporting on controls at service organizations, including

Software-as-a-Service providers (SaaS). The SOC 2 attestation covers the security, confidentiality, processing integrity, and availability trust service principles.



With customers in more than 50 countries, data privacy and adherence to regional regulations is of the utmost importance to Adaptive Insights.

TRUSTe performs annual certification of our services to ensure compliance with EU-US Privacy Shield, US/Swiss Safe Harbor framework, and APEC Cross Border Privacy Rules (CBPR) system covering the collection, use, and retention of data. Our practices are also consistent with Canada's PIPEDA and the Australian Privacy Principles.

We maintain an exhaustive security program aimed at securing and maintaining the integrity of our customer's data via physical and logical security and data encryption. Our security program covers both the technology platform itself and how we develop, test, and deploy software. We obtain third-party security audits for our SOC 2, Type II certification relating to security and data privacy. We protect our platform through rigorous backup processes, built-in redundancy, and disaster recovery mechanisms. We provide role-based security and an audit trail of user actions. Adaptive Insights provides the high availability demanded by global operations and performance transparency you can trust.

¹ Association of Finance Professionals Benchmarking Survey October, 2016.

² 2017 Adaptive Insights CFO Indicator.

Learn more at adaptiveinsights.com

Financial Planning & Consolidation – Sales Planning – Workforce Planning – Operations Planning – Project Planning

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