Focus on Professional and Business Services Organizations

The Adaptive Insights Business Planning Cloud enables professional and business services firms of all sizes to collaboratively plan and model, easily access real-time analytics, and streamline complex reporting. You get easy, powerful, and fast software that empowers finance and operations teams to better manage the business. It’s easy, so you can plan as a team. It’s powerful, so you can model anything and analyze everything. And it’s fast, so you can model rapidly and adapt quickly. With this best-practice active planning process, you can plan and adapt without compromise.

Adaptive Insights provides service-based companies with a budgeting, planning, and reporting solution that includes multidimensional, driver-based modeling capabilities and integrated P&L and cash flow planning and reporting.

Planning and Reporting Challenges
The professional and business services firms need to constantly adapt to market and economic trends. To stay competitive and profitable, they need to quickly adjust hiring plans in response to economic growth or downturn and improve utilization of their billable resources. Detailed personnel planning is the backbone of services budgeting and forecasting. These companies pay close attention to the fully loaded cost of each employee and often allocate personnel across multiple projects, departments, or service offerings. It’s important for these companies to be able to analyze key metrics, such as employee utilization and service line profitability, and to use this information to carefully plan headcount. In addition, headcount impacts the revenue plan. Revenue planning can involve drivers such as bill codes and bill rates, and key comparisons such as paid hours versus billable hours. Frequently companies need to perform what-if analyses to compare various hiring scenarios and their impact on the bottom line. The ability to reforecast easily, making adjustments based on different revenue assumptions, can be a significant differentiator. Planning and reporting this way requires careful analysis of historical metrics, so integration of data from other systems is critical for planning. And reporting requirements include comparison of key metrics—actual versus plan. Spreadsheet-based systems are inefficient, error-prone, and fundamentally unsuited for the complex, dynamic planning and reporting required by business services organizations.

“With Adaptive Insights, we can push the budgeting process out toward the end of the year and still be confident in finishing it on time. What’s more, we get better visibility into the financial picture of the operation and a more accurate budget. We got exactly what we were looking for to make our budgeting process a lot less painful—and it didn’t cost a fortune”

– Deborah Lansford, CFO, CORT Business Services
The Adaptive Insights Budgeting, Planning, and Reporting Solution

The Business Planning Cloud enables profession and business services organizations to model, report, analyze, and plan across the entire organization to make smarter decisions and gain business agility. With Business Planning Cloud, you can:

- Plan headcount in detail, including multiple dimensions, and assign calculations to groups of people or to specific individuals
- Allocate personnel across multiple projects, departments, or service offerings
- Tie headcount to both costs and revenue, and easily perform utilization and gap analyses
- Perform what-if analyses to compare various hiring scenarios and their impact on the bottom line
- Plan complex revenue recognition scenarios for various revenue streams
- Reforecast frequently and make adjustments based on different revenue assumptions
- Automatically integrate data from any other enterprise systems
- Model integrated P&L, balance sheet, and cash flow statements, including effects of sales on accounts receivable, deferred revenue, and cash
- Use dashboards to analyze key metrics, including sales per employee, billable and paid man-hours, utilization of billable resources, etc.
- Use reports to perform variance analysis, including to drill down into underlying transaction detail from other systems
- Distribute report books via email for financial presentations such as board packages and executive reporting
- Improve accuracy and turnaround time in the planning and reporting process

The patent-pending Elastic Hypercube Technology supercharges the Business Planning Cloud platform with the power, scalability, and performance companies of all sizes need to model the complexities of their business and to report on and analyze results — without compromising ease of use. As a cloud solution, no new hardware, software, or IT support is required for implementation or ongoing maintenance.

The Business Planning Cloud integrates with other core business systems and external data sources to enable comprehensive planning, analysis, and reporting. Purpose-built domain intelligence makes it easier and faster for users to build and adapt functional models. Tight linkages with Microsoft Office products enable quick creation of board reporting. The web-based, highly customizable interface allows users to operate in a familiar Excel environment, allowing interaction by all types of employees with virtually no training.

“It was unbelievable how flexible Adaptive Insights was despite a complex set of drivers and models. We wanted the ability to model the client business as we needed to based on KPIs. In addition, the forecasting and reporting capabilities were exactly what we needed to reduce the time previously spent collecting and manipulating this information in Excel spreadsheets.”

—Cliff Marnick, VP, Director of Finance, Jones Lang LaSalle

Select professional and business services customers:
- Airlines Reporting Corporation
- CohnReznick LLP
- CORT Business Services
- DRPM
- Frost and Sullivan
- Grant Thornton UK LLP
- Howard R. Green
- Jones Lang LaSalle
- Maritz Holdings Inc. Corporation
- Pinsent Masons
- SiriusDecisions, Inc.
- C3i Solutions
- The Ken Blanchard Companies
- WNS