

AdaptiveLive | 2016

#ALive16

A Case for FP&A Transformation

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Session Objectives



Hear Adaptive Insights founder Rob Hull discuss why **now** is the time for you to transform your FP&A practices.

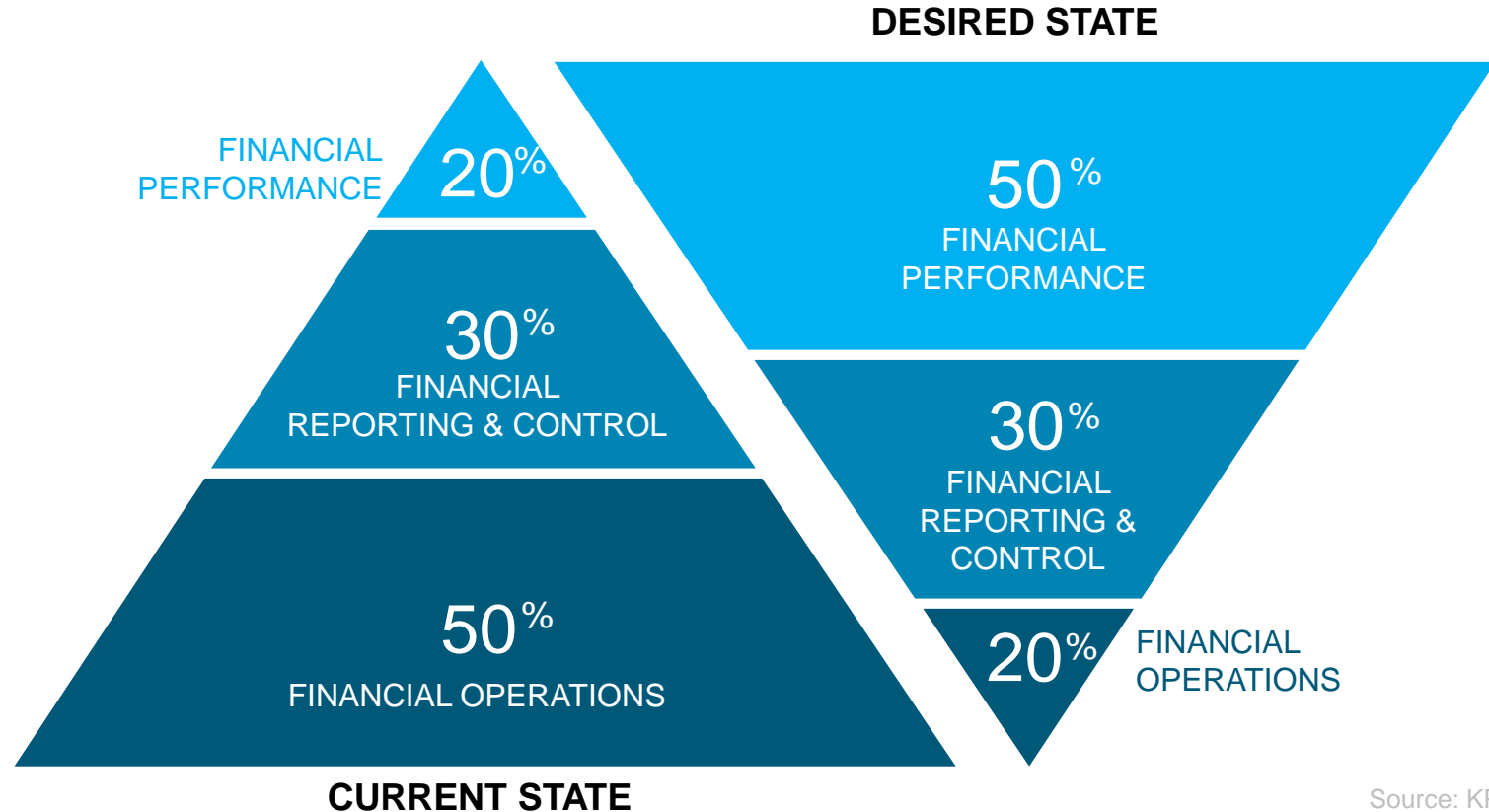


Learn from a seasoned CFO about the importance of evolving your tools and processes so your team can make the leap to a **high-performing finance organization** and keep pace with business change.

The World is Changing



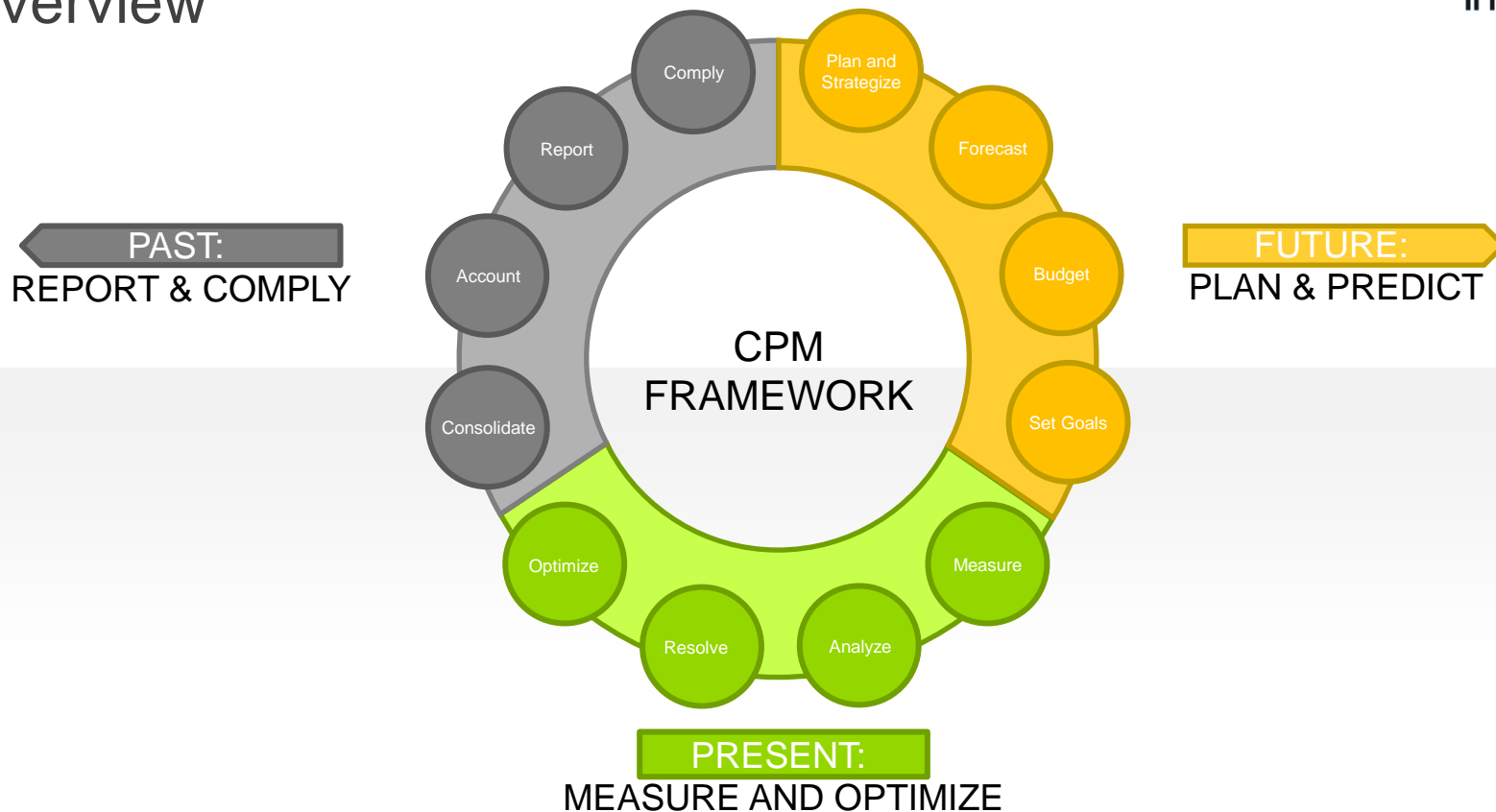
CFOs Want Strategic Focus



Source: KPMG

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Corporate Performance Management Overview



Source: Forrester's "Align Financial Processes And Systems For Better Business Value And Compliance"

Transforming: Tactical to Strategic



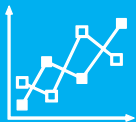
FINANCIAL, OPERATIONAL,
STRATEGIC



TIMELY AND ACCURATE
INSIGHT



CONTINUOUS FORECASTING



BUSINESS DRIVER FOCUSED



CROSS-FUNCTIONAL
COLLABORATION



OPPORTUNITY
IDENTIFICATION

Typical Challenges to Success



Source: CFO.com

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What if your Team could?

Elevate the role of FP&A and become more strategic to the business



Spend **less time** on low value added tasks



Improve the **confidence and ownership** of the planning numbers



Deliver **insights and analysis**, with a single click

Adaptive Insights:

The Leader in Cloud CPM



3,000+
CUSTOMERS

BIGGEST BRANDS: 350+ Large Enterprises



HOTTEST COMPANIES: 20% of Deloitte Fast500



200+
PARTNERS

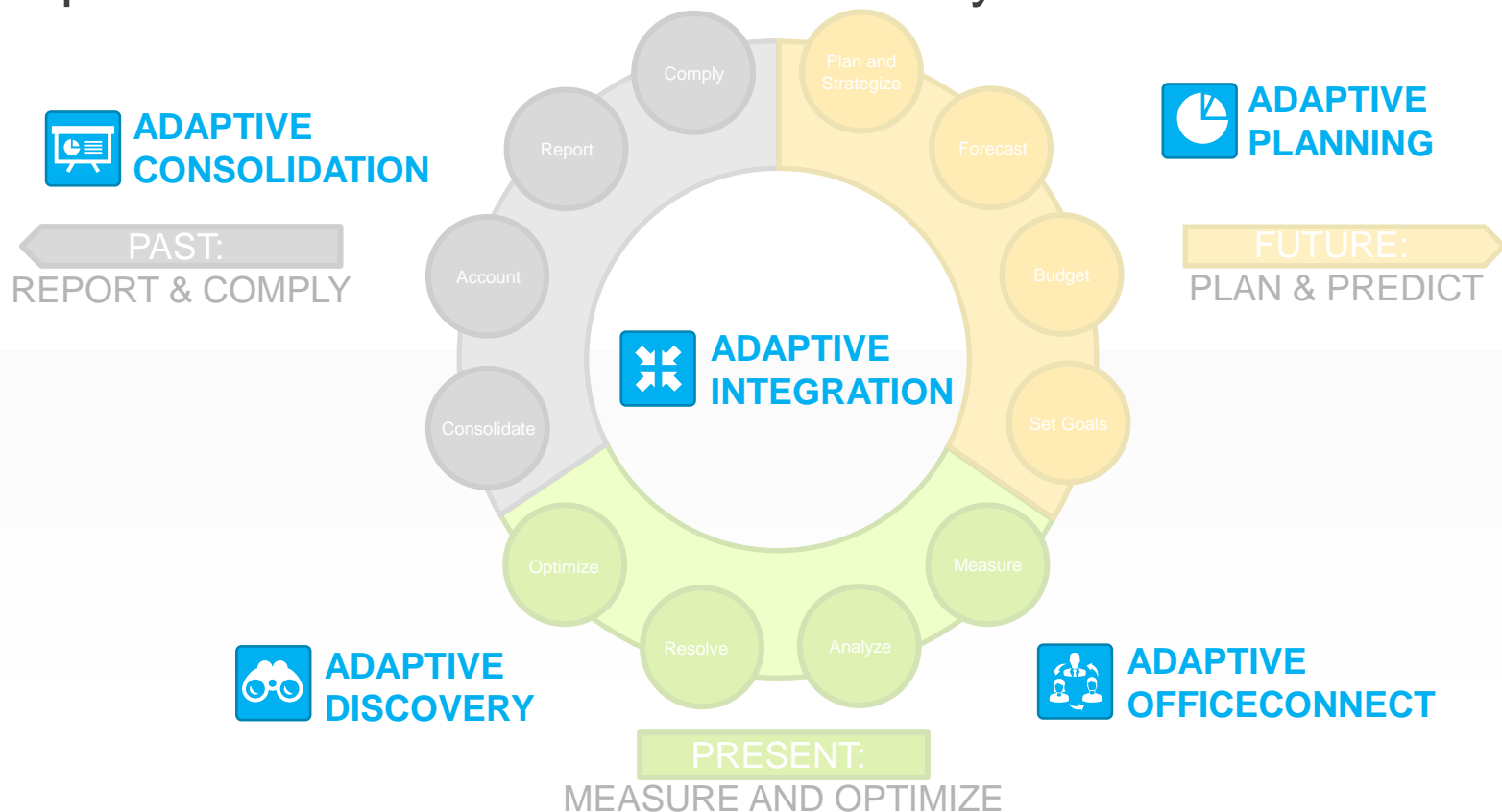


#1
EXPERIENCE

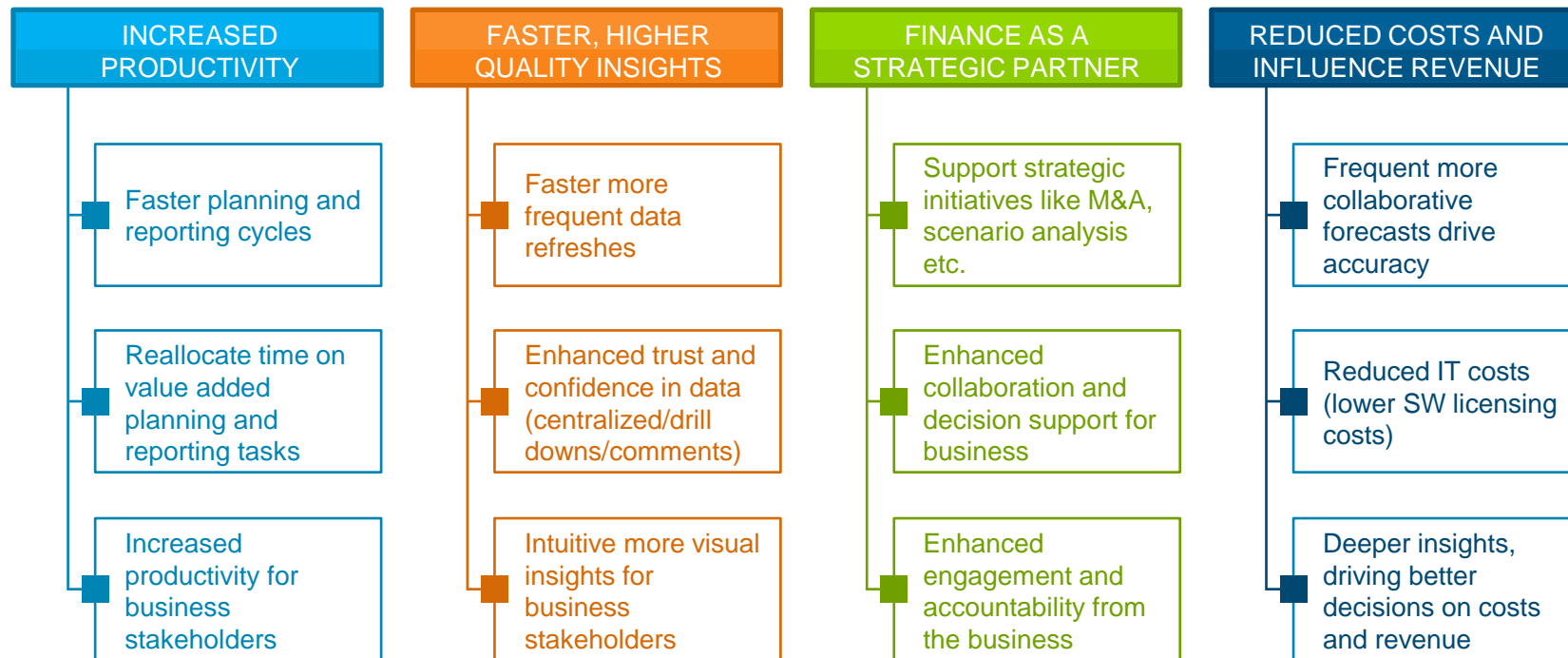


Corporate Performance Management

Adaptive Products Address the Full Cycle



Potential Benefit Metrics



Value Proof Points

INCREASED PRODUCTIVITY

“We cut our planning cycle from 4 months to days”



FASTER HIGHER QUALITY INSIGHTS

“Adaptive helped us become much more succinct in the way we use, present, and think about data. It's central to how we run our daily business”



FINANCE AS A STRATEGIC PARTNER

“The finance team can make quick recommendations to senior management about the profitability impact of any decision”




REDUCED COSTS AND INFLUENCE REVENUE

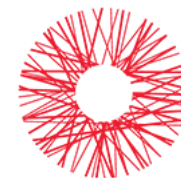
“We are better able to manage expenses with Adaptive Insights. In the first year we saved \$8 million”



Source: Adaptive Insights Customer Quotes

Proven Customer Success

	AVG. ANNUAL BENEFIT	ROI	PAYBACK
	\$165k	299%	4.8 MONTHS
	\$915k	751%	1.3 MONTHS
	\$115k	211%	7.2 MONTHS
	\$269k	802%	1.5 MONTHS



NUCLEUS
RESEARCH

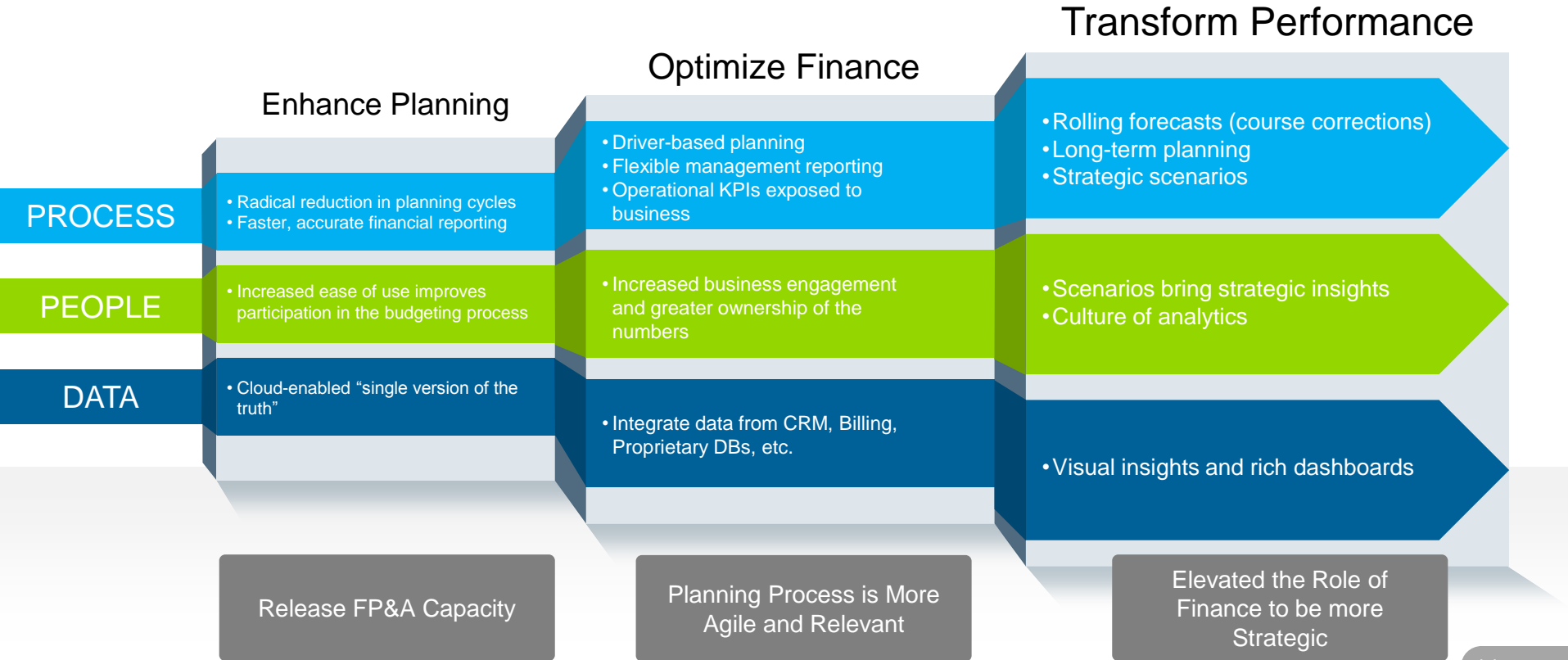
ROI survey conducted
by Nucleus Research

Represents post
implementation benefit
realizations

Source: Nucleus Research

Phased Roadmap

For Strategic Transformation





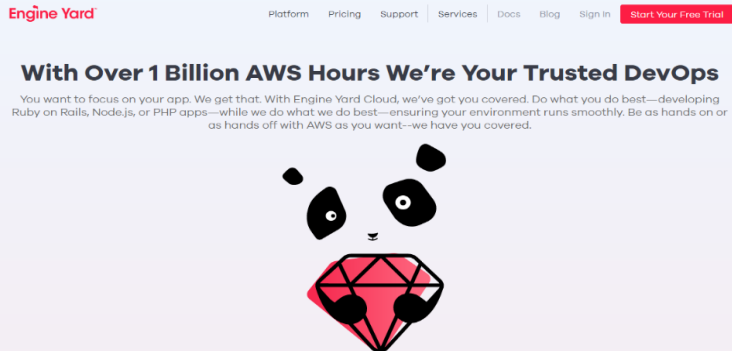
Cloud startup in application management
1500+ customers
HQ in San Fran | Global Customer base

CHALLENGES

- Disconnected data stores, and Excel proliferation for planning and reporting was clearly not sustainable, given the growth aspirations
- Significant senior management time being spent on debating/validating numbers, rather than making decisions
- Finance needed to focus on strategic initiatives and operations

SOLUTION

- Deployed Adaptive Suite to reduce cycle times for annual planning cycles
- Planning focused on expenses, HC, recurring usage revenue and customer churn

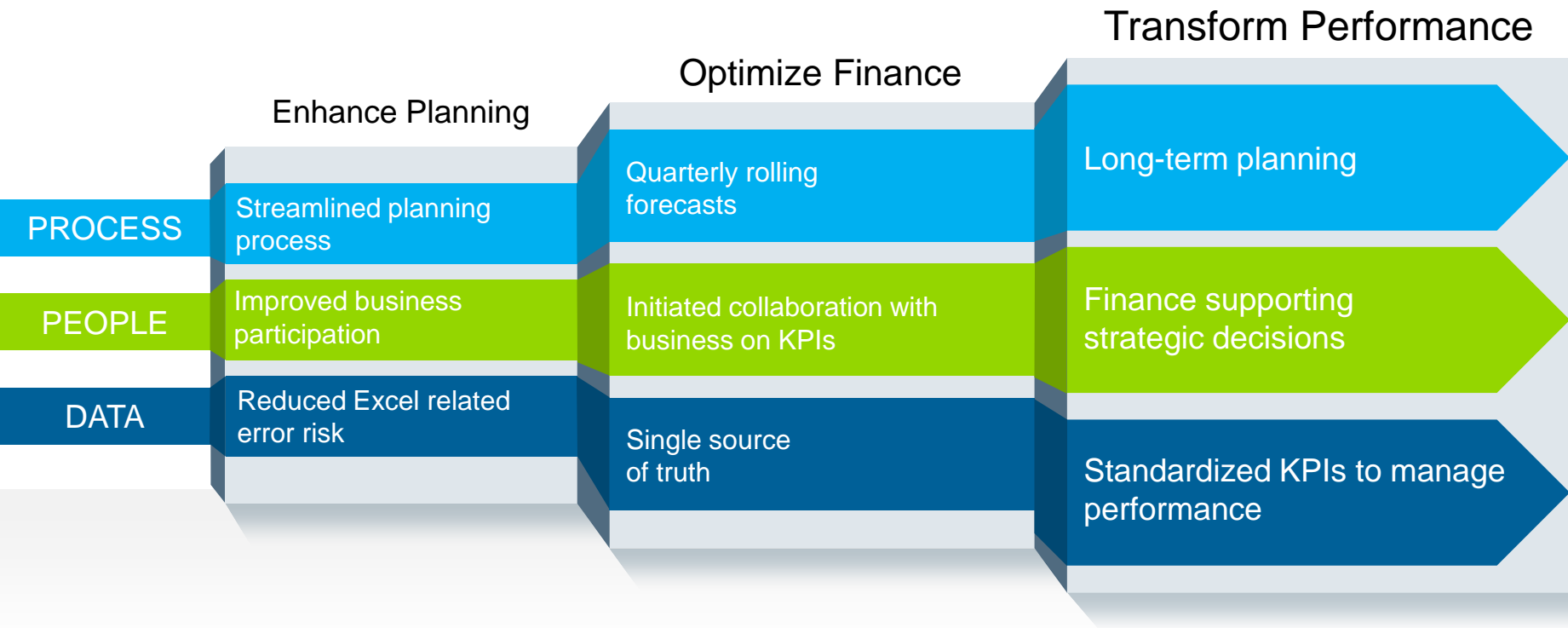


BENEFITS

- Single source of truth reduced data debates and enhanced collaboration with business
- Finance delivering analytical support for strategic decisions like M&A
- Driving organization wide performance, by exposing dashboards with operational KPIs (customer, usage, churn etc.)

"With Adaptive Insights, it's all in front of you in real time. It can be frustrating for a CFO if finance says one thing about a statistic or metric, while marketing says something different based on another data source. We now have one view of the truth, driven out of Adaptive."

Milestones in Engine Yard's Transformation Journey



Engine Yard™



\$269M + Revenue | #1 in screen protection | 234+ Employees



CHALLENGES

- Few mature forecasting, budgeting, and reporting processes in place
- Huge variance in sales forecasts, that were driven by sales staff
- Company missed guidance estimates of net sales by 30%

SOLUTION

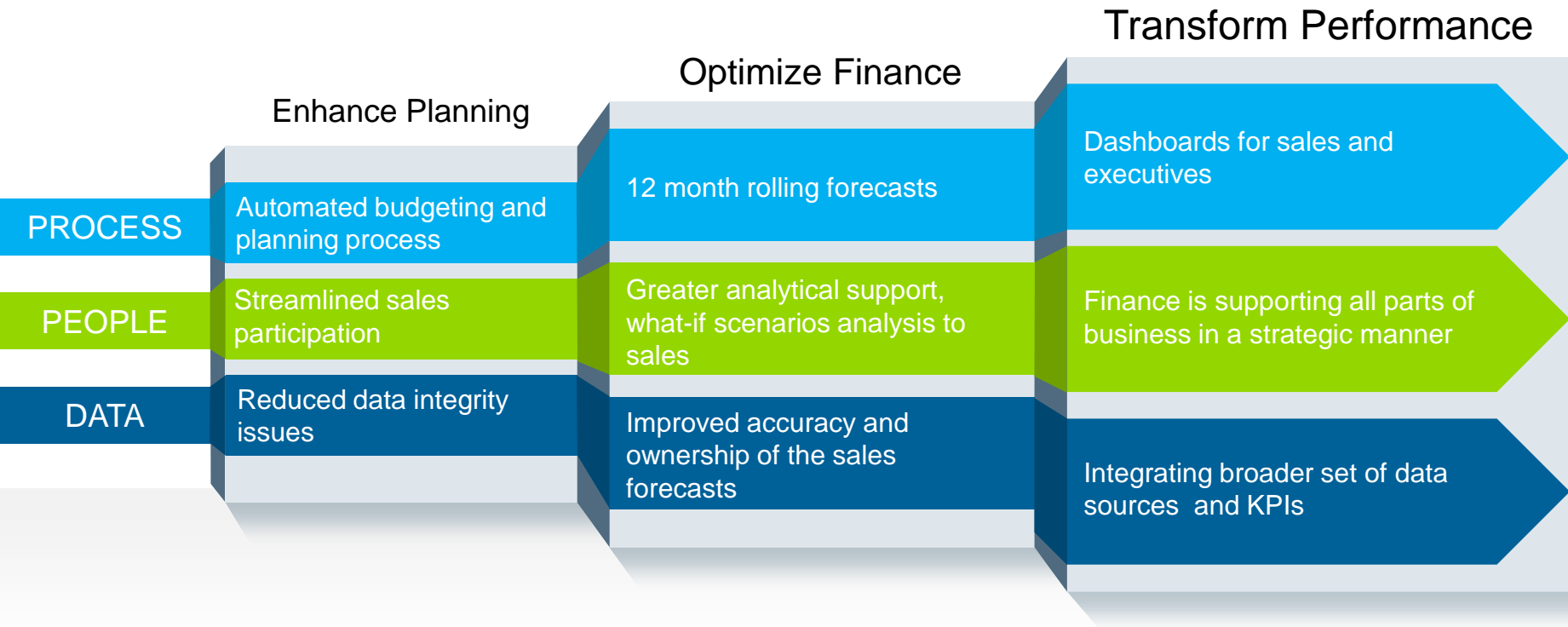
- Leveraged Adaptive as a repository to deliver insights and analysis
- Deployed 12 month rolling forecast process

BENEFITS

- Improved forecast accuracy to course correct earlier, and avoided wasteful manufacturing & distribution costs
- Achieved deeper visibility into COGS and margins by products
- Realized margin improvement of 5% across the company's entire product portfolio

"We are better able to manage expenses with Adaptive Insights. In the first year we saved \$8 million "

Milestones in ZAGG's Journey



ZAGG®



245 million people reached each week | 454 owned-and-operated radio stations | 90 US media markets

Captivating Our Audiences

245 million people reached each week
across our affiliated and owned and
operated stations

The Power of Cumulus Radio



CHALLENGES

- Cumulus quadrupled its revenue; however planning processes did not scale; Excel based budgeting was manual, error prone and in-flexible
- Reporting was cumbersome, accessibility challenges; majority of reporting at corporate delivered via email
- Significant IT costs associated with legacy reporting platform (Microsoft FRx)

SOLUTION

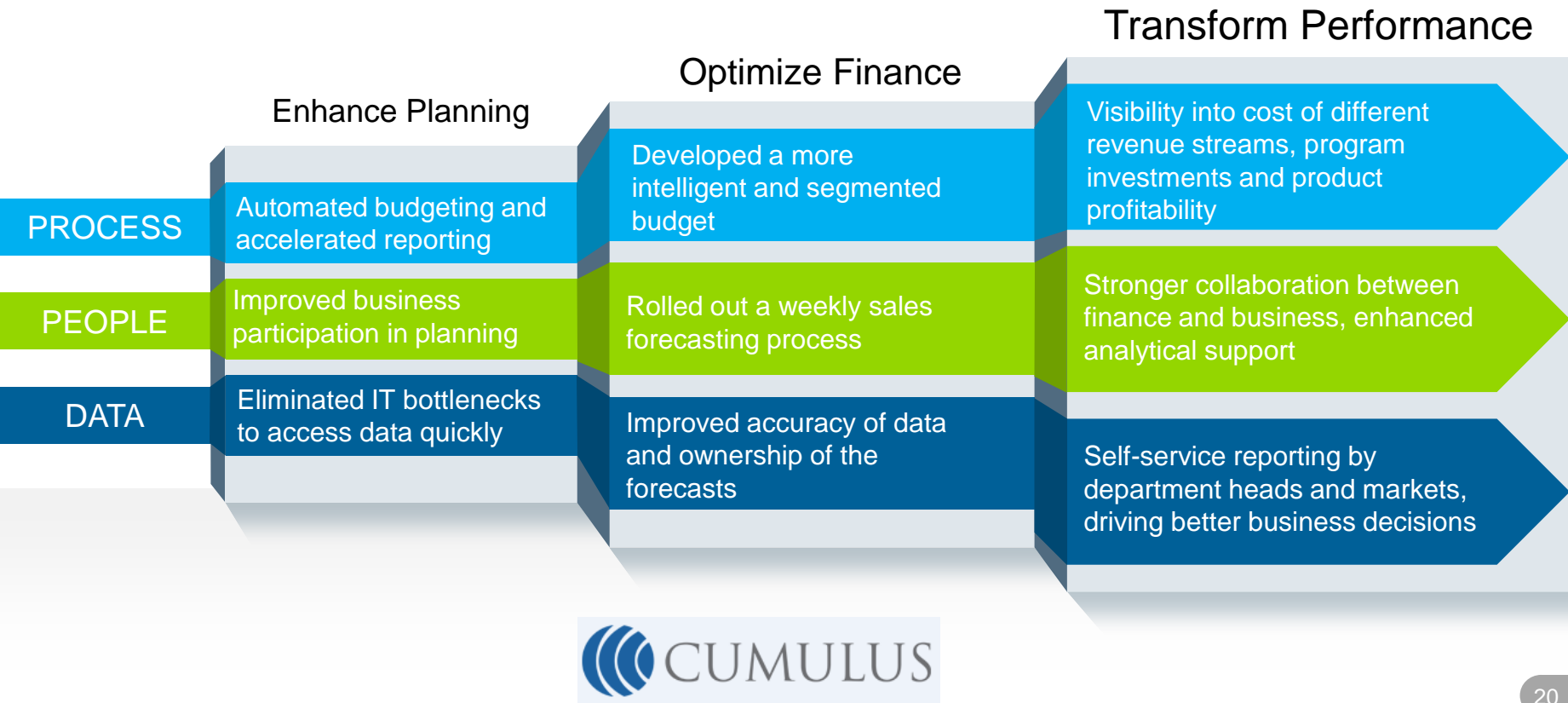
- Automated annual budget; strengthened the sales forecasting process
- Enabled easy-to-use self-service reporting for growing user base

BENEFITS

- Increased productivity; faster cycle times for budgets and reports
- Reduced IT infrastructure costs (FRx licensing)
- Increased collaboration with business stakeholders and enhanced analytical support
- Increased forecast accuracy, resulted in accurate guidance to the analysts

“Adaptive singularly changed the culture and focus of our company. We have 110 businesses across 30 states, collaboratively reviewing financial performance on daily basis. Adaptive has enabled accessibility, with accountability and unbelievably it has saved us money”

Milestones in Cumulus's Journey



3000+ Customers Across Verticals

Software



Manufacturing



Healthcare



Non-Profit



Consumer



Financial Services



Media



Other



Biggest brands & hottest companies

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Thank you!

Contact Me: rhull@adaptiveinsights.com

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