

Adaptive Acceleration

AN INSIDE LOOK AT THE **ADAPTIVE CUSTOMER EXPERIENCE**



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Leader in
CLOUD BUSINESS
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CPM & BI Cloud »

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**Global
Enterprises**
RUN ADAPTIVE »

ONLY
Unified Cloud
CPM & BI Suite »

**Biggest
Brands**
RUN ADAPTIVE »

EXCEPTIONAL
**Global
Growth** »

Industry
INROADS »

The Leader in Cloud Business Analytics for the Biggest Brands and Hottest Companies

With 2,500 customers in over 85 countries, Adaptive Insights is transforming performance management and business intelligence in mid-size and enterprise companies worldwide. Our solutions for planning, reporting, consolidation, and visual analytics give leaders the perspectives and insights to make better, faster, more informed business decisions.



// Adaptive has become the backbone of our finance organization. The ROI is greater than any other software we have deployed—Adaptive is the most valuable piece of software that any company can put in place. //

—Mike Dinsdale, CFO

DocuSign[®]

Customers at the Core

At Adaptive Insights, we are keenly focused on providing an exceptional customer experience. From the beginning, we have delivered powerful features combined with an intuitive user experience and personalized customer service and support. We're proud to be consistently ranked #1 in customer satisfaction and usability by leading analyst firms.

It's no wonder that our worldwide customer base includes the biggest brands and hottest companies across nearly every industry.



// It used to take us months to compile our budget. Now, it takes less than a day with Adaptive. //

—Pamela Langshaw, Finance Manager

Coca-Cola



Biggest Brands Run Adaptive

Large enterprises make up over 1/3 of Adaptive's user base, using the Adaptive Suite as an alternative to, or together with, existing on-premises systems such as Oracle Hyperion.



The Jackson Family Wines portfolio includes 30 renowned wineries.

30 COMPANIES
CONSOLIDATED
125 USERS
9 INSTANCES

Adaptive Suite

replaced existing
on-premises solution



Major medical device manufacturer
with 40 worldwide locations.

\$7B REVENUE
11 INSTANCES
WORLDWIDE
300% ROI | **375+** USERS

Adaptive Planning

integrated
with **ORACLE**
HYPERION



A leader in tools, diagnostics,
equipment, software, & services.

4200 USERS
50K INDIVIDUAL PRODUCTS
\$3B+ REVENUE
100 METRICS | 85 BUSINESS TEAMS

Adaptive Discovery

Biggest Cloud
BI Implementation

// Adaptive's self-service reporting feature is a tremendous benefit for us. We can take advantage of all of the data in Adaptive to answer important questions about our business. //

—Joanne Belmontes, Planning, Reporting, & Analysis

SIEMENS

Hottest Companies Run Adaptive

Adaptive's customer base includes some of the fastest-growing companies in the world. Approximately 50% of recent tech IPOs manage their growth with Adaptive, with many more fast-growing customers expected to follow in their footsteps.

Recent tech IPOs using Adaptive



"We have utilized the Adaptive Suite to better manage and plan for growth before and after the IPO process. Adaptive's cloud solution has been invaluable for us in time savings, collaboration, and executive level reporting."

—John McGuire, Senior Director of Finance, Zendesk

"Companies now need to be able to have up-to-the-minute information regarding their business. The old world model of annual or quarterly plans is obsolete as a model of continuous improvement has arisen."

—Forbes

// Adaptive offers extraordinary value at approximately 10 percent of the total cost of on-premises solutions. //

—Dr. Narayana Swamy, FP&A Manager



Global Enterprises Run Adaptive

Adaptive is used by numerous multi-national corporations worldwide, in both divisional and enterprise-wide deployments.



One of the largest aircraft manufacturers in the world.

7 INSTANCES

300 USERS | **20K** EMPLOYEES

14 CURRENCIES

\$18B REVENUE

Adaptive Suite

integrated with 



The world's second-largest brewing and beverage company.

\$35B REVENUE

70K EMPLOYEES

140+ USERS | **200+** BEER BRANDS

11 INSTANCES
& COST CENTERS

Adaptive Planning

integrated with 

THIESS

Australia's leading construction, mining, and services contractor.

8M RECORDS

2MOS ROI | **200** USERS

25+ LOCATIONS

\$7B REVENUE

Adaptive Discovery

integrated with 
JD EDWARDS ENTERPRISEONE

// My first order of business at Blurb was to implement Adaptive because I was so happy with how the solutions performed at a prior company. I'm not going anywhere without Adaptive. //

—Gene Domecus, COO



Exceptional Global Growth

Adaptive's unbeatable combination of powerful yet easy-to-use solutions, delivered in the cloud and coupled with exceptional customer service and support, has driven remarkable growth and success.

#1
customer
experience

#1
market
share

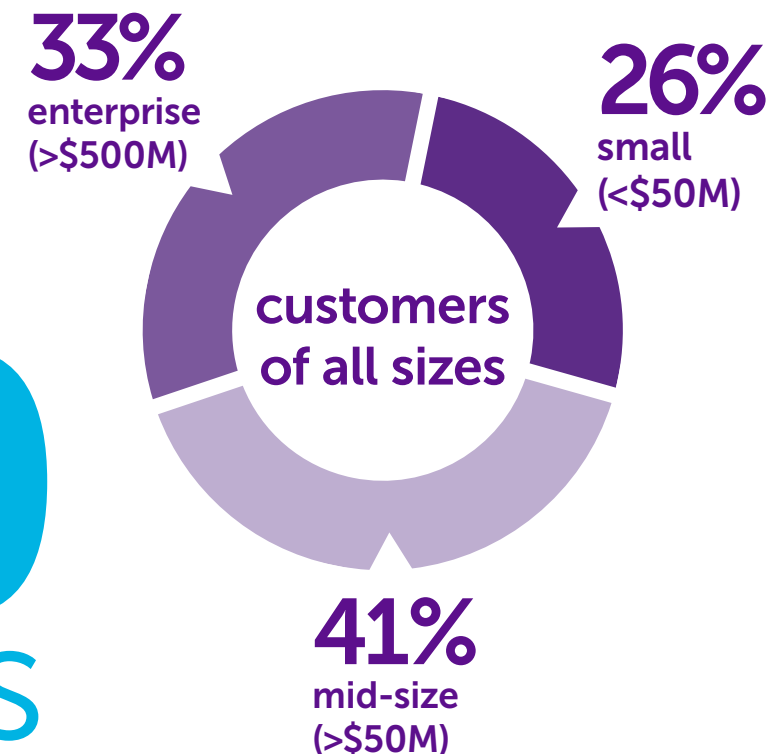
#1
fastest
growing

100%+
renewal rate (\$s)

2500
customers

30x
customer
growth
since 2006

1000→2500
customers in the last 3 years



// Adaptive has completely revolutionized the way we support our customers and run our business. Now I'm a more strategic contributor to the business, not just a number cruncher. //

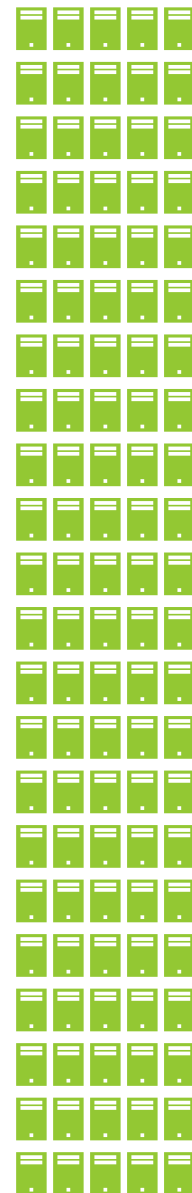
—Rick Smith, FP&A Manager

Engine Yard™

World's Largest CPM & BI Cloud

From billions of calculations per day, to hundreds of thousands of reports, Adaptive's cloud is helping the most organizations make better, faster decisions.

2.4M
accounts



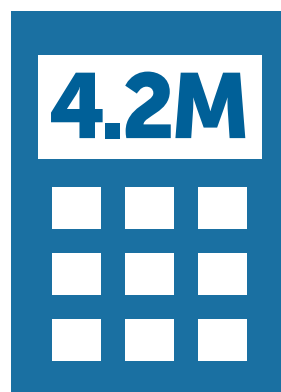
70,000
unique dimensions
across customer models

400,000
reports 

99.99%
availability

1million
projects & cost centers

340,000+
queries
per day 

4.2M

calculations
per second

100+
Source
System
Integrations

5000
users in largest
analytics deployment 

// If Adaptive fell off the face of the earth, it would be like cutting off my arm. I've used Adaptive in three different businesses, and it keeps getting better and better. //

—Dan Bradford, VP of Finance



The Only Unified Cloud CPM & BI Suite

**Organizations simply
run better when
they run Adaptive.**

"When I think about Adaptive,
what really makes me smile
is the reporting capabilities.
There are so many other
capabilities, but that really has
been the huge game changer."

—Brian Teets,
Financial Systems Manager



The Adaptive Suite is the most complete cloud Corporate Performance Management (CPM) and Business Intelligence (BI) suite on the market today, including unified planning, reporting, consolidation, and visual analytics solutions that are modern, powerful, and intuitive for all types of business users.

With the Adaptive, our customers can more easily collaborate across their organizations, spend less time and effort on financial and operational processes, cut costs, and make better faster, more informed decisions.

Industry Inroads

Adaptive's customers include companies of all sizes across a wide variety of industries.

Click on the links below to explore how Adaptive is creating value for companies in different segments.

[SOFTWARE »](#)

[BUSINESS SERVICES »](#)

[MANUFACTURING »](#)

[HEALTHCARE »](#)

[HIGHER EDUCATION »](#)

[FINANCIAL SERVICES »](#)

[ENERGY & UTILITIES »](#)

[SPORTS/ENTERTAINMENT »](#)

[NON-PROFIT »](#)

[RETAIL & CONSUMER »](#)

[INSURANCE »](#)

[BIOTECH/PHARMACEUTICAL »](#)

[MEDIA & PUBLISHING »](#)

[GOVERNMENT »](#)

<< Software

BOOKINGS
QUOTA ATTAINMENT
PRODUCT MARGIN BY REP
ACV|TCV|ARR
CONVERSION RATE
BACKLOG
YOY REVENUE GROWTH
WHAT-IF ANALYSIS
PS HOURS & UTILIZATION

"At DocuSign we have close to 70 SaaS applications that we run, and the return on investment with Adaptive is greater than any other software we have deployed."

DocuSign®

3 weeks

cut to
minutes
with
**Adaptive
Reporting**

67%
faster performance
management



3000
hours freed up
for analysis

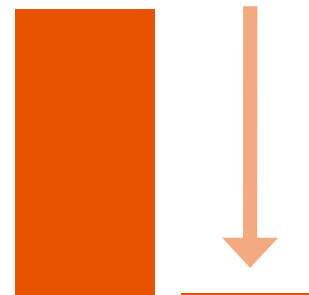
<< Business Services

UTILIZATION
BACKLOG | BILLINGS
PAID VS BILLABLE HOURS
VARIABLE GROWTH RATES
GROSS MARGIN
COMPLEX REV REC SCENARIOS
PERSONNEL ALLOCATIONS
RESOURCE PLANNING | ATTRITION
REVENUE BY BILL RATES
SERVICE LINE PROFITABILITY
FULLY LOADED EMPLOYEE COSTS

"It was unbelievable how flexible Adaptive was despite a complex set of drivers and models. The ability to manage a portfolio's expenses and to compare actuals vs. forecast is critical to client project success."

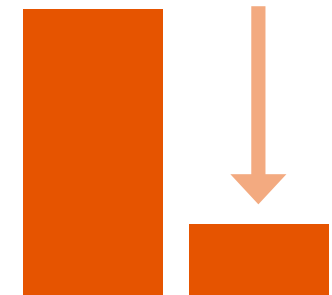


99%
time saved in
consolidation
process



Reports
in seconds
rather than
weeks

75%
reduction
in budget
cycle time



<< Manufacturing

INVENTORY TURNS
PRODUCT PROFITABILITY
 COST OF CARRY
 ASP & COST PER UNIT
 QUOTA ACHIEVEMENT
PRICE SENSITIVITY ANALYSIS
 DAILY SALES FLASH
FREIGHT & SHIPPING ANALYSIS
 CAPEX & REPAIRS/MAINTENANCE
DEMAND CHANGES
 CUSTOMER AGING
VOLUME PRODUCTS/MARGINS
 PLANT SHIFT BUDGETING

"The Adaptive Suite is helping us unify our planning, consolidation, and analytics processes. The new user experience, looks and feels even more like Excel, making it even easier to engage our budget managers." ← **EMBRAER**



1 week per month
saved with
 real-time reports

236%
 ROI

7-10
 FTE savings
 versus
 on-premises
 solutions



<< Healthcare

RVU BY PHYSICIAN
CHARGE PER ENCOUNTER
 NET PATIENT REVENUE
 FACILITY COST | **DIRECT COSTS**
 OPERATING EXPENSES VARIANCE
SALARY PER ENCOUNTER
SALARY BY PROVIDER TYPE
 P&L BY PROGRAM & LOCATION
PATIENT STAY BUDGET
SEASONALITY ACCOUNTING
 OVERTIME WORKFORCE PLANNING
SHIFT DIFFERENTIALS

"We previously used Hyperion for planning, and it was not a good experience. Our business users couldn't interact with Hyperion on their own. Adaptive fits our need for end user ease of use."

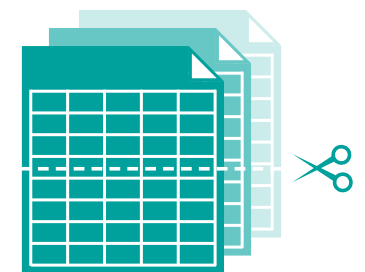


GENTIVA

50%
 less time spent
 preparing budget



2K+
 2K+
2K+
 dimension
 values



250
 spreadsheets
 cut from
 the process



<< Higher Education

ENROLLMENT | RETENTION
REGISTERED CREDITS
 STUDENT:TEACHER RATIO
FACILITIES | RESERVES
 VARIABLE GROWTH RATES
DROPS/WITHDRAWALS
 ENDOWMENTS
BUDGET VARIANCE BY SCHOOL/COLLEGE
FUNDS | **GRANTS**
 TUITION BY COURSE
 ENROLLMENT BY COURSE AND FACULTY
STAFF HC REPORT

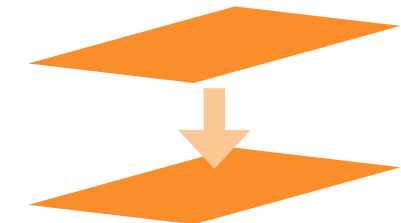
"Adaptive gives UCF the ability to blend financial and non-financial information into a more unified and strategic plan, which is a leap over what was possible before"



Board reports with
1click



150+
 spreadsheets
 eliminated



Quick & easy
 drill-down

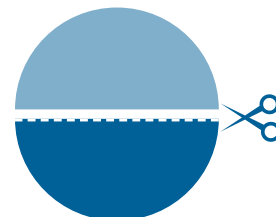


<< Financial Services

EFFICIENCY RATIO | ASSET GROWTH
 OPERATING SURPLUS
 RETURN ON REGULATORY CAPITAL
 CUSTOMER DEPOSITS
 LIQUIDITY COVERAGE RATIO
 NET STABLE FUNDING RATIO
 PRODUCT YIELD
 CUMULATIVE FUNDING DEFICIT
 YTD RETURN ON AVERAGE ASSETS
 BRANCH CONTRIBUTION MARGIN
 CAPITAL EXPENDITURE
 ASSET MIX | ASSET QUALITY BENCHMARK

“NorthStar Financial Services manages over \$200BN in assets, across 9 subsidiaries. With Adaptive Discovery, we’ve already reduced our time to see key metrics by over 70%, enabling us to drive more agile planning.”

NorthStar

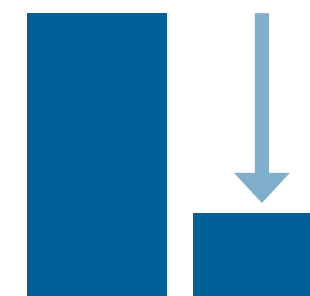


50%
time cut
from
planning
process



50+
hours saved
collecting data

70%
reduction time
to see KPIs



<< Energy & Utilities

PUMPING HOURS | CAPACITY FACTORS
 PLANT OPERATIONAL & MAINTENANCE
 MAINTENANCE HOURS
 EXPLORATION SUCCESS RATE
 FORCED OUTAGE HOURS
 CAPITAL PROJECTS
 LOST UNPLANNED MEGAWATTS
 GROSS ENERGY MARGIN
 RESERVE REPLACEMENT COSTS
 CAPITAL EXPENDITURE
 REFINERY CAPACITY & UTILIZATION
 RESERVES VOLUME

"Our managers and analysts already access Adaptive from 50+ locations across North America to more effectively plan and model from anywhere."

GDF SUEZ

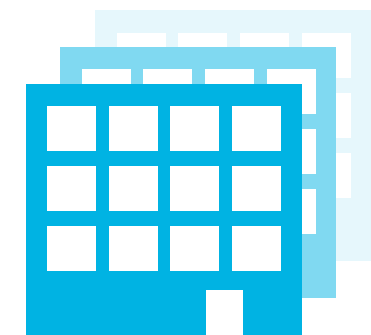
10%
TCO versus
Oracle
Hyperion



1 week
ROI



125
entities



GDF SUEZ

SolarCity

Bruce Power

URS
FLINT

Bloomenergy

SIEMENS

Recology
CleanScapes
WASTE ZERO

THIESS

THE
DOE RUN
COMPANY

ENERNOC

Nexant

solazyme

fairfield nodal

KUA
KISSIMEE
UTILITY
AUTHORITY

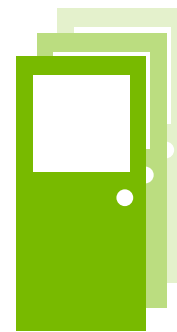
South Central Indiana
SCI REMC

Scientech

<< Sports & Entertainment

TICKETS SOLD | MEDIA RIGHTS
INJURY INCIDENTS
 SEATS FILLED | LUXURY SUITES
 DEBT | **DONATIONS**
 OPERATING EXPENSES
 POINTS PER SEASON
 SOCIAL MEDIA SENTIMENT
 CAPITAL INVESTMENTS
 NET CASH FLOW
REVENUE BY STREAM
 FACILITIES | STADIUM

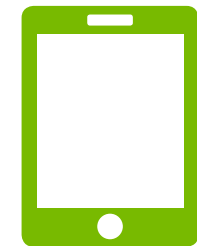
"Adaptive simplified and streamlined our process. We don't have any more version issues or broken formulas, and our managers are more active and see the benefit of expense control with Adaptive."



60+
departments



Implemented
Adaptive with only
10 hours of support



Immediate
mobile access



<< Non-profit

OPERATING RELIANCE
PROGRAM EFFICIENCY
STATEMENT OF FUNCTIONAL EXPENSES
PERSONNEL ALLOCATIONS
STATEMENT OF FINANCIAL POSITION
OVERHEAD & SHARED COST
STATEMENT OF CASH FLOWS
COST PER DOLLAR RAISED
LIQUIDITY | FUNDRAISING EFFICIENCY
STATEMENT OF ACTIVITIES
AVERAGE DONOR CONTRIBUTION

"I can look at the detailed budgeting level and then quickly switch to a global view. We can easily slice data in different ways, such as reviewing department level budgets by project vs. overall organization spending."

ybca



900
service users
managed
with ease



127
spreadsheets
cut from
planning
process



1
unified system
to roll up
all projects



<< Retail & Consumer

PAYROLL BY STORE | MARGIN BY REGION

INVENTORY TRANSFERS

MERCHANDISE & DISTRIBUTION PLANNING

INVENTORY TURNS

CAPITAL EXPENDITURE

CUSTOMER SATISFACTION

NEW STORE ROI

SALES PER SQUARE FOOT

PRODUCT SKU REVENUE

STORE PERSONNEL PLANNING

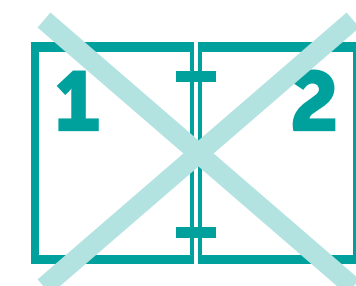
SAME STORE SALES

YOY SALES GROWTH

"We are passionate about where Adaptive is taking us. Our businesses are all decentralized and different from one another. I didn't want to push a solution on our users; instead, they are pulling Adaptive in themselves."



7 days ✂
cut to
minutes
with
**Adaptive
Reporting**



2+
days of work
eliminated from
monthly close



300+
spreadsheets
cut from
planning
process



PAPYRUS

Sur la table
THE ART & SOUL OF COOKINGPayLess Drug
Special Service PharmacyLucky Brand
BORN IN AMERICA

ModCloth



PARTYLITE



The Container Store

LYTRO



KENRA

<< Insurance

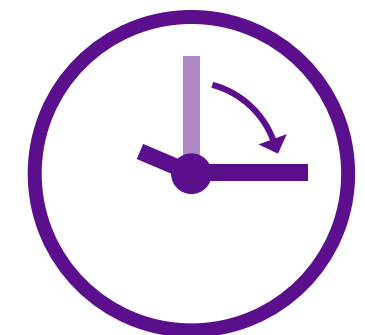
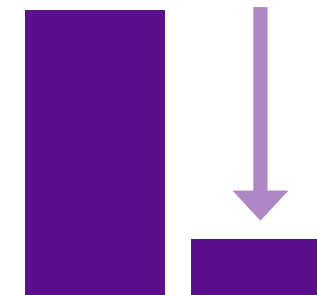
COST PER CLAIM | RENEWALS
TIME TO SETTLE A CLAIM
PREMIUM BY PRODUCT
REVENUE PMPM | INCENTIVE LEVEL
FORECASTING
TRANSACTION ERROR RATE
STOP-LOSS/REINSURANCE
UNDERWRITING CYCLE TIME
REVENUE BY BROKER & PRODUCT
OPERATING INCOME BY PRODUCT
TOTAL ANNUAL PREMIUM VARIANCE
INPUTS FROM ACTUARIES
PRODUCTION BY POLICY TYPE
GROSS WRITTEN PREMIUM
POLICIES BY PRODUCT

"Adaptive has saved me weeks of time. It used to take us three weeks to finalize our budget, and now we can finalize in minutes."



1K
1K
1K
employee
salary plan
created with
ease

80%
reduction
in time
gathering data



15 mins
to run reports versus
three weeks in excel

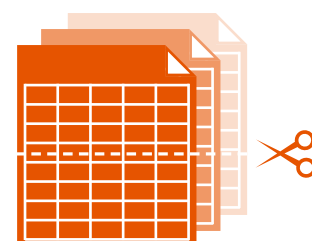


<< Biotech/Pharmaceutical

R&D AS % OF SALES
PATIENTS RECEIVE TREATMENT
PATIENTS IN TRIAL
NUMBER OF TRIALS
COMPLEX DISTRIBUTION MODELS
CASH FLOW
SHARED SERVICES FOR FINANCE
REGULATORY FILINGS
CAPITAL INVESTMENTS
NET SALES | EARNINGS PER SHARE
OUTSOURCED MANUFACTURING

"With Adaptive, our data aggregation and reporting process went from 5 days to 1. Now we can spend 4 more days on higher-value analysis."

Aegerion
Pharmaceuticals



112

spreadsheets
cut from
planning
process

Cut up to

12 weeks

per year
in closing time



**25-
page**

board
package
managed
with ease



<< Media & Publishing

CIRCULATION | AD PRICING
SUBSCRIPTION RENEWAL RATE
AD UNIT RATE
AVERAGE SUBSCRIPTION RATE
% READERSHIP
SUBSCRIPTION LENGTH
SHIPPING COSTS
LICENSING CONTRACTS
WEEKLY REVENUE
SYNDICATION SUPPORT
% REVENUE FROM ADS

"Our business is complicated, with lots of products, categories of revenue, and endless numbers of ways to slice and dice. Adaptive helps us do this and understand the data better."

CHICAGO
SUN-TIMES

75%
more time
for analysis



Deep
**Data
Analysis**

2	3	5	7	1	1	1	3	1
3	5	9				7	7	1
7	1	0				3	1	2
7	1	6				7	1	7
9	2	1	1	2	2	3	2	2
7	2	6	3	2	6	9	2	7



**One platform
to track
all KPIs & reports**

The Boston Globe

COX

ZIFF
DAVIS

CHICAGO
SUN-TIMES

lonely planet

WIKIMEDIA
FOUNDATION

blurb

sift

comSCORE

CUMULUS

ACTIVE INTEREST MEDIA

CIRRUS
MEDIA

MACMILLAN

BONNEVILLE
INTERNATIONAL

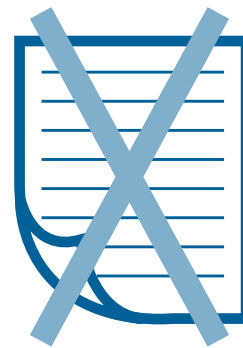
<< Government

AUDITS COMPLETED
RESOLVED/UNRESOLVED ACTIONS
SURPLUS
AVERAGE PROCESSING TIME
BALANCED BUDGETS
CONSUMPTION, INVESTMENT, TRANSFERS
NUMBER OF CALLS TAKEN
DEFICITS
PROPERTY, INCOME, SALES TAXES
TIME FOR APPROVALS

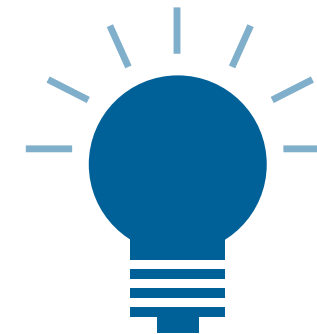
"By implementing Adaptive and moving our processes online, we eliminated manual data entry and paper distribution, decreased our budget cycle by a full month, and saved considerable time and money."



SKAGIT COUNTY



Eliminated
paper-based
budgets



Improved
revenue insight

36%
Decrease in
budget cycle



SKAGIT COUNTY



PORT NELSON

Thank you to the thousands of customers around the world that are Accelerating with Adaptive.

**CORPORATE
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