

# From Static to Strategic:

Thinking Beyond Spreadsheets  
A New Financial Planning Process  
to Successfully Navigate Change







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# Navigating Change is Your Biggest Business Challenge

We all know that our world is changing rapidly, and businesses are moving at a faster and faster pace. Many factors contribute to this:

- Increased competition
- Faster innovation cycles
- Higher customer expectations
- Global markets
- Shorter produce lifecycles
- New forms of communication

**“I want tension in my business. Tension creates change. Change is necessary to evolve and prosper. I am never satisfied.”**

— **Kenneth C. Griffin,**  
*Founder/CEO, Citadel*

To keep up—and keep ahead—companies need to get a lot better at navigating change. That puts a lot of pressure on you to provide accurate and actionable financial projections so your company can be strategic.

But most finance teams' processes have long cycle times for creating annual budgets and new forecasts. They simply aren't optimized for change, especially rapid change. Manual-intensive tasks—often completed in Excel spreadsheets—eat up valuable hours, leaving little time for analysis that leads to insight and the more strategic perspective that results.

This impedes your ability to make decisions in a timely fashion to keep up with the pace of change. You need timely data, analyses, and forecasts to make timely decisions—something that spreadsheets just can't do.

Read on to discover a smarter, better way to embrace change, be strategic, and come out ahead.

## **Too slow to strategize**

- 77 days to complete annual budgets
- 20 days to prepare a forecast
- Plus, 83% of time is spent on non-strategic tasks





## Spreadsheets Lead to Static Planning

To navigate change, you have to predict the future performance of your company. This involves planning and modeling your business. All groups—HR, sales, finance, operations, marketing, and the executive team—have inputs that ultimately need to come together in the financial plan.

But in most companies, the financial plan is created using a siloed approach on different platforms. As a result:

- Consolidation typically occurs in Excel spreadsheets.
- Collaboration for the inputs that roll up to finance's plan is mostly through email.
- Changing an assumption is difficult and uncoordinated.
- Running scenarios requires significant effort.
- There are limitations on what you can model.

### Do You Spend More Time on Spreadsheets or Strategy?

- 75% of effort is wasted re-keying and manually rolling up data.
- 90% of spreadsheets contain data and formula errors.

— Source: ACCA

Nothing is easy or fast, and you end up with a compromise—with a process called static planning.

### *It's hard to be strategic when all you hear is static*

Static planning doesn't let you navigate change and actively manage the business. Here's why:

- There's no collaboration because it doesn't have comprehensive interlocked models across teams.
- It's too slow to do a lot of scenario planning, let alone a continuous rolling forecast process.
- A heavy reliance on spreadsheets means you spend more hours on error-prone manual tasks instead of analysis.

Those are compromises you can't afford.

The background is a composite image. On the right side, there is a profile of a man with a beard and glasses, looking towards the right. On the left side, there is a city skyline with various buildings. The entire image has a blue tint.

# Active Planning



# Active Planning: The Engine that Propels Your Business

With active planning, there's no need to compromise.

This new approach to planning lets you deliver real strategic insights that keep up with the ever-quicken pace of business. Active planning allows you to shift into a leadership and guiding role, instead of being mired in the drudgery of back-office transactional tasks.

## The three Cs of active planning

1. **Better collaboration:** Everyone across your organization can participate in the planning process, with technology that makes it easier to establish a single source of shared data and customized dashboards that give users ready access to information. Now, everyone is accountable for their part in the budgeting process, which drives ownership.
2. **Comprehensive capabilities:** With active planning, you get a single, comprehensive process that lets the diverse parts of your business work more effectively. You get the benefits of real bottom-up planning and develop a robust picture of the business.
3. **Continuous planning:** Plans are produced rapidly and can be quickly adjusted so ongoing, real-time planning and rolling forecasts become the norm. At last, you can provide insights to help your business respond rapidly to changing market conditions or competitor activity.



How can you enable active planning? Hint...you won't get it with spreadsheets.

## What If....? Scenarios Made Simple

Scenario planning leverages the whole model - not just one siloed function and makes frequent updates based on ion business inputs. For example:

- **Growth rate:** See what that means for ramped reps and quotas, and in terms of revenue & cash.
- **Adding headcount:** Immediately grasp the implications for real estate and IT, and then ultimately for spending & cash.

# The 3 Ingredients of an Active Planning Solution

To really do active planning and help your business strategically navigate change, you need a technology solution that is easy, powerful, and fast.

Here's why:

1. **Easy**, so you can get business users as well as finance as active participants in the process. The solution needs to provide the tools to simplify collaboration around the planning process, around the variance analysis process, and around business metrics and KPIs.
2. **Powerful**, to build rich, sophisticated interconnected models based on real business data. It has to be on a single source of truth built on comprehensive, relevant, and fresh data across your plan and from your operating systems like your ERP, HR, and CRM systems.
3. **Fast** to model and fast to adapt, so finance can adapt plans quickly to keep them current. This enables them to spend more time on the "why" behind the numbers, and support business partners with continuous planning.

**Remember: easy + fast + powerful = active planning**

## Survey Says: Automation Drives Insights

CFOs want to automate finance.

Here's why:

- 40% want faster, higher quality of insights for executives and operational stakeholders
- 26% want to be more strategic/provide enhanced decision support.

— Source: Adaptive Insights CFO Indicator Q4 2017 report





# Get Adaptive Insights and You'll Get Active Planning

Adaptive Insights is the only corporate performance management (CPM) solution that is simultaneously easy, powerful, and fast.

Adaptive Insights is built for:

- **The cloud** on a modern, in-memory planning and analysis engine, so your data is always fresh and always accurate.
- **Automated data integration** with systems including your ERP, CRM, payroll, and HCM solutions.
- **Meaningful collaboration**, like managing the tasks in the planning and forecasting processes, walking end users through the steps they need to take, and managing the variance analysis and annotation process.

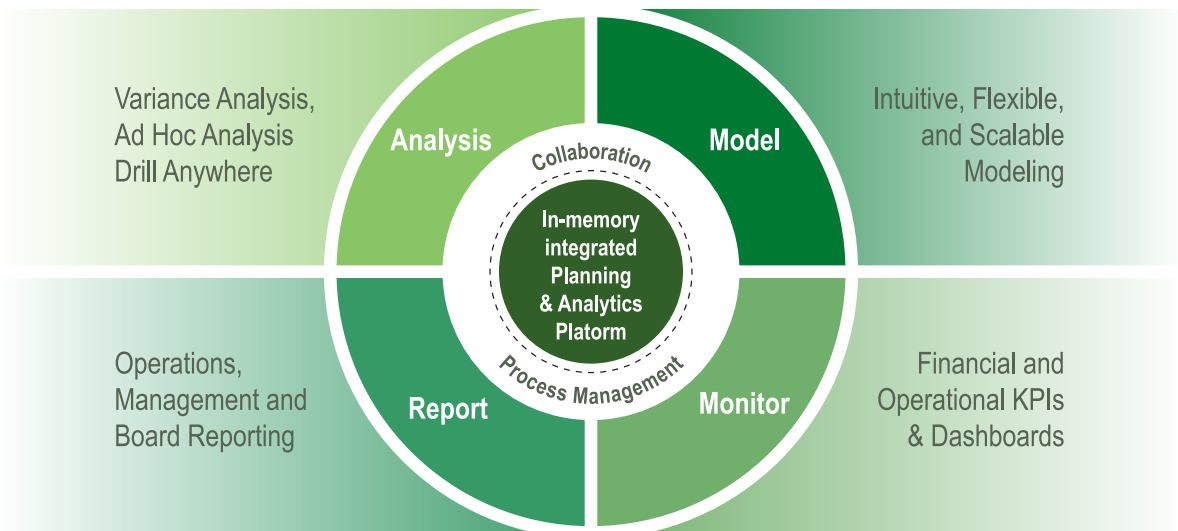
Every step of the active planning process is possible with Adaptive Insights. It offers:

1. **Powerful, flexible and scalable modeling capabilities**
2. **Tools to monitor business performance including financial and operational KPIs**
3. **Self-service reporting tools to provide end-users with the insight they need**
4. **Multiple ways to analyze data, driving timely and strategic decision-making**

Ready to embrace active planning? Good. Read on.

## Love Your Spreadsheets? Keep Them!

In the brave new world of active planning, there's still room for your favorite spreadsheets. With Adaptive OfficeConnect from Adaptive Insights, you can easily create high-quality reports, board books, and presentations within a familiar Microsoft Office (Excel, Word, and PowerPoint) environment. Adaptive OfficeConnect gives you total control over formatting and the power to refresh your data with one click, reducing your financial reporting process from days to minutes.



# Navigate Change Successfully with RKL eSolutions and Adaptive Insights

Adaptive Insights enables the entire active planning process by being **easy** for collaboration, **powerful** for the models and analysis you need, and **fast** to get to value quickly and to adapt as your business changes with a continuous process.

But changing your business' technology and processes may seem neither easy nor fast—and can feel risky.

That's why you need an implementation partner like RKL eSolutions. We're committed to delivering your Adaptive Insights solution on time and on budget.

We offer:

- A step-by-step proven methodology from start to finish, including optimizing after go live.
- A dedicated Help Desk staffed by in-house experts
- More than 15 years' experience offering business software, IT support, and networking solutions for our clients.
- Choice. Work at your own pace. Implement only the components of Adaptive Insights as you need, when you need it.

Ready to move from static to strategic? Say goodbye to spreadsheets and hello to active planning with Adaptive Insights.

## Easy, Fast, and Powerful Drives Business Success

Adaptive Insights users work more efficiently and have the tools to navigate change:

- **Legendary Entertainment** reduced budgeting time by 3 months
- **P.F. Chang's** dropped their forecasting cycle times dropped by 80%
- **Compañía Cervecería de Nicaragua** saved 80 weeks of time spent integrating and verifying/aggregating data for budgets.
- **CollabNet** increased the efficiency of its planning process by 25-40%



A man in a dark suit, white shirt, and patterned tie stands in front of a city skyline. The image is overlaid with a semi-transparent blue filter. The text is centered in the middle of the image.

Contact **RKL eSolutions** today  
for a complimentary assessment  
of your needs.





#### **About RKL eSolutions**

Since 2002, RKL eSolutions has helped growing companies maximize their technology resources and investment. Over the years, we have helped hundreds of small and medium sized businesses as their strategic business partner. We specialize in the needs of Entertainment, Software & SaaS, Professional Services, Manufacturing, and Non Profit organizations. Our experienced consultants have a passion for making every facet of your business successful and are intent on building a long-term relationship with every client.

#### **About Adaptive Insights**

Adaptive Insights powers a new generation of business planning. We transform the planning process into a strategic advantage with powerful modeling that's easy for everybody who plans. Our Business Planning Cloud platform enables organizations of all sizes to adapt to changing business conditions with confidence and agility. [www.adaptiveinsights.com](http://www.adaptiveinsights.com)



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