# Adaptive Insights

# Multi-Instance Planning & Analysis

**Adaptive's Multi-Instance functionality helps organizations with disparate planning requirements improve coordination of planning, reporting, and analysis.**

## Increasing Complexity

Nearly 90% of companies with revenue exceeding $500 million manage 11 or more entities, according to APQC. True enterprise-wide planning requires the flexibility to meet the unique planning needs of diverse subsidiaries, specific countries, and different divisions, while ensuring that everything aligns and integrates with the corporate plan. Adaptive's multi-entity planning and analysis provides the flexibility and control that organizations need to make it happen.

## Adaptive Multi-Instance

Adaptive Multi-Instance is the solution for companies that need to coordinate planning, reporting, and analysis across:

- Complex enterprises with multiple independent lines of business (unique GLs and organization structures, varying fiscal years, different administrators)

- Companies analyzing and integrating M&A targets

- Investment firms that manage a portfolio of operating companies

- Companies with independent functional processes (Sales planning, HR planning, etc.)

- Companies with separate planning processes (long-range, top-down strategic planning and shorter-term, bottom-up budgeting and forecasting)

### Key Benefits

- Simplify administration of planning, reporting, and analysis across companies with disparate requirements

- Automatically consolidate data across multiple entities, even with different structures and planning cycles

- Preserve autonomy of independent business units

- Deploy in phases to ensure successful implementation of complex requirements

- Enable different frequency of re-forecasting and what-if analysis across functional groups

## How It Works

An Adaptive instance is a self-contained financial model that includes the elements to plan, report, and analyze a business. The Multi-Instance capability enables companies to set up, link together, and automatically consolidate data from multiple Adaptive instances. Shared data from child instances roll up to provide consolidated financials in the parent instance.

## Use Cases for Multi-Instance

An organization comprised of multiple business units with unique planning needs can use Multi-Instance to aggregate data for total company results. Each business unit has an individual Adaptive instance with its own organizational hierarchy, chart of accounts, user community, data entry, and integration. The data from the individual business units is then consolidated in the Corporate instance – and Corporate administrators determine which planning scenarios to pull data from in each business unit's instance.

## Varying Planning Methodologies and Timeframes

An organization may do more detailed, bottom-up planning for the short-term. But the long-range strategic plan doesn't need this granular detail — the plan only requires adjustments to high-level assumptions and drivers. The organization can have two instances — one instance that contains the detailed information for the short-term and a second instance that references the detailed data to make high-level judgments.

## Functional Planning

Different functional organizations may have completely different planning needs. The plan for Sales may be driven from top-down sales targets, individual rep quotas, or historical detail of sales by product and customer. The HR plan may be focused on headcount detail and benefits choices, while the Treasury plan contains detailed debt schedules. Each function can plan in its own unique instance, and they can be quickly consolidated in the parent.

## Key Features

- Independent organizational structures, cyclicality, fiscal years, chart of accounts, dimensions, versions, users, permissions, data entry templates, and integration for each instance

- Specification of which data is shared or kept private for each instance

- Unlimited number of instances and levels of hierarchy within each

- Automatic consolidation of data from child instances to parent

- Data drill-down from parent to child instance, with the ability to toggle seamlessly between instances



Drill to the Child Instance from the Parent Instance

"Now we're able to do so much more analysis that benefits our business. We've used our analysis in customer negotiations so that we're not losing money on deals. There used to be ambiguity about whether certain things were adding value — now we're sure, and we can quantify it."

—Dr. Narayana Swamy
  Manager of FP&A, The Doe Run Company