

Associations

The Adaptive Insights Business Planning Cloud enables associations to plan with seamless, integrated planning software that's easy for everyone to use.

With powerful cloud-based planning, reporting, and analytics, associations can create plans as unique as the causes and programs they serve that help everyone plan as a team to better achieve their mission.

Planning & reporting challenges

Associations require strict fiscal management. Their budgets must be accurate to ensure they operate within their means. Their work must be transparent to demonstrate that they are good stewards of their members' funds.

Their organizations can be complex, involving multiple funds (restricted and unrestricted), programs, and locations. They need to manage business drivers associated multiple revenue streams including memberships, training and certification, events, donations, and grants.

Their boards often require a budget prior to approving the use of resources. And third-party stakeholders may require a formal budget before considering grant applications, making pledges or donations, or extending credit. Associations must have confidence that what they present to their board and to the public is accurate and reliable.


In addition, it is critical for associations to plan cash flow to ensure they have unrestricted cash when they need it. Projecting cash flow is challenging, given revenue is tied to membership, training and certification, events, grants, donations, pledge drives or other fundraising events. It's also tied to the general ebb and flow of overall industries so it is important to be able to project cash flow on a rolling basis, rather than the typical static planning associated with spreadsheets.

Spreadsheet-based systems are inefficient, error-prone, and fundamentally unsuited for the complex, dynamic planning and reporting required by associations.

Spreadsheet planning forces compromise

Spreadsheet-based systems are inefficient, error-prone, and fundamentally unsuited for the complex, dynamic planning and reporting required by association organizations. Spreadsheet planning forces compromise—compromise between getting the plan just right and just getting it done. The result? Static plans that can't drive results.

Adaptive Insights provides a cloud performance management solution that automates collaborative planning, reporting and analysis of both operational and financial data, and financial consolidation. You get a best-practice, active planning process to drive success.



An active planning process is collaborative, comprehensive, and continuous—one that results in a better plan and better budgeting and forecasting. You'll get greater visibility into organization performance, build confidence in the numbers, make data-driven decisions, and increase buy-in and accountability throughout the organization.

Adaptive Insights' solution is easy, powerful, and fast

Adaptive Insights helps associations to focus more resources, more time and more energy on their mission by automating their data, decreasing the painstaking work that financial professionals must work through now inputting financial information into other solutions now. Adaptive Insights helps associations evaluate the impact of new projects, projecting out benefits from those new initiatives while allowing for the input of assumptions and costs related to the project to have the most accurate reflection of total overall benefits of the new project. Adaptive Insights also minimizes installation time and costs, ensuring that they can focus on the mission and put the maximum amount of resources towards serving their mission.

Adaptive Insights can:

- Accurately plan revenues and expenses across a complex organization with many dimensions
- Integrate P&L and cash flow planning to ensure accurate cash projections
- Incorporate contingency planning or what-if scenarios
- Streamline their planning and analysis
- Plan for and consolidate complex organizations, including multiple funds and programs
- Perform detailed staff planning and report on fully loaded costs by employee
- Allocate headcount and overhead to funds, programs, locations, etc.
- Model integrated P&L, balance sheet, and cash flow statements
- Enable cross-fund and cross-department reporting
- Use dashboards to analyze KPIs
- Use reports to perform variance analysis, including drill down into underlying transaction detail from other systems
- Create and distribute report books for financial presentations such as executive and board reporting
- Improve accuracy and turnaround time in the planning and reporting process and conduct frequent reforecasting and what-if analyses

Adaptive Insights is intuitive and easy to use. It saves time and effort with built-in intelligence vs. spreadsheet-based systems. And its web-based, highly-customizable, Excel-like interface is easy for all types of employees to learn and use.

