

Professional Services

Adaptive is proud to deliver top-rated customer service, with a Professional Services team staffed with seasoned finance professionals.

Overview

Adaptive recognizes that delivering great software is only part of the equation, and we are also committed to delivering top-rated customer service. Our Professional Services team brings deep product expertise, best practices knowledge, and real-world CPM and BI experience. We have completed thousands of projects and support those customers across many industries, in companies and nonprofits of all sizes. We strive for excellence and it shows – we are ranked #1 in customer satisfaction in industry surveys conducted by both Gartner and BPM Partners.

Implementation and Application Consulting

Adaptive's implementation and application consulting services are highly flexible and designed to meet the needs and resources of each customer. Customers can choose from the following implementation and application consulting services options:

Self-Implementation is a good fit for customers who prefer to be self-sufficient from the beginning. We provide multiple training choices to help these customers get started and gain a solid understanding of the fundamentals of Adaptive, and we provide full support to ensure their ongoing success.

Adaptive Implementation Packs are designed for customers interested in application design guidance and focused hands-on assistance with their implementation. These packages include a set number of consulting hours (which can be increased as needed), and are designed to give customers the appropriate balance of consulting expertise and advice, tools, and best practices to successfully complete their implementation.

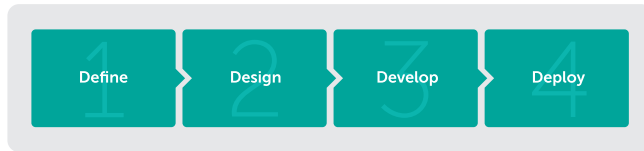
The Full Service Implementation approach is used by customers wanting to take full advantage of Adaptive's Professional Services.

A Full Service Implementation can be delivered using two approaches:

- Time & Materials projects give customers access to our consultants' expertise and guidance as needed, for an hourly rate. This arrangement is a good fit for new customers who want to actively participate in the implementation, or existing customers who would like assistance with expanding their use of Adaptive.
- Fixed Bid projects are a good fit for customers with tight time frames and/or limited staff. Our Professional Services team and partners can perform the up front design work, complete the implementation quickly and efficiently, and deliver model training.

The 4D Professional Services Methodology

Adaptive uses our proven 4D methodology for implementation and application consulting. We use the latest internet-based document exchange and meeting technology, and our cloud-based application, which can be accessed anywhere with a web browser. Our professional services can be delivered remotely and/or on-site, as preferred.



Define

To assist customers with determining the appropriate implementation approach, we use a combination of questionnaire and discussion. We review all potential options, and then recommend a level of service that meets the customer's budget and availability. The final comprehensive Scope of Work becomes our mutual agreement regarding the services that we will deliver.

In preparation for the engagement, we review the customer's existing and available data and documentation (e.g. chart of accounts, current spreadsheets, etc.). Customers attend Administrator training to learn the fundamental skills of the application.

Design

The next step is a project kickoff with key participants in the customer's organization and the Adaptive project manager. During this meeting we:

- Review and confirm customer expectations, project goals, deliverables, and timeline
- Discuss what we learned in the Define phase and the overall design
- Make recommendations on the structure and ensure best practices are followed

The application design agreed upon at this time provides a roadmap for project completion. However, the design is flexible and can be changed during the implementation as needed, dependent upon approval by the project team.

Develop

Our project managers then guide the customer through the development of the company model in Adaptive. Depending upon which implementation option has been chosen, the project manager's role ranges from providing guidance and project leadership (Adaptive Implementation Pack projects) to also completing some or all of the hands-on building work (Time & Materials and Fixed Bid projects.)

A key element of the implementation is regularly scheduled weekly meetings with the Adaptive project manager and the customer to ensure ongoing knowledge transfer and data exchange. Customers view model progress and learn about the design and build during the meetings. They are encouraged to log in to the model to begin their hands-on experience and to take ownership.

Deploy

Detailed written documentation describing the customer's model is provided if this is included in the Scope of Work. If the Scope of Work includes end-user training, our Professional Services team prepares and delivers this also.

Once the Adaptive project manager and the customer agree that all implementation work and training has been completed per the Statement of Work, we send the customer a project close-out letter and a project satisfaction survey.

"The Adaptive professional services team was very impressive. They really got to the heart of the issues quickly and were able to customize the support departments and business units across multiple countries in a matter of weeks."

- Wendy Baum, EVP, Finance, The NPD Group

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