Adaptive
Insights

Software Planning & Analytics Solution

Software publishers, Software-as-a-Service (SaaS) companies, and other subscription businesses deliver value by helping customers enhance productivity, reduce operating costs, and improve processes that ultimately result in better products and services. In doing so, there are unique challenges that these company executives and their teams must manage daily in order to execute efficiently and grow. They must develop "stickiness" for their products, aggressively market and sell while keeping acquisition cost structures in check, keep customers extremely satisfied, and closely match sales with recurring revenue plans. Adaptive Insights' Software Planning & Analytics Solution models the entire business, enabling companies to navigate change with an active planning process. This includes everything needed to plan, forecast, monitor, and analyze their software, subscription, and service performance. It includes software industry best-practice templates for budgeting, topline and expense forecasting, scenario modeling, and dashboards and reports. The solution accelerates your time to deployment, is built to be configured to the needs of your business, and provides the framework for collaboration, and the insight needed to improve your revenue plans, bookings forecasts, expense budgets, and overall business performance management.

> " We analyze performance data of our three biggest sources of new revenue. It's been a huge contributor to our international expansion and helps us make strategic decisions on hiring and investing in the business.
>
> —Charles Best, CFO, Blackline Systems

Visualize and Explore the Metrics that Matter

Continuously monitor software/subscription key performance indicators and trends, and drill into the underlying details for:

- Bookings – New, Renewals, Services
- Revenue Growth %
- Customer Lifetime Value (CLV)
- Customer Acquisition Costs (CAC)
- Annually and Monthly Recurring Revenue (ARR, MRR)
- Annual Contract Value (ACV)
- Churn and Renewal Rates
- SaaS Rule of 40 (Rev + FCF)%
- SaaS Magic Number (New ARR/S&M)

Align Topline and Expense Plans with Corporate Objectives

- Forecast bookings for different time horizons based on a combination of:
  - opportunities in the sales pipeline
  - sales capacity and quotas
  - price-volume
- Forecast marketing expenses
- Forecast revenue recognition

Forecast New Subscriptions, Renewals, and Services Bookings

- Create a holistic forecast for all types of bookings

- Forecast renewals with a cohort model

- Perform sales forecast variance analysis

Plan Revenue Recognition

- Plan for current and deferred revenue

- Use revenue waterfalls to determine recognition timing

Model Sales and Service Capacity

- Use sales capacity scenarios to determine sales headcount needed to meet forecasted quota

- Use services capacity scenarios to determine services headcount needed to meet backlog

- Make capacity adjustments in your plans

- Model sales rep compensation and productivity, accounting for onboarding ramp rates

Plan and Track Commisions Expense

- Forecast commission payouts based on different attainment scenarios

- Track actual commissions expense from sales commission system, such as Xactly or CallidusCloud

Forecast Hosting, Opex, And Capex

- Model and budget ongoing hosting and other operational expenses

- Determine project capitalization costs for new data centers and expansion

Integrate Financials and Sales Data

- Drive forecasts with opportunity and lead data with CRM system integration

- Leverage financial management data from your ERP system, taking advantage of Adaptive Insights integration with dozens of ERP systems, including NetSuite, Intacct, MS Dynamics GP, and Oracle Financials

Compare with SaaS Industry Benchmarks

- Load SaaS industry benchmarks from sources like OPEXEngine to compare and contrast with your business metrics

Key Benefits

- Monitor and analyze SaaS metrics continuously

- Derive insights to increase LTV and reduce CAC

- Improve bookings and revenue forecast accuracy

- Collaborate confidently with sales and service teams

- Accelerate time to deployment and use

See how our software planning & analytics solution can help your organization adopt active planning. Request a demonstration at adaptiveinsights.com