

How Adaptive Insights Improves NetSuite Reporting and Planning



Get the most out of your NetSuite ERP system

Many businesses rely on NetSuite ERP software to record accounting transactions, request POs, and much more.

But NetSuite ERP can't do it all. When it comes to creating robust and dynamic financial reports that pull together data and insights from [multiple systems](#), the business management solution comes up short. It just wasn't built for strategic planning, modeling, reporting, and analysis.

And now more than ever, you need that type of functionality to effectively measure and forecast business performance. Exporting data out of your NetSuite ERP system into Excel, or using spreadsheets for reporting, planning, and forecasting, just doesn't cut it these days.

Especially when finance is being asked to do so much more. As you face increasing pressure to measure and report on more aspects of your business, relying on manual, [single-user spreadsheets](#) can lead to flawed or incomplete reports that cause confusion and stymie collaboration.

That's where the Adaptive Insights Business Planning Cloud can add real value.

The Adaptive Insights Business Planning Cloud extends the power of NetSuite ERP to provide you with a comprehensive financial management solution—it allows you to spend less time collecting, validating, and formatting data, and more time on strategy and true financial analysis.

When combined with NetSuite ERP, [the Business Planning Cloud](#) helps FP&A teams to collaboratively plan and model, easily access real-time analytics, streamline complex financial reporting, and accelerate financial consolidation.

Read on to learn why more than 800 NetSuite customers rely on Adaptive Insights for strategic reporting and financial planning.

By combining the real-time visibility into actual financial results provided by NetSuite ERP with the easy, powerful, and fast active planning capabilities delivered by the Adaptive Insights Business Planning Cloud, organizations can significantly improve the speed and quality of their decision-making, helping them to outperform competitors.

Our Partnership with NetSuite

Adaptive Insights has a long history with NetSuite. The relationship dates back to 2005, when NetSuite became one of the first customers of Adaptive Insights. Then, in 2009, NetSuite began partnering with Adaptive Insights for financial planning—an active planning solution for budgeting, forecasting, reporting, and analytics.

The combination was a win-win then—and now. Today, more than 800 NetSuite ERP customers rely on Adaptive Insights to do everything from better manage their business to fund more lifesaving research. But the story doesn't end there.

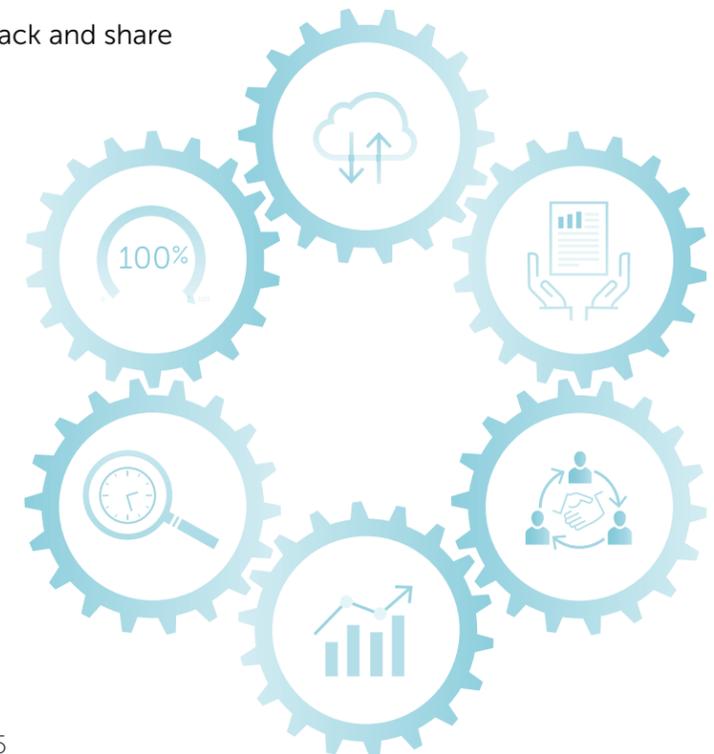
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The benefits are immediate and measurable—both on your finance team's daily work and on the impact they can make throughout your organization.

6 Ways to Enhance NetSuite ERP Reporting and Planning

Here are six proven ways we can help you get more out of your [NetSuite ERP investment](#):

1. Eliminate offline spreadsheets for planning and reporting
2. Foster a self-service culture for reports
3. Build strategic plans without devouring all your time
4. Expand visibility well beyond what NetSuite offers alone
5. Add more value by creating timely reports and relevant plans
6. Create KPIs that are easy to track and share



Eliminate offline spreadsheets for planning and reporting

HERE'S HOW:

Adaptive Insights offers a dynamic cloud solution with always up-to-date data

ELIMINATE OFFLINE SPREADSHEETS FOR PLANNING AND REPORTING

When you integrate the Adaptive Insights Business Planning Cloud with NetSuite ERP, you're always working with fresh data, dramatically reducing or eliminating the need for manual data entry and manipulation. Deep integration via our NetSuite ERP cloud connectivity, which has been refined through years of co-development, allows you to quickly generate reports and strategic insights.

The Business Planning Cloud provides direct drill down into transactions imported from NetSuite ERP so you are always using "the latest version" as opposed to toggling on and offline or being slowed by manual drudgery.

The Adaptive Insights Business Planning Cloud connects to saved searches, integrating financial and transactional data, statistical accounts, and operational metrics—all of which you can model and report against.



Foster a self-service culture for reports

HERE'S HOW:

Augment NetSuite ERP reporting with self-service everything

FOSTER A SELF-SERVICE CULTURE FOR REPORTS

FP&A can sometimes feel like a report-delivery service. Senior leaders and business partners are constantly requesting reports relevant to their business, and expecting your team to drop everything to create and deliver them. When you pair the Adaptive Insights with NetSuite ERP, now they can do much of that work themselves.

Adaptive Insights' drag-and-drop report builder puts powerful yet easy-to-use, web-based reporting into the hands of NetSuite ERP finance and business managers. The Business Planning Cloud provides [self-service reporting](#) to department users, freeing up finance resources for more strategic work. You can also generate and distribute real-time reports quickly to inform more timely decision-making. The bottom line: Real self-service *that business partners will actually use.*

Build strategic plans without devouring all your time

HERE'S HOW:

Plan effectively and continuously—and with greater speed

BUILD STRATEGIC PLANS WITHOUT DEVOURING ALL YOUR TIME

Financial planning with NetSuite ERP alone isn't intuitive, so when you do try to stretch it beyond its sweet spot it can devour precious time. But when you tap the power of the Adaptive Insights Business Planning Cloud, you can save time by using workflows that keep everyone on task and working collaboratively. You can minimize risk with always-fresh data, version-controlled plans, and [driver-based models](#). And you can engage your finance and business partners with easy-to-use planning sheets on the web as well as using our Excel-based interface.

Expand visibility well beyond what NetSuite offers alone

HERE'S HOW:

Gain clear vision into plans, forecasts, revenue, expenses, and headcount

EXPAND VISIBILITY WELL BEYOND WHAT NETSUITE OFFERS ALONE

It's not enough anymore to see past and current results. To compete, companies need to see what is around the next corner—and on the distant horizon. Adaptive Insights has helped hundreds of NetSuite ERP customers worldwide transform their balance sheets into dynamic cash flow plans, revenue forecasts, headcount analysis, budgets, and expense plans.

By combining the Adaptive Insights Business Planning Cloud and NetSuite ERP, your planning process becomes collaborative, comprehensive, and continuous—as opposed to sluggish static planning with manual spreadsheets or legacy on-premises solutions. Further, the ability to forecast and model a wide range of scenarios provides unmatched visibility that helps management and business leaders make informed decisions and prepare for emerging trends and market conditions.

Add more value by creating timely reports and relevant plans

HERE'S HOW:

Financial reporting that's always up-to-date and easy to access

ADD MORE VALUE BY CREATING TIMELY REPORTS AND RELEVANT PLANS

You've been there—by the time your reports are complete, the data already seems stale or the market has moved on. That's no longer the case when you team the Adaptive Insights Business Planning Cloud and NetSuite ERP. Your days of copying and pasting are done, replaced with always up-to-date reports, accessible from anywhere.

Any user can build the financial reports they need just by dragging and dropping in a browser with a pivot table-style experience. You can slice and dice the latest data however you require. You also can use [OfficeConnect](#) to produce highly customized board and external reports within the Microsoft Office suite. Consolidate dimensional reports and comparisons, see a P&L for each or all of your projects (or combined), and even present customer P&Ls by location or revenue relationship. Ultimately, you spend less time building the same reports repeatedly and instead spend more time understanding your business.

“ I instantly knew Adaptive Insights had return on investment. It's top of mind for financial planning, and it allows me to spend much more time on really strategic things instead of jockeying spreadsheets for eight hours. ”

—Dan Bradford, vice president of finance, Hortonworks

Create KPIs that are easy to track and share

HERE'S HOW:

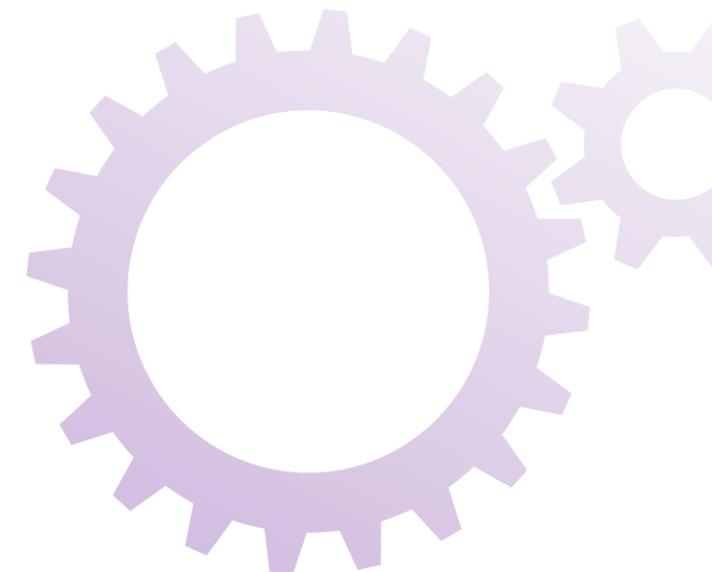
KPI dashboards that give everyone instant insight into the past, present, and future



CREATE KPIs THAT ARE EASY TO TRACK AND SHARE

At a lot of companies, there's a lot of buzz around creating [KPIs](#). Yet because of the challenges of tracking and sharing them, they often become afterthoughts. If you're using NetSuite ERP without the Adaptive Insights, you're not fully leveraging it to easily track and measure your KPIs and key metrics. You can monitor the metrics that matter most with KPI dashboards that make it easy for business leaders and managers to see how they are performing. Powerful financial intelligence and analytics let everyone understand your business better. You can instantly visualize variances and drill down into NetSuite ERP source transactional data to see their causes, and take action by re-planning and forecasting. Again, it's all connected to NetSuite, so data is always fresh and accurate.

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THE ACTIVE PLANNING ANSWER

READY TO GET MORE OUT OF NETSUITE ERP?

The Adaptive Insights Business Planning Cloud is the only [performance management solution](#) that fully enables active planning—planning that is collaborative, comprehensive, and continuous. You can plan without compromise, adapt swiftly, generate real actionable insights, and ultimately, become a driver of business success.

[Active planning](#) requires a technology solution that is easy, powerful, and fast. Adaptive Insights is the only vendor that provides technology that is:

- **Easy, so you can plan as a team**
Adaptive Insights is ranked #1 in usability by Gartner, Forrester, Blue Hill, Nucleus Research, and BPM Group
- **Powerful, so you can model anything and analyze everything**
Adaptive Insights is the only vendor with integrated planning and analytics
- **Fast, so you can model and adapt quickly**
Adaptive Insights is top ranked in time-to-value and modeling usability according to [Gartner and Forrester](#)

These capabilities allow users to transform the data and actuals that are generated through NetSuite ERP into powerful insights and the foundation for robust forecasts and scenario models.

You can plan without compromise, adapt swiftly, generate real actionable insights, and ultimately, become a driver of business success.

The challenges today's [FP&A teams](#) face aren't going away. Truth is, they are accelerating. Finance will need to continually evolve to keep pace with the competition—and keep up with the demands from within the organization.

For NetSuite ERP users, the Adaptive Insights Business Planning Cloud offers a clear path to a solution that will maximize your team's strategic strengths, and enable better decision-making and more accurate forecasts.

You have the power of NetSuite ERP at your fingertips. Now take full advantage of it with Adaptive Insights.

Ready to enhance your NetSuite ERP reporting and planning? [Get started here.](#)



About Adaptive Insights

Adaptive Insights, a Workday company, is powering a new generation of business planning. Driving business agility in a fast-moving world, the Adaptive Insights Business Planning Cloud leads the way for people in companies to collaborate, gain insights, and make smarter decisions faster. Powerful modeling for any size organization, yet so easy for everybody who plans. Adaptive Insights is headquartered in Palo Alto, CA.

To learn more, visit www.adaptiveinsights.com.