

# Selling Simplified Plans Faster and Makes Better Decisions With Adaptive Insights & Sage Intacct

CASE STUDY



**armanino**

## At A Glance

### Customer Profile:

Selling Simplified Group offers the industry's leading platform to connect with B2B buyers, helping companies drive demand and revenue. That value proposition resonates with the company's clients, helping the privately held firm grow 342% in four years. Supporting that growth meant first moving to a modern financial system from Sage Intacct and then moving to Adaptive Insights to automate and centralize planning, budgeting and forecasting. Now the demand generation company has the real-time insight it needs to make even better business decisions.

### Software & Services

- Adaptive Insights
- Armanino Sage Intacct-Adaptive Insights Integration Pack
- Armanino implementation and training services

### Benefits

- Delivers greater visibility and control for budgeting and forecasting, while dramatically reducing the effort and time required
- Provides real-time insight into the impact of board-level business decisions
- Automatically consolidates international budgets in other currencies into one corporate budget in U.S. dollars

*“Previously it would take three or four weeks for the board to get reports or answers to their questions. Now with Adaptive Insights, we can show changes and their impacts in real time.”*

**-Karen Phillips**

## Challenge

Founded in 2012, Selling Simplified Group is the leading provider of business-to-business demand generation solutions, delivering leads that help companies drive revenue. Headquartered in Denver, Colorado and with delivery centers positioned strategically in Australia, Singapore, Ireland, India and London, the organization has grown 342% in four years. That explosive growth landed Selling Simplified at number 1,128 on the 2016 Inc. 5000 list of the nation's fastest-growing private companies.

At the same time, the skyrocketing success at home and abroad also meant more challenges for the finance and accounting team. The first step in addressing those challenges was moving to Sage Intacct, a cloud financial management solution that provides the company with a modern accounting system. Sage Intacct allows Selling Simplified to efficiently consolidate the financial information in various currencies for all its subsidiaries into one company-level set of reports in U.S. dollars.

With Sage Intacct in place, it was time to think about how the company managed its performance. Selling Simplified began looking for a way to automate the planning, budgeting and forecasting process to cut the time and effort required while enabling real-time insight into the company's progress against its key performance indicators (KPIs).

“For budgeting and forecasting, I needed the ability to project growth and costs for our locations around the world,” says Karen Phillips, chief financial officer at Selling Simplified. “Each location has its own currency and needs to be consolidated into one projection in U.S. dollars. While I could do that with Excel, I knew that there was a better way.”

## Solution

Selling Simplified chose Adaptive Insights, a cloud-based corporate performance management solution, for its ability to handle the complexities of the company's growing global operations. However, after an initial deployment partner was unable to meet Selling Simplified's needs, Phillips chose Armanino to help implement Adaptive Insights.

Armanino is an independent accounting and consulting firm with the largest certified Adaptive Insights development and implementation team in the nation. It's also the Sage Intacct Partner of the Year and Adaptive Insights Partner of the Region: Americas. Based on the firm's expertise in both the Sage Intacct and Adaptive Insights systems, Selling Simplified also selected Armanino's Sage Intacct-Adaptive Insights integration pack to eliminate duplicate data entry, automate data flow between the systems and deliver better financial reporting.

*“Armanino is my go-to resource for implementation, training and support for Sage Intacct and Adaptive Insights. Armanino consultants’ product knowledge is second to none and they have been very responsive to all of our needs.”,*

**-Karen Phillips**

Armanino worked closely with Phillips to quickly deploy Adaptive Insights at Selling Simplified. It also provided hands-on training on the new system. The deployment and training went so well that, as the halfway point of the implementation approached, Phillips chose to use Adaptive Insights instead of Excel for an unexpected reforecasting effort.

“I thought it would be a waste to put all the effort into spreadsheets for this important reforecasting project,” says Phillips. “Armanino helped me upload actuals and showed me how to handle assumptions. Then I was off and running.” Phillips took the results to the board, making changes in real time and showing the impacts of those changes through 2020. “Adaptive Insights was an instant success before we were even finished with the implementation,” says Phillips.

## Results

Although it is still early days in the deployment of Adaptive Insights, Phillips is confident that the new solution is already improving visibility, control and decision making while reducing time and effort for the finance department. Her team will soon be starting on the budget for the next fiscal year, with forecasts extending out three years. She expects to complete the entire planning process in a matter of weeks, instead of months of manual effort.

The company’s international board of directors, of which Phillips is a member, is eager to gain the full benefit of the new performance management system. As already demonstrated with the reforecasting effort, Adaptive Insights will help Phillips and her team respond faster to requests from the board for information or reports. “Previously it would take three or four weeks for the board to get reports or answers to their questions,” says Phillips. “Now with Adaptive Insights, we can show changes and their impacts in real time.”

The board is also eager to see improved tracking and reporting of KPIs, something that Phillips will also be delivering in the near future, thanks to Adaptive Insights. “With dashboards showing the new KPIs, we can make better decisions in our board meetings and see the impact in real time,” says Phillips. “It feels like I am really providing value to the company, and that makes me really proud.”

## Next Steps

Once the implementation of Adaptive Insights is complete, Phillips plans to continue relying on Armanino to guide her in getting the greatest benefit from her financial software. “Armanino is my go-to resource for implementation, training and support for Sage Intacct and Adaptive Insights,” says Phillips. “Armanino consultants’ product knowledge is second to none, and they have been very responsive to all of our needs. I’m grateful for our partnership with Armanino.”

## About Armanino<sup>LLP</sup>

Armanino provides an integrated set of accounting services—audit, tax, consulting and technology solutions—to a wide range of organizations operating both in the US and globally. You can count on Armanino to think strategically, to provide the sound insights that lead to positive action. We address not just your compliance issues, but your underlying business challenges, as well—assessing opportunities, weighing risks, and exploring the practical implications of both your short- and long-term decisions. When you work with us, we give you options that are fully aligned with your business strategy. If you need to do more with less, we will implement the technology to automate your business processes. If it's financial, we can show you proven benchmarks and best practices that can add value company-wide. If the issue is operational, we'll consult with your people about workflow efficiencies. If it's compliance, we'll ensure you meet the requirements and proactively plan to take full advantage of the changes at hand. At every stage in your company's lifecycle, we'll help you find the right balance of people, processes, and technology.

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