

## Adaptive Planning Makes Budgeting, Forecasting and Reporting Easy A Case Study About How DocuSign Improved Budgeting with Adaptive Planning

### Introduction of DocuSign:

DocuSign is the electronic signature cloud platform leader, offering the fastest, easiest, and most secure way to get a signature. Headquartered in San Francisco, the organization has more than 180 employees. DocuSign helps customers decrease transaction times, reduce costs, and enhance customer satisfaction with the easiest, fastest, most secure global network for sending, signing, tracking, and storing documents in the cloud.

### The Challenge:

Five years ago, while working in another organization, Mike Wong, the Director of FP&A at DocuSign, had implemented a six figure SAP system, which took a year and a half to complete and resulted in a budget prone to system errors. As a result of that experience, Wong researched alternative solutions and discovered Adaptive Planning, which was a great, low-cost alternative to expensive, hard to implement on-premise systems.

“I implemented Adaptive Planning at a previous company before coming to DocuSign and experienced great results,” said Wong. “When I arrived at DocuSign, the organization was dependent on Excel spreadsheets. We were on track to double our revenue and triple our employee head count and we needed a more automated solution to manage through this period of rapid growth. With Adaptive Planning, it is easy to model our ever evolving business to the exact department and line item.”

### The Solution:

DocuSign rolled out Adaptive Planning to the management team and finance group in time for the next budget cycle. Now DocuSign has the ability to conduct top down and bottoms up budgeting. In addition they are able to plan for future events, measure the performance of the company, and conduct variance analysis.

“Adaptive Planning’s support organization is outstanding,” said Wong. “At one point, I mistakenly deleted important data and the support group was able to recover the data promptly. In addition, with Adaptive Planning, we have the details behind every budget or forecast number and with their new release we can drill into our GL detail and satisfy the accountant in everyone.”

### The Results:

By relying on Adaptive Planning for corporate performance management, DocuSign has saved a dramatic amount of time. In 2012, DocuSign will no longer have to send spreadsheets out to budget contributors and spend manual effort consolidating spreadsheets and correcting errors. Each time a new employee is added, the changes are instantaneous across the model. In addition, as booking figures change, the financial statement is automatically updated.”

“Everyone uses Excel,” said Wong. “It is a great tool, but it is not collaborative and has limitations especially in regards to errors in assumptions or calculations. With Adaptive Planning, you can create a new plan in a matter of seconds.”

DocuSign benefits from being able to maintain the application within the finance team and not depend on the company’s IT resources. It also benefits from being able to analyze data from multiple systems, as well as to conduct budgeting, forecasting, commission planning, and sales forecasting.

“The reporting is the holy grail of Adaptive Planning,” confirms Wong. “Being able to drag and drop fields for reports is a great feature. Finally, it is very easy to import data from different data sources for improved forecasting and reporting.”

## Sage MAS Intelligence (SMI) Training Classes Now Available!

Martin & Associates is now offering Sage MAS Intelligence courses. There is an intermediate and advanced course offered. Each course is one day and costs \$395

### SMI Intermediate

In this course, you will:

- Learn how to use the Report Designer for financial reports
- Learn how to create a new report, including how to define columns and parameters and how to filter, sort and total information on a report
- Learn the basic features of the Connector Module
- Learn how to define new data containers to use with reports
- Learn how to use report tool add-ins to add pivot tables and drill downs on a report
- Learn how to maintain and distribute reports
- Learn about security as it relates to creating reports

### SMI Advanced

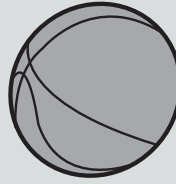
In this course, you will:

- Learn how to build reports to consolidate databases and companies
- Learn how to use multiple tables in a container
- Learn how to create new connections
- Learn how to work with add-ins and macros
- Learn how to schedule reports with Windows scheduler

Both of these classes are taught by our certified trainers and offer hands-on experience.

For more information, including the upcoming schedule, please visit [http://www.martinandassoc.com/M&A\\_training\\_schedule.htm](http://www.martinandassoc.com/M&A_training_schedule.htm) or email [training@martinandassoc.com](mailto:training@martinandassoc.com).

## March Madness Lunch & Learn



March 15, 2012  
Martin & Assoc.  
Cincinnati, OH

For more information or to register, please email [seminar@martinandassoc.com](mailto:seminar@martinandassoc.com)

### Sage Web Seminars

Martin and Associates would like to invite you to attend one of the free Sage online seminars. Check the schedule below and sign up now. To sign up, for a Sage Webcast please visit [www.sagesoftware.com/training](http://www.sagesoftware.com/training) then click on the webcast link.

#### Dates:

Jan 11	What's New in Sage ERP MAS 90 and.....4:00 PM EST 200 Version 4.5?
Jan 16	What's New in Sage ERP MAS 90 and.....1:00 PM EST 200 Version 4.5?
Feb 22	Sage BusinessWorks 2012: Come.....11:30 AM EST See What's in Store for you!



### Services

E-Business  
Financial Analysis  
System Needs Analysis  
Software Sales  
Software Installation  
Software Implementation  
Software Design and Development  
Training and Support  
Custom Programming  
Hardware Installation and Support  
Web Management/ISP Services



# Sage CRM -included in Sage MAS 90/200 v4.5

One Sage CRM Server License is now included with your Sage MAS 90 or 200 version 4.5 maintenance.

Sage CRM is used by over 10,000 organizations in 70 countries worldwide to manage their critical sales, marketing and customer service activities every day. Sage CRM equips businesses with the tools they need to find new customers, close sales faster and build lasting, more profitable relationships across all channels. Regardless of how, when or where customers, partners and prospects choose to interact with your business, Sage CRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships. Thanks to its ERP integration capabilities, the Sage CRM front-office is powered by data from the back-office to give sales, marketing, customer service and other front-office staff a true 360 degree view of customers across front- and back-office functions, differentiating it from many other CRM solutions in the market today.

## **Benefits of Sage CRM to Your Business:**

- Ensures your sales, marketing and customer services resources are being used to maximum effect
- Reduces your cost-of-sale
- Reduces the cost of your marketing leads
- Ensures you meet customer service level agreements
- Minimizes administration costs
- Protects and grows your revenues
- Ensures that your investments are all aligned to revenue development
- Enables you to pinpoint underlying issues and take corrective action accordingly
- Reduced the potential for customer attrition
- Enables you to leverage further revenue opportunities within your current customer base
- Empowers your staff to provide exceptional service to your customers
- Reduce your opportunity costs
- Boosts productivity and enables staff to accomplish more in their working day
- Maximizes customer communications and interactions through integrated social media channels

## **Benefits of Sage CRM to the Sales Team**

- Improves transparency in the sales pipeline
- Offers exception monitoring/alerts
- Enables corrective action against variance earlier in the sales cycle
- Enables quarterly forecast accuracy
- Maximizes cross- and up-sell opportunities
- Eliminates manual/duplicated sales processes

## **Benefits of Sage CRM to the Marketing Team**

- Enables marketing programs to be planned more efficiently and effectively
- Improves marketing campaign response rate
- Produces highly targeted customer communications
- Delivers detailed information on the lifetime value of customers and enables profitable customer to be easily identified

## **Benefits of Sage CRM to the Customer Service Function**

- Enables customer satisfaction measurement and benchmarking
- Increases productivity of customer support reps
- Ensures issues never “get lost between the cracks”
- Improves response times to customer service requests
- Enables benchmarking/score carding of customer service operation on an on-going basis

## **Benefits of Sage CRM for Senior Managers**

- Drives revenue growth
- Improves profitability
- Enables real-time corporate performance management
- Drives productivity across the entire organization
- Eliminates process bottleneck
- Reduces budget and performance variance
- Delivers at-a-glance business insight via the interactive dashboard

To get the most out of your Sage CRM license, please contact your Martin & Associates Account Rep!

## Course List

Course Title	Course Length	CPE Credits	Cost
Business Alerts	1 day	8	\$395
4.2 Customer Workshop GL or LM	1 day	8	395
4.2 Customer Workshop SO & AR	1 day	8	395
MAS 90/200 Core Applications	5 days	40	1,580
MAS 90/200 GL, AP, AR, or Payroll	1 day	8	395
Crystal Reports - Introduction	2 days	16	790
Crystal Reports - Beyond the Basics	2 days	16	850
Distribution	3 days	24	1,070
Inventory Management	1 day	8	395
Sales Order or Purchase Order	1 day	8	395
Return Merchandise Authorization	1 day	8	395
Manufacturing	3 1/3 days	28	1,265
Inventory Management	1 day	8	395
Bill of Materials or Work Order	1 day	8	395
Material Requirements Planning	½ day	4	250
MAS 90/200 Installation	2 days	16	1,080
MAS for SQL Installation	1 ½ days	12	600
SMI Intermediate or Advanced	1 day	8	395
FRx	2 days	16	790
Data File Structure	1 day	8	395
Technical Support	2 days	16	850
Job Cost	2 days	16	790
Visual Integrator	2 days	16	790
Customizer or Customizing Forms	1 day	8	395
Data Migrator	2 days	16	690
e-Business Manager	2 ½ days	19	1,000
BusinessWorks Core	4 days	32	1,175
BW System Manager or GL	½ day	4	200
BW A/P, A/R, Payroll, Order Entry,			
Inventory Control or Job Cost	1 day	8	345
BusinessWorks: Crystal Reports	2 days	16	690
FAS Intermediate	2 days	16	1,100
Abra Human Resources or Payroll	3 days	24	1,320
Abra Crystal Report Writer (HR or PR)	1 day	8	690
Abra Payroll Year End (Lecture)	1 day	8	575
Dynamics GP Financial Series	5 days	40	1980
Dynamics GP Foundations	1 day	8	495
Dynamics GP General Ledger	1 day	8	495
Dynamics GP Payables Management	1 day	8	495
Dynamics GP Receivable Management	1 day	8	495
Dynamics GP Fixed Assets	1 day	8	495
Dynamics GP Bank Reconciliation	1/2 day	8	250
Dynamics GP Supply Chain Series	3 days	4	1188
Dynamics GP Inventory Control	1 day	24	495
Dynamics GP Purchase Order Processing	1 day	8	495
Dynamics GP Sales Order Processing	1 day	8	495
Dynamics CRM Sales Management	1 day	8	495
Dynamics CRM Marketing Automation	1 day	8	495

To register for Sage classes, please visit  
<http://www.sagesoftwareuniversity.com>

To register for Microsoft classes please fill out the registration form and fax it to 513-772-4529 or call Mary at 513-772-7284 x118

## Class Spotlight

### Dynamics CRM Sales Management:

This one-day course explores the Microsoft Dynamics CRM application from the user's perspective. Application functionality covered in the course includes Core CRM Navigation, User Interface, Outlook Client, and the Sales Management module.

This course teaches the process and functionality used by sales managers and sales representatives. This course begins with an introduction to the core concepts of Microsoft Dynamics CRM then an overview of the sales processes. Subsequent lessons explore the sales concept in greater detail. A thorough understanding of the sales process in Microsoft Dynamics CRM helps you to get the most out of your system.

### Dynamics CRM Marketing Automation:

This one-day course explores Microsoft Dynamics CRM application for a user's perspective. Application functionality covered in this course includes Core CRM Navigation, User Interface, Outlook Client, and Marketing Automation module. This course teaches the processes and functionality used by the marketing managers and marketing representatives. It begins with an introduction to the core concept of Microsoft Dynamics CRM and then an overview of the marketing automation processes. Subsequent lessons explore the marketing concepts in greater detail. A thorough understanding of the marketing processes in Microsoft Dynamics CRM helps you to get the most out of your system.

## Microsoft Classes Registration

Event/Class Choice \_\_\_\_\_

Class Date \_\_\_\_\_

Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State and Zip \_\_\_\_\_

Office Number \_\_\_\_\_

Fax Number \_\_\_\_\_

E-mail address \_\_\_\_\_

\*Credit Card # \_\_\_\_\_

Expiration Date \_\_\_\_\_

Cardholder Name \_\_\_\_\_

\*\* To register for Sage courses, please visit  
<http://www.sagesoftwareuniversity.com>

In case of cancellation, participants must notify the training center at least two weeks prior to the class in order to avoid loss of full tuition.



# Events and Training Schedule January 2012 through April 2012

January

Monday	Tuesday	Wednesday	Thursday	Friday
2	3	4	5	6
9	Intro to Crystal Reports Tech Support	Intro to Crystal Reports Tech Support	Crystal Reports Beyond the Basics	Crystal Reports Beyond the Basics BusinessWorks - Job Cost
16	Distribution - IM SMI Advanced	Distribution - SO	Distribution - PO	Return Merchandise Authorization
23	Visual Integrator	Visual Integrator	BusinessWorks - Inventory Control	BusinessWorks - Order Entry
Dynamics GP Financials - Foundations	GP Financials - General Ledger			

February

Monday	Tuesday	Wednesday	Thursday	Friday
		GP Financials - Payables Management	GP Financials - Receivables Management	GP Financials - Fixed Assets
MAS 90/200 Core Intro and Sys. Admin	MAS 90/200 Core General Ledger	MAS 90/200 Core Accounts Payable	MAS 90/200 Core Accounts Receivable	MAS 90/200 Core Payroll
13	BusinessWorks - Intro/Sys Admin	BusinessWorks - Accounts Payables/Cash Management	BusinessWorks - Accounts Receivable SMI Intermediate	BusinessWorks - Payroll SMI Advanced
20	21	GP Supply Chain - Inventory Control	GP Supply Chain - Purchase Order	GP Supply Chain - Sales Order
27	28	BusinessWorks Crystal Reports		

March

Monday	Tuesday	Wednesday	Thursday	Friday
			1 Job Cost	2 Job Cost
5	Manufacturing - Inventory Mgt	Manufacturing - Bill of Materials	Manufacturing - Work Order	Manufacturing - MRP
12	e-Business Manager	e-Business Manager	FRx	FRx
19	Applications in CRM	Applications in CRM	Applications in CRM	23
26	27	28	29	30

April

Monday	Tuesday	Wednesday	Thursday	Friday
2	3	4	5	6
9	10	Visual Integrator	Visual Integrator SMI Intermediate	BusinessWorks - Job Cost SMI Advanced
Dynamics GP - Foundations	Dynamics GP - General Ledger Distribution - IM	Dynamics GP - Payables Management Distribution - SO	Dynamics GP - Receivables Distribution - PO	Dynamics GP - Fixed Assets Distribution - RMA
23	Intro to Crystal Reports Tech Support	Intro to Crystal Reports Tech Support	Crystal Reports Beyond the Basics	Crystal Reports Beyond the Basics
30				

Let Martin and Associates assist you with all of your training needs. Martin and Associates is constantly receiving positive evaluations and we continuously hear how "friendly, helpful and hospitable" we are. Martin and Associates not only wants each student to have a positive learning experience but also to have fun and enjoy class with their fellow students. We are one of the few training centers that offer a complimentary continental breakfast, as well as, lunch at a local restaurant.

Martin and Associates has been training and working with resellers since 1988 and became a Sage Authorized Training Center (ATC) in 1997. Starting with one training room and three trainers, we have grown to three training rooms and thirteen trainers. Our thirteen certified trainers are consulting specialists when they are not teaching; therefore, they are able to bring real world situations to the classroom.

Martin and Associates always uses Sage certified course curriculum and all of our courses include hands-on demonstrations, interactive sessions, reviews, and lab exercises. We guarantee your satisfaction!

## Save the Date

**March Madness Lunch & Learn**  
March 15, 2011  
11:30 - 2:30

For more information, please visit  
[http://www.martinandassoc.com/M&A\\_events.htm](http://www.martinandassoc.com/M&A_events.htm)



# Information Matters



Product	SLP	Annual Maintenance
<b>Electronic Banking Suite</b>		
ACH Complete - Accounts Payable, Accounts Receivable, Sales Order & Payroll Bundle	2,995.00	1,000.00
ACH Complete - Accounts Payable, Accounts Receivable & Sales Order Bundle	2,595.00	865.00
ACH Complete - Accounts Receivable & Sales Order Bundle	1,795.00	600.00
ACH Complete - Accounts Payable & Accounts Receivable Bundle	2,095.00	700.00
ACH Complete - Accounts Payable & Sales Order Bundle	2,095.00	700.00
ACH Complete for Accounts Payable	1,295.00	430.00
ACH Complete for Accounts Receivable	1,295.00	430.00
ACH Complete for Sales Order	1,295.00	430.00
ACH Complete for Payroll	695.00	230.00
Positive Pay - Accounts Payable & Payroll	1,095.00	365.00
Positive Pay - Accounts Payable	795.00	265.00
Positive Pay - Payroll	795.00	265.00
BankRec Clear	795.00	265.00
BankRec Clear and Positive Pay Accounts Payable	1,350.00	450.00
BankRec Clear and Positive Pay Payroll	1,350.00	450.00
BankRec Clear and Positive Pay Accounts Payable & Payroll	1,500.00	500.00
<b>Sales Tax Management</b>		
Sales Tax Management Bundle	1,795.00	599.00
Sales Tax Management - Accounts Payable & Purchase Order	1,195.00	398.00
Sales Tax Management - Accounts Receivable & Sales Order	1,195.00	398.00
Sales Tax Management - e-Business Manager	495.00	165.00
<b>White Paper</b>		
White Paper Suite	598.00	358.00
White Paper W2	390.00	238.00
White Paper 1099	240.00	144.00
<b>Other</b>		
Payroll Additional Pay Rates	795.00	265.00
Customer Sales/ Vendor Purchase History Recalculation	765.00	N/A
Magnetic Media - State Quarterly Unemployment Reporting	1,295.00	430.00
Magnetic Media - State W2 Electronic Media Reporting	1,095.00	365.00