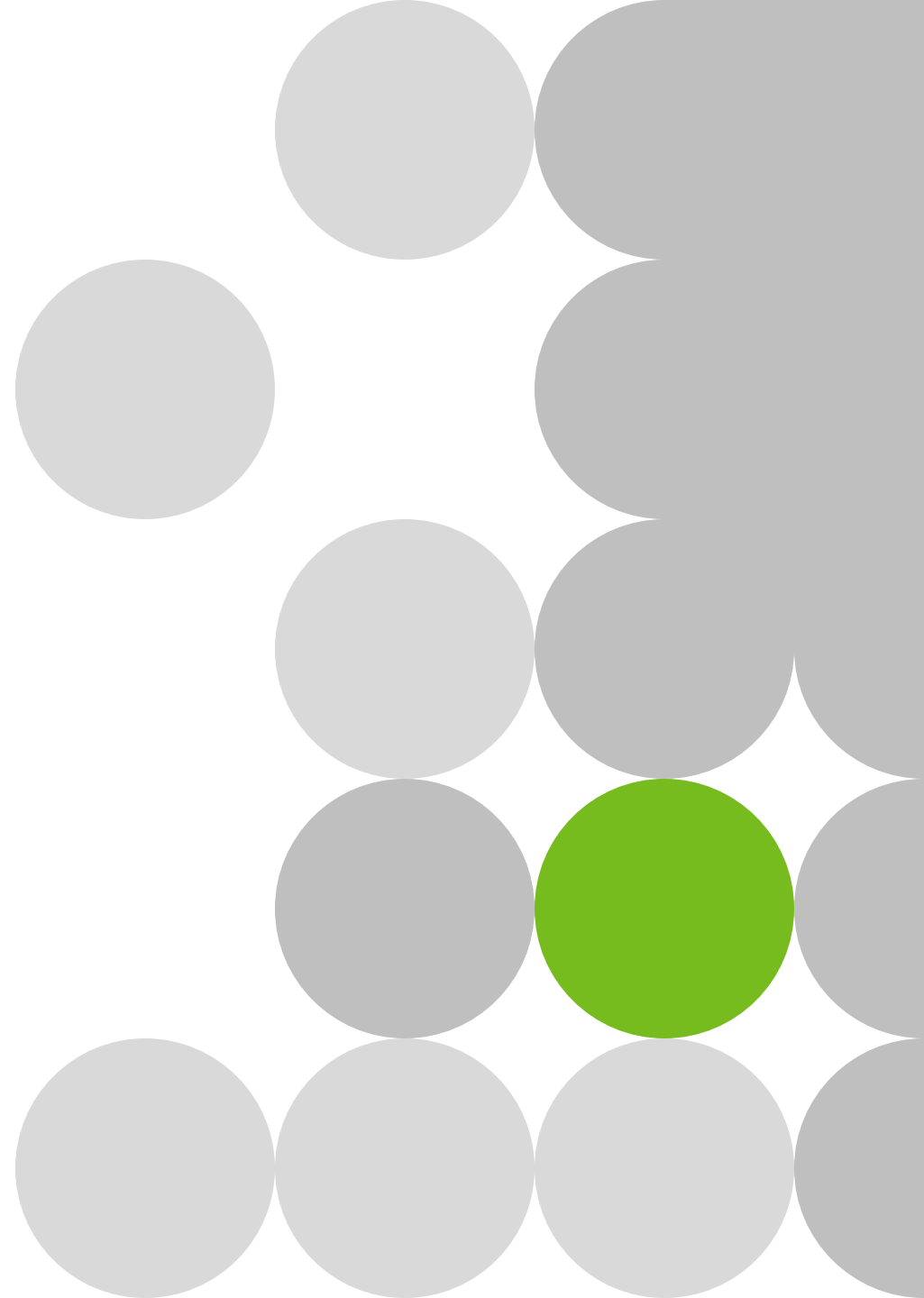


# Adaptive Live | 2019

## Using the Process Tracker to Drive Collaboration and Adoption

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Amanda Merchant  
Manager, Consulting Services

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Adaptive Insights,  
a Workday Company

# Customer Speaker



- Company has been using Adaptive Insights for 4 years
- Power user
- Financial and Non-Financial data
- Using Process Tracker as checklist for month-end process in FP&A and as a guide for the budget process for the broader team



Ben Gibson, FP&A

# Agenda

What is Process Tracker?

Leveraging Process Tracker to Onboard New Adaptive Insights Users

Driving Increased Collaboration by Engaging Non-finance Users

Demo

Customer Story

# What is Process Tracker?

Better user experience and increased collaboration

- Guide users through process with step-by-step instructions
- Assist users through navigation of a new system
- Give finance and non-finance users direction for entering and validating their data

The screenshot shows a task list for '003-Marketing Plan' as of 'Jun 22'. The first task, '1. Adjust Personnel Plan', is completed (checked) and dated 'May 15'. Below it is a detailed view for this task with tabs for 'Description' and 'Notes'. The 'Description' tab is active, showing 'Content: Personnel Planning' and 'Version: Working Budget'. A paragraph of instructions follows: 'For each employee, review this information imported from the HR system. Adjust the Title, End Date, and benefit details where you know there will be changes. Enter an explanation of changes in the Comments field. For new hires, add a new row and fill in the details you know.' Below the description is a list of seven remaining tasks:

Task	Due Date
<input checked="" type="checkbox"/> 2. List Marketing Expenses	Jun 15
<input type="checkbox"/> 3. Enter Travel Plans	Jun 15
<input type="checkbox"/> 4. Enter Capital Plan	Jun 15
<input type="checkbox"/> 5. Review Department Pl...	Jun 19
<input type="checkbox"/> 6. Explain Variances	Jun 19
<input type="checkbox"/> 7. Submit the Plan	Jun 22

# Why Process Tracker?

## Step-by-step guide for users to follow

The screenshot shows the 'Overview' page for a process. At the top, there is a navigation bar with 'Standard Demo | Processes > Overview' and the Adaptive Insights logo. Below this is a 'Create Task' button. The main content area features a large circular progress indicator with the number '44' in the center, representing 'Days to target'. To the left of this indicator, the text reads: 'Days to target: 44', 'Process target date: Jul 1, 2018 5:00 PM PDT', and 'Final task due date: Jul 2, 2018 5:00 PM PDT'. Below this, a legend indicates '44 days before target' (blue dot) and '0 days since start' (black dot). At the bottom of the overview, there are dropdown menus for 'Assigned to: Anyone' and 'Process: 003-Marketing Plan'. Below these is another circular progress indicator showing '0%' overall progress. A legend for this indicator shows '0 tasks completed' (green dot), '8 tasks in progress' (blue dot), and '0 tasks running late' (orange dot).

The screenshot shows a list of tasks under the heading 'Tasks in Progress'. There are four task entries, each with a title, a user profile picture, and a status button. The tasks are: 1. 'Adjust Personnel Plan' (Due May 24, 2018 5:00 PM PDT, Incomplete), 2. 'Adjust Personnel TBH Plan' (Due May 24, 2018 5:00 PM PDT, Incomplete), 3. 'Enter Capital Plan' (Due Jun 15, 2018 5:00 PM PDT, Incomplete), and 4. 'Enter Travel Plans' (Due Jun 25, 2018 5:00 PM PDT, Incomplete). Each task entry also includes a list icon, a trash icon, and a 'More' link.



# Process Tracker





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Q&A



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Thank You

Amanda Merchant

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