

# *Boathouse Gets Project Tracking Help with Adaptive Planning*

## Introduction

Boathouse Group is a privately held advertising and brand management firm located in Waltham MA. Boathouse prides itself on its unique, creative and low-cost operating approach toward providing value added to its clients. Boathouse believes that each client's problems are different so that there is no single process/methodology to apply to every problem.

## The Challenges

Boathouse needed to provide accounting staff support to facilitate and report on client/project/task resources, budgets and actuals using differing billing rates which its Clients and Profits accounting system was unable to provide. The project/task tracking capability allows Boathouse to project individual resource (internal and external) requirements but also tasks against each resource, so that unique rates could be applied to various tasks/resources to roll up each project's budget by client. Boathouse chose Adaptive Planning due to its ease of use, low cost of ownership and its ability to meet the workflow demands.

## Solution

In less than 3 weeks, Bob developed an Adaptive Planning model to replicate Boathouse's financial reporting needs as well as incorporate a client/project driven budgeting and reporting capability. In addition, he helped develop the processes to bulk load transactional task related data for reporting of actuals vs. budget.

## Outcome

Currently, Boathouse is transitioning to Adaptive Planning due to time pressures and resource limitations as with any new system. F.A.C.T.S is committed to helping Boathouse with this transition and "whatever it takes" for a successful implementation