



# Frequently Asked Questions (FAQs)

## What can Plan-It do for me?

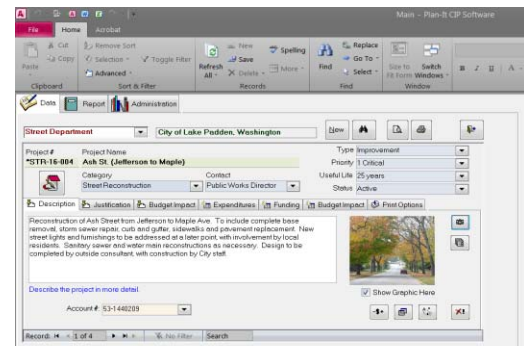
Plan-It, the leader in specialized CIP software, provides an easy way to plan for future infrastructure projects and equipment purchases. It will save you time in the budgeting process, produce an outstanding Capital Improvement Plan and help you make better decisions about how you are spending your resources in coming years. It collects information such as project description and justification, expenditure amounts and funding sources. There are 100+ automatic reports and exports that summarize the data in many useful ways (in 1, 2, 5, 6 and 10-year formats).

## How many municipalities use Plan-It?

Since 1998, when the first user was installed, the Plan-It community has grown significantly. There are currently over 250 cities, counties and other organizations using Plan-It.

## Why is it better than what I am using now (e.g., spreadsheets)?

- Spreadsheets are difficult to manage year to year. Much time is spent adding/deleting columns, tying worksheets together and making sure formulas work
- Complex spreadsheets are difficult to maintain, especially if only one person knows how it all works
- Plan-It makes data entry simple – just fill in the blanks
- It is easy to have people in many departments sharing responsibility for data entry
- Graphics, such as pictures or maps, can easily be added to reports to make a better final document
- Automatically-generated reports produce a superior final document for decision-maker review
- With a large user base, you benefit from ideas requested by other users and put in new versions



### First Year Cost

Base Software - 1 User Department (\$1,600)  
 Each Additional User Department (add \$800)

### Annual Renewal Cost

50% of First Year Cost at time of renewal

### Small City Discount

30%+ off for cities with populations under 5,000

## How much does it cost?

Plan-It is sold on a licensed basis, with a 'First Year' cost and an annual renewal cost. A 30%+ discount is given to small cities (< 5,000 population). Costs are based on the number of user departments (with an unlimited number of installed PCs in each). Additional departments may be added at any time for a reduced incremental cost. For example, a "1-User" customer will pay \$1,600 the first year and \$800 annually for the upgrade and license continuation. Costs for "Small City" users are \$995 the first year and \$600 annually.

## Is there technical support?

Technical support is, for the most part, available at no cost. If you have a quick question, want to talk over the best way to structure your data or have technical issues, you can call or email Strategic Insights at any time. If your issue requires programming support, there may be a charge to cover that cost. Nearly all questions are answered at no cost to users.

## What are the technical requirements?

Any Windows and Microsoft Access 2013, 2016, 2019 or 365 version must be installed on each user's PC. No user knowledge of Access is required, however. If necessary, you can download Access Runtime from Microsoft at no cost.

## Can Plan-It interface with my financial system?

Yes. Through the use of Excel spreadsheets, Plan-It can import data from your financial system to create "Budget vs. Actual" reports.

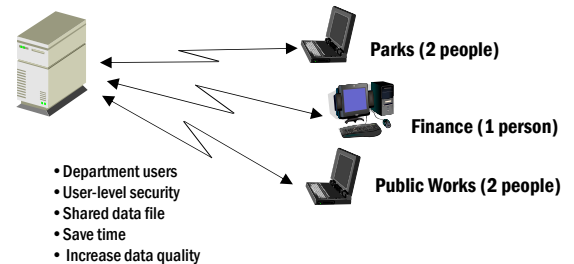
## What kind of system security is there?

Plan-It has optional user-level security where rights to key areas or functions can be granted on an individual or group basis.

## Can I do fund cash flow forecasting?

Yes. By entering up to 10 years of projected revenues for your funds, reports can be generated that show cash flows through your funds.

## Multi-User Installation Example



## How can I learn more about Plan-It?

Upon request, you can receive an email with example reports, detailed license information and user references (with links to customer websites so you can take a look at what finished Plan-It CIPs look like).

## Can I get a demo?

Free downloadable demos or an online web seminar demo are both options. Just let us know what works best for you.

## How do I get going using Plan-It?

After letting Strategic Insights know you would like a license, we provide an email with the files you need and will help you get installed. Additional training can be done at the time of installation to make sure users are comfortable using Plan-It.

**Contact us: bleskee@CIPsoftware.com or (952) 994-1744**