

Building a multi-division long-range plan aligned to where the business is going, not just where it's been

Topics

Finance
Fractional & Interim Decision Intelligence & AI
Fractional & Interim Finance
Planning & Analytics

Industry

Business & Professional
Services, Technology, Media,
Telecommunications &
Software

Team Size

3 members: Decision
Intelligence & AI
lead, CFO, FP&A
Manager/ Sr. Analyst

Duration

6 weeks

Situation

A multi-division technology services company engaged Growth Operators to build a three-year financial planning model that could keep pace with a complex, evolving business. Operating across multiple geographies and service lines, the company needed a dynamic model that reflected distinct revenue drivers, cost structures, and strategic priorities while providing a unified organizational view.

Execution

Using AI-powered financial modeling, Growth Operators transformed fragmented strategic and financial inputs into a dynamic, executive-ready planning tool. Key steps included:

- Synthesizing leadership priorities, financial targets, and historical data into a structured AI build brief
- Building a 3 year, multi-business-unit financial model with division-level detail and consolidated reporting
- Tailoring each division's model to its unique revenue and cost drivers while rolling up into a unified P&L
- Designing a flexible model architecture that can be updated as strategies, initiatives, and actual results
- Delivering in hours an executive-ready model that would have required weeks of manual financial modeling

Result

The client gained an executive-ready, three-year financial planning model that aligned with strategic priorities, accelerated planning, and unified division-level forecasts into a single organizational view. With a scalable model built for ongoing forecasting, the organization established a more effective approach to long-range planning.