FINANCE ADVISORY

Publicly Traded Leading Hospitality Company

ENGAGEMENT OVERVIEW

A leading hospitality organization engaged Alliance to provide senior-level FP&A expertise to modernize its strategic planning process. The client needed an experienced consultant who could not only develop a sophisticated five-year financial planning model, but also redesign the overall process to improve collaboration, automation, and visibility across the organization.

The engagement centered around building a strategic long-range plan (SLRP) that would serve as the company's financial roadmap through 2030. Management established ambitious EBITDA targets and needed a planning process capable of evaluating multiple business scenarios, measuring key performance indicators, and supporting informed strategic decision making. At the same time, the organization was undergoing significant changes to its general ledger structure and company hierarchy, creating additional complexity that required seamless integration into the new planning model.

[alliance]

ALLIANCE SOLUTION

Alliance provided financial advisory in a variety of ways including:

01 Automated Financial Planning

Developed a dynamic strategic planning model using Power Query to automate data consolidation and reduce manual effort.

02 Collaborative Forecasting

Created a process that allowed 50+ business units to own their 5-year forecasts while Corporate maintained enterprise visibility.

03 Strategic Forecasting Framework

Developed models using department-specific assumptions around royalty revenue, SG&A expenses, and key operational drivers.

04 Organizational Change Integration

Integrated GL and organizational hierarchy changes into planning, while maintaining forecasting accuracy and project momentum.

CLIENT OUTCOMES

- Replaced a manual process with an automated solution that consolidates 50+ forecasts into a single enterprise-wide financial model.
- Improved visibility into departmental assumptions, enabling faster collaboration, more informed decision-making, and timely management feedback.
- Reduced manual effort, increased forecast accuracy, and streamlined the overall long-range planning process.