

# FINANCE ADVISORY

Leading Financial Institution



## ENGAGEMENT OVERVIEW

A leading financial institution engaged Alliance to provide additional FP&A capacity and technical support during its FY25 Annual Financial Plan cycle. The organization's planning process relied on a complex network of linked Excel workbooks, Hyperion data, department-level income statements, compensation and benefits reporting, and personnel files that required significant manual effort to refresh, reconcile, and validate as business unit submissions changed.

Alliance embedded an experienced FP&A resource directly within the client's team to take ownership of critical planning and reporting activities mid-cycle. In addition to supporting the immediate annual planning process, Alliance identified opportunities to automate recurring reporting, standardize data uploads, improve business intelligence capabilities, and document key processes to create efficiencies for future planning cycles.

[alliance]

## ALLIANCE SOLUTION

Alliance worked alongside the client's FP&A leadership and analysts to provide:

01

### Planning & Consolidation

Maintained and reconciled consolidated financial, compensation, and personnel reporting throughout multiple rounds of review.

02

### Executive Reporting

Developed executive-level tables, charts, financial waterfalls, and ad hoc analyses to support annual plan decision-making.

03

### Reporting Automation

Developed Power BI dashboards and streamlined compensation and vacancy reporting to reduce manual processes.

04

### Planning System Support

Created a standardized Hyperion personnel upload template and helped analysts validate and prepare personnel data.

## CLIENT OUTCOMES

- Added 301 hours of FP&A capacity, helping the team reach final approval.
- Improved accuracy and reduced risk by reconciling budget and personnel data before executive review.
- Accelerated reporting through KPI automation in PowerBI and standardized ERP upload templates.
- Improved future planning readiness through documented procedures, instructions, and lessons learned.