



# Budget Preparation

## Case Study

### Background

After an acquisition and migration to a new ERP system, the client's budgeting process became outdated and misaligned with their updated financial structure. The previous budget was limited to an income statement, leaving gaps in visibility of working capital and hindering decision-making.

### Objectives

- + Build a comprehensive three-statement budget
- + Integrate the newly acquired company into the budgeting process
- + Align financial projections with the new general ledger structure post-ERP migration
- + Engage with key departments to validate financial assumptions

### Solutions

- + Updated the budget framework to incorporate the newly acquired entity
- + Mapped historical financial data to the new ERP-driven chart of accounts
- + Conducted cross-functional consultations to refine key budget assumptions
- + Developed a full three-statement financial model, replacing the previous income statement-only projection
- + Prepared a board-ready budget presentation summarizing key financial insights

**Construction**  
INDUSTRY

**150**  
EMPLOYEES

**\$40M**  
ANNUAL  
REVENUE

**Built a comprehensive three-statement budget, giving the client deeper financial visibility and stronger decision-making insights.**