



Multi-Location Budget Development

Case Study

Background

A recently created fast growing platform with 20+ locations required a bottoms-up budget to inform daily operations and future acquisition growth.

Objectives

- + Obtain historical financials to identify trends and drivers
- + Interview management and key employees to determine short- and long-term strategic goals
- + Develop a consolidating bottoms-up budget model focusing on revenue build up, personnel, variable expense, and corporate expenses
- + Prepare board of directors budget presentation for review and discussion

Solutions

- + S+H worked with various team members to extract financial data from the industry specific ERP solution, enabling ongoing updates
- + Successfully completed detailed discussions with key personnel to refine drivers and impactful seasonality trends
- + Provided training to the finance and accounting team to enable ongoing monthly updates for budget-to-actual comparisons

**Residential
Services**

INDUSTRY

1,000

EMPLOYEES

\$75M

ANNUAL
REVENUE

Developed a 20+ location consolidating operational budget to inform daily operations and enable future acquisitions.

