

CASE STUDY

2025 - 2026

Strengthening FP&A
Infrastructure and Board
Reporting During a High-
Stakes Budget Planning Cycle



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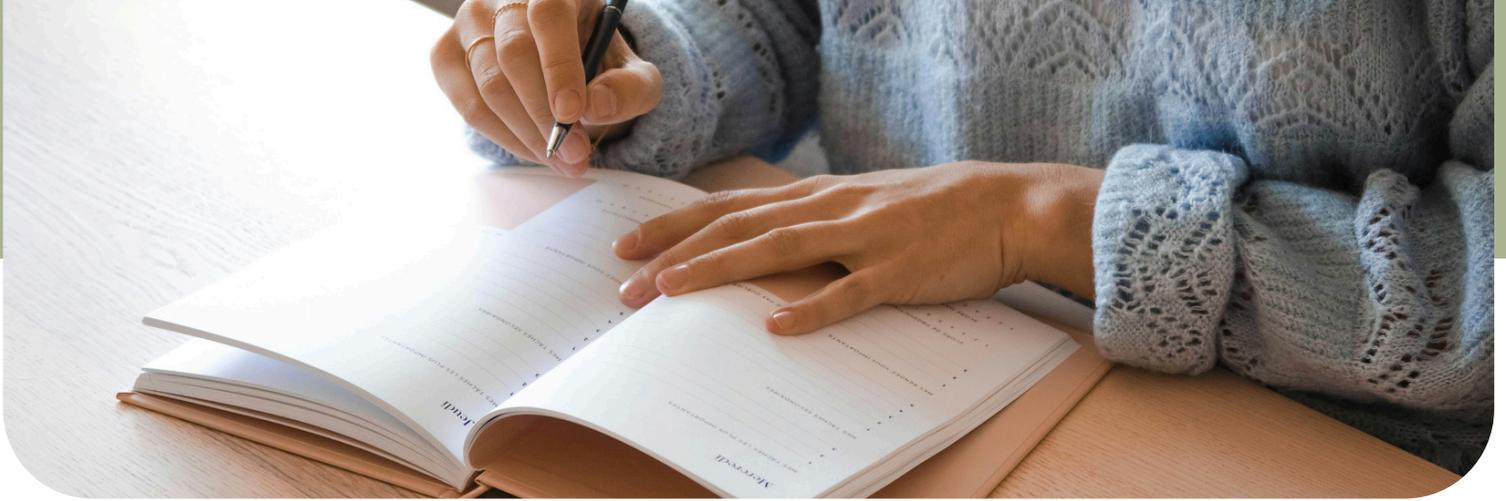
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OVERVIEW

A rapidly growing Series B, venture-backed healthcare organization engaged Rancourt Consulting to strengthen its finance function during a pivotal planning and reporting cycle. The company was expanding operations across multiple markets while preparing its annual operating plan, supporting board reporting requirements, and evaluating strategic opportunities.

While the organization had strong operational and clinical leadership, the finance function had not yet fully scaled to support the complexity of the business. Financial planning processes were largely manual, reporting workflows were fragmented, and leadership lacked a consistent framework for monitoring performance across the organization.

The initial scope began as a 90-day consulting engagement focused on supporting the company's upcoming budget cycle and strengthening financial reporting infrastructure. As the work progressed and additional opportunities emerged across financial planning, reporting, and board preparation, the scope expanded and the engagement was extended to complete the 2026 planning process and transition the newly developed financial infrastructure to the internal team.



CHALLENGES

As the organization entered a critical annual planning cycle, leadership needed greater financial clarity to support strategic decision-making and board communication. However, the company's finance infrastructure and reporting processes had not yet scaled alongside its operational growth, creating pressure across planning, reporting, and financial visibility.

01

Fragmented Financial Planning Processes

The organization needed to complete its 2026 Annual Operating Plan and bottom-up budget while relying heavily on manual spreadsheets and ad hoc workflows. This made collaboration across stakeholders difficult and created challenges with version control, data consistency, and transparency during the planning process.

02

Inconsistent Financial Reporting

Monthly and quarterly reporting required significant manual effort and lacked standardized templates or processes. Leadership needed clearer reporting structures and repeatable financial narratives to support board discussions and internal decision-making.

03

Limited Financial Modeling Infrastructure

The company did not yet have a scalable financial model capable of supporting forecasting, scenario planning, and structured financial analysis. Without a centralized planning framework, evaluating strategic initiatives and tracking performance across the organization was difficult.

04

Evolving Finance Leadership

During the engagement, the company onboarded new Head of Finance. Ensuring continuity of financial planning processes, reporting cadence, and financial tools became an important component of the project to ensure the internal team could effectively manage these systems going forward.

SOLUTIONS

Rancourt Consulting partnered with leadership to stabilize the budgeting process, strengthen financial reporting, and establish scalable FP&A infrastructure. The focus was on delivering the immediate outputs required for the 2026 planning cycle while building durable financial tools and processes that the internal team could sustain going forward.

01

Strengthening Financial Planning Processes

To support the 2026 Annual Operating Plan, a structured financial planning framework was established to guide the company's bottom-up budget development. This included building the core financial model used to support the planning cycle and collaborating closely with leadership to refine assumptions, align priorities, and produce a clear budget summary for internal and external stakeholders.

02

Standardizing Financial Reporting

Financial reporting processes were redesigned to improve consistency and clarity for both leadership and the board. Standardized monthly and quarterly reporting templates were developed, and board presentation materials were refined to align more closely with the narrative of the 2026 operating plan, creating a repeatable reporting cadence moving forward.

03

Building Financial Modeling Infrastructure

A scalable financial modeling framework was developed to support ongoing planning, forecasting, and performance monitoring. The model provided leadership with a centralized structure for evaluating financial performance and established the foundation for future variance analysis and financial reporting.

04

Supporting Finance Leadership Transition

During the engagement, new Head of Finance joined the organization. Close collaboration ensured continuity across planning and reporting processes while enabling a smooth transition of financial models, templates, and documentation to the internal team for ongoing ownership.



We couldn't be more impressed. As our Finance Function has evolved, Rancourt Consulting has consistently gone above and beyond, bringing not only deep financial expertise but also a thoughtful, collaborative approach that's elevated how we operate.



OUTCOME

By the end of the engagement, the organization had established a significantly stronger financial foundation to support its continued growth.

Leadership gained a structured and reliable planning process for the 2026 Annual Operating Plan, supported by a centralized financial model that enabled clearer forecasting, budgeting, and performance monitoring. Financial reporting processes were standardized through the development of repeatable monthly and quarterly reporting templates, improving both internal visibility and board-level communication.

The engagement also ensured a smooth transition to the company's internal FP&A leadership. Financial models, reporting templates, and documentation were fully transitioned to the internal team, allowing them to continue operating and refining these processes independently.

What began as a targeted planning engagement ultimately helped the organization establish scalable financial infrastructure to support more consistent decision-making, clearer financial visibility, and stronger communication with leadership and investors.



Rancourt Consulting has far exceeded our expectations. We highly recommend connecting with them.