

REPORTING GOAL · GOAL CATEGORY: CONTROL COSTS

On track

Every department manager tracks their own budget

Budget questions to Finance per week

Managers using Budget Watch



Started at 14 · now 6 · target 3

Started at 0 · now 7 of 12 · target 12

Figures supplied by your Finance team each week.

Weekly check-ins

- Nov 6** **Progress:** 7 managers live; questions down to 6. **Bottleneck cleared:** a 5% Over flag caught too many small accounts — Over moved to 10%, with a Watch flag at 5–10%.
- Oct 30** **Progress:** Budget Watch live; tie-out passed. **Bottleneck:** 5 managers can't see their department yet (Birst security group missing).
- Oct 23** **Week 1 complete:** workshop, tie-out to Analyze Budget, missing-account check, handover check: Ready.

Your engagement

✓ Workshop week

✓ Tie-out

✓ Handover check

✓ Mini-course: 5 of 6 done

✓ Check-in 1

✓ Check-in 2

Check-in 3 · Nov 13

Executive briefing · Nov 20

Open bottleneck

5 managers waiting for Birst access to their department

Owner: Birst administrator · due Nov 10

Escalation: the Controller, at check-in 3

Your next reporting improvements

Your choice: nothing is booked, and no savings are assumed until checked.

Spending with no budget

Managers asked about 4 accounts with actuals and no budget.

Benefit: spot unbudgeted spending earlier.

Control costs

Missing Account Check

New accounts are added during the year and can be left off the chart.

Benefit: lower the risk of an incomplete statement.

Trust the numbers

Close Pack Setup

Finance still runs 9 month-end reports one at a time.

Benefit: less manual month-end preparation.

Close faster

What ECS Reporting Advantage does next: we weigh these opportunities, recommend a solution with acceptance criteria, help line up the right people, and check each completed improvement.