

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:** threshold of 5% flagged too many small accounts — raised to 10% and \$2,500.
- 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:** intro call, working session, tie-out to Analyze Budget, handover check: Ready.

Your engagement

- ✓ Intro call
- ✓ Working session
- ✓ Tie-out
- ✓ Handover check
- ✓ Mini-course: 5 of 6 done
- ✓ Check-in 1
- ✓ Check-in 2
- Month-end review · Dec 4

Open bottleneck

5 managers waiting for Birst access to their department

Owner: Birst administrator · due Nov 10

Your backlog

Other solutions we think would help. Your choice — nothing here is booked.

Spending with no budget

Managers asked about 4 accounts with actuals and no budget. A short add-on to Budget Watch.

Control costs · quote

Missing Account Check

Two new accounts showed in actuals but not in your chart during the tie-out.

Trust the numbers · free check → Report Tie-Out

Close Pack Setup

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

Close faster · package

Keep this dashboard, your check-ins and your backlog after month-end with the **Reporting Retainer**.