

Situation

GridSource, is a leading utility contractor that specializes in infrastructure solutions for the telecom and gas industries.

GridSource is 100% private equity owned and is focused on growth driven initiatives.

Challenge



The team had to compile detailed P&L budgets at market level, then manually enter GL account level amounts into QuickBooks.



The time-consuming process led to inefficient budgeting. Additionally, manual compilation of market budgets increased risk of error and version control.

Action



Developed a detailed market level budget model. Customer controlled drivers integrate with historical actuals from system to automatically calculate budgeted amounts.



BUCS model automatically updates each year, eliminating the need to re-assemble the budget.



A web hosted dashboard allows for historical, consolidated or granular budget analysis as well as the ability to override when it makes sense.



Once budget is finalized, an export is provided for batch upload to QuickBooks.

Result

30+

market level
budgets automated

6 month

increase in budget cycle,
creating more time to
analyze and adjust



"Our company has seen rapid growth. This has come organically by launching new markets and introducing new offerings. BUCS has provided the visibility for us to grow with confidence. Our decision makers have the information they need to execute. Additionally, BUCS has enabled us to execute with minimal incremental resources."

Tom Mohl
former CEO



formerly WISECONNECT

Systems Integrated



BUCS launched the first version of our platform in 2016 to help mid-market companies improve performance through better information. This idea has blossomed into an end-to-end data management platform used by high-growth organizations, private equity firms, and top professional service firms. They rely on our platform to drive efficiency and increase decision velocity, resulting in value creation greater than 5% of revenue.