

CASE STUDY

STRATEGIC PROOF

# Integrated Business Planning at Global Manufacturing Corp

How Fortis & Peak transformed a fragmented, reactive finance function into a proactive strategic engine – delivering 94% forecast accuracy, \$4.5M in inventory savings, and 9.5% sustained revenue growth within 18 months.

# Executive Summary

## The Challenge

Global Manufacturing Corp (GMC) faced fragmented planning processes that led to inaccurate forecasting, reactive decision-making, and margin erosion across its multi-national operations.

## The Solution

Fortis & Peak implemented a comprehensive Integrated Business Planning (IBP) model, unifying strategic goals with operational execution and financial outcomes through a single, rolling planning cycle.

## The Results

Within 18 months, GMC achieved 94% forecast accuracy, \$4.5M inventory savings, 3.8% gross margin uplift, and 9.5% sustained revenue growth—transforming finance from reporting history to driving the future.

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## Client Profile: Global Manufacturing Corp



### Multi-National Presence

Operations spanning multiple continents with complex supply chain networks and diverse market requirements



### Leading Manufacturer

Established position in competitive manufacturing sector with extensive product portfolio and customer base



### Growth Focus

Strategic imperative to expand market share while maintaining profitability in volatile economic conditions

GMC represented a classic case of a mature manufacturing organization that had grown through acquisition and expansion, resulting in disparate systems, processes, and planning methodologies across its global operations. The company's finance function operated primarily as a historical reporting mechanism rather than a strategic partner in business decisions. This case study examines how Integrated Business Planning transformed GMC's financial operations from reactive budgeting to proactive value creation.

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## The Challenge: Fragmented Planning & Margin Erosion

GMC operated with traditional, siloed planning processes that created significant operational and financial challenges. Sales & Operations Planning (S&OP), Strategic Planning, and Financial Planning ran independently of each other, creating conflicting priorities and misaligned objectives across the organization.

### Inaccurate Forecasting

The sales forecast didn't align with the financial forecast, resulting in constant budget revisions and unexpected inventory costs that strained working capital and operational efficiency.

### Reactive Decision-Making

Capital allocation and resource decisions were often made based on monthly P&L reports rather than proactive, long-term strategic plans, leading to suboptimal investments and missed opportunities.

### Margin Erosion

A lack of clarity on product profitability and supply chain costs meant the company frequently accepted low-margin orders, eroding the bottom line and compromising long-term sustainability.

The fragmented approach meant that when sales made commitments to customers, finance didn't immediately understand the financial implications. Operations would then scramble to fulfill demand, often at higher-than-expected costs. This reactive cycle consumed management time, created tension between departments, and prevented the organization from making strategic, forward-looking decisions about where to invest resources and which customers to prioritize.

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# Fortis & Peak's Solution: IBP as the Enterprise Operating Model

Fortis & Peak implemented a comprehensive IBP model across GMC, designed to link strategic goals directly to operational execution and financial outcomes. This wasn't simply a technology implementation or process change—it represented a fundamental shift in how the organization planned, executed, and measured its business performance.

01	02
<b>Unified Planning Cycle</b> Established a single, rolling 24-month planning cycle that mandated consensus between Sales, Operations, and Finance, eliminating conflicting forecasts and priorities	<b>Financialization of Volume</b> Translated all operational plans into financial terms immediately, eliminating manual reconciliation and ensuring a single, shared reality across the enterprise
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<b>Profitability Alignment</b> Integrated margin analytics into demand review processes, making sales teams immediately aware of financial impact and driving focus toward high-value customers and products	<b>Strategic Resource Allocation</b> Used Executive Business Review meetings to proactively align capital and operational expenditures with highest growth strategic priorities for the next quarter

The implementation required significant change management, as it fundamentally altered how different functions operated and collaborated. Sales teams had to think beyond just winning orders to understanding the profitability implications. Operations had to shift from simply fulfilling demand to optimizing for financial outcomes. Finance evolved from being a reporting function to becoming a strategic partner in every business decision. The key was building trust through transparency—everyone saw the same data, the same forecasts, and the same financial implications, creating alignment rather than conflict.

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# Implementation Approach: Building Consensus

The IBP implementation followed a phased approach that balanced speed of deployment with organizational readiness. Fortis & Peak began with a pilot in one business unit to prove the concept and refine the processes before rolling out across the entire enterprise.

Key implementation elements included:

- Executive sponsorship and governance structure
- Cross-functional team with representatives from all planning functions
- Technology platform enabling real-time financialization
- Training programs to build capability across the organization
- Change management communications to drive adoption
- Continuous improvement processes to refine the model

The implementation emphasized building consensus rather than imposing a top-down solution. By involving stakeholders from sales, operations, and finance in designing the processes, Fortis & Peak ensured that the IBP model addressed real business problems rather than theoretical best practices. This collaborative approach significantly accelerated adoption and reduced resistance to change.

## Timeline

6-month pilot phase followed by 12-month enterprise rollout

## Investment

Technology platform, consulting services, and internal change management resources

## Success Metrics

Adoption rates, forecast accuracy, and financial performance improvements

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## Measurable Financial Outcomes

The implementation of the IBP model transformed GMC's financial predictability and profitability, moving them from reactive budgeting to proactive, strategic finance. The following table presents the key financial metrics before and after implementation:

Financial Metric	Before IBP	After IBP (18 Months)	Fortis & Peak IBP Uplift
Consensus Forecast Accuracy (1-3 Months)	78%	94%	<b>+16%</b>
Inventory Carrying Costs	Baseline (High due to safety stock)	-12%	<b>\$4.5 Million Savings</b>
Gross Margin Uplift	Baseline	+3.8%	<b>Strategic Shift in Orders</b>
Sustained Revenue Growth Rate	4.5%	9.5%	<b>+5%</b>
Budgeting Cycle Time	6 weeks (Annual)	2 weeks (Rolling Forecast)	<b>Reduced by 66%</b>

These improvements represented significant value creation for GMC. The forecast accuracy increase meant that the organization could make more confident decisions about investments and resource allocation. The inventory savings directly improved cash flow and return on assets. The gross margin uplift demonstrated that the company was successfully shifting its business mix toward more profitable products and customers. The revenue growth acceleration showed that strategic focus on high-value opportunities was paying dividends. And the dramatically reduced budgeting cycle time freed up management bandwidth for strategic work rather than administrative reconciliation.

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## Key Success Factors



### Executive Sponsorship

Active, visible support from the CFO and business unit leaders ensured that IBP became the way the business operated rather than just another process initiative



### Strategic Alignment

Linking planning directly to strategic priorities ensured that operational decisions drove business outcomes rather than just operational efficiency



### Technology Enablement

Real-time financialization required integrated systems that could translate operational plans into financial statements automatically and accurately



### Cross-Functional Collaboration

Breaking down silos required building trust and shared understanding across sales, operations, and finance through transparent processes and data



### Continuous Improvement

Regular reviews and refinements based on actual performance ensured the model evolved to meet changing business needs and market conditions



### Change Management

Comprehensive training and communications helped employees understand not just what was changing but why, accelerating adoption and reducing resistance

These success factors were interdependent—strong executive sponsorship enabled the cross-functional collaboration, which in turn made the technology implementation more effective. The continuous improvement mindset ensured that early challenges became learning opportunities rather than reasons to abandon the initiative. Together, these elements created a virtuous cycle where each success built momentum for the next.



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## Lessons Learned & Best Practices

Start with Business Problems, Not Technology

The most successful IBP implementations begin by identifying specific business problems that fragmented planning creates, then designing solutions that address those pain points directly

Build Consensus Through Transparency

When everyone sees the same data and understands the same financial implications, it becomes easier to build alignment rather than forcing agreement through authority

Focus on the "Why" as Much as the "What"

Employees need to understand not just what processes are changing but why those changes matter to business outcomes and their own success

The GMC implementation taught several valuable lessons that apply to other organizations considering IBP. First, the change required patience—transformation doesn't happen overnight, and early setbacks are normal. Second, the finance function needed to evolve its skill set, moving beyond traditional accounting expertise to include business partnering and strategic thinking capabilities. Third, technology was necessary but not sufficient—processes and people changes were equally important. Fourth, starting with a pilot in one business unit provided a proof point and learning opportunity before enterprise rollout. Finally, celebrating early wins built momentum and demonstrated the value of the changes to skeptical stakeholders.

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# Conclusion: From Reporting History to Driving the Future

The IBP model transformed the finance function at GMC, providing the predictable performance and strategic agility required to drive profitable, sustainable growth in a volatile market. Finance moved from reporting history to driving the future, becoming a true strategic partner in business decisions rather than just a compliance function.

94%

Forecast Accuracy

Consensus forecasts within 1-3-month windows

\$4.5M

Inventory Savings

Reduced carrying costs through better planning

+3.8%

Gross Margin Uplift

Strategic shift toward profitable orders

9.5%

Revenue Growth

Sustained growth rate through strategic focus

The transformation at GMC demonstrates that Integrated Business Planning is more than just a process improvement—it's a fundamental rethinking of how finance creates value in an organization. By integrating strategic goals with operational execution and financial outcomes, IBP enables organizations to move from reactive, siloed decision-making to proactive, aligned value creation. For other organizations facing similar challenges of fragmented planning and margin pressure, the GMC case provides a roadmap for how to transform finance from a reporting function into a strategic driver of growth and profitability.

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Fortis & Peak's **Strategic Proof** series goes beyond traditional case studies to provide clear, evidence-based validation of our methodologies in action. Each engagement demonstrates how a foresight-driven strategy, when fully aligned with finance and operations, translates into measurable business outcomes. These are not theoretical perspectives—they are real-world applications that showcase how complex challenges are systematically transformed into scalable growth, operational excellence, and sustained competitive advantage.

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