

Accelerate Future Growth with Digital Transformation in Finance

Industry: Services/Real Estate
Revenue: Approx. \$673 Million
Employees: 40 (Finance Team)



Mission-critical priority

To gain efficiencies and support future growth, the CFO needed to lead a digital transformation for the finance function to enable a greater focus on business partnership, grow cash reserves and improve investment processes.



How Gartner helped

The client:

- **Identified inefficiencies** in finance processes that resulted in improved cost savings and streamlined the transition to automation.
- **Leveraged Gartner research** and Gartner BuySmart™ proposal review to select the best-fit technology and negotiated improved contract terms.
- **Designed a new finance competency model** to formalize career paths for finance staff.



Outcome

With support from Gartner for Finance, the client:

- **Selected** the right technology vendor to support its BI and RPA systems
- **Negotiated** improved contract terms, saving more than \$70K
- **Transitioned** to automated solutions with improved and documented finance processes
- **Created** a new finance competency model to align needed skills and formalize compelling career paths