

The Finance Consulting Group

Empower Main Street: Google-Level Finance for Your Small Business.

Business Case.

Completion Time: 40 hours - [Link to MVP](#)

The Problem

As a business owner of Awesome Company, you likely have a [spreadsheet](#) pulled from Salesforce containing sales pipeline data for the past three months. Imagine you'd like to make sense of this data. Perhaps you're looking for a data-driven strategy to increase sales, understand how your different lines of business are performing, or develop your first operating review with your Sales and Marketing team.

With my expertise in managing and optimizing large businesses at Google, and in bringing innovation as a trusted finance partner to startups incubated at Kraft Heinz, I can help you run your business the way Google would.

My Solution (What I Would Do)

1. **Revenue Projection Model:** I will build a formula-based revenue projection model that pulls insights relevant to the business. This model will use fields your small business typically uses, such as Account Name, Annual Recurring Revenue, Opportunity Create Date, Close Date, Sales Rep, and Marketing Lead Source (shaded blue). Any assumptions I make during the project will be documented for your reference.
2. **Data Insights:** In addition to the predefined fields, I will use pivot tables to generate at least one additional insight from the data point.

3. **Actionable Presentation:** Once the model is built and insights are identified, I will create a compelling PowerPoint presentation that highlights these findings. This presentation will be designed to tell a clear and actionable story to your Sales and Marketing stakeholders. The presentation will be visually appealing and leverage elements like "pretty tables" and waterfall charts. The presentation will also include live links to the underlying Excel model for easy reference.
4. **Transparency:** I will document any assumptions I make throughout the process, ensuring transparency and allowing you to follow my work.

Outcomes (What You Get)

- Identification of key trends crucial for your Sales and Marketing partners to achieve their team goals.
- Breakdown of sales rep productivity and sales/marketing funnel activity.
- Crucial analysis of sales profitability, allowing you to make informed and strategic business decisions.

[Link to MVP](#)

Let's strategize with you to improve your business.

Next Steps

If you're interested in Google-level finance for your small business, let's get in contact.

Daniel Pascual - CEO & Founder, The Finance Consulting Group

Ex. Google, JP Morgan & Kraft Heinz

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