Financial Workflow Automation in Construction Industry

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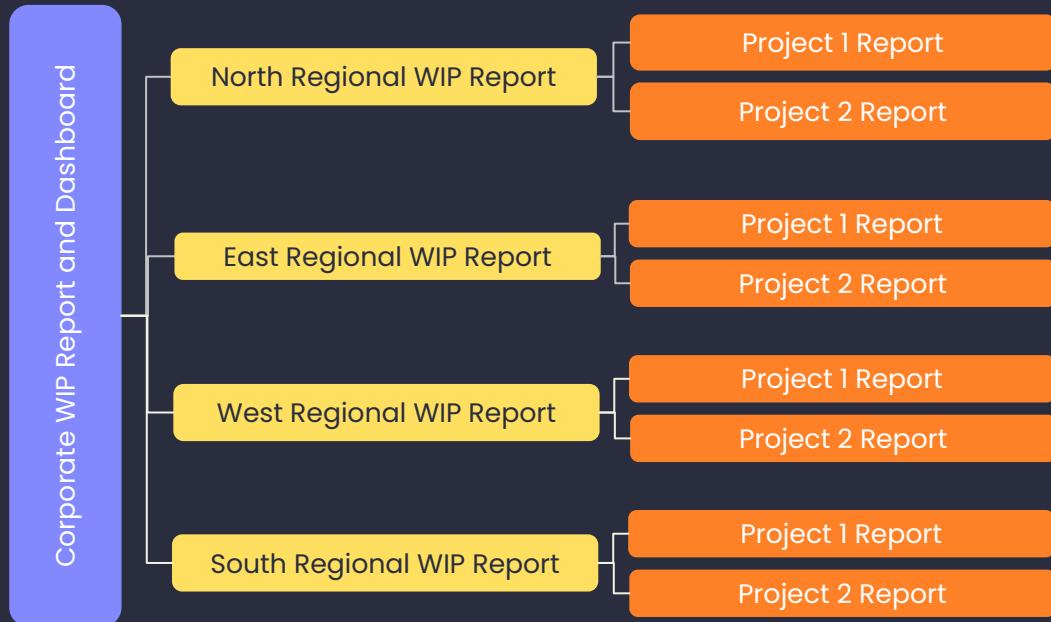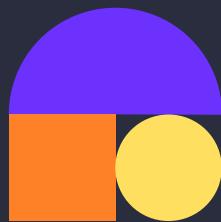
Business Problem

- The General Contractor company currently relies on a highly manual, email- and Google Drive-based process to collect, consolidate, and report financial data from over 200 construction sites across the United States.

- This approach results in operational inefficiencies, data quality issues, scalability limitations, and heightened data security risks.

- The lack of automation and standardization limits the Financial team's ability to access timely, accurate, and secure financial insights necessary for effective oversight and decision-making.

Corporate WIP Report and Dashboard

North Regional WIP Report
- Project 1 Report
- Project 2 Report

East Regional WIP Report
- Project 1 Report
- Project 2 Report

West Regional WIP Report
- Project 1 Report
- Project 2 Report

South Regional WIP Report
- Project 1 Report
- Project 2 Report
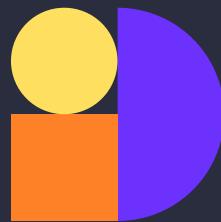
an automated and centralized financial reporting workflow for 200+ construction sites.
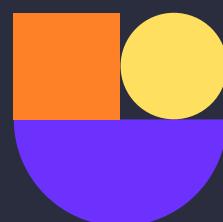
OBJECTIVE 1

replace legacy manual processes for tracking, data transcription, reconciliation, file formatting & repair

OBJECTIVE 2

100% reduction in email-based data collection; 40% faster reporting cycles; zero critical data discrepancies.

OBJECTIVE 3

Deliver real-time visibility and aggregate insights for proactive, data-driven financial decision-making.

Key Stakeholders

Business

- CFO
- Heading of Accounting
- Finance Controller
- IT Controller
- Project Managers
- Accountants

Product

- Product Manager
- Product Analyst
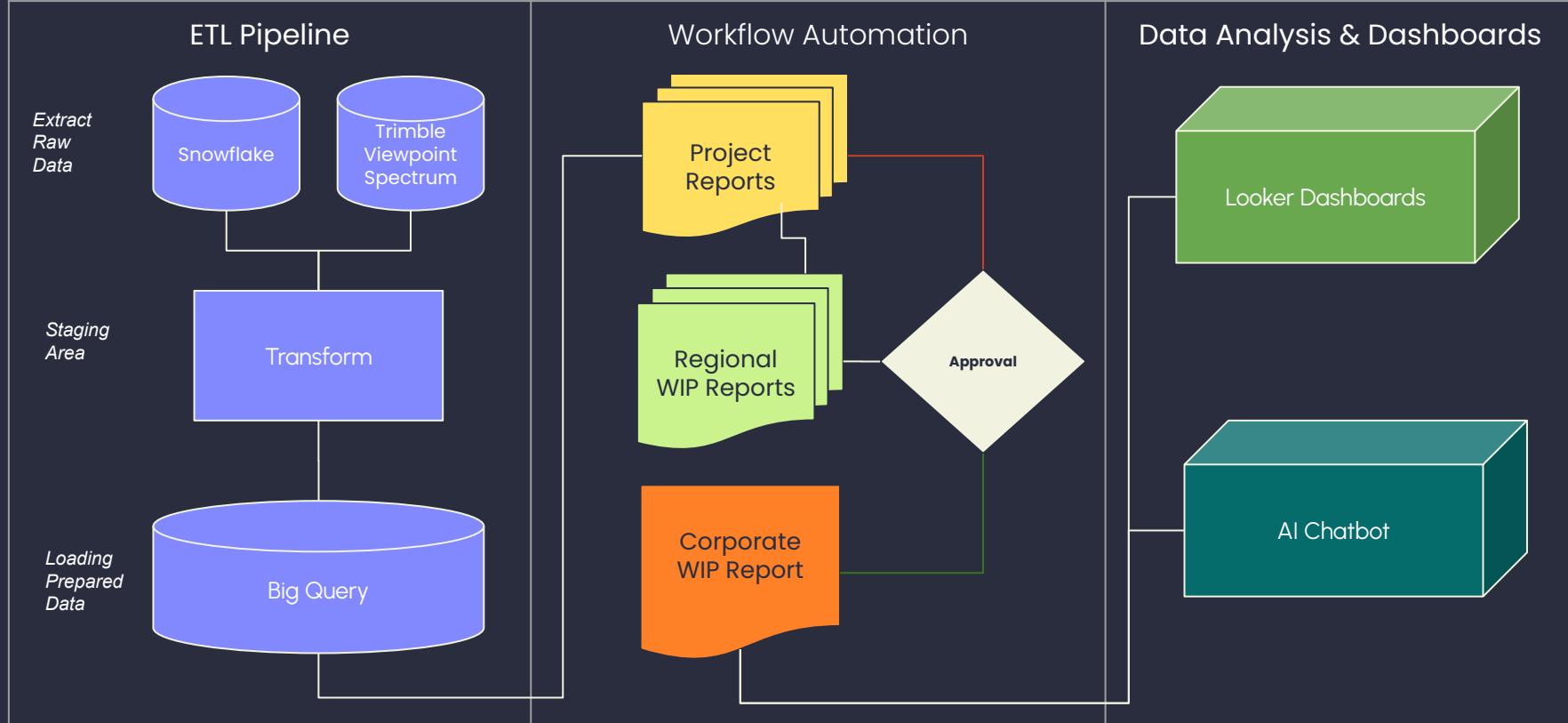
External

- External System Specialists
- SMEs
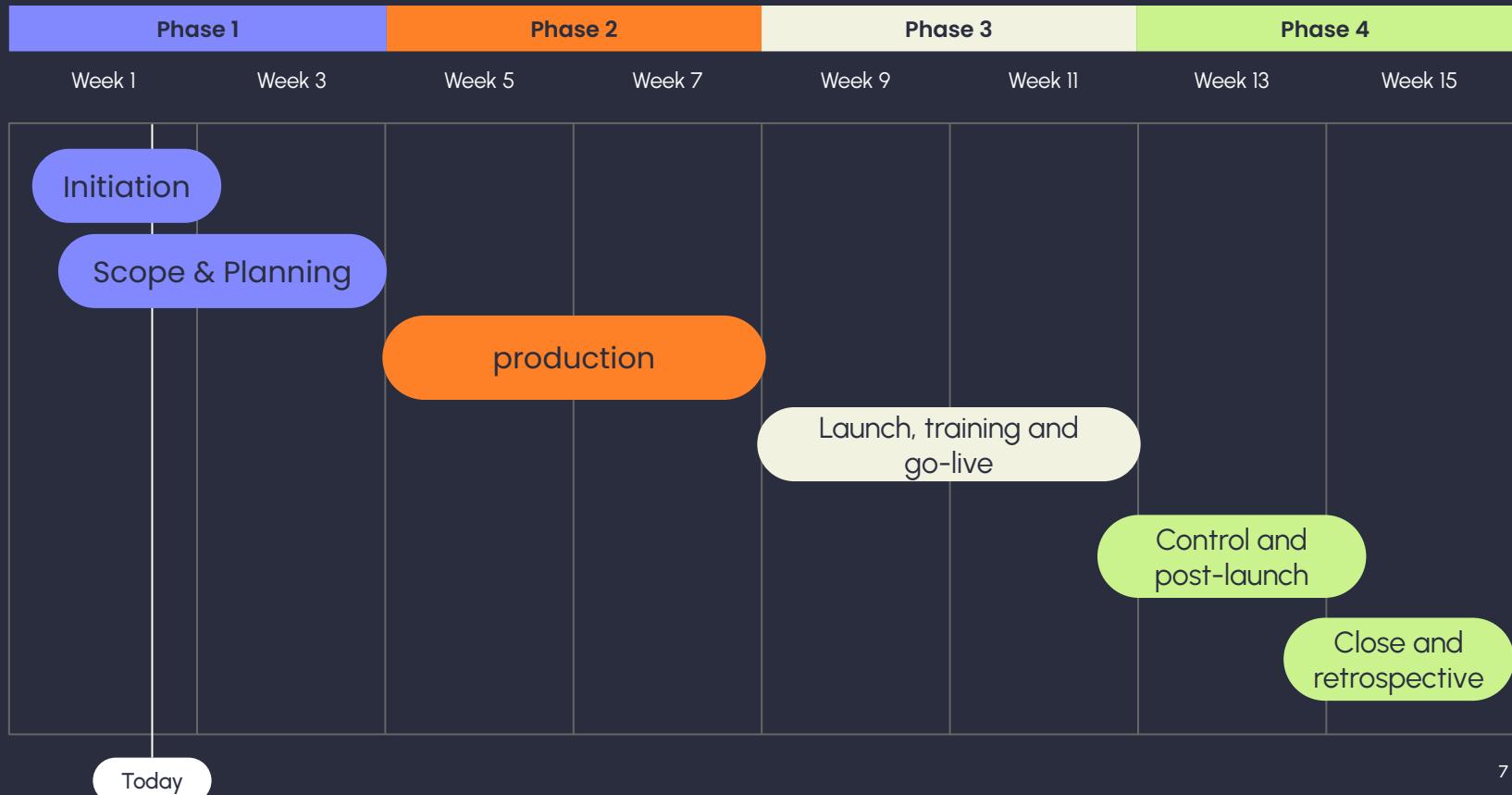
Engineering

- Technical Consultants
- Automation
- Front end/Back end
- AI
- QA

Scope of work

Project Timeline

	Phase 1	Phase 2	Phase 3	Phase 4

Week 1 · Week 3 · Week 5 · Week 7 · Week 9 · Week 11 · Week 13 · Week 15

Task 1 — Initiation

Task 2 — Scope & Planning

Task 3 — production

Task 4 — Launch, training and go-live

Task 5 — Control and post-launch

Task 5 — Close and retrospective

Today

RACI matrix

This is a RACI matrix. It shows which team members are responsible, accountable, consulted, or informed at each stage of the project.

	CFO/ Head of Accounting	Finance Controller	Automation Engineer	Technical Consultant
Project phase 1	C	A	I	R
Project phase 2	I	C	R	A
Project phase 3	I	A	C	R
Project phase 4	I	A	C	R

R Responsible
A Accountable
C Consulted
I Informed

Lessons learnt
from similar projects in past

INCREMENTAL WINS MATTER

Transitioning 200 sites at once is high-risk; a phased rollout allows for process tuning based on real-world feedback.

FIELD ADOPTION IS KEY

Technical success fails if site managers find the new system harder than email; user experience (UX) is a risk factor.

DATA HYGIENE IS DEBT

Clean data is expensive to retroactively fix; building validation at the point of entry is cheaper than fixing it in the dashboard.

Thank you