



From Cost Center to Growth Engine

The Strategic FP&A; Playbook — Executive Summary (2025)

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Only 2% of organizations consider their FP&A; teams optimized
46% of FP&A; time is spent on data collection
77% of CFOs cite forecasting as a top risk

FP&A; must evolve from reporting the past to shaping the future. AI, automation, and driver-based planning are now the differentiators that turn finance into a strategic insights engine.



The Five Pillars of Modern FP&A;

1) Driver-Based Modeling	Build models that reflect operational reality, not static accounts.
2) Scenario Planning & Rolling Forecasts	Maintain 12-month forward visibility; plan upside, base, downside.
3) Intelligent Automation & BI	Automate data flows and dashboards; free analysts to think.
4) Strategic Business Partnership	Embed finance in decisions; influence through clear narratives.
5) Performance Management & Improvement	Track accuracy, efficiency, and impact; iterate continuously.

Case Highlight: \$3.2M cost savings • +22% forecast accuracy • –40% reporting cycle time

The 12-Month Transformation Roadmap

Phase 1 (Months 1–3)	Assessment & Strategy • Quick wins • Reporting calendar • Rolling forecast start
Phase 2 (Months 4–8)	Driver-based models • Automation & dashboards • Strategic partnering
Phase 3 (Months 9–12)	AI & predictive analytics • Performance management • Best-practice codification

Year 1: 3–5x ROI	Year 2: 5–8x ROI	Year 3+: 10x+ ROI
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Schedule Your FP&A; Transformation Consultation

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