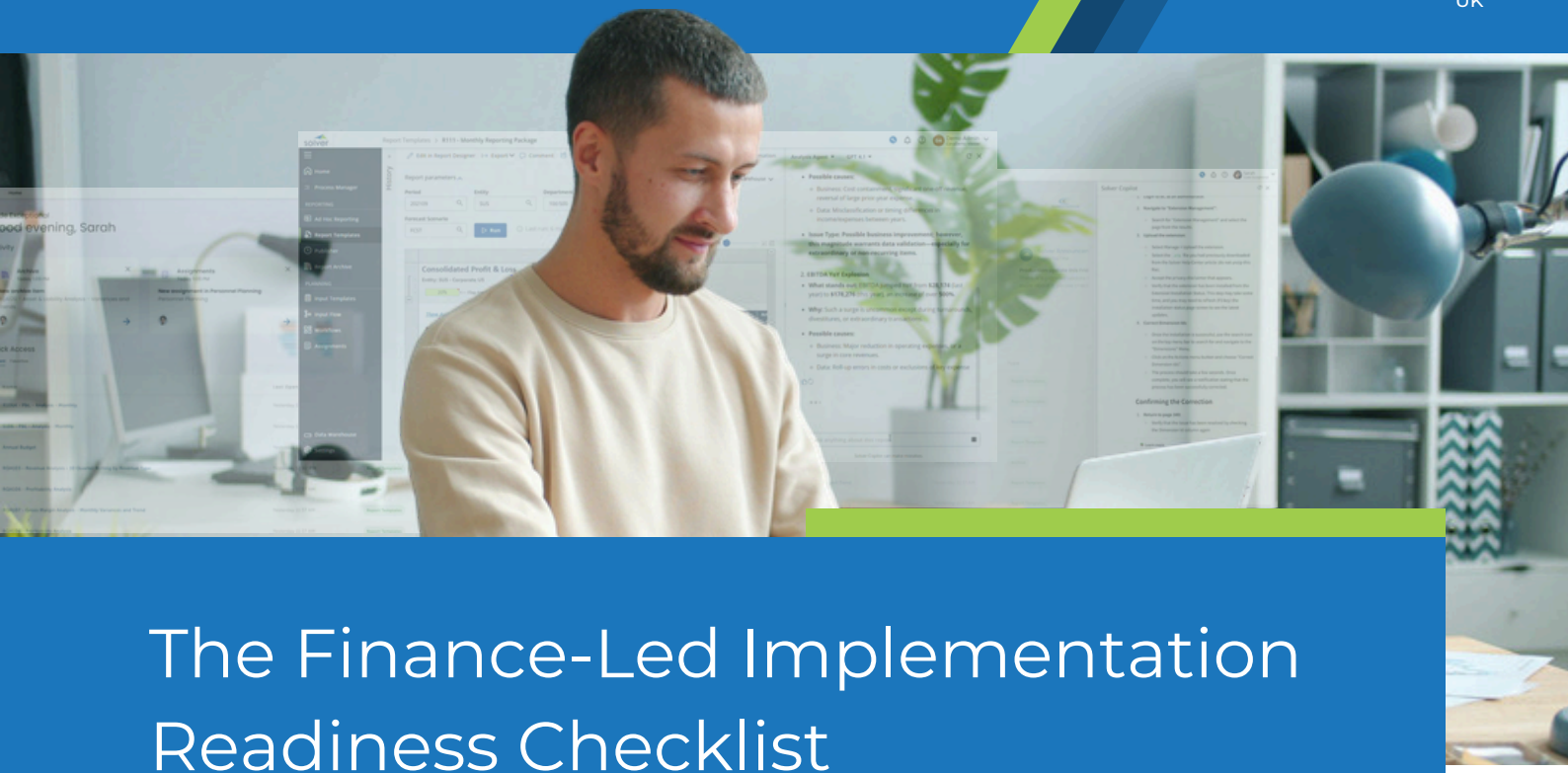
Solver Finance Structure Series



The Finance-Led Implementation Readiness Checklist

Questions to answer before implementing a reporting, consolidation, budgeting, or forecasting platform.

Use this checklist to prepare for an implementation discussion and identify the information your finance team will need to define before reporting, consolidation, budgeting, or forecasting can be structured inside a platform.

1. Finance process and outputs

- Which finance process are we addressing first?
- What outputs does the team need to produce?
- Who reviews or uses those outputs?
- How often does the process run?

2. Data sources and finance logic

- Which systems and files provide the required data?
- Which mappings, calculations, adjustments, or assumptions shape the output?
- Are entities, currencies, departments, cost centres, or projects part of the model?
- Who understands how the current process works?

Contributors and workflow

- Who provides information, reviews it, and approves it?
- How are inputs, comments, and assumptions currently collected?

- Which deadlines and review stages apply?
- How should access differ by role, entity, or department?

Implementation readiness

- Who will own the process during implementation?
- Which reports, models, templates, and supporting documents are available?
- Who will test and approve the new structure?
- What would a successful first cycle look like?

Ongoing use

- Who will maintain the process after go-live?
- What support will the team require?
- Are new entities, users, or reporting requirements expected?
- Which finance process could be added in a later phase?

Preparing for a finance system implementation?

A useful implementation discussion starts with the process your team needs to support, the outputs it needs to produce, and the structure required behind them.

Use this checklist to prepare internally, or speak to Solver UK about how your reporting, consolidation, budgeting, or forecasting process could be structured inside Solver.



Start with the finance process under the most pressure

Talk to Solver UK about how your current reporting, consolidation, budgeting, or forecasting process could be structured inside Solver.

+44 20 3488 1750 | info@solveruk.co.uk

WWW.SOLVERUK.CO.UK