Gartner for Finance

Accelerate Future Growth with Digital Transformation in Finance

Client Success Story

With increasing regulations and an organizational need to improve efficiency, the CFO was tasked with delivering a digital transformation for their finance function. With help from Gartner, the CFO identified the right technology solution and negotiated modified contract terms, realizing a significant cost savings of more than $70K.

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

Leveraging Gartner benchmarking tools, the CFO and team identified inefficiencies in finance processes that resulted in improved cost savings and streamlined the transition to automation. Leveraging Gartner research and Gartner BuySmart™ proposal review, the client selected the best-fit technology and negotiated improved contract terms. Additionally, Gartner experts helped the CFO design a new finance competency model to formalize career paths for finance staff.

Mission accomplished

With support from Gartner, the client successfully:

• 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