



CFO PLAYBOOK

YOUR GUIDE TO UPGRADING FINANCE TOOLS IN Q4 2025/Q1 2026

Partnering with the Right Consultancy for a
Future-Proof Finance Transformation

Empowering UK Finance Teams with Strategic Technology Solutions

 boltconsulting

INTRODUCTION: WHY Q4 2025 AND Q1 2026 IS THE MOMENT TO ACT

The UK finance sector is at a pivotal juncture. Changing regulatory requirements, evolving IFRS standards, and a need to be at the cutting edge of technology all demand robust, compliant systems that add value.

Meanwhile, the rise of AI-driven analytics, cloud-based platforms, and real-time reporting is reshaping how finance teams operate.

Upgrading your finance tools in Q4 2025 or Q1 2026 positions your organisation to meet these challenges head-on, ensuring compliance, operational efficiency, and scalability for future growth.

However, the success of your transformation depends on more than just choosing the right software. A poorly planned or executed upgrade can lead to costly delays, data migration errors, or systems that fail to meet your needs.

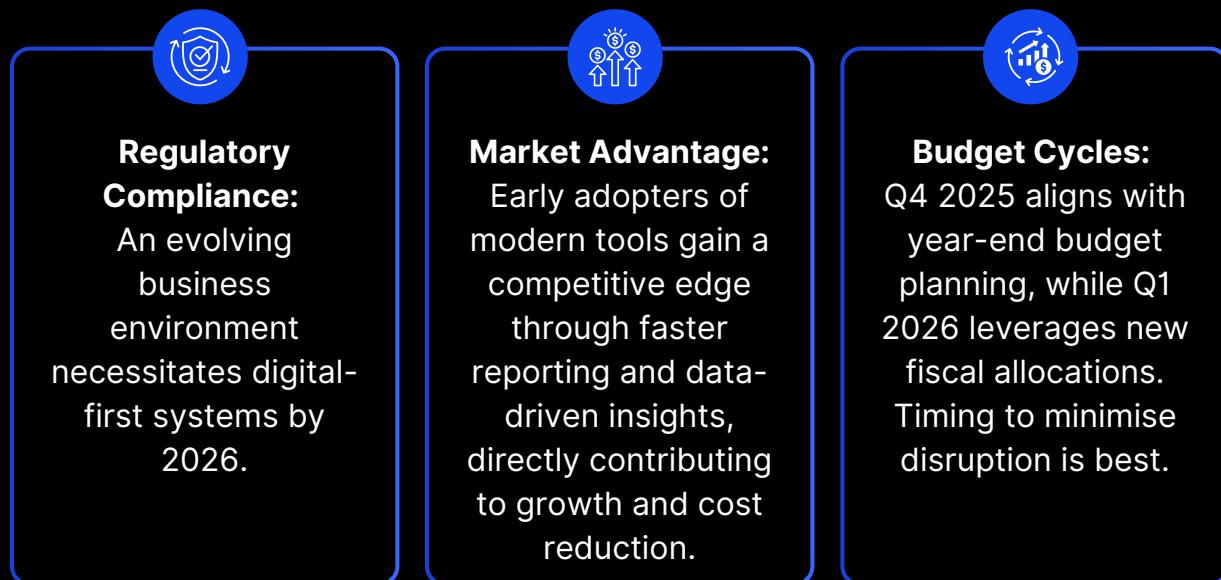
The key lies in partnering with a consultancy that understands your business, aligns technology with your goals, and supports you beyond the go-live date. This playbook equips your finance teams with the knowledge to make informed decisions, from selecting tools to choosing a consultancy partner that ensures long-term success.



What You'll Learn in This Playbook:

- How to assess your finance solution needs in the context of UK regulations and market trends.
- Critical factors to evaluate when selecting a consultancy partner for implementation.
- A practical timeline to plan your upgrade for Q4 2025 or Q1 2026.
- Actionable tools and strategies to maximize ROI and minimize risks.

Why Timing Matters:



Sign up to our newsletter to get access to exclusive tools and insights for a seamless finance tool upgrade.





THE PLAYBOOK – A STEP-BY-STEP GUIDE TO SUCCESS



STEP 1: DEFINE YOUR FINANCE TOOL REQUIREMENTS

A successful finance tool upgrade begins with a clear understanding of your organisation's needs. Finance buying committees must align stakeholders - finance, IT, operations, and leadership - to ensure the selected tools deliver value across the business.

Here are key considerations to guide your requirements gathering:



Current Pain Points in your Processes: Ensure your tools solve real business critical challenges, by ensuring you've accurately identified where your current processes are causing pain to the business. If you need a fresh pair of eyes, consult with an expert like Bolt Consulting.



Scalability for Growth: Select platforms that accommodate business expansion, such as multi-entity reporting, multi-currency support, or cloud-based accessibility for remote teams. Where specific planning, or scenario modelling, or consolidation is a need, ensure this is identified.



Automation and Efficiency: Prioritise tools with AI-driven features (e.g. automated workflows, agentic processing, predictive forecasting) to reduce manual workloads and improve accuracy.



Seamless Integration: Your new tools must integrate with existing systems like ERP (e.g., SAP, Oracle), CRM (e.g., Salesforce), or HR platforms to avoid data silos and a single source of truth.



User Adoption: Choose intuitive platforms with robust training resources to ensure your team embraces the new system. Consider user adoption from the outset, instead of considering it an afterthought.

Common Pitfalls to Avoid:

- Choosing a tool based on vendor hype rather than business fit.
- Underestimating data migration challenges, which can disrupt operations.
- Overlooking long-term costs, such as licensing fees or maintenance.

Action Item: Convene your finance decision making committee to create a high level strategic checklist. Include input from all relevant departments to ensure alignment. If you need support, Bolt Consulting can assist this process, helping you prioritise needs and avoid costly oversights.



STEP 2: CHOOSE THE RIGHT CONSULTANCY PARTNER

Selecting a consultancy is as critical as choosing the right tool. A skilled partner guides you through tool selection, implementation, and post-launch optimisation, ensuring your investment delivers results. Here's how to evaluate potential partners:

Unbiased Tool Selection

- **Why It Matters:** Some consultancies prioritise vendor partnerships over your business needs, limiting your options. A partner that evaluates tools objectively ensures you select a platform aligned with your goals. Single vendor consultancies inherently are biased to the platform they offer.
- **Key Questions:** Does the consultancy have ties to specific vendors? Can they demonstrate experience across platforms in the space? Do they have relationships across multiple platforms, and can talk to the pros and the cons?

Proven Implementation Expertise

- **Why It Matters:** Implementation is the make-or-break phase. Errors in data migration, configuration, or user training can lead to delays, cost overruns, or system failures.
- **Key Questions:** Are their consultants certified in leading finance platforms? Can they provide case studies of successful implementations for other finance teams?

Ongoing Support Post-Go-Live

- **Why It Matters:** The weeks and months following launch are critical for user adoption and system stability. A consultancy that offers post-go-live support ensures your team maximises the tool's potential.
- **Key Questions:** Do they provide training, troubleshooting, and optimisation services? How do they handle unexpected issues after launch? Do they strike you as a team that will see you right if something goes awry?

Action Item: Request detailed proposals from shortlisted partners & vendors, including timelines, deliverables, and references. Ask for metrics like implementation success rates or time-to-value for past clients.



STEP 3: PLAN YOUR TIMELINES IN ADVANCE

Timing your finance tool upgrade strategically minimises disruption and maximises ROI. Q4 2025 planning for a post year-end kick off, with go live in Q1/Q2 2026 is sensible and sufficient time to do it properly. Here's a detailed timeline to ensure success:

3-6 months out (Now):

- **Conduct a needs assessment and compile your initial requirements checklist.**
- **Conduct research or engage an independent advisory consultancy to research tools and shortlist platforms based on scalability, compliance, and integration capabilities. Consider the pros and cons of any tools.**
- **Engage a consultancy to guide tool selection and begin detailed project scoping.**

1-3 months out:

- **Finalise tool selection with your consultancy's input.**
- **Develop a detailed implementation plan, including data migration, testing, and training schedules.**
- **Secure stakeholder buy-in and allocate budgets.**
- **If possible, try to engage your consultancy to negotiate the best deal on licensing on your behalf. Bolt Consulting can help you with this.**

1 month out:

- **Begin data collation in readiness for implementation, and identify and resolve any issues early.**
- **Conduct user engagement sessions to ensure strong team adoption.**
- **Sign off the phased delivery plan and post-go-live support plan, ensuring each step of your upcoming transformation programme goes according to schedule and budget.**

Go Live & Beyond

- **Launch the new system with close monitoring by your consultancy partner.**
- **Address user feedback and resolve any issues promptly.**
- **Optimise the system based on early usage data to maximize ROI.**

While this can be a daunting process which consumes time, energy and money, trusting and leaning on experienced partners who've been there plenty of times before can pay dividends. If you want support through any Finance Solution need you may have, contact us for a no-obligation consultation.



We hope this playbook has been useful to you. If you think we can help contact us at info@boltconsulting.co.uk or call us on +44 (0) 208 058 7005



WHY BOLT CONSULTING IS YOUR IDEAL PARTNER



PARTNER WITH BOLT CONSULTING FOR A SEAMLESS TRANSFORMATION

Upgrading your finance tools is a high-stakes endeavor that demands expertise, objectivity, and ongoing support. Bolt Consulting is uniquely positioned to guide your finance buying committee through every stage of the process, ensuring a future-proof transformation that delivers measurable results.

WHY CHOOSE BOLT CONSULTING?

- **Technology-Agnostic Advisory:** Unlike consultancies tied to specific vendors, we provide unbiased recommendations tailored to your business. Whether it's Anaplan, Pigment, Planful, Workday, IBM or another, we evaluate platforms based on your unique needs, ensuring the best fit for your finance team. We also cover data integration tools like Alteryx, MuleSoft and more.
- **Expert-Certified Implementation:** Our consultants hold certifications across leading finance platforms, with a track record of delivering complex implementations on time and within budget. From data migration to user training, we minimize risks and ensure a smooth rollout.
- **Post-Go-Live Support:** We go beyond the launch, offering tailored training, troubleshooting, and optimisation services to maximise user adoption and system performance. Our support ensures your team is confident and your tools deliver long-term value.

CASE STUDY: TRANSFORMING A UK FINANCE TEAM

A UK-based Lloyds of London Insurance firm needed to upgrade its legacy FP&A system to enable faster forecasting and reporting. Bolt helped them with Pigment, the chosen technology, and supported enablement. Our certified team with strong partnership from client-side delivered implementation 25% faster than industry benchmarks, with zero data migration errors. Post-go-live, our support reduced user adoption time by 40%, saving the client substantial operational costs within the first year.

Bolt provided high calibre resources from their Professional Services Team – consultants and solution architects who were experienced and had great expertise in Pigment. Where we had questions outside of scheduled hours, Bolt were quick to respond with detailed information and helpful insights. They also made time for calls at short notice. Overall, they went above and beyond what we expected of consultants!

Max S. Planning & Reporting Manager

CLIENT TESTIMONIAL



SEAMLESS SUPPORT POST GO-LIVE

We at Bolt Consulting recognise that your journey only begins at go-live. It's the moment that the investment you've made in solutions should start delivering value to you, your team and your business. As a result we've made the success of your engagement of paramount importance with a range of support options.

INCLUDED SUPPORT

Our standard engagement includes comprehensive early-life support as standard, ensuring that you hit the ground running.

- **Expert-led training & enablement:** Our consultants will provide tailored support, training and enablement to your key system administrators, ensuring they are equipped with sufficient knowledge of the platform and training to self-serve and maintain the system post-go-live.
- **Inclusion of time for any issues:** We go beyond the launch for any teething issues you might face, or tweaks toward reports or dashboards, and minor amends to process flows etc. Where you might find data issues or integration problems, we build in a period of time for you to use against these activities, so you know you're covered.

ADMIN AS A SERVICE

For even more comprehensive coverage, we offer a range of extended support packages which can be tailored to your needs. These include additional time allowances every single month, as well as reduced consulting rates for further engagement.

Admin-as-a-Service can be used for training more users or making adjustments to your methodology once live, this is to really help you get the most out of your new systems! The inclusions can be tailored to your specific needs.

**Click here to learn more about
Admin-as-a-Service**



TAKE THE NEXT STEP TOWARD TRANSFORMATION

Your Q4 2025 or Q1 2026 finance tool upgrade is an opportunity to drive efficiency, compliance, and growth. The right consultancy partner ensures your investment delivers lasting value.

Get Started Today:

- **Download Exclusive Resources:** Enter your email to access our requirements checklist and implementation timeline template, designed to streamline your upgrade process.
- **Book a Free Consultation:** Schedule a 30-minute call with Bolt Consulting's experts to discuss your finance transformation goals.
- **Stay Informed:** Subscribe to our newsletter for the latest insights on finance technology trends and UK regulatory updates.

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Your Partner for Future-Proof Finance Transformation