

Agile forecasting with Mosaic

Time is of the essence and managing the financial budget process requires lots of it. Learn how HappyCo leveraged Mosaic to accelerate month-end close and open more time for agile forecasting.



1

Click budget vs. actuals (BvA)

15 Hours

Saved during budget vs. actuals

90%

Faster data consolidation and aggregation

HAPPYCO

Industry Real Estate Software

 Xero

 Salesforce

Justworks

Company size 51-100 Employees

Key Pain Points

Manual month-end consolidation

Insufficient time for budget analysis

Time to advise vs. report on past

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About HappyCo

HappyCo is a leading real-time operations platform for inspecting, managing and monitoring residential properties and commercial facilities.

When customers use their software, communities get stronger. Their tools empower multifamily property managers to improve their operations and maximize returns, which means they're building better experiences for their residents.

HappyCo is on a mission to improve property management and deliver happiness to residents and property managers.

Staying Happy While Budgeting in Spreadsheets

Performance minded leaders like the team at HappyCo understand the importance of building and tracking a budget. A budget helps leadership take a practical and pragmatic approach to goal setting while measuring financial progress against business milestones.

A good budgeting process looks forward more than backward, and helps the team avoid pitfalls by quickly adapting to stay on track. Being proactive and leveraging real-time data is key to ensuring the outcomes a good budget aims to predict. Tight collaboration with business leaders is critical to staying ahead of dynamic business conditions.

But multi-currency, departmental budgeting and forecasting in spreadsheets is backwards-looking and extremely time consuming. It's difficult to explain all the assumptions that go into every cell and makes collaboration with business leaders confusing.

Before Mosaic, the HappyCo team would spend days consolidating data from multiple ERPs in several currencies, then comparing it to their forecast (BvA). Due to the complexity of the business, by the time they would close the month and publish reports, they were only left with a small window of time to update the budget before starting the close process all over again. Sound familiar?

This narrow window left little time for budget reforecasting—a necessary part of intelligently reviewing performance and allocating resources for any company.



Andrew, VP Finance HappyCo.

"I wanted to run a finance team that was a strategic partner to the organization. To realize this vision, we needed to get from monthly cycles that gave us outdated data to having real-time insights for future-facing budget decisions."

A Real-Time, Collaborative Budgeting Platform

The team was looking for ways to optimize and run faster BvA cycles while gaining insights that would help the company make smarter decisions for the road ahead.

To meet the growing demand for their services, HappyCo aimed to accelerate their BvA process by choosing Mosaic as their strategic finance platform.

With Mosaic in place, HappyCo was able to unify its multi-step financial month-end close process inside one platform. Data from their ERP, CRM, HR, and billing systems now flow straight into a central hub that also houses their budget and plan. The entire team has easy access, preventing unwanted delays from hand-offs or translations.

Additionally, expense and revenue forecast variances are available in real-time through a budget tracking canvas so the team can quickly pull insights and drill down into the data on the spot. All critical information is available on-demand so reports and insights could be shared quickly and accurately with key stakeholders.

With much of the heavy lifting out of the way, the team is able to focus on bigger variables such as the impact of growing headcount. Best of all, they could easily model the impact of new expenses or revenue in real-time and provide leaders with a POV to help drive better decision-making.

Benefits experienced



Connected Team

Leveraged a central platform vs. a lengthy multi-step handoff process.



Faster BvA

Real-time data flowing into a budget vs. actuals dashboard.



Smarter Budgeting

Time savings from month-end close enabled smarter forecasting.

Aligned, Agile and Happy Teams

Mosaic was able to simplify complex and tedious financial consolidation and analysis enabling HappyCo to prepare budget vs. actuals in seconds. The increased time savings have enabled a different kind of budgeting for HappyCo—a more dynamic and agile version where they can provide the strategic advice their company needs today, not next week.

“With Mosaic, we were able to move from a production line approach to a desired live and agile process. Having many of the heavy-lift items automated gave us at least 60% more time to focus on better forecasting to help the company navigate future decisions.”

— Andrew Vernik, VP Finance at HappyCo

Mosaic and HappyCo are working together to unlock new ways to scale their business to new heights. As HappyCo continues to focus on best-in-class property management tools, Mosaic can help them run a more productive budgeting process.

HappyCo is now able to...



Connect their team through a central platform.



Streamline month-end close.



Analyze BvA within a few clicks and in real-time.



Quickly add assumptions and model impact to budget.

**The best companies
are thoughtful companies.**

See how you can run better budgeting.

[Request Demo](#)