

Ecosystem Investment Partners (EIP) is a private equity firm and national leader in large-scale ecological restoration with over 48,000 acres of wetlands and 220 miles of restored streams.



Financial Services
FP&A Forecasting

| Business Challenges

- **Disconnected Planning:** Budget tracking disconnected between departments with manual legacy processes causing bottlenecks and delays.
- **Project Visibility:** Inability to see full project life cycle migration and associated data; difficult to manage several versions of crucial documents.
- **Limited Reporting:** Current software did not offer reliable, comprehensive reporting of dynamic data to senior leadership.

| Solutions

- **Data Consolidation:** Automated data feeds from Yardi/Salesforce allowed for real-time cost, expense, and revenue information on live projects and performance evaluation in real time.
- **Project Pipeline:** Trackable solution from pipeline to investment where leadership had clear visibility of spending throughout life cycle and milestones achieved.
- **Centralized Feedback:** Streamlined input and review process to build up project assumptions and estimates that can be readily available across organization and enable productive dialogue.

| Impact

- **Expedited Planning:** Analysis including “what if” versioning was reduced from several days via Excel to a few hours through utilizing Interactive PDFs.
- **Centralized Portfolio:** Senior leadership can make informed decisions on fiduciary obligations by cross-referencing previous real estate projects.
- **Department Cohesiveness:** Vastly improved communication across real estate, operations, and finance divisions to decide KPIs by project, phase, and team leads.