

Insite's Workforce as a Service (WFaaS) achieves enhanced forecasting and budget optimization—reducing meeting times by 50%.

The client, a multinational automotive company focused on designing, engineering, manufacturing, distributing, and selling vehicles and components, faced the complexities of a newly merged entity. To ensure greater accuracy, predictability, and efficiency, the client sought to streamline its financial forecasting and budget management processes. Insite partnered with the client to implement tailored Workforce as a Service (WFaaS) solutions that delivered significant improvements in financial operations and strategic planning.



2 DAYS

**Forecasting Cycle Completed
Ahead of Schedule**



**Increased Forecasting
Confidence and Predictability**

50%

**Reduction in Monthly
Finance Meeting Time**



Challenges

Prior to Insite's engagement, the client faced several financial management challenges. The existing forecasting process suffered from inefficiency due to a lack of clear timelines and procedures, often leading to delays and inconsistencies in meeting objectives outlined in supplier Statements of Work (SOW). Ensuring continuous alignment with budget targets across various departments and supplier engagements was also a complex and time-consuming endeavor.

Furthermore, a lack of predictability in forecasting resulted in frequent inquiries from suppliers regarding future staffing needs, creating additional administrative burden. Finally, time spent in finance meetings was extensive, often focused on reactive problem-solving rather than proactive strategic planning for future impacts.

See how we leverage cross-industry expertise and data-backed methodologies to help you optimize your operations and reach performance goals.

To meet the mark, your operations must be competitively productive and efficient. To exceed the mark, your processes, people, platforms, and partners need to set the industry-leading benchmark. That's where Insite comes in.





Solutions

Insite implemented a comprehensive approach to address the client's financial management challenges:

- **Enhanced Forecasting Process:** Established clear timelines and procedures for the forecasting process, ensuring the client consistently met SOW objectives and maintained budget alignment. This included monthly partnerships with key personnel to update locked forecast timelines and continuously improve underlying files.
- **Automation and Process Enhancements:** Introduced various automation improvements and process enhancements that significantly streamlined and accelerated the forecasting cycle.
- **Proactive Budget Management:** The Insite team took on a critical role in managing the client's Contact Center budget, actively tracking and monitoring spend. They served as the go-to resource for updates on budget performance, providing timely insights to the client's Finance team.
- **Data Trust and Guidance:** Provided reliable data that consistently proved to be ahead of the client's internal tracking, fostering deep trust with the client's Finance team and guiding critical business decisions.



Results

The Workforce as a Service (WFaaS) solutions implemented by Insite yielded significant, measurable benefits for the client:

- **Accelerated Forecasting Cycle:** The forecasting cycle was completed two days ahead of schedule, a direct result of the automation and process enhancements introduced.
- **Increased Predictability and Confidence:** Both the client and its suppliers expressed appreciation for the increased structure and predictability of the new process. For the client, this translated to fewer supplier inquiries about future staffing needs and greater confidence in their forecasts. For suppliers, it enabled better resource planning and alignment with business needs.
- **Trusted Financial Partnership:** The Insite team became a trusted resource, with the client's Finance team and key stakeholders repeatedly expressing trust in Insite's data, which often outpaced their own internal tracking.
- **Significant Time Savings:** The time spent in monthly finance meetings was reduced by 50% in 2025, thanks to the clear, easy-to-follow changes implemented in the forecasting and budget tracking process.
- **Shift to Proactive Strategy:** The time given back to the team allowed them to focus on strategizing for future months and upcoming impacts, shifting their approach from reactive to proactive. As Scott, a key stakeholder, stated, "This is the best this process has ever been." He further noted that the new process is "much easier to follow and has made a meaningful difference."



Conclusion

This case study demonstrates the critical importance of robust financial management and the power of tailored solutions in navigating complex organizational changes. By providing strategic, data-driven approaches to forecasting and budget optimization, Insite empowered the client to achieve significant operational efficiencies, enhance predictability, and free up valuable time for proactive strategic planning.

The measurable improvements in forecasting accuracy, meeting time reduction, and increased confidence highlight Insite's capability to transform financial operations. If your organization is looking for similar impactful results in financial efficiency and strategic decision-making, our customized solutions can help. Book a discovery call today to see how we can support your success.

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"This is the best this process has ever been. I really appreciate the direction the team has taken to drive improvements and proactively get ahead of needs. The new process is much easier to follow and has made a meaningful difference."

- SCOTT T. | HEAD OF CUSTOMER CARE OPERATIONS