



# How Planr Transformed Pave America's Financial & Operational Reporting

## Overview

Pave America, a leading asphalt & concrete pavement company, and who are backed by Private Equity firms Trivest and Shoreline Equity Partners, has been on a rapid growth trajectory through the acquisition of multiple Concrete and Paving businesses across the United States. As the company scaled to 30+ businesses, the Finance team faced significant challenges in aggregating, analyzing, and reporting financial and operational data efficiently.

Trivest were readily aware of the challenges being faced at one of their larger portfolio companies. When alerted to the potential capabilities of Planr in solving complex data challenges, they introduced the Pave America team to Planr.

With Planr, Pave America has revolutionized its monthly reporting process, eliminating manual inefficiencies and enabling more real-time decision-making for senior leadership. This case study explores how Planr's automation capabilities have saved time, improved accuracy, and provided a strategic advantage as Pave America continue to scale.

*Planr has delivered significant savings and operational efficiencies for Pave America. Prior to automating our monthly reporting with Planr, our FP&A team were burning one to two weeks of time every month to manually produce monthly reporting decks for each of our 30 businesses. Automating our monthly reporting, provides key financial and operating information, all in one place, to help decision makers across our business make more timely decisions to drive future growth in our business.*



**PAUL O' REGAN**  
SENIOR DIRECTOR OF FP&A

## The Challenge

### A Labor-Intensive, Inefficient Reporting Process

Before implementing Planr, Pave America's finance team relied on a highly manual process to compile their monthly operating reports.

Key challenges included:

- **Data Fragmentation:** Financial data for each company resided in NetSuite, while operational data was stored in PavementSoft, their internal CRM and operations system. Aggregating this information across 30+ businesses was time-consuming and complex.
- **Slow, Manual Reporting:** Preparing reports required extensive Excel manipulation and PowerPoint creation, taking up to two weeks each month.
- **Delayed Insights:** By the time reports were finalized, they were often outdated, making those reports less useful for leadership when making key strategic decisions.
- **Lack of Scalability:** As Pave America continued to acquire new companies, the reporting workload grew exponentially, increasing the need for automation and efficiency.

***Key financial and operating metrics were tracked in multiple systems prior to implementing Planr. Those metrics often required manual data manipulation to obtain or calculate.***

***Following the implementation of Planr, our key financial and operating metrics can be easily obtained in one place.***

**Paul O'Regan, Senior Director of FP&A**

## The Solution

### Implementing Planr for Automated, Real-Time Reporting

Pave America sought a solution that could:

- Integrate seamlessly with NetSuite and PavementSoft to pull in financial and operational data.
- Automate the creation of their 30-page monthly operating review deck and eliminate manual data wrangling and PowerPoint creation.
- Provide real-time insights to business leaders for faster decision-making.

*One of the great things we found with Planr was they were able to figure out solutions to get data out of whatever systems we wanted. We had a clear set of key financial and operating metrics we wanted to automate at the start of the project. Planr were able to assist us accomplish all our project goals.*

**Paul O'Regan, Senior Director of FP&A**

#### The Implementation Process:

- **Integration with NetSuite** – Achieved almost instantaneously due to Planr's deep expertise in financial system integrations.
- **Custom Integration with PavementSoft** – Despite being an in-house CRM, Planr successfully extracted and automated data workflows.
- **Dashboard and Report Automation** – Planr implemented a reporting structure that refreshes daily, enabling instant access to critical business KPIs.



## The ROI?

### Faster Reporting, Better Decisions & Significant Cost Savings

Planr's implementation has transformed Pave America's financial operations by reducing manual work, accelerating decision-making, and improving scalability.

#### 1. Reporting Time Reduced from 2 Weeks to 1 Day

Previously, the finance team spent up to two weeks compiling reports after the monthly financials were closed. Now the reports are automatically generated and sent the day after the monthly financials are closed.

***Our FP&A team were spending so much of our time preparing the decks, as opposed to actually reviewing what's going on in the business. We would literally finish the decks, get them all out, and then we were almost on to the next month putting together the decks again. Versus now, we've freed up 2 weeks and are able to have meetings every month with each of the businesses where we're going through those decks.***

#### 2. Real-Time Insights for Better Decision-Making

Previously, reports were delivered too late due to the time it took to produce manually. That meant the data and metrics were often stale by the time the reports were sent out. Now, with daily data updates, real time financial and operating metrics can be easily accessed to help inform decision making.

***It's the speed—you can make much more informed decisions when you get data 6, 7 days into the month, as opposed to towards the end of the month, when it's often too late.***

### **3. Professionalized Reporting & Investor Confidence**

Previously, reports were delivered too late, meaning the report was not helping our business leaders make decisions. Now, with daily data updates, Pave America can prepare professionalized monthly reporting decks within one day after the monthly financial statements are closed.

***Planr's automation significantly enhanced the professionalism of Pave America's reporting. The finance team now produces automated, investor-ready PowerPoint decks, instead of manually created spreadsheets.***

### **4. Scalability to Support Growth**

With Pave America planning to continue acquiring new business in the future, seamless integration of new entities and continued automation of our monthly reporting should reduce the need for incremental FP&A headcount .

## What's Next?

### Expanding Planr's Impact

Given the success of the initial rollout, Pave America is now exploring additional Planr integrations, including:

- Automated report distribution via email to streamline executive communications.
- Integration with payroll to provide a more comprehensive view of operations.
- Expanding reporting capabilities for board materials to further enhance investor transparency.

***NetSuite houses our key financial data in terms of revenue, expenses, etc., and our operating system PavementSoft tracks great data in terms of bids, contract wins, scheduled work.***

***The real value of Planr for us is marrying all that data under one roof. Planr serves as a one-stop shop to unify multiple data sources critical to our business***

## Conclusion

### A Transformational Partnership

Planr has delivered a fast, scalable, and automated reporting solution that has fundamentally changed how Pave America operates. By eliminating manual processes, enabling real-time insights, and enhancing reporting professionalism, Planr has positioned Pave America for continued growth and success.

With significant cost savings in finance operations and a newfound ability to focus on strategic decision-making, Pave America is now leveraging data as a competitive advantage—exactly what private equity-backed companies need to stay ahead.

## Interested in Transforming Your Reporting Process?

If your business struggles with fragmented financial data, manual reporting, and slow decision-making, Planr can help.

- ❌ Manual data extraction from NetSuite across dozens of entities.
- ❌ Slow, error-prone board reporting cycles.
- ❌ Fragmented insights from disconnected systems like CRMs and operational tools.
- ❌ No single view of group-wide performance.
- ❌ Delayed decision-making from outdated reports.

### How Planr Solves It

Planr connects directly into NetSuite via our proprietary API and your wider tech stack if needed, consolidating data from every entity and creating a seamless data flow to create clear, reliable insights.

- ✅ **Seamless NetSuite Integration:** Automate data collection from every subsidiary—no manual exports required.
- ✅ **Fully Automated Board Reporting:** Instantly generate presentation-ready board packs with live financials, operational metrics, and group-wide insights.
- ✅ **Parent-Level & Subsidiary-Level Dashboards:** Drill from consolidated group performance down into individual entity details, with real-time visibility into what's working—and what's not.
- ✅ **Future-Proof Scalability:** Easily onboard new acquisitions or add-ons with a framework designed to grow with your business.
- ✅ **Automated Distribution:** Email reports and dashboards directly to stakeholders on a set schedule, with zero manual intervention.

