BUDGET CYCLE HANDOFF / 01

BUILD THE BUDGET-CYCLE BRIEF

Use neutral labels. Keep amounts, account data, credentials, identities and private financial records out.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Cycle A / decision purpose / no recommendation

Audience or participant roles / no identities

Input A / owner role / source-reference status

Input B / owner role / unresolved question

Requested professional deliverable / format question

Timing, dependency or review-window question

Preparation only. Not a budget, forecast, model, calculation, validation, approval or financial, accounting, tax, investment, lending, management or legal advice. Keep amounts and private records out.

BUDGET CYCLE HANDOFF / 02

MAP BASELINES, REVIEWS AND CHANGES

Ask the professional to propose the workflow. Do not enter amounts, formulas or approval conclusions.

Baseline A / provider-proposed version label / date

Scenario A / purpose label / relationship to baseline

Review checkpoint / reviewer role / question

Decision or approval reference / private record location

Change Request A / prior and new version labels / owner

Superseded item, unresolved question or next review

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BUDGET CYCLE HANDOFF / 03

CHECK THE PRIVATE-READY PACKET

Tick what is organized. These checks do not validate a budget, forecast, assumption, approval or business decision.

- [ ] Cycle, input, baseline and scenario labels are neutral and consistent
- [ ] No amounts, accounts, credentials or private data is recorded
- [ ] Decision purpose and audience are stated without recommending action
- [ ] Input owners and source-reference status are visible
- [ ] Baseline and scenario versions are distinguished
- [ ] Review checkpoints and decision roles are requested in writing
- [ ] Changes and superseded versions have a proposed record trail
- [ ] No calculation, validation, approval or recommendation is recorded

Input, source-reference or owner question still open

Baseline, scenario or review-role question still open

Change, actual-versus-budget or handoff question still open

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BUDGET CYCLE HANDOFF / 04

QUESTIONS FOR THE FRACTIONAL CFO

Ask every professional the same cycle, input, baseline, review, change and handoff questions.

Cycle: how will purpose, participants and deliverables be defined?

Inputs: how will owners, source references and gaps be recorded?

Versions: how will baseline and scenario labels stay current?

Reviews: which checkpoints and decision roles will you propose?

Changes: how will requests and superseded versions be tracked?

Handoff: what review and final record package will be delivered?

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BUDGET CYCLE HANDOFF / 05

COMPARE CYCLE AND HANDOFF SCOPE

Use Professionals A and B with the same neutral brief. Clarify different deliverables or decision roles before comparing proposals.

Professionals A / B / proposal references / dates

Cycle, inputs and source-reference workflow - A / B

Baseline, scenarios, review checkpoints and changes - A / B

Actual-versus-budget review, handoff and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Fractional CFO request for budgeting and forecasting support. Share a non-sensitive cycle, input-owner and review-handoff brief so participating pros can compete with proposals. Compare deliverables, review cadence, responsibilities, change process, timing and fit. A private records and engagement discussion may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A private records and engagement discussion may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/fractional-cfo/budgeting-and-forecasting

U.S. Small Business Administration: Manage Your Business (official reference)

U.S. Small Business Administration: Grow Your Business (official reference)

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