

How a public biotech got its first week back from *BvA*

COMPANY	SYSTEMS	MASTER	WORKFLOWS
Clinical, public co.	Netsuite + Planful	Excel, Shared Drive	BvA Flux · Rollforward
✓ 7 days → 1 day BvA cycle, from variance pull to roll-forward staged ----- PREVIOUSLY MANUAL · NOW ORCHESTRATED		✓ Auto-commentary Variances get draft commentary, with sources by program, by department ----- NO MORE CTRL+F THROUGH THE GL	✓ BvA → RF Same trigger pushes deltas into next month's forecast ----- CHAINED · NOT SEPARATE STEPS

BvA Flux · May 2026 · R&D					14:08
Variance & commentary					Approve & post Edit
ACCOUNT	BUDGET	ACTUAL	VAR \$	VAR %	COMMENTARY
CRO services	1,000K	1,180K	+180K	+18%	ABC Lab — Phase 2 enrollment ahead, 14 sites tracking...
Headcount	620K	642K	+22K	+4%	Senior hire started mid-month, partial accrual...
Drug substance	290K	275K	-15K	-5%	Q2 batch deferred to Q3 per CMC schedule...

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"The agent does the digging, gives me draft commentary attached. I'm not Ctrl+F'ing through the GL anymore."

— FP&A MANAGER, CLINICAL-STAGE BIOTECH

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• § 01 — THE CHALLENGE

Close → BvA → board prep → forecast → repeat

Month-end close is always a rush. Variances flagged in Planful had to be traced back through NetSuite, attributed to specific vendors and programs, written up as commentary, and reconciled with the department heads, before the roll-forward could even start. By the time FP&A handed off to the CFO, a full work week was gone, mostly to pivot tables and Ctrl+F.

• § 02 — THE SOLUTION

The agent does the digging, draft the file with your style, you approve

Variance, attributed

The agent reads actuals from NetSuite, the budget from Planful, and works through every account that breached threshold. For each, it traces the variance to the underlying drivers and drafts commentary that names the cause. The FP&A team opens the file, reads what was found, and edits where it disagrees.

Roll-forward, chained

The same trigger pushes deltas into next month's forecast. Programs running ahead get reforecast upward; categories with timing shifts get redistributed. Roll-forward isn't a separate workflow anymore. It's the back half of BvA, staged for review.