Sales and Financial Planning

> *Paolo is a young Chilean entrepreneur with an active presence in the Chilean and Uruguayan markets, primarily in real estate. He is also involved in e-commerce and education ventures.*
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> *His track record reflects a combination of strategic vision, execution capability, and a firm commitment to professionalizing his companies. His ventures blend the energy of emerging leadership with a methodical approach to building sustainable, scalable businesses.*

Background

As founder of a group of young, expanding companies, Paolo saw an urgent need to bring structure to how operations are planned and monitored. In particular, he needed an effective way to organize financial, commercial, and project management, developing the right metrics to understand the performance of each business unit. The challenge was not only technical — it also required training his key managers in sound analysis, planning, and control practices so they could adopt these tools as part of their day-to-day management. The goal was twofold: enable tracking for each company individually while achieving a consolidated view at the holding level. To do that, he needed a monitoring architecture that was clear, practical, and sustainable over time.

Solution

To address this challenge, he worked with Imppulsor to design and implement a comprehensive planning and control model. Over two months, the team defined essential metrics tailored to the group’s current stage to support financial planning and monitor cash flow, commercial performance, and project progress. Each of these pillars was translated into practical dashboards, both for each company and for a consolidated

holding-level view. The management team was also trained in the model’s key fundamentals, driving ownership of these tools and criteria among the users responsible for sustaining them operationally.

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The project allowed us to establish a more structured and deliberate management mode

In young businesses, where momentum often runs ahead of method, this structure not o

The real challenge will be sustaining this architecture and the disciplines that kee
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Source: https://imppulsor.com/casos-de-exito/sales-and-financial-planning/