

How Rose Rocket unified HR and Finance for stronger workforce planning with Bob Finance

**Founded in**

2015

Headquarters

Toronto, Canada

Employees

~70

Total Funding

\$69M

What they do

Transportation management and supply chain optimization software

Highlights

Rose Rocket is the #1 top-rated, award-winning, all-in-one Transportation Management System (TMS), that helps thousands of trucking and logistics companies (brokers, carriers, and shippers) streamline and automate their businesses.

Rose Rocket is a 70-person transportation management software company operating in a fast-moving, operationally complex industry. As the team expanded and the business matured, **Matthew Cimino**, Director of Finance, needed a more reliable way to plan for headcount and model different growth scenarios.

But the underlying data structure couldn't support it.

HR and Finance were working from systems that didn't communicate. Key people data lived in Bob, financial models lived elsewhere, and everything had to be stitched together manually. As Matthew put it, "our headcount and our finance software couldn't always talk to each other," and the disconnect made it difficult to trust the numbers or keep plans up to date.

Small but important details often slipped through the cracks. Matthew said that "the things that got lost were the small details that turned out to be very important," such as promotions or compensation changes that never made it to Finance in time for payroll or forecasting updates.

"As we were growing our headcount as well as working on different scenarios, we really realized that we needed one system that everyone could work in together"

**Matthew Cimino**Director of Finance, **Rose Rocket**

The manual nature of the process created ongoing misalignment. HR and Finance frequently ended up with different versions of the truth — a real problem when the team was trying to plan ahead. "Our HR teams and finance teams were chasing different versions of the truth," Matthew said.

As Rose Rocket's headcount increased and scenario planning became more important, the gap became harder to ignore. "As we were growing our headcount as well as working on different scenarios, we really realized that we needed one system that everyone could work in together," Matthew said.

The missing component was a shared foundation of data the company could use to plan with confidence.

Unlocking a shared source of truth inside a platform they already trusted

Rose Rocket had already invested heavily in HiBob as its people platform. HR data, processes, and organizational structure were all living there as Finance began rethinking its planning approach.

When Bob Finance launched within the HiBob ecosystem, it introduced an opportunity to unify planning, people data, and real-time updates without introducing a brand-new tool or rebuilding workflows from scratch.

Rose Rocket needed:

- One place where headcount and compensation changes stayed current
- Real-time synchronization between HR and Finance
- A planning environment that let teams work from the same assumptions
- A way to run multiple scenarios without rebuilding models each month

Bob Finance delivered that directly inside the platform HR was already using daily.

By having one system of record for both finance and HR to work out of, it has really helped our teams become more efficient. You always have data live and ready to go.



Matthew Cimino

Director of Finance, **Rose Rocket**



With a unified source of truth in place, the day-to-day work between Finance and HR became noticeably smoother. Manual uploads were no longer a constant chore, and updates flowed through the system without the back-and-forth both teams were used to. HR didn't need to resend details, and Finance didn't need to piece together information from separate files.

Both teams were finally working from the same set of numbers, with far less risk of details being missed or duplicated. That alignment gave Rose Rocket a more stable foundation for headcount planning and made it possible to build scenarios with confidence that the inputs were accurate.

Running a more connected and reliable planning process

Once Finance and HR began working from the same source of truth, planning at Rose Rocket became noticeably smoother. The data was easier to trust, updates flowed more consistently, and both teams could participate in the process without the misalignment that used to slow things down.

The improvements showed up across several areas of the business.

Scenario planning that actually works.

With Finance and HR sharing the same data, scenario planning has become a reliable part of Rose Rocket's operating cadence. "Since using Bob Finance, we've been able to make scenario planning a consistent part of our processes," said Matthew. "Each month we're able to roll forward the data and work on different scenarios the business needs."

Stronger partnership between Finance and HR.

"The relationship between the Finance team and the HR team has improved a lot," said Matthew. "We're working with a lot more efficiency, and we've been able to run much smoother meetings because we're always on the same page." What used to be a constant back-and-forth has become a more predictable, collaborative workflow.

Faster reporting and smoother planning cycles.

The unified system isn't just impactful on the planning side. Board prep and monthly close processes have become more manageable for Rose Rocket, with fewer ad hoc fixes and a clearer view of forward-looking assumptions. The automation of close processes, board reporting, and international consolidations all help the Rose Rocket team spend more time focusing on business partnership. Instead of sending spreadsheets back and forth trying to get Engineering or Marketing to confirm data for board reports, Matthew and the Finance team can focus on strategic conversations in preparation for planning cycles and board meetings.



With Finance and HR aligned on a single system, it has become easier for the rest of the organization to participate in planning. Leaders can review headcount plans, scenario assumptions, and hiring updates directly, without waiting for Finance to package the information or translate spreadsheet changes. That level of access has made planning more transparent across teams.

Matthew noted that this impact is felt beyond just the HR and Finance partnership. "Our C-suite is able to log in directly to Bob Finance and work on any headcount and scenario planning, including live hiring details," he said.

With everyone looking at the same information, discussions move faster, decisions come with fewer surprises, and Rose Rocket can adjust its plans with a clearer view of what each choice means for the business.

Main takeaways

- Bob Finance gives Rose Rocket one shared system of record for headcount and compensation across Finance and HR.
- Scenario planning is now a consistent, repeatable process, not a one-off rebuild every month. With the Greenhouse integration, transferring new hires' information into Bob is seamless, saving time and eliminating duplicate entries.
- Board reporting and monthly close are faster and less error-prone, with clearer forward-looking views.
- Leaders across the business can self-serve the data they need, reducing back-and-forth and helping decisions move faster.

Integrations

- ATS
- Expense Management

Favorite Bob features

- Financial Planning
- Financial Insights
- Workforce Planning