

DEPARTMENTAL CAPACITY

PROJECT EXAMPLE

PROJECT OPTIONS

COMPLIANCE CONCERNS
 CONTRACT MANAGEMENT
 COST CULTURE
 DEPARTMENTAL CAPACITY
 GOVERNANCE / POLICIES
 INTERNAL COMMUNICATIONS
 KPI MANAGEMENT
 MAVERICK SPEND
 PEOPLE MANAGEMENT
 PROCESS MANAGEMENT
 RATIONALIZING DEMAND
 SKILLS & TIME UTILIZATION
 SOURCING MANAGEMENT
 SPEND ANALYSIS
 SUPPLIER MANAGEMENT
 TECHNOLOGY MANAGEMENT

ENTERPRISE BENEFITS

BENEFIT CULTURE
 COST REDUCTION
 EXPERT NETWORK
 INNOVATION & TOOLS
 LEVERAGED TIME
 PEACE OF MIND
 UNBIASED ASSESSMENT

PRICING STRUCTURE

FIXED FEE
 FOCUSED ON ROI
 NO HOURLY METER

PROJECT OVERVIEW

- **CLIENT:** CEO/CFO of \$200M Enterprise
- **CLIENT NEED:** Finance Department Transformation with controls put in place.
- **PROJECT OBJECTIVE:** Create additional capacity for overworked team.
- **PROJECT VALUE:** Free up capacity (time) to work on new high value activities and don't have to invest in hiring new employees to take on these activities.
- **PROJECT METRICS:** 1) Elimination of duplicated/inefficient/unnecessary tasks, 2) Faster data availability and 3) Decrease time spent with A/P functions
- **PROJECT DURATION:** 90 days

PROJECT APPROACH

- Conduct comprehensive surveys, interviews, skill set alignment and observation of daily work and time utilization analysis of (17) Finance Department team members.
- Gathered data and applied the Expense Assist Vulnerability Index© to identify the severity of the vulnerabilities and weaknesses.
- Designed customized treatment for each identified vulnerability and weakness to drive the desired Project Objective.

PROJECT OUTCOME

1. During the Diagnostic Assessment steps, it was uncovered that an unnecessary burden was placed on the Finance Dept. by the A/P Dept. due to several areas of Process weakness. This led Finance to spending extra time on A/P related activities.

Additionally, the A/P Dept. weaknesses resulted in financial information being delayed to prepare monthly financial statements which resulted in lost time for the Finance Dept. as they waited for the A/P Dept. to complete their tasks. After applying repair treatment to the weaker A/P process, 5-10% (34-68 hours/ week) capacity returned to Finance.

2. During the Diagnostic Assessment steps, it was uncovered that four staff members had received separate requests from upper management and operational personnel that had similar intelligence data included in a daily and monthly report and none of them knew the others were collecting similar data.

A combined report produced by (1) person with only one data request created proper alignment and a time savings of 17 hours/week returned to Finance.

Assess. Identify. Treat. Grow.