

Client Summary

<i>Industry</i>	Financial Services
<i>Size</i>	6,000 employees
<i>Global/US</i>	North America, Central America
<i>Project Duration</i>	9 Months
<i>Deployment Strategy</i>	Phase 1: Initial Go-Live Staged Portfolio Go-Live

Technology / Process Area

Finance Transformation Project

Implemented seven key workstream solutions for the North America Finance Transformation:

- Hyperion Planning & Reporting
- Cash Collections and Revenue
- Budgeting and Finance
- Headcount Management
- Credit to Cash
- Outsourced Management
- Organizational Change-movement of processes and systems offshore

Global Conductor

Overview As a result of our client's tremendous growth in past 5 years and a recent global Oracle upgrade it became apparent that financial transparency and richer reporting was required across the North America business units. Their key objectives were to enhance business partnering, improve decision making, standardize the sales reporting, analysis and planning processes and enable more centralized business line reporting with smarter analytics. A Project Management Team Lead, with deep functional and system expertise, was needed to supplement the client's PMO and lead the North America Finance Team in their process re-engineering effort.

Our Approach:

Using our project management and organizational design capabilities, along with functional expertise, we were able to assist our client in the evaluation of their organizational readiness, their internal resources and skill gaps and provide transition recommendations, project staff and expertise as required to transform the organization into a more mature organization.

Our team provided support and leadership to complete the transition by utilizing our key tools and methods in regards to best practices and value realization to support a successful finance transformation and organizational change initiative.

Project Team Support **Project Management Lead**

- Support Executive Sponsors – North America Controller & Finance Program VP
- Workstream Lead – project planning, management, deliverables, coaching, guidance, training and team development. Business case development and associated contract negotiations
- Global Contact

Change Management Subject Matter Expert (SME)

Benefit Summary

- Measurable improvements with technology utilization, process and productivity improvements, greater transparency within finance and a smooth offshoring transition.
- Ensured organization transitioned to more cost effective project capability upon departure.
- Critical organization readiness to provide timely and accurate internal and external customer service.
- Allows client to increase productivity and maintain and track financial reporting in deeper detail in the business units.
- Enabled all end users to have immediate access to information at point of need.
- Provide ability to validate projected metrics.