VALUEONSHORE

CASE STUDY

Finance Process Excellence For a Communication & Tech Company

ABOUT THE CLIENT

A global enterprise with offices in 10 locations across the world and a pioneer in the research impact and technology solutions space, Our client provides AI products and solutions for scientific editing and publication support, medical writing, translation, English education, publishing, business and media transcription

BUSINESS CHALLENGE

With Offices across the globe and non-integrated accounting applications, our client faced

- Stressful and time-consuming month end close process,
- Delayed invoice processing and duplicate payments affecting credibility
- Low visibility across spends and Inaccurate provisioning
- Ineffective budgetary controls
- Multiple levels of approval leading to delay in TAT
- Manual data points across invoices – adding to inaccurate data capture

OUR APPROACH

Define Goals - Identify quantified goals and align deliverables with process owners

AS-IS Process mapping - Reviewed historical data, validated management perceptions, assessed data robustness, and mapped processes with identified gaps

Identify Change Areas - Presented reality versus expected processes, identified improvement areas, and aligned required changes with process owners

Define Actionable Improvements - Detailed step-by-step action plans defining responsibilities, timelines, dependencies, and mapping each actionable to the agreed goals addressed

Monitoring and Dashboards - Created management dashboard highlighting transaction excellence progress and developed consolidated action tracker with responsibilities, proposed completion dates, and task sequencing.

BUSINESS IMPACT & VALUE CREATION

Valueonshore assisted the organization with Finance Process Excellence. The major impact areas included the following:

- Finance dashboard to monitor progress
- Streamline month close process by grouping the activities into "Start early", "Require strengthening", "Continue AS-IS"
- Chart of month close activities with source/ timelines/ responsibility ensuring 4th day closure
- Design supplier catalogue, Payment File generation for all entities & Change in Payment Scheduling
- Elimination of redundant activities in PO-Invoice process and optimized team's bandwidth

ABOUT US

Valueonshore is a global business advisory firm of Big 4 alumni and industry leaders, supporting financial executives on complex, high-impact matters across accounting, M&A, risk, and managed services. Founded in 2009, the firm has grown to ~400 professionals across the **U.S.**, **India**, and the **UAE**, serving mid-cap and high-growth companies as a trusted partner in navigating complexity and driving value.

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