

PROPELLING CLIENT PERFORMANCE AND SETTING THE ESG INDUSTRY STANDARD

Leveraging data from disparate systems enables unique insights and proprietary offerings.

WHO NEEDED HELP

A mission driven investment consulting firm is helping non-profit clients find investments that align with their values by developing their own proprietary ESG model for manager analysis.

HOW WE HELPED

Together we identified their in-house Lead and paired him with Belinda DiGiambattista to train him on project management and leadership best practices. They co-led the project through the business analysis, requirements, use cases, and test phases.

The firm successfully launched their proprietary ESG model to their investment team and now have new capabilities and analysis to share with clients related to the managers with whom they invest.

WHY THIS WORKED

1. New competencies and capabilities

In-house Lead has new skills to deploy for the firm.

2. Improved communication

The business and the software development teams now have seamless communication in place.

3. Unique ESG offering

Our client has a proprietary ESG model expanding their unique value proposition.

CASE STUDY



AT A GLANCE

OBJECTIVES

- Train Managers with new skills
- Eliminate communication gaps between business and IT teams
- Launch proprietary tools to add to the firm's offering

BENEFITS

- Unique value proposition with their ESG model
- Growth in talent skillset that can be broadly applied to new projects

CLIENT TAKEAWAY

"One of the things that impressed me most about Belinda was her ability to blend in seamlessly with our organization. She took the time to get to know our team, and her approach was collaborative and inclusive.

She is an expert in her field and possesses a wealth of knowledge and experience that was invaluable to me. Her approach was customized to our organization's needs, and she was always available to answer questions and provide guidance whenever we needed it.

Her deep understanding of project management best practices, combined with her ability to blend in seamlessly with an organization, makes her an ideal partner."

Daniel J. Baptiste, Director, Investment Consulting

ACCURATE ACCOUNTING SYSTEMS ENABLE SMART DECISIONS

Financial statements show the path impact and success and can prevent fraud.

WHO NEEDED HELP

A food service company experienced employee theft and needed a fast analysis of the extent of their losses. Additionally, they needed to enhance their accounting operations in order to protect their assets and manage profitability with smart decisions.

HOW WE HELPED

We used a multi-pronged approach as they needed multiple solutions simultaneously. Forensic accounting analysis was conducted while performing a smooth migration from QuickBooks desktop (a server based system) to QuickBooks Online (a cloud based system), and we implemented new safety systems.

WHY THIS WORKED

1. Clean, accurate P&L and B/S

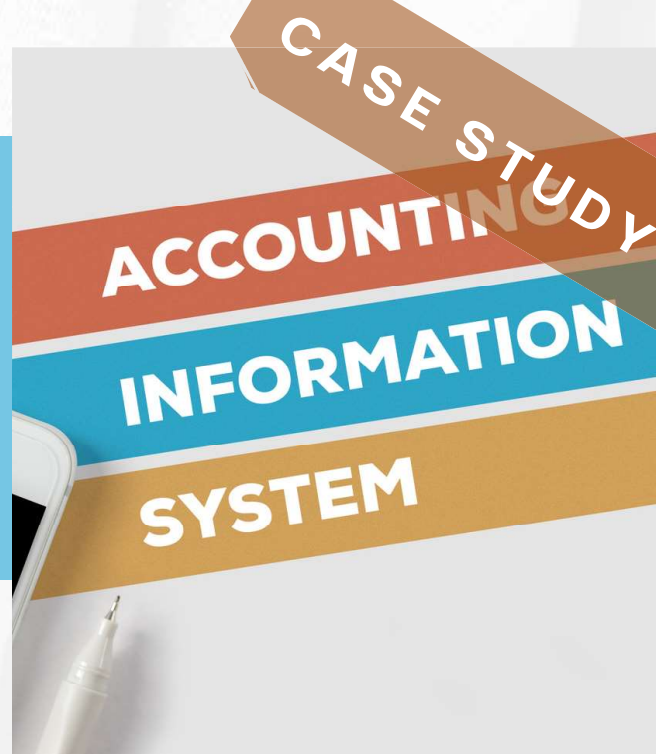
The company knows how much money they are making for the first time with accurate financial statements.

2. Ability to make business decisions

With insight into monthly cash flows and a revised chart of accounts, they can make confident business decisions on investments and growth.

3. Evidence for a grand jury

Analysis was used to indict the employee who transferred a large sum of money to their own accounts.



AT A GLANCE CHALLENGES

- No insight into their financial position nor profitability.
- Susceptible to the risk of employee theft.
- Late tax filings and mis-matched info.

BENEFITS

- Ability to make sound and confident business decisions with new insights into their business' financial health.
- Meticulous analysis for use in seeking retribution for stolen money and creating a more secure system.

CLIENT TAKEAWAY

Thank you for everything you do for us. Now that we are more organized and have our financial house in order, we are able to focus on growing our client base, improve our product and service offerings and run a stronger business.

Lewis S., Owner

