

SEPTEMBER 2007

CFO Advisory Services *Case Studies*

At Blum Shapiro Consulting LLC, we have the experience, skill and resources to help your business perform better. We provide strategic advice so financial leaders can cut costs, streamline processes, reduce risk and maximize their potential for growth. We have already delivered for clients like these:

\$1.8 Billion Dollar Public Manufacturer and Distributor

We directed the evaluation of Performance Management software. This evaluation included interviewing key personnel in the divisions and corporate office to develop requirements, performing a market scan to identify vendors to receive an RFP, creating an RFP that supports the evaluation of the vendors, analyzing the RFP, contrasting the different proposals, creating a script for demonstrations, facilitating scripted demonstrations, creating a framework and scorecard for evaluating the solutions, assessing the technical fit, and highlighting relevant differences between the solutions. The result was a confident and proven selection of software that was the best fit for the company.

\$12 Billion Dollar Retailer

We facilitated the design and implementation of a multi-tier consolidation, budgeting, planning and forecasting solution for a New Jersey retailer. Our team provided company leaders with insight into their information needs and capabilities. The project included external financial reporting and internal management reporting. Our Consulting Group designed, built and delivered more than 400 reports with drilldown analysis and other specialized capabilities.

\$20 Million Dollar Public Biotechnology Company

We implemented budgeting, forecasting, and reporting software and best practices. This included analyzing their process, integrating with multiple source systems including general ledger, ADP, and project tracking, creating complex allocations with data from multiple systems, building a business process flow for the budgeting process to be used by finance and by operating managers, developed detailed training manuals, and trained users. We delivered a state of the art solution that provided accountability of results to the operations and accessibility to information to drive the business.

\$200 Million Dollar Public High Tech Manufacturing Company

We assessed the opportunity to outsource finance and IT functions. This included analyzing the activities of the staff, working with potential outsource vendors to assess the opportunity, researching competitors to assess what outsourcing they have done, analyzing the technology platforms and the viability of finding outsourced resources to operate them, and plotting the processes and FTEs on an opportunity grid. The result was a clear direction and approach to driving outsourcing in the appropriate areas.

\$12 Million Dollar Private Venture Backed Financial Services Company

We replaced an existing financial transaction system with a new transaction system and Performance Management systems. This included the creation of an advanced allocation model to allocate overhead costs from over 100 different accounts to over 40 divisions. This solution reduced manual journal entries from 300 per month to 12 and closing time from 30 days to 9.

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