



Close + Reporting Process Enhancement

Case Study

Background

We assisted our client in enhancing close process accuracy and timeliness in preparation for evaluating close process automations.

Objectives

- + Accumulate close process tasking across 7 business units and 8 locations.
- + Evaluate task & task owner alignment. Recommend realignment and task consolidation across the business units.
- + Proctor 3 close periods during corporate controller turnover cycle.

Solutions

- + Accumulated 350 close process tasks by owner, business unit, financial statement, and close day.
- + Tracked task by task progress during 3 close periods.
- + Built tracking and reporting document to create awareness for CFO and finance functions.

Distribution
INDUSTRY

2,800
EMPLOYEES

\$500M
ANNUAL
REVENUE

**Developed a
CLOSE PROCESS TASK LIST
and enhanced accountability across the accounting
organization**