

# Rapid Close Assessment




## Bridge the gap

Let's set the scene: Closing the books is a breeze. You waved goodbye to manual and time-consuming processes, miscellaneous spreadsheets, and overtime. Instead of worrying about accuracy and underlying issues, your focus is taking action. That's because your team is backed with leading edge technology that pivots away from Excel and creates exciting efficiencies that make the job fun.

But for many finance teams, this sounds too good to be true. It's one thing to have this vision—but finding the root of the problem is another story. And with so much new technology on the market, it's hard to know where to start. That's where our Rapid Close Assessment comes in: Recognizing where you are now, understanding where you want to be, and identifying tactical steps for how to get there.







### What we do

Leaning on our experience of over 300 projects across the close cycle, we'll take a detailed look at your current state, analyze against leading practice, and convert your data into meaningful insights. That way, you're armed with:

-  Simple, quick wins that meet you where you're at now—and don't need to wait for technology or investment
-  A thorough understanding of the technology landscape, including what tools are out there and how they help
-  Insight into leading practices and a detailed report of improvement opportunities


### We're not keeping score, but...


Here's how we've helped similar organizations:

- |  |  |
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|  Automated over 50% of reconciliations  |  Curated a culture of continuous improvement  |
|  Placed thresholds that eliminated the need for certain reconciliations and journals during close |  Automated the population of financial statements and footnotes—including roll forwards |
|  Created a single, transactional system for intercompany  |  Made consolidated financial results available on day 5                                 |

What are you waiting for?

### What to expect

-  **COLLECT**  
There's a bit of pre-work required before we can dive in. Here's what we need from you to get the full picture of your current state:
  - Have key stakeholders involved in the close complete a self-assessment and quantify effort spent on critical activities
  - Outline the timeline of your close, indicating when activities start and finish during an average cycle
  - Inventory your existing technology and policy landscape


-  **LEARN**  
All your data? We look at it and compare it to leading practice. Now it's time to get out some pen and paper as we schedule two working sessions.

#### Close cycle working session (1.5 - 2 hours)

- See industry benchmarks, how you stack up against other organizations' cycle times, and the Achilles heel of your processes
- Learn the technology tools available, what they focus on, and how other companies leverage the software
- Join a collaborative discussion into where you'll see the biggest impact and reduction in effort and overtime

#### Topic deep dive (1.5 - 2 Hours)

- Based on your unique pain points, we'll take a closer look at an area that would be most valuable for your team—whether that's account reconciliations, manual journals, close management, intercompany, consolidation, cash management, or financial reporting automation
- Home in on process, technology, or policy and discuss a roadmap to your ideal future state

-  **EXPLORE**  
Everything we found is yours to run with! You've now got a report in hand that covers:
  - Suggested new tools or enhancements to existing tools
  - Policy and process changes with an immediate impact
  - Close management and change management considerations

**The best part? We focus on all sorts of improvements—including those that are easy-to-implement and don't require any external investment.**

-  **Get started**  
Ready to get a better grip on your processes? Let's talk.

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