

Finance Insight Toolkit

You’ve got the data. It’s time to leverage it.

It’s the age-old story: With a changing market environment, demands from stakeholders, and other conflicting forces, finance leaders are being asked to do more with less. But that’s not an easy feat. Making informed decisions with a positive impact requires sound, reliable data—and an accurate analysis of what exactly that data means. Whether you’re not sure where to start or how to piece together expansive and disparate finance footprints, that’s where a visualization tool like our Finance Insight Toolkit can help.

Stay forward thinking

Clearsulting’s proprietary Finance Insight Toolkit is a ready-made dashboard that supports finance leaders in their efforts to stay strategic. Pulling in real data and leveraging seamless survey technology, it outputs insightful, pictorial charts and graphs that help you understand the bottom line. And with interactive functionality, you can play around to discover a tailored way forward for your organization.

How you’ll use it

Data doesn’t lie. We’ll provide you the full picture of your operations so you can plan your next move. With our toolkit, you’ll be well equipped and backed with research as you tackle various projects, like:

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|  | Process improvements |  | Organizational redesign |
|  | Business process automations |  | Finance system landscape redesign |
|  | Shared services design and transitions |  | Target operating model transformation |

What are you waiting for?

The game plan



YOUR ROLE

We’re all about light lifts—so we keep the kickoff process quick and strive to minimize disruptions to your team. Here’s what you can expect.

- Provide inputs on target goals, objectives, and insights to inform the data model and survey design
- Facilitate input of survey to defined end-user population
- Provide supplementary data to support analysis



OUR ROLE

That survey you took? We’ll bring the data into our toolkit and build a visual dashboard. Here’s what we’re analyzing:

- What activities are being performed
- Where your team is spending the most time
- What the different job levels are focused on
- What realistic time savings could come from improvement projects
- How your processes are structured



OUTCOMES

From there, we’ll let you hit the ground running. Lean on the visualizations to understand where your organization is facing the largest challenges.

- Learn which processes take unnecessary manual effort—and where to earn a quick win
- Use the insights to get buy-in on future investments and create a baseline for business cases
- Access sanitized, detailed data for ad hoc analysis down the road
- Uncover the true functions of your team and their workflows

The best part? You’ll keep the big picture in mind.



Get started

When you’re ready to visualize the way forward for your organization, let’s talk.

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▶ www.clearsulting.com