



# Solutions for Optimizing your Finance and Accounting Operations

Finance & Accounting Re-engineering & Implementation Leadership  
Processes | Procedures | Systems

# Introductions

## Our Mission:

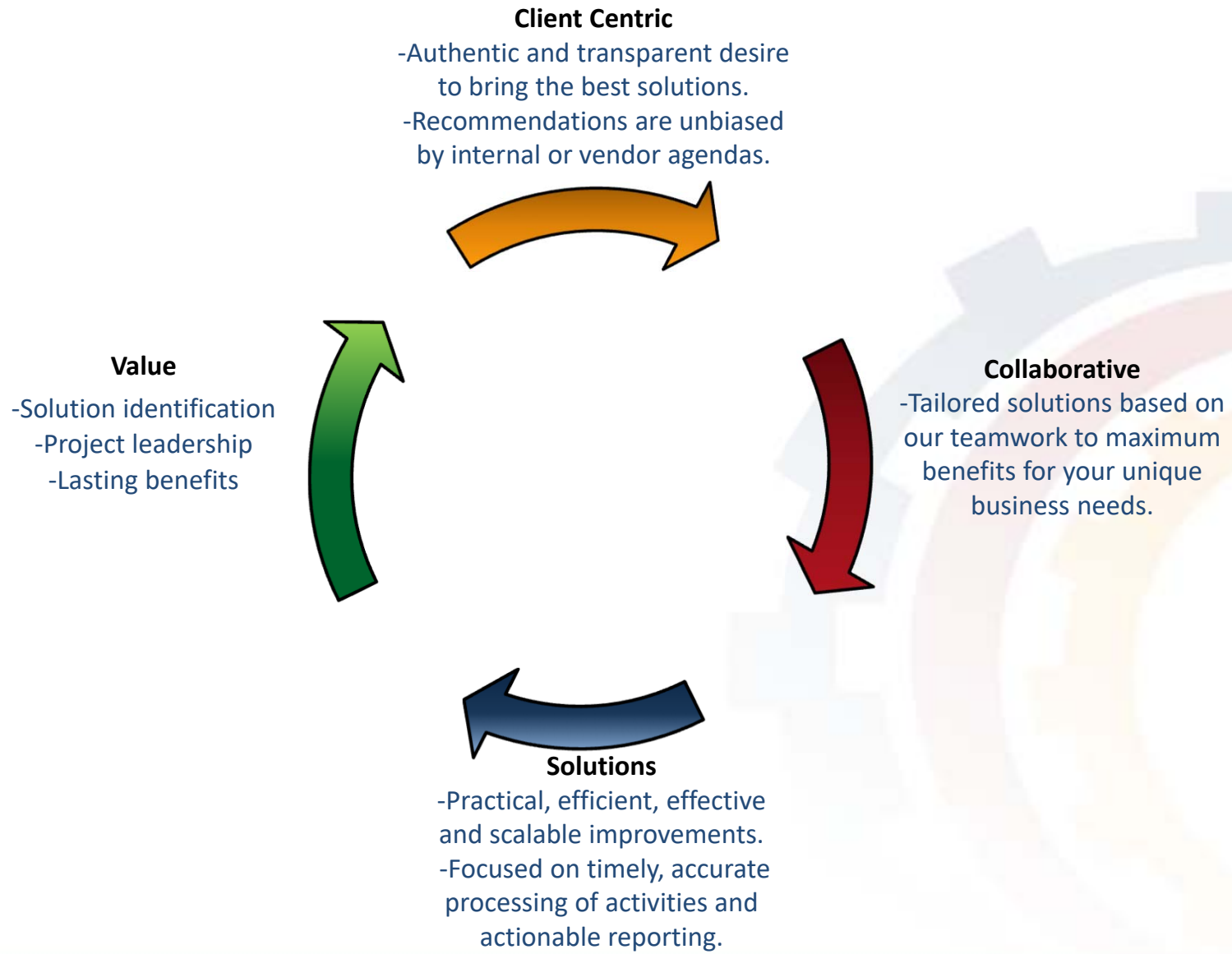
To serve our clients by providing project leadership and solutions for optimizing their back-office operations and enabling them to focus on growing their business.



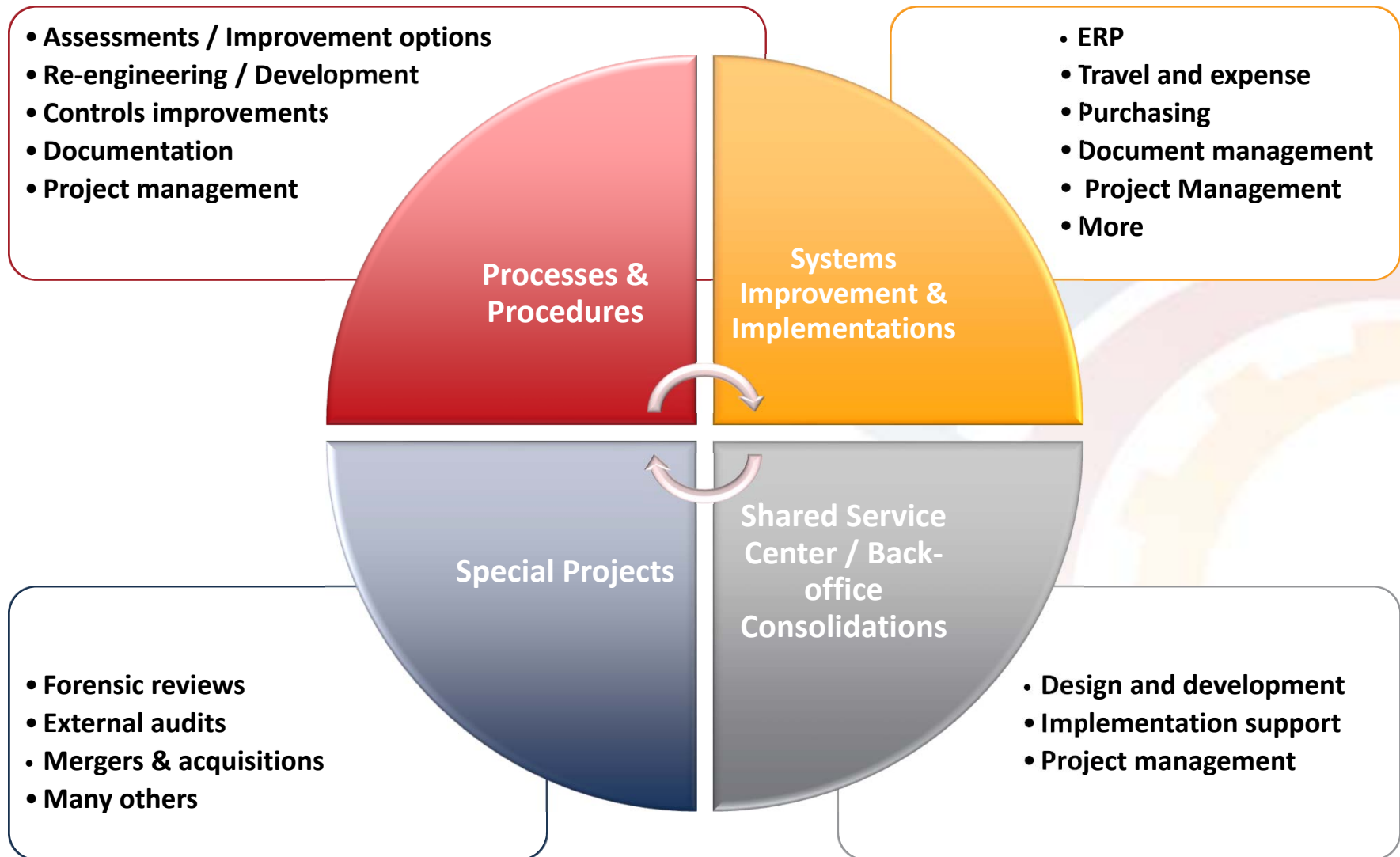
## Terry Schramm – President and CEO

- Proud U.S Marine Corps Veteran
- Licensed CPA and CAPM
- Finance & Accounting Leader with over 20 years of providing services to public and private companies.
- Experiences include:
  - Public auditing
  - Director / Controller over accounting operations
  - Leading F&A improvement projects

# Client Service Philosophy



# Client Focused Solutions & Capabilities

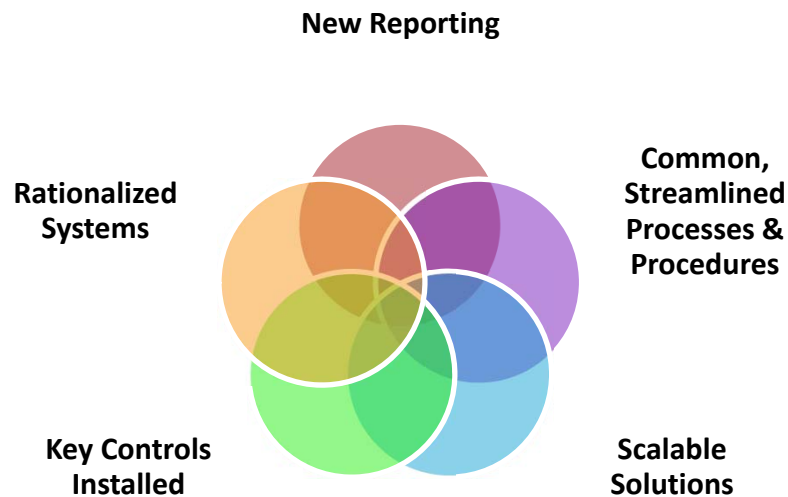


# Results

## Solutions Developed With The End In Mind

Practical, efficient, effective and scalable improvements  
Focused on timely, accurate processing of activities and actionable reporting

### Optimized & Interconnected Processes, Procedures, Systems



### Realized Improvements Costs, Time, Focus



# Case Study

## ERP Implementation

### Background:

The client had multiple business lines each with their own back-office, set of processes, procedures, and systems that did not integrate with each other or the main corporate office. Many of these operations were run on outdated mainframe platforms. The client had strategic goals that included upgrading its F&A capabilities to both capture current functionality improvements and provide a scalable platform that could integrate acquisitions as part of their strategic growth goals.

Challenges included developing a robust enough solution that balanced the need for commonality and consistency across the disparate business models with ensuring that each business could leverage the solution to their needs. This required a very high level of communication and coordination across all stakeholders and the complete rebuilding of how the F&A teams worked both internally and with the operations.



### Results:

As members of the project leadership team we successfully worked with all stakeholders to lead the company development of an entirely new, common set of processes, procedures, and system configuration. Additionally, we led in the facilitation of change management identification, communication and training development for users and impacted stakeholders. This 18 month, multimillion dollar project went live on time and on budget. Functionality was operational within days of cutover and improvements were being recognized by the time of the first month end closeout.

# What Our Clients Say

“Terry brings the key attributes needed to a Finance Transformation program: he is a leader that can work with a team and bring them through challenging change.”

**David Mangold,**  
Chief Transformation Officer,  
Cunningham Lindsey, Inc.

“Terry is an enthusiastic accounting professional that has exhibited the drive to tackle and achieve complex issues. For example, Terry was a key contributor to the successful implementation of an ERP solution”

**Randall Zavertrnik,**  
Controller at TECO Energy, Inc.  
/TECO Services, Inc.

“Terry was instrumental in improving controls around the AP process as part of a streamlining and optimizing project he led.”

**Eric Gustafson,**  
Sr. Director of Sarbanes-Oxley Compliance,  
Alere, Inc.

See [www.linkedin.com/in/terrerschramm/](http://www.linkedin.com/in/terrerschramm/) for more projects and recommendations.



## Options to get started!

- **Contact us to learn more**
- **Free initial consultation**
- **Assessment engagement**
- **Program engagement**

### **Contact Information:**

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