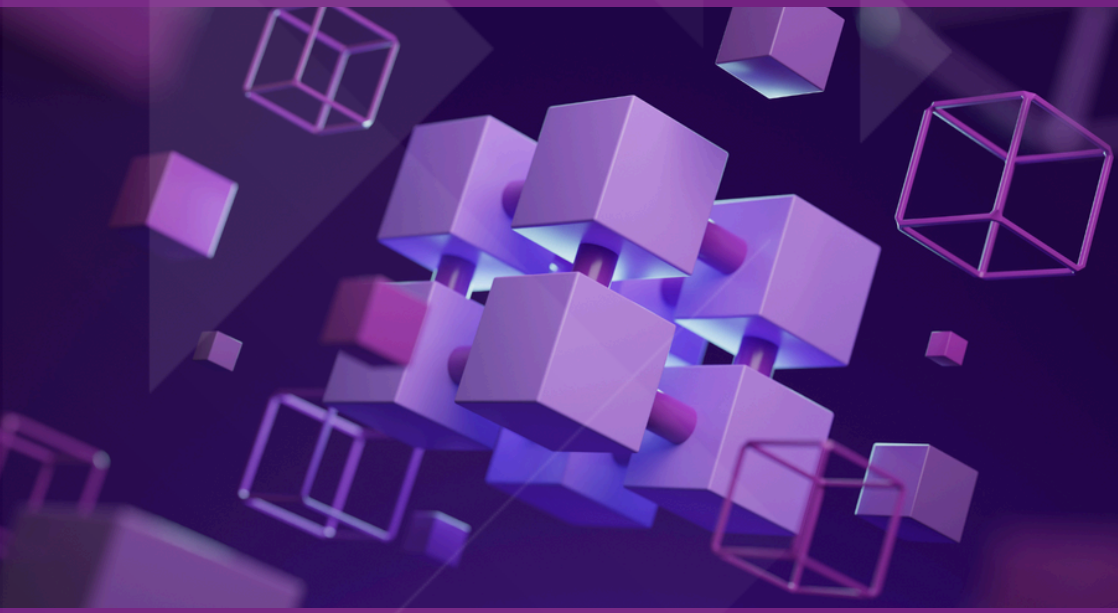
proservartner



REIMAGINING ORDER TO CASH

GSA AWARDS 2025 WINNER
ADVISORY FIRM OF THE YEAR 2025



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ABOUT PROSERVARTNER

Transformation advisers to Finance and GBS leadership



Lean and Six Sigma — 2013

Business Transformation — 2012

Incorporation — 2008

Investing in Tech — 2015

Today — 2025

Size

- 100+ Employees supporting process led business transformation

Focus

- A significant portion of our revenue is driven by AI and Automation solutions, with deep specialism in Finance, HR, and Procurement.
- BA, functional expertise and change management skills

Our People

- Our greatest asset as a consulting firm
- Straight-talking practitioners that focus on ROI
- Functional experts



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CHALLENGES

OUR SOLUTIONS

Strategy & Operating Model

Business leaders are aware that they need to modernise their O2C structures and ways of working, and embrace technology but not clear on the end state.

Our team support the development of a compelling vision, clear objectives and an op model that enables a business to achieve a competitive advantage through O2C.

Benchmarking & Maturity Assessment

Business leaders recognise the need to become more efficient and effective but do not know where to start.

We have 1000+ benchmarks for O2C, and a maturity model that tests the adoption of best practices, and compares to industry leaders in O2C.

Process Optimisation

Processes can have any paths, be poorly documented and have no clear “happy path”. They can be non-standard and wasteful.

Our depth of process capability helps us help you establish end to end processes with quality processes, documented well, and running efficiently.

GenAI & Automation

Many organizations are navigating the complex landscape of AI and automation regulations including compliance with data privacy laws such as the CCPA (California Consumer Privacy Act) and ensuring adherence to Federal Trade Commission (FTC) guidelines. A pragmatic approach that emphasizes ROI while maintaining regulatory compliance is essential.

We diagnose your current set up, we assess your digital capability and we help you select and implement technology that enables process automation.

Change Management

Resistance to change can hinder the effectiveness of O2C transformation, especially in highly regulated industries like finance and healthcare. We ensure your processes not only align with business goals but also comply with key U.S. regulations such as Sarbanes-Oxley (SOX) and sector-specific guidelines.

Our change experts understand O2C and are experts in building change ambassador models, communication structures and winning the hearts and minds of your people.

CHALLENGES

OUR SOLUTIONS

Data Transformation

Data is a problem area for most businesses today due to poor maintenance, and structures.

We diagnose how data is used, cleanse data and provide the right processes and systems for the future to get this right

Treasury

Cash is king but treasury is normally a place where there are hidden costs – bankcharges, interest rates and general inefficiencies.

Our treasury experts will assess and deliver improvement in the banking cycle, in cash flow management, in pooling and FX models, and in operational processing.

Sourcing Advisory

Our team will assess the mix of internal and external order management, cash apps, collections, and dispute resolution strategies while ensuring compliance with U.S. labor laws, and regulations like the Fair Debt Collection Practices Act (FDCPA) to optimize your O2C outcomes.

Our team will assess the mix of internal and external provision of order management, cash apps, collections and disputes support to optimise your O2C outcomes

Surge Resources

The demand for operational resources in the U.S. remains high, with talent shortages in AR, Credit, Collections, and Dispute specialists further exacerbated by evolving labor regulations, including state-level employment laws and national labor standards. We provide surge support while maintaining compliance with U.S. labor laws.

We support the provision of short term resource to resolve backlogs and meet processing needs. We do this based on daily productivity metrics and close management processes.

Training, Coaching & Upskilling

Attracting talent is difficult, retaining and upskilling is even more complex. People are the greatest asset in many companies but often underskilled.

Our O2C specific courses cover face to face training in:

- Hard skills
- Soft skills
- Transformation skills

Strategy & Operating Model

- Proservartner adopted a strategic approach to address Fuji Film's challenges, beginning with collaborative strategic workshops with the European executive team. These workshops aimed to identify the optimal process and operating models for the company. Through this collaborative effort, they determined the need to consolidate OTC teams and develop clear process ownership.
- The solution included a thorough review of cash and collections processes and an evaluation of the current technology in use.
- Based on these assessments, Proservartner defined a comprehensive OTC strategy roadmap, outlining the steps needed to streamline operations and enhance efficiency across the order-to-cash process.

Process Optimization

- We provided a comprehensive solution, centered around the implementation of the data mining tool Celonis. This powerful tool offered a clear visualization of the sales order process across multiple countries and numerous sites,. Univar was able to identify key areas for standardization, reducing variation and enhancing performance. This approach was meticulously aligned with DMAIC and Six Sigma methodologies, ensuring a structured and data-driven process improvement strategy.
- Celonis also pinpointed the root causes of process issues using existing system data, allowing for targeted improvements. The tool measured the impact of these improvements and facilitated ongoing monitoring of process performance, ensuring continuous enhancement. The alignment with DMAIC and Six Sigma further reinforced the rigour of the improvement efforts.

Change Management

- Using the Proservartner Change Management Methodology, a compelling case for change for the Change leadership roles were defined, with performance metrics established and a global Change Champion model implemented. Local leaders were trained in change management and provided with toolkits for effective communication.
- A structured stakeholder management approach was introduced, including coaching for Global Process Owners. Change impact assessments were conducted to inform interventions, and resistance mapping workshops and readiness surveys identified potential resistance areas and necessary focus actions.
- Proservartner organised briefings and created support materials, including presentations and training guides. Feedback was gathered to assess communication effectiveness, and post-implementation surveys evaluated the change impact.



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Data Transformation

- Proservartner conducted a rapid diagnostic to understand the business vision, data landscape, sources of data, entities and systems involved.
- Proservartner compared 5 leading MDM tools technically and commercially, guiding CIO to decide the best solution.
- Subsequently, Proservartner managed the implementation of the MDM solution by providing the Project Managers, MDM solution architects and Developers. As usual provided a close project governance to ensure necessary steer and project success
- Lastly, provided annual maintenance services for MDM providing much quicker resolution on issues with the MDM software.

Treasury

- We performed a detailed diagnostic on each element of Dorsch Global cash management and treasury function. Through comprehensive diagnostic interviews, we conducted a maturity assessment and reviewed borrowing, investments, services, balances, and transactions. This highlighted areas where technology could add significant value, leveraging Proservartner's deep expertise and extensive knowledge of solution providers.
- Proservartner presented an independent view on best practice methodology and optimal banking structures, ensuring the recommendations were tailored to Dorsch Global 's needs. Additionally, providing insights into strategic improvements that could enhance operational efficiency and financial performance. The culmination of this work was a final report that objectively summarised the current state ('as-is') and provided clear, actionable recommendations.

Training Coaching & Upskilling

- To address JTI's challenges, a tailor-made training and coaching programme was developed, designed to work globally across all their locations.
- The training was delivered by experienced trainers who incorporated real-life examples from the audience, ensuring the content was relevant and engaging. Practical workshops were held, using attendees' actual problems to provide hands-on experience.
- Ongoing coaching sessions were implemented to support live projects and regular probing calls to ensure the team was actively working on the initiatives. The training was adapted in real-time to provide up-to-date help, effectively bridging the gap between theory and practical use. This comprehensive approach ensured that JTI's workforce received the support and guidance needed to achieve meaningful and sustained improvements.



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Order to Cash Optimisation through Process Mining

- Proservartner implemented Celonis process mining tool to analyse Univar's O2C data, identifying bottlenecks and inefficiencies
- We then developed custom process mining solutions tailored to Univar's organizational landscape to identify process inefficiencies
- Our industry and process experts conducted a thorough and multidimensional analysis revealing significant improvement areas: rejections, returns, and OTIF (On Time In Full).
- We pinpointed specific U.S. business segments (sales organizations, customer and product segments) contributing most to inefficiencies, ensuring that all improvements are aligned with industry regulations such as Sarbanes-Oxley (SOX) and Federal Reserve guidelines for financial operations.
- Process improvement opportunities advised by Proservartner where resulting in an estimated €5M additional annual profit through reduced returns and rejections.
- These actionable insights were shared with Univar's senior leadership to inform strategic initiatives.

Technology Transformation

World's leading fin-tech software providers

- Proservartner, takes the burden off clients through comprehensive Project Management, Design and Implementation, Training support for the implementation of FIS GetPaid Solutions.
- Our bespoke workshops are crafted to meet the functional and technical requirements for system framework configuration and design, specifically for GetPaid Collections, Disputes, Collections Customer Risk Weighted Scorecards, Customer Portal, and Sales & Service Portal.
- During our design workshops, Proservartner delves into the business process challenges and collaborates closely to define the desired future state. We translate this vision into technical, functional, and best practice system and process requirements.
- In the Implementation, UAT, and Training phases, Proservartner employs industry best practices while aligning with your business needs, ensuring full support and meticulous attention to detail for a smooth transition to your new operational processes from Day 1 Go-Live.



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OTC Increasing DSO

The company recognises that its increasing Days Sales Outstanding (DSO) is linked to process breakdowns, receipting issues, disputes, and rejects, although the root causes of these symptoms remain unclear.



Proservartner proposes to use its rapid diagnostic and recovery approach to uncover the root causes of the challenges and recommend a targeted strategy to address and resolve them effectively.



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OTC Increasing DSO

Both upstream and downstream processes are interlinked

UPSTREAM

Customer Master Data	• Adding, changing and deleting the customer data to keep the master data updated
Order Management	• Managing quotes • Receiving & validating sales orders • Determining product/ service availability • Entering & tracking orders, logistics
Contract Management	• Enter and monitor customer contracts to ensure accurate billing
Credit Management	• Evaluating & scoring customer creditworthiness • Establishing and maintaining credit lines



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OTC Increasing DSO

Both upstream and downstream processes are interlinked

DOWNSTREAM

Cash Apps and AR Recs	• Establish AR and revenue policies and maintain bad debt reserves • Receive/ deposit customer payments and apply cash remittances
Billing	• Compile billing source data and calculate and generate Invoices • Post receivable entries & record revenue
Collections & Disputes	• Define collections policy & treatment strategies • Investigate & resolve customer issues
Deductions	• Compiling, verifying & approving deduction requests



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WHY PROSERVARTNER

Experts in GBS, Shared Services and Sourcing with
a strategy, vision and objectives pointing the way forward

International Experience

- Teams of senior experts cross-industry, Big 4, SIs
- Specialists with an average of 15+ years experience
- Experience working in Europe, Middle East, Asia, North America and LatAm

Functional Knowhow

- Process: Finance, HR, Insurance, Operations, Compliance, Procurement, IT, Ops
- We have helped a range of enterprises make their next step

Techniques & Methods

- Leaders on a wide range of techniques and methods
- Understand popular methods like agile and waterfall, and the pros and cons of each

Independence

- Challenger mentality
- Independent and impartial outlook
- Strong point of view

Practical

- Focused on performance
- We show how to take directly action on real-life situations and challenges

Unlock the potential in your organisation today with Proservartner



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No matter where you are on your journey, Proservartner's team of experts can help connect the dots between your business needs and the technology that can make it happen.



Contact us today for a free assessment and find out where best practice and technology could most benefit your organisation.

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PROSERVARTNER EXPERTISE

Client and Industry Examples

Real Estate & Construction

JLL · CBRE · Cushman & Wakefield · Realty Income · HSS Hire · Rinnal · Kier

Retail and Consumer Products

travel counsellors · Richemont · Nikon · Swarovski · Fujifilm · Bridgestone · avis budget group · Euromaster · adidas

Financial Services & Insurance

STARR · fiserv. · Insight Investment · Zurich · Pantheon · cfc

Healthcare and Pharma

Smith+Nephew · stryker · Roche · Takeda · AstraZeneca

Chemicals, Utilities & Infra

ENGIE · Elementis · Cadent · EDF · RSBGI · aggreko · Infinitum · Univar Solutions

Technology, Media & Entertainment

OAG · DLG Group · Ashling · Guidewire · Schibsted · ocn. · WNS · informa

Transport and Logistics

Alexander Dennis · V.Group · DHL · PD Ports