

REIMAGINING RECORD TO REPORT

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

proservartner

CREATING A UNIFIED FRAMEWORK: Why a Global R2R Template is Key to Successful Automation

In today's interconnected business environment, Record-to-Report (R2R) processes are the backbone of effective financial control and reporting.
Yet for many global organisations, these processes vary widely across regions, ERPs, and teams, creating inefficiencies, compliance risks, and barriers to automation.

A Global R2R Template offers the solution: a unified, scalable framework that standardises processes, strengthens governance, and paves the way for automation success.





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Why a Global R2R Template Matters

In today's interconnected business environment, Record-to-Report processes are the backbone of effective financial control and reporting. A Global R2R Template offers the solution: a unified, scalable framework that strengthens governance and paves the way for automation success.

Standardisation Across the Enterprise

A single, harmonised approach to close, journal, and reconciliation processes eliminates regional discrepancies. This ensures consistent quality, reduces rework, and builds a foundation for automation across all entities.

Stronger Control Assurance

By embedding clear ownership, defined roles, and standard workflows, organisations can meet stringent compliance requirements — including those outlined in the UK Corporate Governance Code — and improve audit readiness.

ERP-Agnostic Flexibility

A well-designed global template works across multiple ERP systems, from legacy platforms like Pronto and Great Plains to new implementations such as Microsoft D365. This flexibility supports phased technology rollouts without delaying automation benefits.

Efficiency and User Adoption

Streamlined templates and shared definitions make processes easier to follow and faster to execute, while fostering adoption through clear training pathways and consistent approval flows.

A unified approach eliminates inefficiencies, compliance risks, and barriers to automation — creating the foundation for sustainable R2R transformation.



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BUILDING THE TEMPLATE: A SPECIFIC BLUEPRINTING APPROACH

Our six-phase blueprinting process creates a future-ready R2R framework:
Discovery & Current State Assessment – Understand regional variations, ERP landscapes, and control gaps.
Future State Definition – Design Cadency-aligned processes integrated with global ERP strategies.
Interim ERP Strategy – Enable legacy ERP regions with low-code or file-based integrations.
Validation & Localisation – Tailor the blueprint for local regulations and operational realities.
Transition to Delivery – Prepare training, change management, and implementation playbooks.
Phased Implementation – Deploy automation in line with ERP readiness and organisational priorities.

THE OUTCOME

A harmonised R2R operating model that:
Accelerates value through faster, more accurate month-end closes
Improves governance with clear accountability and documented controls
Enables automation deployment with minimal rework
Prepares every region for a seamless transition to next-generation ERP environments
By investing in a Global R2R Template, you're not just standardising processes — you're creating a robust platform for sustainable automation and future transformation.



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Building the Template

A Structured Blueprinting Approach

1

Discovery & Current State Assessment
Understand regional variations, ERP landscapes, and control gaps.

2

Future State Definition
Design Cadency-aligned processes integrated with global ERP strategies

3

Interim ERP Strategy
Enable legacy ERP regions with low-code or file-based integrations

4

Validation & Localisation
Tailor the blueprint for local regulations and operational realities

5

Transition to Delivery
Prepare training, change management, and implementation playbooks

6

Phased Implementation
Deploy automation in line with ERP readiness and organisational priorities

The Outcome

- Accelerates value through faster, more accurate month-end closes
- Improves governance with clear accountability and documented controls
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- Prepares every region for seamless transition to next-generation ERP environments



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FROM VISION TO VALUE: R2R TRANSFORMATION IN ACTION

Multi Academy Trust Case Study

17 Academies: Business Services Transformation Programme

The Challenge

Multi Academy Trust operated 17 academies with no standardised processes, siloed operations, and costly inefficiencies across their administrative functions.

The Solution

Proservartner delivered a comprehensive Business Services transformation over 17+ months, establishing centralised processes, governance frameworks, and a unified operating model across all academies.

Value Delivered

✓ Standardisation of processes across all 17 academies
✓ Enhanced service quality and faster response times
✓ Improved decision-making through centralised analytics
✓ Strengthened compliance and risk management
✓ Significant cost savings through operational efficiency

Your R2R Journey Starts Here

Just as we standardised operations across 17 diverse academies, our Global R2R Template delivers the same transformation benefits across your global financial operations.

Ready to accelerate your Record-to-Report transformation?



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MONTH END CLOSE OPTIMIZATION CASE STUDY

CUSTOMER

-Is one of the world's leading medical technology companies Company operating in 100+ countries
-Hub-and-spoke GBS model, with main global hub in Amsterdam
- Scope – European Record to Report processes

OBJECTIVES

- Optimizing closing cycles, capitalizing fixed assets, and reducing manual journals, open item reconciliations, and intercompany mismatches can unlock significant value.
- Mitigate risk and lower costs by reducing accounting silos, delays and errors, and creating standardized, globally compliant processes.
- Deliver transparency and timely accounting close financial reporting that support insightful decision-making.

OUR APPROACH

- Standardize global closing and reporting processes, closing calendars, frameworks and templates for reconciliation, fixed assets, and inter-company processes
- Peak-load balancing to reduce month-end close efforts and allow effective utilization of resources
- Optimal use of existing IT investments through, for example, systems of engagement
- Create closing and reporting policy harmonization that drives effectiveness and efficiency
- Consolidate group services that simplify and accelerate reporting

OUTCOMES ACHIEVED

Process Time – 30%
Accuracy – 45%
Cost Avoidance – $ 0.2M
Enhanced controllership – 99%
Risk mitigation ZERO



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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 · Rinnai · Kier

Retail and Consumer Products

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

Financial Services & Insurance

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

Healthcare and Pharma

SmithNephew · stryker · Takeda · AstraZeneca

Chemicals, Utilities & Infra

engie · Elementis · Cadent · EDF · RSBGI · aggreko · Inforcum · UniverSolutions

Technology, Media & Entertainment

OAG · OLX Group · Ashling · Guidewire · Delivery Hero · Schibsted · ocado · WNS · informa

Transport and Logistics

Alexander Dennis · V.Group · DHL · PD Ports