

# STRATEGIC OPTIMIZATION

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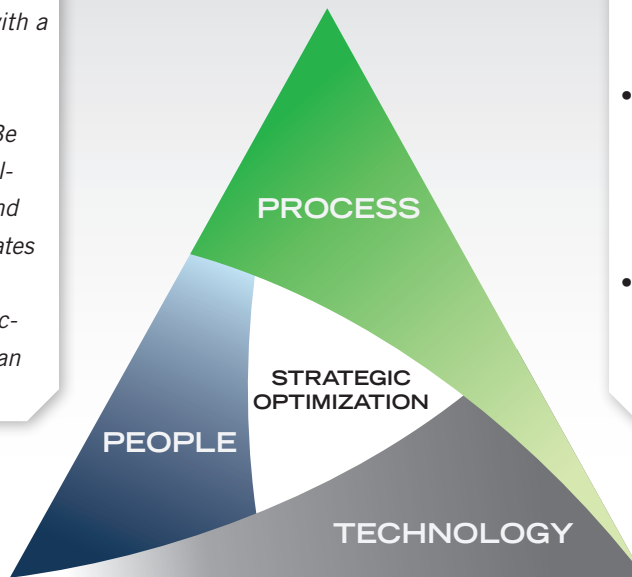
- *Enables clients to focus their efforts on the highest value-add activities*
- *Streamlines and automates transactional daily functions and re-allocates them to the most appropriate level within the organization*
- *Strategically and tactically aligns organizational structure, staffing, and the operational systems to support the business*

### PEOPLE

- **Organizational Structure**  
*Ensure an organizational structure that is efficient, effective and in-line with a proper governance model*
- **Delegation of Duty and Controls**  
*Assess functions and design "To Be Roles and Responsibilities," detailing headcount, job descriptions and required skill sets of ideal candidates*
- **Workload Re-allocation**  
*Balance workload, skills and capacity to establish a sustainable human resources model*

### PROCESS

- **Efficiency Maximization**  
*Assess, critically analyze and re-design business process work flow to increase efficiency*
- **Internal Controls**  
*Design a multi-level, yet efficient, internal control framework to ensure quality and accuracy of information*
- **Waste Elimination**  
*Create streamlined processes focusing on value-added activities and SLAs*



### TECHNOLOGY

- **Application Alignment**  
*Determine that business systems address the highest priorities and provide efficient information flow*
- **Data Integrity and Security**  
*Ensure the completeness and accuracy of critical data and provide protection from unauthorized access*
- **Competitive Intelligence**  
*Provide an analytic data repository to support dynamic response to business challenges*
- **Technology Continuity**  
*Create redundant storage and processing capabilities to enable measured response to impairment or destruction of systems*

## APPROACH:



### GOALS OF STRATEGIC OPTIMIZATION:

- Increase efficiency and lower cost pressures
- Enhanced service level agreements of the department/firm
- Apply industry leading practices and strategic planning
- Secure the quality of work with internal controls
- Optimize human capital
- Align organizational structure, roles and responsibilities and system with policies, procedures and internal controls of workflows

CLIENT	SERVICES	RESULTS
Large Global Private Equity Firm	Strategic and Tactical Optimization	<ul style="list-style-type: none"> <li>• Optimized processes and procedures for 53 functions across Back, Mid and Front Offices</li> <li>• Aligned processes, procedures, internal controls, organizational structure and systems, resulting in enhanced service levels</li> <li>• Redesigned Investor Relations function</li> </ul>
Multi-site Medical Provider	Shared Services/ Process Design	<ul style="list-style-type: none"> <li>• Designed organizational structure diagram</li> <li>• Designed process/system overview detailing applications, interfaces and the workflow</li> <li>• Redesigned process flows, including system control and interface touch points</li> </ul>
Global Hedge Fund Manager	Regulatory Valuation Services	<ul style="list-style-type: none"> <li>• Implemented accurate, objective valuation procedures for quarterly results</li> <li>• Established transparency procedures for private investors and regulatory purposes</li> <li>• Streamlined information processes</li> </ul>