

Operational Design for Accounting Services Firm

CLIENT SITUATION

A growing accounting firm is looking to become a full service accounting and financial services provider to small businesses. They pride themselves on superior customer service and have had great success in generating new clients. To manage all of the incoming work, the CEO recognized a need for a more formalized operating model and documented business processes to help firm employees do their job with efficiency – freeing up time for them to focus on a higher level of customer service.

Applied Intelligence Consulting was contacted to help this accounting firm define and document operational processes and design a sustainable, innovative and compliant operational model that will help them achieve their business goals of high quality financial solutions and superior customer service for their small business clients. We are currently engaged with this client now.

SOLUTION

Operational Design

- Collaborated with firm CEO and executive team to define a high-level operational model that is scalable and sustainable
- Identified and defined key operational areas and critical business processes- including related (cross-functional) processes, roles, responsibilities, technology, information and metrics
- Creation of “straw-man” map of current business processes is planned as well as identification of process gaps, areas for increased efficiency and opportunities for innovation

Proposed Process Development

- Document Standard Operating Procedures and Best Practices for each core functional area
- Identify and implement an online tool to manage documented processes (that employees can readily access)
- Creation of a custom template for documented processes
- Partner with key subject matter experts to draft, document and curate processes (in the online tool)
- Develop and implement a performance management system

- Collaborate with CEO, Human Resources lead and executive team to create a sustainable system for managing employee performance and engagement
- Design, develop and facilitate information sharing sessions, training, opportunities for participation in process development activities, etc. to ensure employee awareness and commitment to operational model
- Create a program for continuous improvement and innovation

VALUE CREATED

At the close of this project, we are hoping to report a significant increase in this accounting firm's employee productivity as well as high marks from their clients on satisfaction regarding improved customer services processes.

About Applied Intelligence Consulting

We help clients imagine, create and implement more efficient systems to improve their business operations, processes and people. We help clients think strategically about how their business is operating, how employees are performing and ultimately how customers are responding. We objectively help our clients identify and prioritize opportunities for operational efficiency and partner with them to define, document and implement an operational plan, key business processes and employee training programs. A well-defined business system results in greater customer value, more efficient resource utilization, higher quality products and services, accelerated time to market and a strengthened bottom line.