



# Finance Transformation

*as part of implementation of shared service centres, ERP and outsourcing*

Multinational corporations often deal with an internal organisation in which key processes have evolved in an organic way. As a result processes are seldom standardised across countries or business units. This is costly and ineffective. CPI is a leading partner in helping clients with the design and transformation of the finance function. We apply an end-to-end and integrated approach, involving business units and third parties. In this context clients choose CPI for project management and support when dealing for example with outsourcing initiatives, ERP implementations or the set up of shared service centres.

- Transformation of the finance function leads to significant cost savings
- Benefit from operational and control effectiveness
- End-to-end and integrated approach delivers expected results
- CPI expertise connects IT, business and finance

## CPI OFFERS A TAILORED APPROACH THAT SAVES COSTS AND ADDS CONTROL

### DESIGN & PLANNING

1. Understanding objectives, current situation and stakeholders
2. GAP analysis
3. Business and system blue print design
4. Implementation plan

### IMPLEMENTATION

*including project management*

1. Governance, roles and responsibilities
2. End-to-end implementation
3. Integrated approach (processes and controls)

### EMBEDDING

1. CPI's exit plan
2. Training
3. Interim management on white spots
4. Plan for continuous improvement

*"CPI is a partner one can rely on. Their multidisciplinary team is a key element from start to finish in the transformation."*

# About CPI

**TRANSFORMATION CONSULTING**  
in Risk, Finance, Governance & Compliance

*Purpose • People • Process • Technology*

## Transformation consulting *in risk, finance, governance & compliance*

CPI (**C**onnection **P**eople with **I**mpact) is a transformation consultancy agency that offers clients and professionals what they truly need in the field of risk, finance, governance and compliance: highly experienced and passionate professionals, flexibility, honest pricing and thought leadership.

## Resilient clients *with an awareness of the current climate*

Our clients recognise that developments around the world require their organisations to be strongly focused on risk, finance, governance and compliance. They choose to partner with CPI and tackle both the compulsory items and those which create value. CPI clients are market-listed, private-equity owned, family businesses or (semi-) public institutions.

## Experienced and driven professionals *with a shared mission*

The CPI model attracts highly experienced and entrepreneurial professionals. We select the very best. Professionals, who in turn choose to work with an organisation that enables them to be independent, develop personal growth and make a difference. There are more than 400 CPI professionals; each has over ten years of experience. Further to their background in consultancy, each has relevant line-management experience.

To give you an idea of the CPI service portfolio, the table below offers some examples



		Risk <i>The power of anticipation</i>	Finance <i>Stronger and predictable performance</i>	Governance & Compliance <i>Good governance, in culture and behaviour</i>
Strategic advice	Direct	<ul style="list-style-type: none"> <li>Risk appetite &amp; dashboards</li> <li>(Re)design risk strategy</li> <li>CSR, Risk management and supply chain reviews</li> <li>Risk maturity scan</li> <li>Hearts &amp; Minds™</li> </ul>	<ul style="list-style-type: none"> <li>(Re)design finance roles and responsibilities</li> <li>IPO &amp; Exit readiness</li> <li>Post merger integration</li> <li>In control statement process</li> <li>Hearts &amp; Minds™</li> </ul>	<ul style="list-style-type: none"> <li>Board evaluation, training and advice</li> <li>Ethical leadership &amp; integrity</li> <li>Compliance strategy</li> <li>Governance</li> <li>Three lines of defence framework</li> <li>Hearts &amp; Minds™</li> </ul>
Transformation & Embedding	Design	<ul style="list-style-type: none"> <li>Risk management framework</li> <li>GRC tooling</li> <li>Review and implementation of Basel, Solvency, IORP, GDPR, Security, Regtech, ERM, ISO, COBIT, GOSO, etc.</li> <li>Quantitative modelling/validation</li> <li>Data, Intelligence &amp; Robotics</li> </ul>	<ul style="list-style-type: none"> <li>Management and regulatory reporting</li> <li>Finance transformation</li> <li>Standardisation of processes/systems</li> <li>ERP improvement and implementation</li> <li>Data, Intelligence &amp; Robotics</li> </ul>	<ul style="list-style-type: none"> <li>Behavioural governance &amp; culture</li> <li>Hearts &amp; Minds™ implementation</li> <li>Implementation of compliance and integrity programs</li> <li>Data governance</li> <li>Privacy and security frameworks</li> </ul>
Subject matter experts	Deploy	<ul style="list-style-type: none"> <li>Subject matter experts (e.g.: risk experts, IT experts, security &amp; privacy experts, data experts, actuarial experts)</li> <li>Interim positions</li> <li>Co-sourcing</li> </ul>	<ul style="list-style-type: none"> <li>Subject matter experts (e.g.: CFO's, controllers, SAP experts, data &amp; robotic experts, SOx experts, IFRS experts)</li> <li>Interim positions</li> <li>Co-sourcing</li> </ul>	<ul style="list-style-type: none"> <li>Subject matter experts (e.g.: compliance managers, internal auditors, data &amp; robotics experts)</li> <li>Interim positions</li> <li>Co-sourcing</li> </ul>

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**Simone Heidema**  
Founder & CEO

*"With CPI's approach to Finance Transformation, clients are able to deliver on operational excellence initiatives such as global outsourcing, shared service centers or ERP implementation, reducing costs substantially."*

Would you like to find out how CPI's approach to Finance Transformation can help you? Please feel free to contact me directly. Email: [sheidema@meetcpi.com](mailto:sheidema@meetcpi.com) / mobile: +31 6 22 41 65 39