

Optimizing the Financial Close Process

Proven strategies to help your organization
save time and money.



Unlock the True Potential of Your Finance Team

By implementing a structured approach to close improvement, companies can ensure accurate financial reporting and mitigate associated risks.

Are you facing challenges with slow-paced, error-prone financial close processes that hinder decision-making and compliance?

What Connor Group Does Differently

We help your organization achieve faster, more accurate results.

We take a unique, phased approach to optimize workflows, implement best practices, and assess technology-agnostic strategies for streamlined financial close management.

Unlike one-size-fits-all approaches, Connor Group offers:

- **Diagnostic Precision**

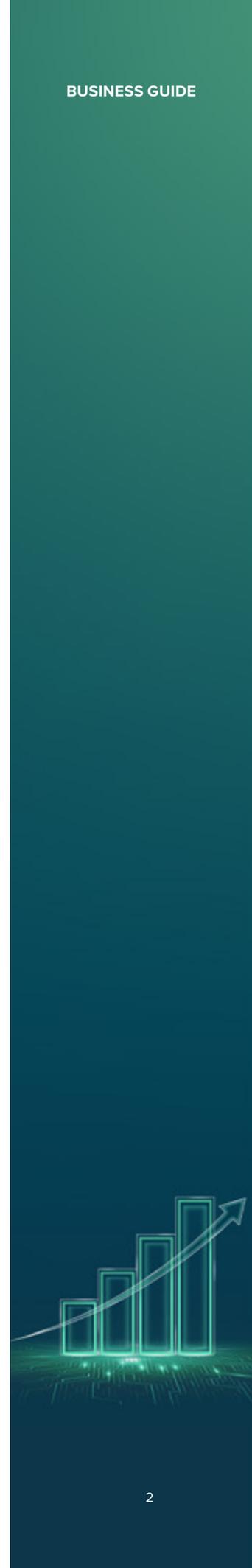
Beginning with a thorough evaluation of your current workflows we perform an assessment to identify specific bottlenecks and inefficiencies, establishing a clear baseline for measuring progress. By pinpointing exact areas for tangible improvement, every recommendation is tailored to your organization's unique needs.

- **Process Optimization**

Through the assessment, Connor Group redesigns tasks and determines appropriate resourcing in the close. This includes streamlining reconciliation procedures and developing clear, concise checklists to optimize pre-close activities, accelerate the close timeline, and reduce errors.

- **Enhanced Team Coordination**

We foster enhanced cross-departmental collaboration through assigned close tasks and ownership, shared close calendars, kickoff meetings, and structured daily stand-ups to ensure all stakeholders are informed and engaged.



- **Improved Controls and Efficiency**

By determining the close pitfalls, we enhance key financial controls, such as the fluctuation analysis and approval workflows, as well as automate repetitive tasks to reduce manual effort.

- **Sustainable Results**

Our commitment extends beyond implementation by providing tailored training, handover guides, and ongoing support to ensure your team maintains the improved processes and adapts to future challenges. This focus on knowledge transfer ensures sustainable results and long-term success.

Connor Group Delivers Quantifiable Benefits

We provide a comprehensive close assessment, process redesign, and implementation of enhanced close procedures that streamline operations and meet compliance standards. Key phases for ongoing success include:

- **Close Assessment Report**

This is a prioritized list of close improvement areas based on effort and impact.

- **Operational Enhancements**

This includes redesigned close checklists, improved meeting cadences, and optimized workflows.

- **Process Controls**

This gives you enhanced close processes, reconciliation preparation and review, fluctuation analyses, and collaboration across teams.

- **Transition**

Ensure sustainability with tailored training and handoff guides .

- **Wrap-Up Review**

This includes a summary of achieved goals with scheduled post-project checkpoints.

Take the Next Step Toward Optimizing Your Financial Close

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Ready to transform your financial operations?

Contact us for a complimentary consultation, and let's streamline your close process together.

Contacts

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