

Creating customer and product profitability with advanced allocations

Client Spotlight



Situation

A professional services firm struggled to grow, with a key bottleneck being the inability to see product and customer level P&Ls

Without this, it was difficult to make smart business decisions to know which parts of the business drove profitable growth



Solution

We deployed our 5i process to diagnose the problem, design a solution, and deploy it at our clients for ongoing use.

A rapid diagnostic created an initial view of customer and product visibility, and allowed for design discussions, feature prioritization and immediate insights.

Based on this MVP, we then built a cloud-based solution for ongoing analytics and updates to profitability models. All collaboration is done online to streamline the process.



Results

For the first time our client could see the precise profitability of key accounts, and used this to realign their sales and support resources more efficiently with customers.

Additionally, by gaining visibility into the drivers of overall enterprise profitability, our client was able to create a bankable roadmap to a \$10M EBITDA improvement goal in the upcoming fiscal year.



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Tags: Cost allocations, professional services, 5i process, customer profitability, product profitability

