

finance transformation & effectiveness services



The role of finance and finance executives is changing. Finance today is a strategic function that enables change and value-added action cross-functionally. For many companies today, this vision demands cultural, technological and process changes. Finance executives must be strategic at selecting the right building blocks for people, process and technology. Once selected, change management and internal capability development become critical to lasting success. Throughout the process, positive stakeholder engagement and leadership flexibility create the environment for teams to succeed.

OUR SERVICES

OTB Advisory is highly experienced at finance strategy development, stakeholder engagement, project planning and management, and change management. We help companies build processes, structure teams, and select and implement software solutions. In some cases, we partner with software providers to effectively roll out and implement flexible and scalable solutions that are just right for the problem.

Finance Strategy Development

Build a strategy that enables teams to focus on mission-critical work.

- Development of finance mission, strategic objectives and plans
- Development of key value drivers and data/digitization requirements
- Development of finance playbooks and team charters
- Stakeholder engagement and analysis
- Assessment of internal capabilities and external pressures/opportunities

Finance Strategy Execution

Selecting the right strategy and its effective and timely execution are both necessary for results.

We focus on the first 180 days of strategy execution to lead and support change efforts, add a unique strategic lens, contribute technical expertise, and build processes and tools. While we work closely with stakeholders, we are free of any political agendas and our work is 100% focused on getting lasting results for each client's unique circumstances.

- Selection of systems and tools
- Full-scope project/team leadership and management / team structuring
- System implementation
- Change management and training
- Cross-functional integration
- Data assurance (data conversion, migration and post-migration controls)
- Development of processes and controls (including regulatory compliance)
- Development of tools (including VBA coding for spreadsheet tools)

Our work with finance teams ranges from a single process or tool to full-scope global finance transformation projects. As a boutique firm, we customize our approach for each client. After the initial change efforts, OTB Advisory will guide you to long-term sustainability by offering ongoing consulting services.

- Assistance in monitoring outcomes & change implementation
- Internal communications

ABOUT OTB ADVISORY

Elena Bowes founded OTB after more than 20 years of working for several multinational accounting organizations. Using all of her knowledge and developing her own unique methodologies, she created OTB to realize positive change and out-of-the-box thinking for each client, helping them to reach their potential, strategically adapt to changing markets, and achieve sustainable growth.

CONTACT US

403-808-6485 |
info@OTBAdvisory.com
OTBAdvisory.com |