

Services for the Unexpected: Scalable Processes and Controls

Dopkins CAAS Team COVID-19 Deliverables

Part 4 of 4

April 30, 2020 - This is the fourth installment of our four-part series on our Client Accounting & Advisory Solution (CAAS). Now more than ever, the need for strategic decision making and seamless access to data is critical. Our team can help you protect your business, enabling you to survive this crisis and continue to thrive when the crisis is over.



As so many of us adapt to the “new normal” while conducting business, the primary objective of our full-scope CAAS solution remains unchanged: to help create an accounting and finance function that is **more efficient**, **more transparent** and **more effective** in contributing to your success.

To realize this objective, we begin with a complete assessment of each client’s existing processes and controls. This starts with our gaining a deep understanding of what processes and controls are in place. We then work with each client to create processes that are scalable to accommodate growth and the complexity of the organization’s business operations.

Our process begins with **DISCOVERY**. Here, we gain an understanding of what our client’s leadership expects from their finance team. Examples include: financial transparency, timely and accurate financial reporting, and financial analysis and insights. We also gain an understanding of what the finance team experiences (day-to-day) as they carry out their duties, including an understanding of individual roles and responsibilities. We use a standardized series of questions and analytics to develop a thorough understanding of your business environment and finance and accounting processes. We use this information to develop a picture of your “**current state**”.

Next, we perform an **ASSESSMENT**. Based upon what we learned in Discovery, we work with your team to design improved processes.

In this series:	
	Part 1 The Right People
	Part 2 Real-Time Visibility
	Part 3 Connected Data
	Part 4 Scalable Processes and Controls

Throughout this process, we draw upon a combination of our expertise and past experiences to identify “best practices”. We customize these best practices and apply them, where appropriate to your business processes. Our assessment results in a series of recommendations as to changes to various processes that we use to develop a picture of your “**future state**”.

Finally, we’ll **REPORT** to our client’s leadership team detailing our observations and recommendations relative to each process we’ve evaluated. We also include a visual modeling of the re-designed processes we’ve developed. Our communication will assist our client’s leadership in determining if an outsourcing/co-sourcing alternative to their existing accounting and finance structure would add value to the organization.

To further explore how we can help, please contact one our team leaders below.

Please stay safe and healthy!

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