

**Case Study:  
Streamlining and  
Automating Finance  
Software for a Growing  
Mid-Size Ad Agency**



# Issue:

The Ad Agency CFO had a clear understanding of what he needed to do: to streamline, automate and fully utilize the enterprise finance system he had purchased. The CFO turned to us to help him execute his plan.

The first challenge, a familiar one, was getting the non-finance staff to participate in using the tool. It was especially challenging because the finance system was not user friendly.

# Discovery:

Through our discovery process, we realized that a user-friendly platform would not comprise the full solution, because creative companies are notorious for non-compliance when it comes to expense tracking and the like.

# Solution:

Our solution was to create an ecosystem whereby the non-finance participants would use the finance system without even understanding they they were doing so. First, we worked with key stakeholders to simplify and clarify all of the external human processes. Then, working with a software developer, we consolidated the internal software processes and made user friendly skins to cover and access the financial software.

The final step was building an expenses app from scratch that integrated with the financial software.

# Results:

- All agency personnel adopted use of the app
- More streamlined financial processes
- More streamlined financial software
- More clarity for users, showing how the financials work with all the other processes
- Back office finance connected to front office operations
- Great reviews to this day