

# CASE STUDY

## Setting Up Shared Services



**Aeries Technology Solutions Inc.**

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## The Client

The client is a mid-sized technology company providing open, integrated security solutions to enterprise customers worldwide. It offers a suite of Mobile VPN and Secure Network Access solutions, focused on solving the challenges of currently facing enterprise mobility and access.

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## The Challenges

The client had two broad overarching needs – to establish resource bandwidth as an independent entity, while also focusing on improvements in operational efficiencies and cost optimization to enhance value for its investors.

Being hived off from a large parent and its attendant resources necessitated rebuilding informational systems across Order Management, Sales Operations, Strategy and Engineering.

It required a service provider and partner capable of providing round-the-clock coverage, enabling the establishment of a cost effective business model, and providing significant analytical and implementation expertise.

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## How did Aeries Help

Aeries' mandate was to provide informational and analytical expertise and to help optimize client operations as it stood itself up as an independent entity.

Aeries' stable of analysts offered the client resources capable of meeting every potential need, with enormous industry experience and expertise in a variety of areas:

- Management reporting & Analytics
- GAAP implementation
- Budgeting & Forecasting
- KPIs
- Reconciliation
- Treasury & Liquidity Management
- Inventory Management
- ERP and Financial Applications
- Regulatory filings
- Sales Tax, VAT, and Corporate Tax filings



Aeries' teams enabled both system implementations and set up critical finance, accounting and reporting structures. Our key achievements in implementation can be characterized as below:

- **Supply Chain & Operations Support:** Setting up an end-to-end 24/7 infrastructure for customer care, order management, point of sales, deal deal, price desk with deep expertise in supply chain operations.
- **ERP implementation:**
  - Implementation and replacement of pre-divestment ERP system through implementation and setup of ERP and BI.
  - Setup a recognition policy for sales arrangements containing multiple elements for which revenue is allocated to each element based on a selling price hierarchy
  - Aeries helped set up an end-to-end Order management to POS cycle in ERP
- **Finance and Accounting Operations:** Quickly scaling up F&A team to support the needs of a spin-off organization. The specific support areas included AR, AP, cash management, and GL.
- **GAAP implementation and budgeting:**
  - Aeries' budget team orchestrated a model for sales tax filings for customers & nexus states
  - The Budgeting team played a key role in establishing cost benchmarks as required by client's management and investors.
  - Additionally, our significant resources in GAAP implementation coordinated compliance with the complex statutory reporting and filing requirements prevalent in different states and jurisdictions in the United States
- **Financial Planning & Analysis:** Aeries offered a deeply knowledgeable FP&A team capable of providing analytics, financial modelling and performance metrics relevant to the specific needs of the client. During the course of our mandate, FP&A performed the following critical functions:
  - Building client specific management systems relevant to sales, operations, engineering and strategy stakeholders
  - Periodic financial summaries specific both to company management and investors' informational needs
  - Laying down frameworks for critical systems, policies, process notes and their implementation
  - Management of sales operations metrics as well as commissions pay-out to sales teams
  - Product introduction analysis

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## The Outcome

A year and half after acquisition, the client is now thriving as an independent entity – having set up support organization for the client, Aeries currently provides round the clock coverage as the client scales up and executes its next growth phase.