

# | CASE STUDY

## Setting Up Shared Services



## 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.

## 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.

## How did ATG Help

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

ATG' 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

# The Client

ATG' 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
  - ATG 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:**
  - ATG' 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:** ATG 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



## 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, ATG currently provides round the clock coverage as the client scales up and executes its next growth phase.

## About Us

ATG is a global services company offering technology, business process management and consulting services to organizations seeking higher operational efficiencies, greater flexibility and lower operating costs. We offer business value to our clients by combining operational excellence with deep domain expertise. Our bespoke solutions drive agility and excellence in our client's business processes plus help expand their operational coverage to 24x7 enabling clients to operate as a truly global business organization. As a true business transformation partner, we offer innovative business solutions which go well beyond labor arbitrage and deliver tangible process improvements for our clients.

## Solutions We Offer

### Technology

Software Development and R&D | Software Testing | IT Services | ERP Implementation | Blockchain | Big Data & AI

### Business Process Management

F&A Operations | Legal Secretarial & Compliance | HR Management & Payroll | Sales, Renewables & Operations Support | eDiscovery, Litigation Support and Document Review Solutions

### Consulting Services

Business Strategy / localization for India and Middle East | Marketing and Business Development | Mergers and Acquisition | Management System

## Contact Us

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