

Business Process Assessment & Optimization



We combine our experience in private equity businesses and deep functional and industry thought leadership to drive **cost reduction, increase customer satisfaction, and enhance operational excellence through intelligent business process optimization and automation.**

Process improvement in private equity held businesses becomes increasingly complex with the introduction of inorganic growth because the organization's headcount grows, the operational interdependencies multiply, and redundancies naturally abound. Our team of process experts employs a proven and systematic approach to business process improvement to focus primarily on sustainable cost reduction and operational efficiency.

We deploy relevant methodologies (agile, lean, and Six Sigma) and CBIZ Private Equity Advisory tools, including process mapping, value stream analysis, and Kanban to identify the as-is process, diagnose the root cause(s), design the new solution, and implement through a rapid change management process.

Our services have been instrumental in helping our clients achieve measurable results in several key areas, including:

- **Cost reduction**
- **Elimination of redundant efforts**
- **Quality improvements**
- **Improved process compliance**
- **Process automation**

Our teams are experienced across various industries and bring relevant best practices and expertise to ensure the solution is scalable and fit for purpose.

Commercial

Sales effectiveness means something different for every organization. We work with sales teams to align goals with the process, best practices, and metrics to achieve the desired outcomes.

Supply Chain

An effective supply chain is well-integrated with the rest of the organization. We help our clients enable supply chain visibility, drive efficiency through automation where possible, and deploy continuous improvement programs.

Operations

Waste exists at every level of the organization. To help our clients be more competitive, we take a lean approach to addressing issues ranging from poor inventory management and overproduction to over-processing and downtime.

Finance

An organization's ability to invest is greatly influenced by the ability to manage net working capital. We work with clients to identify the optimum solutions to free up capital for redeployment.

Our Difference

WE LEVERAGE NIMBLE TEAMS WITH DEEP EXPERTISE TO EFFICIENTLY DELIVER IMPACT.

FLEXIBLE — We tailor proven approaches and best practices to the situation at hand.

EXPERIENCED — Our consultants have a hybrid of deep expertise in private equity and consulting.

AGILE — We balance structure and discipline with an agile mindset which allows us to expedite value capture.

RESPONSIVE — We work closely with you, communicate regularly, and are responsive to your requests.

PROACTIVE — We identify and address blind spots before they escalate into issues.



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Expertise In Action

Select Business Process Assessment & Optimization Clients



Private Equity Fund:
Highview Capital



Private Equity Fund:
General Atlantic



Private Equity Fund:
Southfield Capital



Private Equity Fund:
Wind Point Partners



Private Equity Fund:
Solace Capital Partners



Private Equity Fund:
Clayton, Dubilier & Rice



Case Study

INDUSTRY: Food Processing

SERVICE: Business Process Review
& Fit Gap Analysis

REVENUE: \$300M

ISSUE: The Sponsor was seeking to understand the current state processes to inform the business integration and ERP migration strategy. CBIZ PE Advisory was asked to review the current state processes at an in-depth level and leverage its review to analyze the process and ERP utilization alignment between the platform business and a recently acquired bolt-on.

SOLUTION: CBIZ PE Advisory prepared fit for purpose process maps and documentation of all key process interactions within the organization's ERP. Based on our extensive understanding of the business activities, we developed a fit-gap analysis that analyzed the following across the platform and bolt-on business: (1) Extent of process alignment across both companies, and (2) Relative degree of ERP utilization to execute key process steps within each organization.

OUTCOME: The Sponsor was able to understand the core business operations at an in-depth process level to debate core assumptions of the integration & ERP selection program because CBIZ PE Advisory captured vital and relevant business and operational nuances across the inputs, outputs, and process variations within the businesses. Furthermore, the fit-gap analysis enabled the Sponsor to make a decision on the degree of integration that it would move forward with, and which ERP(s) would be used to enable the go-forward operating model.