

Creating a Roadmap for Business Excellence

Financial Software Scale: 355 employees

Adonis Partners helped a software company identify key improvement opportunities and develop actionable strategies, resulting in end-to-end operational business excellence.

- ✓ Uncovered and prioritized high-impact process changes
- ✓ Elevated customer engagement through standardized workflows and readiness protocols
- ✓ Reinforced knowledge management with robust issue tracking and resolution systems



68

Opportunities for Improvement

36

Interviews Conducted

4

Week Engagement

For over 30 years, this leading software company has helped energy firms navigate complex financial decisions. Their solutions are trusted by CFOs across North America, but as the business has evolved, inefficiencies within core processes began to slow progress. Adonis Partners was brought in to assess the current state and identify vital areas for improvement.

Adonis' expert consultants conducted an in-depth assessment across three critical systems: cloud migration, sales support, and M&A integration. Through leadership interviews, data analysis, and process mapping, the team uncovered 68 opportunities for improvement (OFIs). Primary challenges included gaps in project management, inconsistent customer engagement, and a lack of standardization in readiness planning. To prioritize solutions, Adonis used an impact/effort matrix, ensuring optimal improvements were addressed first.

A roadmap of recommended actions was presented to the client, starting with hiring specialized talent for project and knowledge management. Other improvements included designing a defect tracking system, standardizing front-end customer engagement, and implementing a customer readiness plan. Additionally, a "lessons learned" process was proposed to prevent recurring issues.

By diagnosing the root problems and taking strategic action, the company minimized inefficiencies and positioned itself for business excellence, ensuring its financial software remains a trusted platform.