

Evidence Pack - Consultant of the Year

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Finance Transformation That Pays for Itself - Automation, Controls, Outcomes

A. Evidence index (what to look for)

Claim	Where it's documented	Evidence type
30-50% process efficiency gains	Board CV (Full), Board Value Narrative	Role impact statements; process efficiency outcomes
50% reduction in bottlenecks	Board CV (Condensed)	Automation + SaaS alignment impact statement
75+ countries governance scope	Board CV (Full/Condensed)	Global corporate card compliance scope statement
Regulatory governance depth	Board Value Narrative	GDPR, IFRS, SOX, SOC 2 alignment statement
Awards / external recognition	Board Value Narrative	7+ excellence & innovation awards statement

B. Case study briefs (selected)

Short, audit-friendly briefs. The focus is on deliverables, operating mechanics, and how the result was made repeatable. Full client names and sensitive data are withheld where required.

Case Study 1 - Finance process efficiency (ERP + RPA + SaaS integration)

Context	Complex, multi-tool finance operations with friction at handoffs and high exception volume. Leaders needed speed without losing control.
Intervention	Mapped end-to-end value flow; redesigned handoffs; sequenced system integrations; built an automation backlog; embedded governance cadence and exception rules.
Impact	Documented 30-50% efficiency uplift through process rewiring and tool integration; lower friction and clearer accountability.
Notes	Impact captured on Strategic Depth (anonymized, published).

Case Study 2 - FinOps and digital workflow transformation (WY Tech Consulting Client)

Context	Fragmented digital spend plus manual workflows across ERP/CRM/SaaS; slow decision cycles; limited real-time visibility.
Intervention	FinOps operating model and cadence; integration across ERP/CRM/SaaS; automation (RPA/workflows); analytics; governance KPIs.
Impact	Reduced operational inefficiencies by 30-50%; improved financial visibility and scalable routines.
Notes	Aligned with GDPR, IFRS, and SOC 2 expectations.

Case Study 3 - Order-to-Cash performance and cash discipline (Orange Business)

Context	Exception volume affecting billing timeliness, collections productivity and cash predictability for major accounts.
Intervention	Automated reporting; workflow stabilization; escalation routines; continuous exception triage.
Impact	Delivered 125%+ DSO accomplishment and improved predictability.
Notes	Business Unit Clients' details anonymized.

Case Study 4 - Global spend governance at scale (Oracle)

Context	Global governance scope required consistent compliance and control expectations across regions and stakeholders.
Intervention	Standardized governance routines; clarified policy-to-control ownership; built reporting and escalation patterns that scale; managed risk and supplier governance.
Impact	Oversaw corporate card compliance and controls across 75+ countries; improved consistency and risk posture without operational drag.
Notes	Specific portfolio details available under confidentiality.

Case Study 5 - FinOps Clarity Sprint (published mini-case, 90 days)

Context	Unpredictable AWS bills, SaaS proliferation, and limited ROI visibility in a scaling SaaS firm.
Intervention	Cross-functional FinOps squad; shared KPIs tied to feature revenue; rolling forecast model.
Impact	17% reduction in waste; 22% reinvestment into high-performing initiatives; +8% margin expansion in underperforming geos.
Notes	The FinOps Multiplier (anonymized, published).

Case Study 6 - Bottleneck elimination through automation and SaaS alignment

Context	Operational bottlenecks created recurring delays and hidden rework costs across teams.
Intervention	Identified bottleneck causes (decision debt + handoff design); automated repetitive steps; aligned SaaS configuration to the real process; reduced exception paths.
Outcome	Documented 50% reduction in operational bottlenecks; faster throughput and fewer escalations.
Notes	Impact captured on Strategic Depth (anonymized, published).

Case Study 7 - Policy-to-product / control telemetry (published mini-case)

Context	Tightening obligations on access, change, and vendor risk; policy binders without enforceable controls; frequent outages.
Intervention	Privileged access boundaries at identity/API gateways; CI/CD deployment gates with feature flags; structured, auto-expiring exceptions; telemetry to finance/audit.
Impact	Failed deployments dropped; approval times improved; audit cycles shrank from weeks to hours.
Notes	From Policy to Product (anonymized, published).

C. Method system (how I work, in outputs)

Module	Artifacts produced
1) Decision Debt Audit	Decision rights map; escalation paths; cadence design; KPI spine
2) Value-Flow Mapping	End-to-end process map; handoff failure points; exception taxonomy
3) Controls-by-Design	Control inventory; control owners; evidence trails; change governance
4) Automation + Integration Backlog	ROI/risk-ranked backlog; sequencing plan; quick wins vs foundations
5) Instrumentation	Dashboards and control telemetry; weekly operating rhythm; board-ready reporting

D. Framework-to-delivery map

Framework	What it addresses	Deliverables it produces
Decision Debt	Delayed decisions, diffused ownership, rework.	Decision-rights map; cadence; escalation; KPI spine.
Rewiring the Core	P2P/O2C/R2R friction and exception load.	Workflow redesign; controls; integrations; automation backlog.
FinOps Multiplier	Spend not tied to value; savings not reinvested.	Spend squads; value metrics; allocation loops; clarity sprint.
Digital Fluency for Boardrooms	Board-level system literacy and risk paths.	Stability map; risk register; question bank; audit call.
The Untangler	Structured rescue method for messy initiatives.	Salvaged and rearchitected roadmaps, rescue-projects delivered in good conditions.
Policy to Product	Compliance as narrative, not capability.	Policy-as-code backlog; control telemetry; CI/CD/identity gates.

E. Thought leadership corpus (relevant pieces)

Asset	Why it matters
The Untangler: My Method for Bringing Order to Chaos	Diagnostic and intervention method used in messy transformations.
Decision Debt	Decision architecture and cadence design for execution speed.
Rewiring the Core	Process + system redesign principles in finance transformation.
The FinOps Multiplier	Spend-to-value discipline and governance loops.
Digital Fluency for Boardrooms	Board-ready framing and governance questions.
Shovel Sellers in the Boardroom	Governance + long-term value creation narrative.
Strategic Slack	Capacity design for resilience and execution.
From Policy to Product	Operationalizing policy into enforceable control systems.
Passport to Skills	Credentialing / talent-market systems thinking.

F. Supporting URLs

<https://www.istinnova.com/insights-frameworks-istinnova>

<https://www.istinnova.com/the-messy-future-adapting-your-fixing-skills-for-emerging-challenges>

<https://www.istinnova.com/the-alchemy-of-the-edge-how-gold-diggers-forge-innovation-and-redefine-the-map>

<https://www.istinnova.com/the-gold-rush-career-when-to-dig-for-gold-and-when-to-sell-shovels>

<https://www.istinnova.com/the-shovel-sellers-secret-how-to-build-a-lasting-business>

<https://www.strategicdepth.com/p/welcome-to-strategic-depth>

<https://www.strategicdepth.com/s/the-boardroom-operating-system>

<https://www.strategicdepth.com/about>

<https://www.strategicdepth.com/p/digital-fluency-boardrooms-system-literacy>

<https://www.strategicdepth.com/p/decision-debt-the-silent-killer>

<https://www.strategicdepth.com/p/why-your-finance-stack-is-slowng>

<https://www.strategicdepth.com/p/rewiring-the-core-end-to-end-financial>

<https://www.strategicdepth.com/p/the-future-fit-finance-function-mastering>

<https://www.strategicdepth.com/archive>

Integrity note: All frameworks are original. Client examples are anonymized where required. Verification can be provided upon request within confidentiality constraints.