

Performance Reporting & Business Intelligence Solutions



CBIZ Private Equity Advisory delivers performance reporting solutions with an emphasis on efficiency and actionable insights so finance teams spend less time manipulating data and more time analyzing the business.

CBIZ Private Equity Advisory's performance reporting solutions enable stakeholders to efficiently digest complicated operational and financial datasets to draw meaningful conclusions that direct attention to enhance business performance.

Financial Reporting Transformation

Our financial reporting approach ensures that leadership teams have comprehensive reporting packages to satisfy both compliance and management reporting needs.

MULTI-ENTITY CONSOLIDATIONS

Standardizing disparate financial reporting elements including cross-system GL account redesign, department / geography / sub-segment hierarchy development and intercompany eliminations.

PRO FORMA ADJUSTMENTS

Layering in pre-acquisition diligence and ongoing management adjustments creates meaningful trends and comparative analysis.

COMPLIANCE & MANAGEMENT REPORTING

Separating views of lender-compliant financial statements for covenant compliance from analytical views for management analysis in an integrated reporting package.

FUTURE ACQUISITION INTEGRATION

Designing flexibility required for efficient integration or consolidation of upcoming add-on acquisitions.

KPI Definition and Monitoring

Our teams collaboratively define KPIs that illuminate business trends and align with strategy; then, CBIZ Private Equity Advisory implements the cadenced processes to report those KPIs.

STAKEHOLDER INCLUSION

Working with management teams and Sponsors to define the most meaningful and relevant indicators of success that underlie financial performance.

SYSTEM UNIFICATION

Incorporating data from various systems to synthesize succinct and meaningful operating measures that impact financial results.

Expanded Cross-Functional Participation

Work alongside departmental leadership, transforming institutional reporting cycles to empower decision-makers.

REVIEW CYCLE STANDARDIZATION

Delivering insight more frequently and timely via daily flash reports, weekly scorecards, and monthly business reviews.

PROCESS ORIENTED

Focusing on workflows to appropriately distribute performance reporting and direct attention.

A Rigorous Process

PERFORMANCE REPORTING GUIDELINES

Performance management is enhanced through effective reporting that permeates throughout an organization. CBIZ customizes reporting solutions that improve:

- **Information & Data Gathering:** Automating time-consuming data extraction and normalization procedures
- **Practical Analyses:** Root-cause analyses allowing management to draw meaningful conclusions
- **Performance Evaluation & Review:** Push-button compilation and distribution allowing for intra-period action planning and immediate course corrections

CBIZ deliverables maintain the following attributes to optimize performance reporting cycles and encourage transparency as well as accountability through:

- Actionable Metrics
- Appropriate Target Audiences
- Comparable Scenarios
- Applicable Granularity
- Meaningful Timeframes



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PERFORMANCE REPORTING & BUSINESS INTELLIGENCE SOLUTIONS *BY THE NUMBERS*

50+

Performance reporting projects completed per year for middle-market businesses while leveraging expertise in a constantly growing number of financial and operational systems to unlock deep insights into business performance.

Expertise In Action

Sample Performance Reporting & Business Intelligence Solutions Clients



Private Equity Fund:
New Mountain Capital



Private Equity Fund:
Odyssey Investment Partners



Private Equity Fund:
Centre Partners



Private Equity Fund:
New Water Capital



Private Equity Fund:
Wynnchurch Capital



Private Equity Fund:
Garnett Station Partners



Case Study

POSITIONED FOR SUCCESS

INDUSTRY: Specialty Healthcare Services

SERVICE: Monthly Financial Package Transformation & Operational Performance Reporting

REVENUE: \$200M

ISSUE: An optometry and ophthalmology platform required consolidated financial performance reporting across multiple bolt-on entities. The existing process was a time-consuming and error-prone effort to manually extract data from multiple systems and stitch together financials.

The Company also lacked data-backed insights into its 43 clinics and two ambulatory surgery centers (ASCs). Without operational analysis, the management team was in the dark on provider, patient, and revenue cycle trends.

SOLUTION: Assisted the Company in enhancing the efficiency and effectiveness of their performance reporting capabilities.

FINANCIAL STATEMENT TRANSFORMATION

- Built an Excel-based monthly financial statement reporting model that included automated querying from the accounting system
- Created consolidated Chart of Accounts across all entities
- Added dimensionality to enable department and location-specific financial reporting

OPERATIONAL PERFORMANCE REPORTING

- Constructed auto-generated daily, weekly, and monthly reporting for clinics and ASCs
- Developed provider scorecard reporting and compensation analyses

OUTCOME: The Company has flexibility, conformity, and traceability within its management, sponsor, and lender financial packages. The Company was able to pinpoint causes of underperforming locations and develop strategies to enhance provider productivity. CBIZ Private Equity Advisory's automated procedures greatly increased the Company's efficiency of performance reporting cycles.