

Financial Services Practice

Our team has extensive experience in operations, finance, and sales. You can engage us to help you in a wide range of our consulting offerings, or on a single, focused issue. The end result is we can provide a specific list of recommendations to improve the performance of your business and your operating results.

EdgeStone | Great Ideas
Great People



Our services include:

Financial System Review

- We perform a detailed review of your financial reporting system and provide detailed recommendations for improvement.
- Is your executive team getting key financial results in a timely manner? We will perform a review of the process and provide specific recommendations how to get results quicker.

Business Plan Development

- We prepare a detailed business plan for your company's new offering. This includes providing market assessment, competitive analysis, detailed financial projections, and how this new business line will be integrated into your company.

Financial Assessment

- We Review the organizational structure and workflow model and provide specific recommendations to optimize performance.
- We review the cost structure and provide specific recommendations to improve your bottom line results.
- Are your Project Managers getting timely and accurate information so they can meet their profit objectives? We can implement an improved project reporting system for your company.

Forecasting Models

- If you do not have an existing forecasting model in place, we will work with your team to implement the process.
- If you have an existing forecasting model, we will review it and provide specific recommendations how to improve it.

Cash Flow Improvement

- Are the people who can make an impact in collecting the receivables getting the information they need in a timely fashion? We can review your current system and recommend areas for improvement.
- If you do not have a model in place, we can design a cash flow forecasting model.



Interim Management Support

- We can provide interim senior management support to fill your temporary need: President, Chief Operating Officer, Chief Financial Officer and Human Resources Director
- By choosing EdgeStone to provide your interim management support, you will give your management team the time to select the right replacement
- We can also assist you in defining your hiring requirements and sourcing potential replacement candidates.

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