

## ENTERPRISE CONSULTING SERVICES

The Enterprise Consulting Services practice offers comprehensive Financial, Operations, System/Technology and Program Management services to the financial services, insurance and reinsurance industries. The Practice is comprised of industry experts, many having more than 15 years of “Big Four” experience using methodologies and tools for rapid results.

**Financial Management Services:** Establish business entity strategy, budget and forecasting to support profit planning. Utilize business intelligence tools and metrics to monitor results. Develop and manage Service Level Agreements (SLA) and Transaction Service Agreements (TSA) to support outsource and divesture activities. Utilize impact analysis and risk assessment tools to quantify potential exposures; determine mitigation strategies; outline plan testing; and establish business continuity and disaster recovery planning methods.

- Business strategy, budget and forecasting
- Business intelligence and key performance indicators (KPI)
- Service Level Agreements (SLA) Management
- Enterprise risk identification and analysis
- Business continuity and disaster recovery

**Operations Management Services:** Focus on process improvement by establishing process maps and applying best practices to identify inefficiencies, redundancies, and processes that benefit from automation.

- Baseline and document “as is” environment
- Research and outline best practices
- Road map, technology implementation and performance management metrics
- Cost reduction initiatives
- Organizational effectiveness and control reviews

**System/Technology Services:** Evaluate, select and implement systems and technology to support current and future business operations. AG’s services are supported by comprehensive SDLC methodologies, tools and industry best practices. We remain current on leading ERP, CRM, Business Intelligence, Policy Administration and Claims application software products, to help clients achieve maximum value from their IT investments.

- IT planning, strategy, and value analysis
- Business requirements documentation and analysis
- Enterprise system (ERP, Policy Administration, Claims) evaluation, selection and implementation
- Custom development, conversions and system integration
- Architecture and technology assessments

**Program Management (PM) Services:** Enhance productivity, communication and control over mission critical projects. AG’s Program Management Office (PMO) methodology structures planning, assigns responsibility, determines Return on Investment (ROI), and reduces enterprise risk and cost. AG can establish a PMO framework, implement a PMO, launch an enterprise-wide PMO capability, and/or provide individual project management resources.

- Strategic planning and vision
- Value mapping and ROI analysis
- Evaluation and implementation of methodology, software tools, templates and training
- Develop and manage project plans for key initiatives
- Provide project management resources to lead key management initiatives under client supervision
- Conduct “in flight” project reviews and turnaround plans for over budget/past due projects

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## Sample Engagements:

### Financial Management Services

- Conducted a spend analysis for a worldwide financial services company that led to the selection and implementation of an enterprise-wide e-procurement system and reduced spend of more than \$25 million.
- Developed and managed Transaction Service Agreements (TSA) to unwind system support for newly divested business units for an international insurance company.
- Developed and executed Service Level Agreements (SLA) for outsourced human resource systems for a worldwide insurance company.

### Operations Management Services

- Performed an analysis of the collections activities of a national insurer and recommended a functional consolidation and new business process that saved the client more than \$1 million annually.
- Performed a business process review of the multinational account servicing operations of an international insurer that led to the creation of a common, cross-business client servicing organization and reduced local policy issuance time by more than 70 percent.
- Conducted cost reductions initiative for executive management that resulted in a 22% reduction of indirect costs for a major financial services company. Study included review of business process, practices, and procedures for corporate accounting, billing, budgeting, forecasting, shared services, financial and project reporting functions.
- Evaluated, selected and implemented program and case management tools at an international commercial insurance provider.

### System/Technology Services

- Engaged as member of Steering Committee of an international insurance company conducting a global implementation of the SAP FICO and Collections and Disbursements products.
- Conducted multi-year implementations of financial systems for a global telecommunications and an international property and casualty insurance company.
- Assisted a global commercial property and casualty insurance and reinsurance organization in developing an automated method of monitoring, processing and reporting catastrophe claim activity.
- Planned and executed the integration of multiple legacy systems for a major reinsurance organization. The resulting central depository improved data accuracy and integrity, reduced mainframe and maintenance costs, enhanced reporting capabilities and eliminated operational inefficiencies by executing streamlined best practices.
- Establishment of a web-based .NET application to streamline the reinsurance billing process for a global insurance agency. Significant aspects of this custom development initiative included SDLC industry standards requirements definition, design, development, unit testing, interface development/testing, conversion, implementation, documentation and post implementation review, resulting in a central repository for billing and real-time reporting.
- Designed and developed the Electronic Legal Auditing System (ELAS) that provides a comprehensive analysis of legal bill invoices, following guidelines and generally accepted law standards. The flexibility of the tool allows for both an automated and manual audit approach and offers online account access, real-time invoice budgeting, management and reporting.

### Program Management (PM) Services

- Developed a comprehensive PMO for Board of Directors of a global financial services company which presented a monthly snapshot of the status, cost and key metrics for more than \$2 billion in global process, systems, and compliance initiatives.
- Developed Program Management Office (PMO) infrastructure at an international insurance company with more than \$600 million in projects under management. Evaluated, selected, and implemented project management tools as a basis for enterprise-wide project management.
- Built and managed the Program Management Office (PMO) to coordinate integration activities due to the merger of two multi-billion dollar international financial services firms.
- Staff supplemented project management professionals to engage, under client direction, multiple multi-year divesture and system implementation initiatives.

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