

Consulting Services

What We Offer

Our experts are available to provide proactive guidance and support—on site or remotely—throughout the entire solution-implementation lifecycle.

ADVISORY SERVICES

Our advisory services are delivered through an integrated team that will learn about your company and business goals and recommend strategies to help you determine and implement the analytics solutions that are right for you.

Rely on us to:

- Understand the issues facing your business
- Make recommendations on how to implement and/or streamline your analytical processes
- Identify opportunities for operational improvement
- Identify and solve operational and performance problems
- See the big picture from the planning stage to the implementation stage and remain flexible, objective, and accountable
- Offer scalable products and services that are sustainable and grow with your business

MANAGED SERVICES

Trust us as your managed services provider to lighten your team's workload and reduce cost.

We provide complete assistance from installation to production and offer a wide range of services to meet your needs.

Some of the managed services we provide include:

- Initial setup
- Daily activity monitoring
- Analytic/maintenance/throttling
- Analytic creation
- Upgrades
- Monitoring of usage (users)
- BPA function and responsibility
- Product training
- Monthly meetings/feedback
- Reporting (BAM) - Standard set of reports
- Customized reports

We're here to help.

INTEGRATION SERVICES

Logical, straightforward system integration is critical to realizing the full potential of any new analytics solution. We make every effort to seamlessly integrate new analytics solutions with current operational and technological infrastructure and ensure that our services and solutions are both applicable and consumable across the business.

Some of the integration services we provide include:

- • Proof of concept (PoC) design and presentation
- • Data integration
- • Business workflow automation
- • Product configuration, extensions and modifications
- • Custom scripting (applied analytics)
- • Data reconciliation and migration
- • Reporting and cross-reporting
- • Assistance with any customized solution needs
- • Performance monitoring
- • ETL framework implementation and scripting

TRAINING AND SUPPORT

Knowledge transfer is of utmost importance during this stage. We offer practical training to optimize user adoption and self-sufficiency—key indicators of solution success.

Usability, not features, drive the development of our pragmatic technology. Our goal is to ensure our solutions are used to their full potential and translate to positive business outcomes.

We provide answers on-demand to product and process questions, taking ownership of any issue to fix it fast.

Our support contract offers the following:

- • Access to support professionals via email and phone
- • Self-serve support through the CaseWare Analytics Passport website: <https://support.casewareanalytics.com>
- • Product upgrades and updates
- • Access to leading educational webinars, newsletters and instructional videos
- • Access to equations, IDEAScript macros and other industry information

Our Approach

The CaseWare Analytics Service Process Management framework is a repeatable four-stage process whereby we assess your needs (technological, analytical, operational); help you plan and implement the solution; manage and optimize your analytics solution, infrastructure and assets; and offer training and support so you can get the most out of the solution.

UNDERSTAND

We make it our business to understand yours, working with you from the beginning to determine your goals and identify the right solution to meet your needs.

Objectives

- Gain a solid understanding of the current technology and processes
- Assess your current business/operational environment
- Identify critical pain points

Input

- Requirement gathering
- Needs assessment and gap analysis
- Goal setting to maximize operational efficiency and performance

Outcome

- Targeted analytics and monitoring strategy suited to your business and solution-management plan

IMPLEMENT

We clearly define the course of action every step of the way. Our iterative design process accommodates changing requirements, maximizes business value and reduces risk.

Objectives

- Configure your analytics solution to fit business-specific requirements
- Effectively tune and redirect the project if required
- Address critical pain points

Input

- Solution project plan
- Solution recommendations and design
- Targeted analytics and monitoring strategy

Outcome

- Analytics and monitoring implementation

Make us your trusted analytics partner.

OPTIMIZE

By identifying optimization opportunities in your analytics environment, we ensure your CaseWare Analytics solution is integrated, fine-tuned and value-maximized.

Objectives

- • Initiate and maintain managed services
- • Provide advice regarding continuous process improvement

Input

- • Process mapping
- • Integration testing
- • Benchmarking to identify improvement opportunities

Outcome

- • Full deployment
- • User and administrator mentoring
- • Reporting and dashboarding

TRAIN AND SUPPORT

By emphasizing knowledge transfer and self-sufficiency, we show you how to get the most of your CaseWare Analytics solution and deliver long-term value.

Objectives

- • Provide on- and off-site training
- • Offer novice to expert courses
- • Provide phone and web-based support

Input

- • Best practices knowledge
- • Interactive, hands-on training adapted to your needs
- • Manuals, webinars and instructional videos

Outcome

- • Maximized investment and usability

For more information about CaseWare Analytics' consulting services, email salesidea@caseware.com or call 1-800-265-4332 ext 2800

CaseWare Analytics is home to IDEA® Data Analysis software and the CaseWare Monitor continuous monitoring platform. Our software solutions are built on a foundation of industry best practices and expertise, enabling audit, compliance and finance professionals to assess risk, gather audit evidence, uncover trends, identify issues and provide the intelligence needed to make informed decisions, ensure compliance and improve business processes. We offer solutions that meet the needs of auditors, analysts, purchasing card managers, compliance officers and more. With 40 distribution offices worldwide, CaseWare Analytics' products and solutions serve more than 400,000 professionals in 90 countries.

To learn more, visit www.casewareanalytics.com

