

CASE STUDY

ALIGNING SYSTEMS AND PROCESSES FOR GROWTH

Kaufman Rossin supported a mission-driven organization in modernizing core Finance and Human Resources operations through an integration- and transformation-led ERP initiative.

CLIENT

A mission-driven, public-sector organization supporting children and families facing increasing operational complexity, funding requirements, and reporting expectations.

CHALLENGE

As programs expanded, leadership recognized that existing systems and processes were no longer sufficient to support timely decision-making, transparency, or scalability.

ERP risked being approached as a standalone technology decision rather than a broader business transformation, potentially reinforcing inefficiencies rather than resolving them.

INSIGHTS

Kaufman Rossin identified an opportunity to modernize the organization's operating model to support scalability, transparency, and timely decision-making across Finance & Accounting and Human Resources. Key challenges included:



Fragmented processes supported by disconnected systems



Limited integration and reporting, restricting visibility and insight



Heavy reliance on manual, spreadsheet-driven workflows



Inconsistent data governance across functions, increasing operational risk





SOLUTION:

Kaufman Rossin's Integration & Transformation (I&T) team partnered with leadership to lead an end-to-end enterprise transformation initiative, positioning ERP selection as a catalyst for broader operational improvement. The engagement aligned people, processes, and technology to support long-term scalability, governance, and more effective decision-making.

To support this effort, Kaufman Rossin conducted enterprise-wide process assessments across Finance & Accounting and Human Resources to define current-state limitations and future-state needs. The team developed Key Business Requirements (KBRs), identified integration gaps and automation opportunities, facilitated Market Research Days to align stakeholders, and applied Vendor Rating Tools, Total Cost of Ownership analysis, and KR's Best Value methodology to drive alignment, strengthen governance, and enable data-driven decision-making.



RESULTS:

The organization selected best-fit ERP solutions for both Finance & Accounting and Human Resources through a disciplined, transformation-led process. Leadership advanced from fragmented operations to a clearer, more integrated future-state operating model as a product of the following workflows:

Improved cost efficiency through transparent visibility into full life-cycle and implementation costs

Stronger enterprise governance through a repeatable, defensible transformation framework

Accelerated, higher-quality decision-making enabled by standardized scoring and governance

Readiness for change supported by a clear implementation road-map and ERP positioned as a platform for continuous improvement

Our Roles:

- Integration & Transformation
- Corporate Finance & Strategy
- Transaction Advisory
- Digital Transformation
- Investment Banking



Focus on operational and performance improvement

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