

CASE STUDY

ESTABLISHING FINANCIAL DISCIPLINE TO ENABLE SCALABLE GROWTH

Kaufman Rossin helped a vertically integrated real estate investment and development organization modernize finance processes and implement an enterprise platform to strengthen reporting, controls, and execution discipline.

COMPANY

A privately held real estate investment and development firm with a growing portfolio of complex properties and affiliated entities. The organization manages development, asset management, and property operations across multiple structures, requiring integrated financial reporting and operational coordination.

CHALLENGE

As the organization expanded its portfolio, leadership faced increasing complexity in financial reporting, project setup, and cross-functional coordination. The enterprise platform implementation represented a critical inflection point—offering the opportunity to connect financial and operational information while introducing execution risk if not governed with discipline.

Management needed structured oversight, process optimization, and clear accountability to ensure the platform enabled operating model improvement—not just system deployment.

WHAT OUR DIAGNOSTIC REVEALED:



Strong operational execution required complementary finance governance to support portfolio growth



Core accounting processes and reporting structures needed refinement to improve accuracy and transparency



Standard Operating Procedures (SOPs) were limited, increasing dependency on individual knowledge



KPI visibility was insufficient to monitor execution and ongoing operational performance



Internal controls and information flows required evaluation to strengthen decision-quality reporting

SOLUTION:



Kaufman Rossin acted as project manager on behalf of the Company, leading the **scoping, selection, and implementation** of an enterprise platform and ensuring alignment between system capabilities and business requirements. The team applied an Integration & Transformation approach—aligning configuration decisions to operating needs, strengthening governance, and embedding process discipline across finance and related functions.

Key elements included:

- Leading **platform scoping, vendor selection, and implementation** oversight
- Establishing **project governance**, milestone tracking, and regular leadership updates
- Reviewing and refining reporting outputs to **align financial information** with management decision needs
- Developing and distributing **detailed SOPs** to standardize key accounting and financial processes
- Identifying **performance improvement opportunities** across chart of accounts design, project setup, and end-to-end workflows
- Implementing **KPIs** to monitor execution progress and operational effectiveness post-deployment
- Assessing **internal controls and information flows** to ensure reliability of financial and operational data

This approach ensured that the platform implementation served as a catalyst for broader finance transformation, rather than a standalone system deployment.



IMPACT:

The organization implemented the enterprise platform with strengthened governance, standardized processes, and improved financial transparency. Leadership gained clearer performance visibility, greater confidence in reporting integrity, and a scalable foundation to support continued portfolio expansion.

Disciplined implementation execution supported by structured governance and oversight

Standardized accounting and financial management processes to improve consistency and control

Enhanced reporting clarity aligned to management's decision-making needs

Reduced reliance on key individuals through documented processes and defined responsibilities

Improved visibility into controls and information flow across finance and operations

HIGHLIGHTS

- ✓ End-to-end implementation oversight across scoping, selection, and deployment phases
- ✓ SOPs developed to standardize core accounting and financial processes
- ✓ KPI framework established to monitor execution and operating performance
- ✓ Process optimization delivered across financial structures and workflows

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Client details have been anonymized to preserve confidentiality.

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