

## CASE STUDY

# ESTABLISHING OPERATIONAL DISCIPLINE TO SUPPORT SCALABLE GROWTH

Kaufman Rossin helped a rapidly growing training and e-commerce organization implement an integrated ERP environment and standardize operations to improve financial visibility and enable scalable growth.

## COMPANY

A high-growth professional training and coaching organization with integrated digital and physical product offerings, operating across e-commerce, events, and content distribution.

## CHALLENGE

As the organization expanded, leadership faced increasing difficulty managing inventory, understanding product-level profitability, and maintaining reliable financial reporting. Core processes—particularly across procurement, fulfillment, and accounting—were fragmented and inconsistently executed.

Inventory tracking relied heavily on manual intervention and periodic counts, while cost of goods sold and revenue recognition methodologies were not aligned with underlying business activity. Disconnected systems further limited visibility and introduced inefficiencies across order management, warehouse operations, and financial reporting.

Leadership engaged Kaufman Rossin to implement an integrated system environment while establishing the processes and governance required to support continued growth.

# WHAT OUR DIAGNOSTIC REVEALED



Inventory and cost structures lacked formal governance and consistency



Financial reporting did not fully reflect operational activity



Core workflows varied across teams, limiting transparency and accountability



Systems were underutilized and not fully integrated across functions



Growth had outpaced the organization's operating model

## SOLUTION



Kaufman Rossin applied its Integration & Transformation approach, beginning with the scoping, selection, and implementation of an ERP platform, including the integration of key operational systems such as warehouse management.

Following system implementation, the team focused on aligning processes, governance, and data flows to fully realize the benefits of the new technology environment.

Key elements included:

- Leading **ERP scoping, selection, and implementation**, including integration with warehouse and operational systems
- Mapping **current-state workflows** across sales, purchasing, fulfillment, and finance to identify breakdowns in data flow and accountability
- Designing a **future-state operating model** aligned with integrated system capabilities
- Redesigning **inventory and financial workflows** to ensure consistency, traceability, and system alignment
- Establishing **governance** across procurement, fulfillment, and reporting processes
- Aligning **revenue and cost recognition** with operational drivers and system data
- Defining **scalable processes** supported by integrated technology
- Providing **project management and coordination** to ensure alignment between process design and system enablement

This approach ensured that system implementation was paired with the operational discipline required to support sustainable scale.



## IMPACT

The organization established a more disciplined, integrated, and scalable operating model, improving visibility, consistency, and decision support across core functions.

Leadership gained a clearer understanding of inventory, costs, and operational performance, supported by aligned systems and standardized processes. The integrated environment reduced manual intervention and improved coordination across teams.

Improved alignment between financial reporting and operational activity through integrated systems

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Standardized workflows across inventory, procurement, and fulfillment

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Enhanced visibility into cost structures and product-level performance

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Reduced reliance on manual processes through system integration

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Increased organizational readiness for continued scale

## HIGHLIGHTS

- ✓ ERP platform successfully implemented and integrated with warehouse and operational systems
- ✓ End-to-end operational workflows standardized across core functions
- ✓ Structured inventory and cost management framework established
- ✓ Key process improvement initiatives identified and prioritized through implementation

Learn more at [kaufmanrossin.com](https://www.kaufmanrossin.com)

*Client details have been anonymized to preserve confidentiality.*

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