



Overview of Offerings

Stage Gate

prioritize opportunities, focus resources, and improve execution

Customer Profitability

grow your business intelligently
and convert unrealized profit potential into realized profit growth

Operations Optimization

optimize inventory, freight, and labor

Quality Systems

transform process, drive operational efficiencies, performance management,
data optimization, and advanced analytics

Monthly Close Diagnostics

increase confidence in close process, view trends,
diagnose variances, and manage exceptions

ShermanSamuels helps your company to
calm the chaos, connect the dots, and grow with purpose.

Leverage the power of Stage Gate to improve execution of highest value opportunities.



Everything is a "top priority"?
Chasing latest "shiny object"?
Lacking leadership alignment?

Burning out people?
Creating confusion
over priorities?

Execution lacking?
Fighting fires just to keep up?

ShermanSamuels identifies and implements tailored solutions that are unique to YOUR business to prioritize opportunities, focus resources and improve execution:



Prioritize Opportunities

Score based on key elements of strategy, competition, financial, and ease of execution. Just enough and not too much process to ensure agility and informed decision making



Focus Resources

End resource-draining, low value initiatives. Align resources, investments and phasing to highest priorities. Communicate clearly and often to avoid confusion



Improve Execution

Enable people to focus, achieve and experience the satisfaction of executing on time and within budget

Stage Gate Process



Score and Vote

Tailor easy criteria, weighting, scoring and equal voting for all key stakeholders



Force Rank

Constant re-prioritizing to ensure best ideas rise to the top of live pipeline of scored ideas



Clarify Roles

Ensure well-understood responsibilities for leaders, voters, and subject matter experts



Execute

Fully integrate into leadership meetings and planning cycle

ShermanSamuels helps your company to efficiently and collaboratively grow with purpose.



Leverage the power of Customer Profitability to grow your business intelligently.



Who are your most profitable customers?
Least profitable? Are they worth your time?

How do you identify customer level inefficiencies?

Is your business becoming more or less profitable over time?
What's causing the change?

How can you leverage customer profitability to differentiate retention and marketing strategies?

ShermanSamuels tailors and implements customer profitability systems that are unique to YOUR business to convert unrealized profit potential into realized profit growth:



Conduct full review of financials

Understand all financial inputs and their implications at a customer level



Evaluate Operational Complexities

Review all processes that create variability in operations and hold working sessions with SMEs. Align on the customer journey and how it affects profitability



Define and design Variable Contribution

Design a living, breathing Profit Model that is entirely customized and coded to business needs, down to the individual customer, supplier, product, and more

Harness the power of the data:

- ✓ Executive level dashboards with trends and key opportunities
- ✓ Interactive customer profit tools for scenario analysis
- ✓ Direct Cx strategy with profit segmentation
- ✓ Maximize profit potential down to the individual customer



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Leverage the power of **Operations Insights** to optimize your inventory, freight & labor.

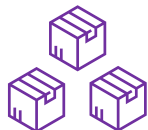


Backorders and dead stock?
Counts and picking errors?
Inventory levels challenging?

Freight costs increasing?

Inconsistent employee performance?
Productivity and turnover issues?

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Optimize Inventory

Comprehensive approach to inventory analysis, from purchasing to distribution, that identifies and solves inefficiencies and issues, and improves cash flow



Optimize Freight

Full review of freight contracts, order data, billing analysis and logistics issues. Negotiate contracts and build robust processes and tools to continuously improve



Optimize Labor

Examine cost per unit and other productivity metrics, facility footprints, incentive programs, and training opportunities. Implement solutions to maximize potential

Optimization Process



Analyze

Analyze data, processes, and tools to prioritize key opportunities



Collaborate

Collaborate with subject matter experts to identify challenges and brainstorm solutions



Propose

Propose and align on a solution strategy for implementation as well as measurement KPI's



Execute

Partner with management to execute the plan, translating insights into impactful improvements

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Create advanced end to end Quality Systems to grow your business intelligently

Do you manage quality control processes over emails or spreadsheets?

Do you have a singular, central database of your quality data?

How quickly can you identify concerning quality trends real-time?

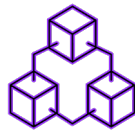
Can you summarize the data into visual dashboards for internal and external audiences?

ShermanSamuels tailors and implements customized quality control systems that transform process in your organization, driving operational efficiencies, performance management, data optimization, and advanced analytics.



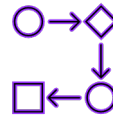
Build highly customized applications

Map end to end process and design application to the needs of your business



Store data in centralized, secure system

Build central database that improves data integrity & accuracy, tracks changes, streamlines auditing, and eliminates risk of data loss.



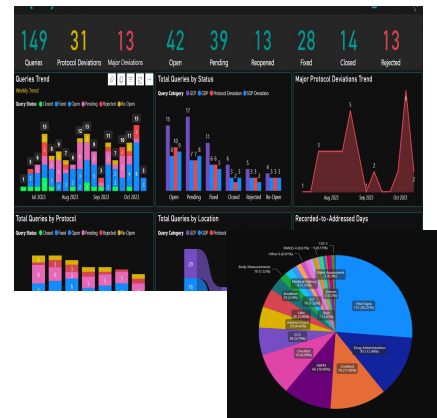
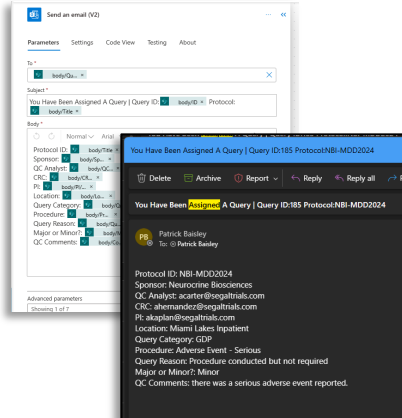
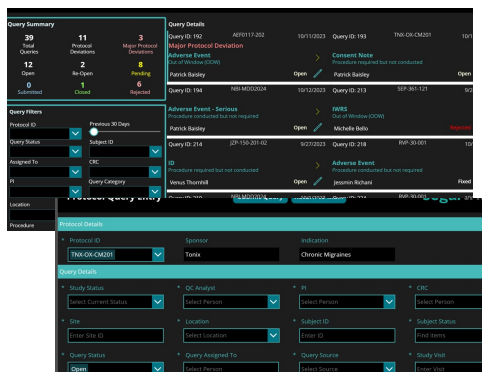
Auto-trigger actions and escalations

Automatically send emails, calendar invites, tasks, approval requests, and other actions without user intervention.



Create real-time interactive dashboards

Create live dashboards with key trends to support decision making, performance management, and customer relations



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Leverage the power of Monthly Close Diagnostics to optimize and increase confidence in the close process.



Does your team spend too much time closing, with insufficient time to analyze and address variances?

Are you confident expenses are consistently booked in the right accounts and departments?

Do you have an informed position on your company's financial performance?

Can you easily view your business in multiple ways?

ShermanSamuels tailors and implements a monthly close diagnostics tool that is unique to YOUR business to view trends, diagnose variances, and manage account exceptions:



Focus on Analysis, Trends, and Variances

Create customized reports for Finance teams to view trends, analyze, diagnose, and understand which variances are real or timing



Create Time to Think, Act, and Follow-up

Enable data to work for your teams, instead of them working hard to extract data and prepare reports



Place Accountability to Manage Expenses

Provide accurate and timely reports for accountable Leaders to manage their teams' expenses

Harness the power of your data:

- ✓ Map tailored views by legal entities, divisions, regions, and departments
- ✓ Enable Accounting, FP&A, and Operations Finance to collaborate throughout the close process
- ✓ Leverage system outputs (actual results and plan) to quickly update the reports
- ✓ Enhance accounting consistency
- ✓ Identify and explain variances

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