



# Performance Assessments

Regardless how long we have trained for a marathon, operated in an industry or strived to meet an ambitious goal, we often plateau and find ourselves staring in the dark and racking our brains trying to determine how to break that barrier and advance to the next level of performance. Just as a swimmer, golfer or any athlete trains with a coach the greatest value of the relationship is the coach's ability to objectively review your technique and form and modify your training to help you advance to the next stage of performance.

All too often companies seek advice within their organization or industry but fail to see the forest among the trees. Our performance assessment services takes an objective look at your business and dives down to the process level of your company to understand the behaviors, decisions, outcomes and activity drivers which affect your performance.

## SCOPE of SERVICES

Do you have an underperforming division, geographical market or the overall company is stagnant? Are costs in functional areas like IT, Finance, Sales and Operations increasing or a greater percentage of revenue each year? Is the product/service portfolio or customer channels not meeting plan?

Performance issues come in many forms. We structured our performance assessments around different levels of scope from company level, division, market, location, to functional areas (Service, Finance, IT, Sales, etc.) or line of business. In addition, the scope of our assessments focuses on key business processes including:

**Market to Cash** (Marketing, Sales, Order Processing, Customer Invoicing, Collections, Credit, Customer Services)

**Purchase to Pay** (Vendor Management, Purchasing, Receiving, Inventory, Accounts Payable, Claims, Payments and Expense Management)

**Design to Sell** (R&D, Engineering, Manufacturing, Quality)

**Make to Deliver** (Production Planning, Logistics, Warehousing, Delivery, Service Management)

**Plan to Report** (Forecasting, Planning/Budgeting, Financial Close, Treasury Management, and Reporting)

**Recruit to Retire** (Recruiting, Training, Development, Benefits Administration, Human Resource Management)

## APPROACH

We take a comprehensive approach when conducting assessments and consider all factors related to the business environment, strategy, people, process and technology.



Our approach is tailored to the type of assessment and can include a variety of proprietary tools we deploy which can include some of the following:

- Labor analysis and time studies
- Performance benchmarking using global industry benchmarks from the APQC (independent and non-profit benchmarking center)
- Business Process Activity Analysis
- Market retention and sensitivity
- Customer valuation
- IT integration, technology congruency, software portfolio review
- Cash management and financial leakage analysis
- Scenario planning and business modeling
- Change readiness assessments
- Business risk assessment
- Product line and service profitability analysis

*Sagin, LLC is a value driven management consulting firm. Our firm is comprised of experienced people from both consulting and the industries which we serve to help our clients achieve their goals. We bring a collaborative approach to our work and incorporate all stakeholders in the process identifying the value drivers to track and deliver results in the process. Visit us at [www.Saginllc.com](http://www.Saginllc.com) to learn more.*



Experience • Confidence

## APPLICATIONS & CASE EXAMPLES

Our performance assessment methodology has been applied in a variety of scenarios. For example:



Large multi-unit utility company needed to better understand the functions, activities and tasks the accounting and finance operations were performing across the company prior to embarking on a strategic acquisition and significant organizational changes.

The assessment deployed identified in great detail the hours, labor and activities performed along with benchmarked performance to support the company's new organizational design.



A multi-billion consumer products company of food and consumables was developing their five year strategic plan and potentially embarking upon a new strategy of vertical integration. The team performed market sensitivity analysis and product line profitability as well as projected pro-forma financial statements and

business modeling to test approaches to the new strategy. The result led to the company making some strategic changes to their markets which subsequently learned they avoided some significant losses that competitors experienced in key markets.



A \$2 billion electronics and semiconductor manufacturer with global reach needed to upgrade their systems and technology platform. In addition, the company was changing their manufacturing strategy to more outsourcing of production and increase collaborative design with customers. Our

assessment focused on developing different technology models with a phased transition plan that would meet the company's strategic milestones while also producing an ROI to fuel future initiatives. The IT assessment conducted by the team assessed the company's change environment, quality of its human capital, the congruency of the technology to meet the company strategic goals and the overall impact to business performance.

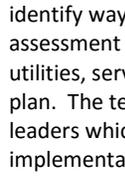


A regional bank and financial services company was faced with an aging customer base and declining profitability. The board of directors initiated the assessment to identify the problems with the current environment but also to compare alternative business models outside their industry to develop a new strategy

for the bank. The assessment laid out a two year plan to migrate the existing customer base to a new line of tailored services while simultaneously launching a new platform of services to attract a younger consumer sector and strengthen brand loyalty. The assessment measured the value per transaction as well as customer profitability using an activity based approach. In addition the team surveyed customers and tested new service concepts which helped form the approach to implementation for the banks new program launch. The bank is now launching their latest venture at moving more of its services



and accessibility to smart phone devices and measuring customer satisfaction on a real time basis.



This health insurance carrier was faced with rising overhead costs across the company from facilities and processing centers to administration and management of claims. The company conducted an assessment to identify ways to reduce costs while also maintaining service levels. The assessment team looked at labor, materials, purchasing, facilities, utilities, services and cash management to develop a comprehensive plan. The team was a combined team of consultants and business unit leaders which upon completion of the assessment launch the implementation on a contingency basis as payment for services.

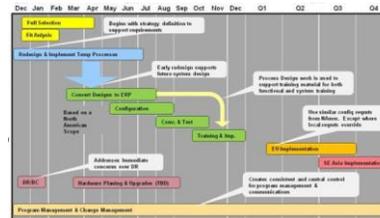


A global manufacturer of consumer products supplying the leading "Big Box" realtors was faced with declining margins from customer pricing pressure while their supply chain costs remained high and being shipped from overseas areas with unpredictable delivery times. The company conducted the performance assessment focused on the supply chain. The team reviewed the

processes and locations to develop a plan which required minimal technology investment but diversified the supply source by multi-sourcing capability but single sourcing product and automated order releases. In the process of implementation the company was able to avoid a massive supply chain disruption by redirecting shipments due to a shipping port strike from one of their key plants.

## DELIVERABLES

Our assessment deliverables are thorough and detailed supported by factual data from our analysis and using independent third party benchmarking data. We have received positive feedback from our



clients because our reports are actionable and identify specific steps the company can take to begin achieving a benefit. In addition, we identify "low hanging" quick wins as well as strategic changes.

## DELIVERY OF SERVICES

Depending on the scope of effort, performance assessments can be conducted in a matter of days or over the course of a few months. We have worked with our clients in a variety of ways structuring our fees on a cost per hour, fixed fee, contingency or in some situations at no cost.

If you are concerned about the performance of your business or focused on a specific problem area, a performance assessment is a quick low cost way to diagnosis the issues using a fact based approach and support your future changes. If you would like to learn more about our performance assessments you can contact us at: [info@saginllc.com](mailto:info@saginllc.com) or +1.312.281.0290

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