

Case Study — Multi-Location Operations Reset (For-Profit)

From exposure and inconsistency to disciplined controls and cleaner decisions.

Client type: Multi-state service company

Context: Rapid growth created vendor sprawl, slow month-end close, and unclear decision rights across branches.



Before:

- Unsegregated duties; inconsistent purchasing approvals and vendor onboarding
- Month-end close slipping; AR aging trending up; branch reporting off-cadence
- Decision rights unclear between HQ and locations; frequent rework

Artifacts delivered:

Disbursement & vendor policies • Approved vendor list • Invoice/close calendar • Remote deposit SOP • DACI map • Branch rhythm guide (weekly/monthly)

What we did:

- Implemented an outsourced finance stack with segregation of duties (request => approve => pay)
- Cleaned the vendor master list; introduced approved vendor list and purchasing thresholds with final approver clarity
- Stood up an invoice-by / close calendar and remote deposit controls
- Launched a branch operating rhythm (weekly branch huddle; monthly financial review), plus DACI for key ops decisions
- Documented disbursement & vendor policies and simple branch scorecards (close adherence, AR follow-ups completed)

After (early outcomes):

- Unauthorized vendors eliminated; purchasing now runs through documented thresholds
- Faster, more predictable close; branch reporting on cadence
- AR follow-up discipline improved; better visibility into aging
- Clearer decision rights reduced ping-ponging and rework

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