

excelia



Finance Best Practices

Best Practices

Companies aiming to remain competitive today face the challenge of continuously improving operations and adapting to new management models, without losing their essence or agility. In this context, guidance based on market best practices can make the difference between merely reacting to change and actively leading it.



“ Only one in three executives achieves optimal outcomes in strategic decisions.

Best Practices, within our offerings, is a strategic advisory solution that acts as a team of experts at your constant disposal, helping organizations align their processes, structures, and decisions with the most effective and proven market standards.

Excelia has extensive experience collaborating with leading companies in every sector, including IBEX 35 firms, giving it firsthand knowledge of the challenges and success factors in diverse industries and business models. Its team of researchers and seasoned professionals covers all areas of financial management, continuously analyzing advanced international methodologies and benchmark models to deliver actionable insights to each client.

In times of uncertainty, this service helps executives understand how other companies have approached similar challenges, what results they achieved, and how to avoid common mistakes, optimizing the efficiency and impact of their decisions. Leveraging strategic insight, cross-industry experience, and a tailored approach, Excelia identifies the specific needs of each organization and delivers a Best Practices service that drives continuous improvement, enhances competitiveness, and ensures sustainable business growth aligned with corporate objectives.

Our Approach

Inform executives in decision-making with maximum impact and minimal risk.

Continuous support to address strategic challenges.

Agility by not reinventing similar successful cases.

Knowledge transfer based on best practices.

All included for an annual fee.

Methodology



DESIGN Advisory support

- 1 Define the business problem
- 2 Establish a mutual understanding of needs
- 3 Identify best practices
- 4 Educate executives in decision-making

EXECUTION Support in implementation

- 5 Kick off the project
- 6 Create an implementation plan
- 7 Start change management
- 8 Measure and evaluate results



Competitive Advantages

	Our Model	Local Partnership	Traditional Consulting
▶ Quality of Information and Resources	✓	✗	✓
▶ Advisory and Professional Development	✓	✗	✓
▶ Speed of Decision Impact	✓	✗	✗
▶ Access to Local Contact Network	✓	✓	✗
▶ Continuous Service with Fixed Annual Fee	✓	✓	✗

Maximizing the Effectiveness of Executives and Companies

How members leverage the services to increase productivity.

ACCELERATE	INNOVATE
Design solutions to improve results	Develop activities while reducing risk
EMPOWER	ENHANCE
Continuous Learning in Decision-Making	Exchange ideas and best practices with peers

Service Offerings

Diagnosis to identify areas for improvement

Best practices analysis to optimize performance

Work sessions to facilitate the adoption of new ideas

Network of contacts to compare practical experiences and insights

Strategic Diagnosis

The Strategic Diagnosis is a tool designed to assess the strengths and weaknesses of a function and pinpoint areas for improvement.

- ▶ It evaluates and compares performance across each of the attributes that define leading organizations in departmental management.
- ▶ The purpose of this tool is to identify and quantify the actions needed to achieve highly efficient department management, fully aligned with business strategy, at the level of a world-class organization.

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Tailored Solutions

The Tailored Solutions service provides practical and detailed responses to specific challenges or those previously identified in the strategic diagnosis.

- ▶ It involves the development of strategic projects that help conceptualize innovative and practical solutions, thereby facilitating strategic decision-making for the partner company.
- ▶ The purpose of this service is to provide the partner company with an executive team of experts who share proven strategies, ideas, and tactics from similar organizations.

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On-Site Presentation

The On-Site Presentation is a service through which the key findings related to addressed challenges are communicated.

- ▶ Presentations are prepared throughout the membership year, directed to the function's management, business area, or Executive Committee on any of the projects undertaken, in the preferred location and format.
- ▶ The objective is to create a forum for discussion to share methodologies or strategies applied by leading organizations that have been successful, highlight key trends and best practices, and analyze mistakes made by other companies.

Diagnosis to identify areas for improvement

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Network of contacts to compare practical experiences and insights

Network of Contacts

The Network of Contacts service facilitates connections between executives and high-level experts with shared strategic interests.

- ▶ It includes identifying and selecting relevant executives and coordinating work agendas to promote the exchange of insights, knowledge, and experiences on topics of relevance to the partner company.
- ▶ Through this service, organizations expand access to valuable perspectives, strengthen professional relationships, and foster shared learning that enhances decision-making and strategic management.

Path to Strategic Efficiency



Diagnose your GAPS

Identify and prioritize areas for improvement.



Inform your decisions

Acquire best practices.



Train your team

Disseminate Knowledge.



Test your ideas

Understand practical application.

Finance Best Practices

Main research areas

Organized into the following areas of specialization:

- > Financial Planning and Analysis
- > Treasury
- > Administration, Accounting, and Consolidation
- > Tax
- > Budgeting
- > Procurement
- > Technological Tools (FIN TECH)
- > Data Management
- > Transformation and Structure
- > Management Control
- > Financial Risk Assessment
- > Shared Services
- > Financial Talent Management

Excelia is a Spanish multinational consulting, technology, and professional services company with over 25 years of market experience, with offices in 9 countries and operations in more than 50 worldwide. Our goal is to help our clients meet their business challenges by advancing toward a process of continuous digitalization through global solutions and technology-driven services.

In this way, we ensure sustainable growth through innovation and by leveraging cutting-edge technologies. We have an extensive network of over 300 professionals around the world. A specialized, global team with local knowledge, fully committed to meeting our clients' needs.

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