



GLOBAL FINANCE PROFESSIONALS  
CONNECTING OPERATIONS TO FINANCE

## Business Health Check through Self Evaluation Test

5 Year Way  
forward Journey

**MSME बढेगा  
तो देश बढेगा**

*CA Yogesh Kulkarni  
CEO & Founder Director – Global Finance Professionals*



# GLOBAL FINANCE PROFESSIONALS

C O N N E C T I N G   O P E R A T I O N S   T O   F I N A N C E

# CORE SERVICES



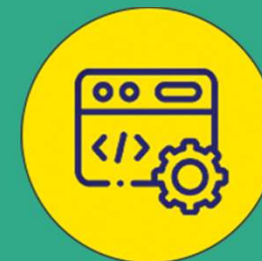
**BUSINESS  
EXCELLENCE**



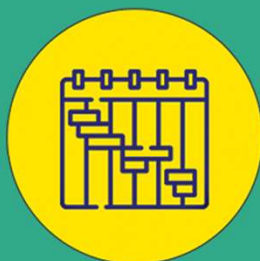
**FINANCE  
EXCELLENCE**



**ERP & IT  
INFRASTRUCTURE  
ASSESSMENT**



**MIS DESIGN &  
DEVELOPMENT**



**MANAGEMENT  
DASHBOARD**



**MSME BENEFIT  
SCHEMES**



**ESG & SUSTAINABILITY  
SOLUTIONS**



Value add solutions to 40 Industries & 200 MSMEs so far

## Our Solutioning Approach

A domain centric design packaged with analytical data products for various industries.  
Additional elaborate detailing upon one-on-one discussions.



### CRAWL

- Bring clarity
- Start Agile
- Set-up foundation



### WALK

- Strengthen lead
- Build culture
- Technical agility



### RUN

- Enable organization
- Mature empathy
- Measure outcomes



### FLY

- Optimize delivery
- Experimentation
- Identify Catalysts



*What gets measured gets done, what gets measured and fed back gets done well, what gets rewarded gets repeated –*

*John E. Jones*



# BUSINESS EXCELLENCE

## 18 AREAS FOR ASSESSMENT



**Customer  
Orientation**



**Planning  
Robustness**



**Inventory  
Management**



**Operational  
Agility**



**Supply Chain  
Effectiveness**



**Quality System  
Robustness**



**Machine up-time  
& Maintenance**



**Facility Layout  
& Handling System**



**Human Capital  
Metrics**



**Visual  
Management**



**Environmental  
Social &  
Governance**



**Product Life Cycle  
Management**



**Design &  
Engineering**



**ERP & IT  
Infrastructure**



**Commercial  
Process  
Effectiveness**



**Finance Excellence  
Process & Controls**



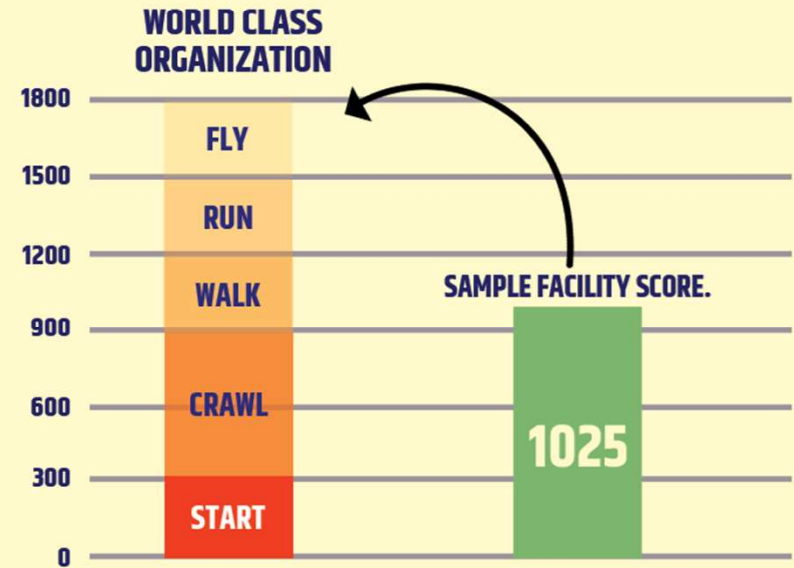
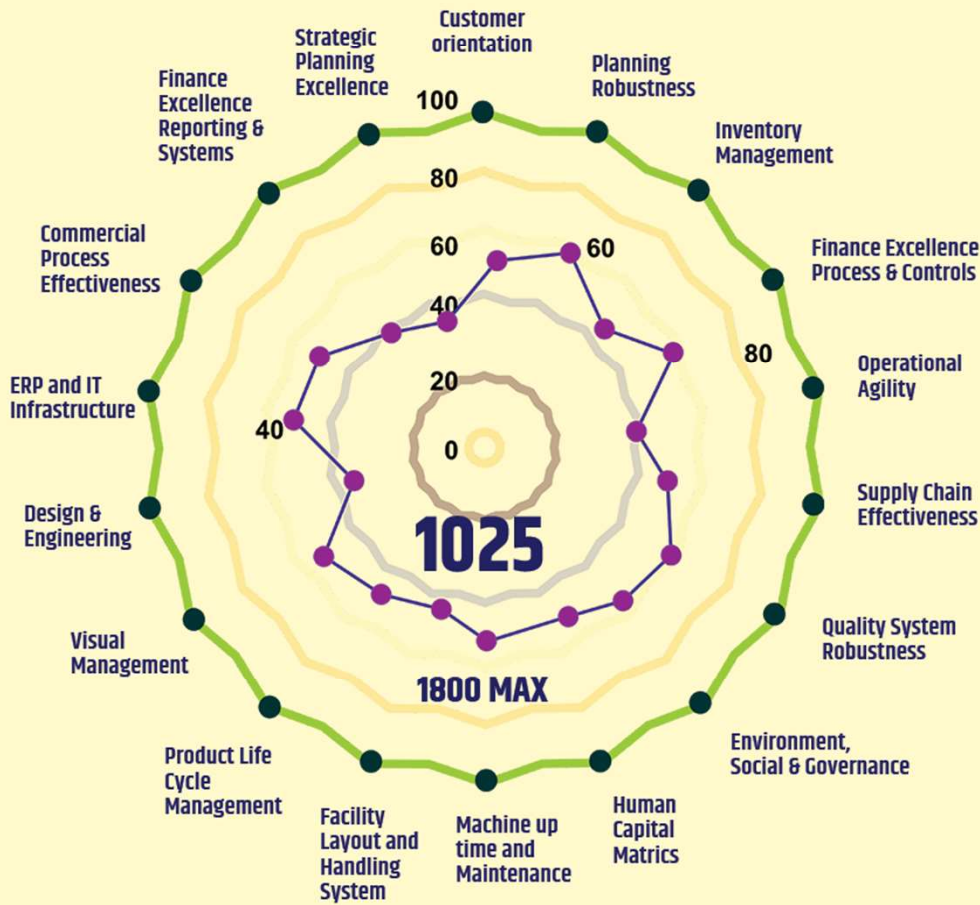
**Finance Excellence  
Reporting & Systems**



**Strategic Planning  
Excellence**

# BUSINESS EXCELLENCE

## SCORE FOR ORGANIZATIONAL HEALTH



# Self-Assessment for *Healthy Growth* of YOUR Business

**“DOES YOUR BUSINESS NEED IT?”**

**Q. Do YOU truly want to take a QUANTUM LEAP in HEALTHY GROWTH of YOUR business?**

**A. Assess yourself on the following to know YOUR relative position:**

## Growth

- Can YOUR organization ‘Handle’ growth?
- Strengths?
- Weaknesses?
- Gaps that hinder Growth?

## Decisions

- Based on data?
- Is data reviewed b4 Decisions?
- Outcomes of Non data based Decisions?

## Strategy

- Time Spent on routine work Vs. Critical Strategic work
- Balancing both types of work
- Specific areas to focus

## Compliance Processes

- Process based ?
- OR Memory / Capability based?
- Tracking?
- Compliance level?

## Skill Sets

- Skill gaps?
- How are Skill gaps being filled?

## Expenditure Mgmt.

- Do you HAVE to approve each expense?
- Current expense approval process?
- Delegation of Financial decision making?

## Auto Mode

- Can business run W/O your active involvement in day to day work?
- What improvements are needed for operational independence?



# How to Self Evaluate your business / Process

## Understanding Processes

- Are the processes for each function or activity clearly defined and documented?
- Do you regularly review and update these processes to ensure they remain relevant and effective?
- Are there any processes or activities that are not clearly defined?

## Identifying Missing Links

- Have you conducted a recent audit to identify any missing links or gaps in your processes?
- How do you address and rectify identified gaps or missing links?

## Standardizing Best Practices

- Do you have a set of documented best practices for each function or activity?
- Are these best practices regularly reviewed and updated?
- Is there a system in place for employees to access and follow these documented best practices?

## Hiring Correct Skillsets

- Do you have a clear understanding of the skillsets required for each role within your organization?
- Is your hiring process designed to effectively evaluate and select candidates with the right skills?
- Do you provide ongoing training and development to ensure your team's skills remain current?

## Defining Accountability

- Are responsibilities and accountabilities clearly defined for each role within your organization?
- Do you have a system in place to monitor performance and hold team members accountable?
- Are resources allocated effectively to support accountability and performance?

## Benchmarking Against Best Practices

- Have you established benchmarks for good practices relevant to the size and industry of your business?
- Do you regularly compare your processes and activities against these benchmarks?
- What steps do you take if your processes or activities fall short of these benchmarks?

## Creating Scalable Structures

- Do you have a plan in place for scaling your business without compromising quality and reliability?
- Are your processes designed to be scalable and adaptable to increased volume or complexity?
- How do you ensure that quality and reliability are maintained as you grow?

# Criteria followed for conducting Business Self Evaluation Test



	Business Area	Sl.	Sub Business Area	Area Weightage	Weightage
A	Sales & Marketing	A1	Marketing Strategy, Market Segmentation.	20%	2%
		A2	Brand Management, Digital Marketing.		2%
		A3	Market research.		2%
		A4	Lead Generation.		4%
		A5	Sales Management including customer ordering.		2%
		A6	Customer Experience Management:- (Customer Relationship management Feedback Process/ Analysis, Complaint Management, Service Quality Mgmt., Customer score card.) . Customer support, Customer Engagement.		5%
		A7	Pricing Strategy		2%
		A8	Public Relations		1%
B	Operations Management	B1	Planning's for Forecasting & Demand ,Supply chain management (SCM), Capacity, Production Planning & Control/Scheduling, Annual Operating Plan.	35%	10%
		B2	Basic Operation Process & Control,		10%
		B3	Quality Management System.		2%
		B4	Quality Assurance, Quality Control, NPD Quality,		5%
		B5	Purchase, Stores, Procurements, Inventory Mgmt.		2%
		B6	Supply chain & Logistics Management includes Delivery/Dispatch Process.		2%
		B7	Manufacturing Engineering & Projects- Facility Layout & Material Handlings, Process Design & Improvements, Lean Mgmt.		1%
		B8	Plant Maintenance (Machines, Equipment's).		2%
		B9	Operational Performance Review (Daily/ Weekly/ Monthly)		1%
C	Design & Development	C1	Product, Process, Service, System Design & Developments.(Advance Product Quality Plan, New Product Document Control)	10%	5%
		C2	R & D, Innovations, Improvement's.		5%
D	Financial Management	D1	Product Costing	10%	1%
		D2	Working capital management.		2%
		D3	Finance (Treasury & Forex)		2%
		D4	Accounting (Controlling Dept.)(Maker-Checker)		2%
		D5	Financial Performance review (MIS/ MBR)(CLD-Company Level Data)		1%
		D6	Governance & Controls		1%
		D7	Fixed Assets & Capex, Budgeting		1%

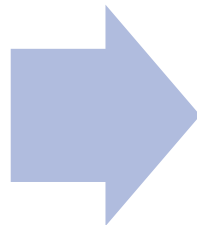
	<b>Business Area</b>		<b>Sub Business Areas</b>	<b>Area Weightage</b>	<b>Weightage</b>
E	<b>Strategic Planning Excellence</b>	E1	Vision, Mission, Goals, Objectives, KRA & KPI Identification & Implementation	5%	2%
		E2	Export Market Entry		2%
		E3	Business strategy through SWOT Analysis.		1%
F	<b>Human Resource Management</b>	F1	Recruitment & Talent Management.	10%	2%
		F2	Company Policy Framework.		1%
		F3	Employee Performance Management (Appraisals, HRMS)		2%
		F4	Performance Compensation & Benefits. (Performance pay, Increment, Bonus )		1%
		F5	Team Learning & Development. (Training )		1%
		F6	Employee Engagement.		1%
		F7	Safety		1%
		F8	Employee Job Satisfaction		1%
G	<b>Support Functions</b>	G1	Risk Assessment (Compliance/Regulatory Legal Risk, Strategic Risk, Reputational Risk, Operational & Physical Risk, Security & Technical Risk, Technology risk, Financial risks, Competition / Market Risk likewise Risks).	10%	2%
		G2	IT Systems		2%
		G3	Legal		1%
		G4	Compliance (Assessments, Audits)		1%
		G5	Visual Management		1%
		G6	Administration.		2%
		G7	ESG (Environmental, Social, Governance)		1%
			<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

## HOW to Self-Assess YOUR Business

Q. How do I conduct this test for my business?

### Questions

- Identify your Business  
Manufacturing, Service, Trading
- Identify Years of Business  
Experience from 0 till 10 Years  
and above
- Test will cover Around 100  
questions covering all aspects of  
your Business
- Read content carefully, take the  
help of Process Explanation  
details & answer in last  
Marks Column.



### Rating Scale Maturity Scoring

Refer Process Name and Process  
Explanation and answer the  
question

**Put marks from 0 to 5, Where**

- 0=Systems not in place
- 1=Process & systems are present -20 %
- 2=Process Partially exist around 40%
- 3=Process Exists 60%
- 4=Process exists 80%
- 5 = Systems in place and utilized to full  
potential (Refer Process Name and  
Process Explanation and answer the  
question)

## Outcome of Self Evaluation Test -

### Ease in facing Competition & Growth with risk analysis with definite outcome

You have a strong ability to handle competitive situations and drive growth by accurately assessing risks.

This means you can anticipate potential challenges and make informed decisions that lead to clear and positive outcomes.

### Opportunity to Invest Time and Resources in More Strategic and Growth-Oriented Issues

You have the capacity to shift focus from immediate operational concerns to more strategic, long-term planning.

This suggests that you are in a position to leverage your resources and time for initiatives that will drive significant growth and advancement.

### Bring in Sustainability in Transition

You are able to manage transitions effectively while ensuring they are sustainable.

This indicates that you can implement changes or transformations in a way that maintains stability and long-term viability.

### Ease in Getting Funding Resources

You have a smooth process for securing funding, whether through investors, loans, or other financial resources.

This suggests that you are well-prepared and credible in attracting financial support for your ventures.

### Improvements in Tangible Profitability

You are seeing concrete gains in profitability. This means that your strategies and operations are yielding measurable financial benefits, contributing positively to your overall financial health.

Final Report will be in the form of Area-wise average Scoring Sheet populated in the table along with, Radar Chart and Way forward Journey

# Self Assessment Test Sample – Manufacturing Business Area -Operations Management

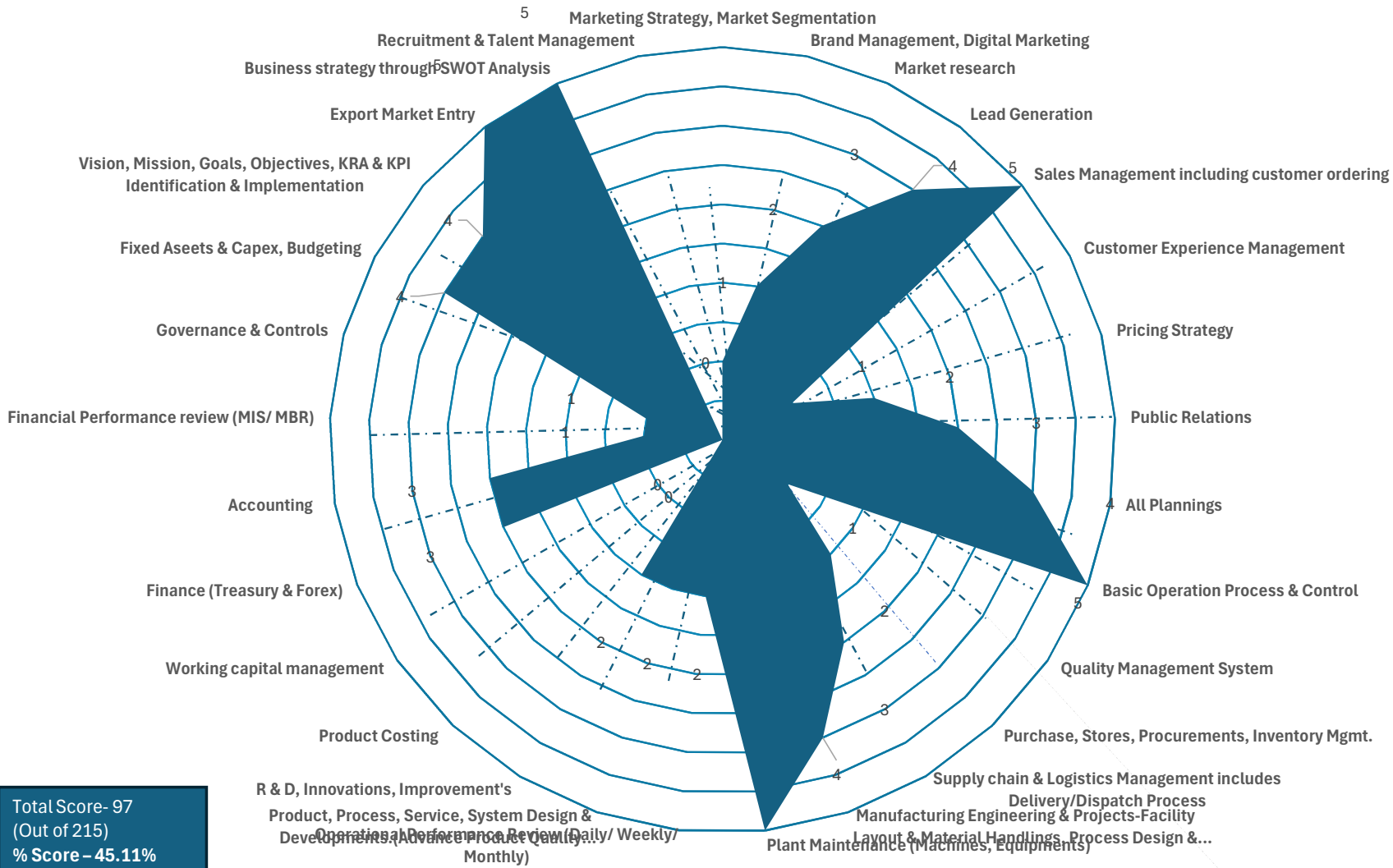
Sub Business Area	Area Explanation	Process Name	Detailed Process Explanation	Criticality Critical ,High, Medium, Low	Startup (New Born) 0 to 3 year	Control (Crawl) 3.1 Years to 6 Years	Information (Walk ) 6.1 years-10 years	Managed (Run) More than 10 years	Optimised (Fly) Enterprise	Marks From 0 to 5
Plannings for Forecasting & Demand , (SCM), Capacity, PPC & / Scheduling, Annual Operating Plan.	Operational Control aim is to improve Efficiency, Effectiveness & Sustainability of operations. The benefits are improvement in operational performance, cost reductions, increase in customer satisfactions to drive Business growth & competitiveness	<b>Production plan as a Process</b>	<ol style="list-style-type: none"> <li>1. Production plan includes details of all machines, equipment's and the various jobs to be processed on shop floor.</li> <li>2. Production plan is to be inline with capacity matrix.</li> <li>3. Plan is released for predefined time frame.</li> <li>4. Plan Vs Actual reviews, appropriate actions, replan to cover backlogs are be the part of prompt production plan.</li> </ol>	High	<ol style="list-style-type: none"> <li>1. Batch size is small, flexible production plan is made to adjust with customer demands.</li> <li>2. Production plan is done &amp; monitored at Management/ owner level.</li> <li>3. Basic level planning &amp; controls are established from Management to complete customer demands.</li> </ol>	<ol style="list-style-type: none"> <li>1. The production batch size is standardized.</li> <li>2. All machines will have work loads. Machines are used in multiple shifts. Production plan is released every day.</li> <li>3. Replanning in case of any machine, equipment failures will be the part of production plan. Weekly off workings, Night shift Overtimes like simple ideas are developed to recover backlogs, meet customer emergencies.</li> </ol>	<ol style="list-style-type: none"> <li>1. Separate Production planning department (PPC) is established &amp; aligned with production department.</li> <li>2. Production plans are initially released on monthly basis &amp; reviewed everyday to check effectiveness of plan.</li> <li>3. Production plan is corrected as per live challenge's like machine brake downs, manpower issues.</li> </ol>	<ol style="list-style-type: none"> <li>1. Company has strong planning process.</li> <li>2. Machine capacities are calculated and efforts are made to have perfect line balancing and smooth flow of products.</li> <li>3. Machine idle times are recorded and analyzed on daily basis to re-correct as per customer requirements.</li> </ol>	<ol style="list-style-type: none"> <li>1. Company has a long-term production plan and monthly production schedule is released.</li> <li>2. Production plan is system generated.</li> <li>3. Machine loading is calculated and material inventories are linked to production plans.</li> <li>4. Production quantities are updated in ERP/ SAP like system.</li> <li>5. Plan Vs Actual effectiveness is monitored on dedicated frequency.</li> </ol>	

# Sample Radar Chart – Manufacturing



Business Self Evaluation Score Card- Manufacturing Sector		
Sr.	Area	Actual Score out of 5
1	Marketing Strategy, Market Segmentation	1
2	Brand Management, Digital Marketing	2
3	Market research	3
4	Lead Generation	4
5	Sales Management including customer ordering	5
6	Customer Experience Management	1
7	Pricing Strategy	2
8	Public Relations	3
9	All Plannings	4
10	Basic Operation Process & Control	5
11	Quality Management System	1
12	Purchase, Stores, Procurements, Inventory Mgmt.	2
13	Supply chain & Logistics Management includes Delivery/Dispatch Process	3
14	Manufacturing Engineering & Projects-Facility Layout & Material Handlings, Process Design & Improvements, Lean Mgmt.	4
15	Plant Maintenance (Machines, Equipment)	4
16	Operational Performance Review (Daily/ Weekly/ Monthly)	2
17	Product, Process, Service, System Design & Developments.(Advance Product Quality Plan, New Product Document Control)	2
18	R & D, Innovations, Improvement's	2
19	Product Costing	0
20	Working capital management	0
21	Finance (Treasury & Forex)	3
22	Accounting	3
23	Financial Performance review (MIS/ MBR)	1
24	Governance & Controls	1
25	Fixed Assets & Capex, Budgeting	4
26	Vision, Mission, Goals, Objectives, KRA & KPI Identification & Implementations	4
27	Export Market Entry	5
28	Business strategy through SWOT Analysis	5
29	Recruitment & Talent Management	0
30	Company Policy Framework	0
31	Employee Performance Management (Appraisals, HRMS)	0
32	Performance Compensation & Benefits.	1
33	Team Learning & Development.	2
34	Employee Engagement	3
35	Safety	4
36	Employee Job Satisfaction	5
37	Risk Assessment	3
38	IT Systems	3
39	Legal	3
40	Compliance (Assessments, Audits)	3
41	Visual Management	3
42	Administration	3
43	ESG (Environmental, Social, Governance)	3
TOTAL:- (45.11%)		97

**Total Score- 97 (Out of 215)**  
**% Score – 45.11%**



# Self Assessment Test Sample – Services Business Area - Operations Management

Business Area	Business Area Explanation	Process Name	Detailed Process Explanation	Criticality	Startup (New Born) 0 to 3 year	Control (Crawl) 3.1 Years to 6 Years	Information (Walk ) 6.1 years-10 years	Managed (Run) More than 10 years	Optimised (Fly) Enterprise	Marks From 0 to 5
Operations Management	Operations management is the administrative function responsible for overseeing and coordinating the day-to-day activities of a business, ensuring that resources are efficiently utilized to produce goods or services. It involves planning, organizing, controlling, and improving processes to maximize efficiency, minimize costs, and meet customer demands.	Services Customisation	Service customization refers to tailoring services to meet the specific needs and preferences of individual customers. This approach ensures that the service provided is highly relevant and valuable to each customer, enhancing their overall experience and satisfaction.	High	<ol style="list-style-type: none"> <li>Respond to customization requests on a case-by-case basis.</li> <li>Document each customization effort for future reference.</li> </ol>	<ol style="list-style-type: none"> <li>Create simple, repeatable processes for common customization requests.</li> <li>Train staff on these processes to ensure consistency.</li> </ol>	<ol style="list-style-type: none"> <li>Develop detailed, standardized processes for customization.</li> <li>Create a customization policy that outlines procedures and responsibilities.</li> </ol>	<ol style="list-style-type: none"> <li>Develop metrics to measure the effectiveness of customization efforts.</li> <li>Track key performance indicators (KPIs) such as customer satisfaction and response times.</li> </ol>	<ol style="list-style-type: none"> <li>Foster a culture of continuous improvement within the organization.</li> <li>Encourage employees to suggest and implement improvements to customization processes.</li> </ol>	
Operations Management	Operations management is the administrative function responsible for overseeing and coordinating the day-to-day activities of a business, ensuring that resources are efficiently utilized to produce goods or services. It involves planning, organizing, controlling, and improving processes to maximize efficiency, minimize costs, and meet customer demands.	Service performance measurement	Effective completion of services is a key to success. Services are measurable and can be measured in terms of time required and quality delivered.	High	<ol style="list-style-type: none"> <li>Informal owner driven basic process.</li> <li>Service competition depends upon the situation customer requirements.</li> </ol>	<ol style="list-style-type: none"> <li>Reactive Approach: Responses to changes and challenges are ad hoc and reactive.</li> <li>Limited Flexibility: Processes are rigid and not designed to handle rapid changes or unexpected issues.</li> </ol>	<ol style="list-style-type: none"> <li>Structured processes for managing changes and adapting to new conditions.</li> <li>Regular tracking of key performance metrics and service delivery issues.</li> <li>Coordination between departments to streamline service delivery.</li> <li>Processes in Place with SOPs &amp; Flow is clear, good documentation</li> </ol>	<ol style="list-style-type: none"> <li>Proactive approach to managing changes.</li> <li>Developed standardized procedures that can be customized based on specific situations or changing customer needs.</li> <li>Automate routine tasks to free up resources for more strategic activities.</li> <li>Provide training to help staff adapt to new processes and technologies.</li> </ol>	Optimized Processes -Robotic & Automation Plays major role rather than manual	



**Business Self Evaluation Score Card- Service Sector**

Sr.	Area	Actual Score out of 5
1	Marketing	5
2	Revenue	4
3	Accounts Receivable Management	3
4	Sales	2
5	Vendor Management	1
6	Project Management	0
7	Control	5
8	Costing	4
9	Operations Management	3
10	Incident Handling	2
11	Quality Systems	1
12	Management Information Systems ( MIS )	0
13	Service Desk Function	0
14	Dynamic Capacity Planning	1
15	Supply Chain Management	2
16	After Sales Services	3
17	Cash Flow Management	4
18	Operations Control	5
19	Financial & Operational Analysis	0
20	Budgeting	1
21	General Ledger	2
22	Taxation	3
23	Revenue	4
24	Bank and Cash	5
25	Treasury and Forex	3
26	Fixed Assets and Capex	3
27	New Service Vertical	2
28	Business Strategy	2
29	Human Resource Management	1
30	IT Systems	1
31	Legal	5
32	Commercial Process	5
33	Compliance	4
34	Environment & Safety Policy	4
	<b>TOTAL:- (50%)</b>	<b>85</b>

# Sample Radar Chart – Services



# Self Assessment Test Sample - Trading

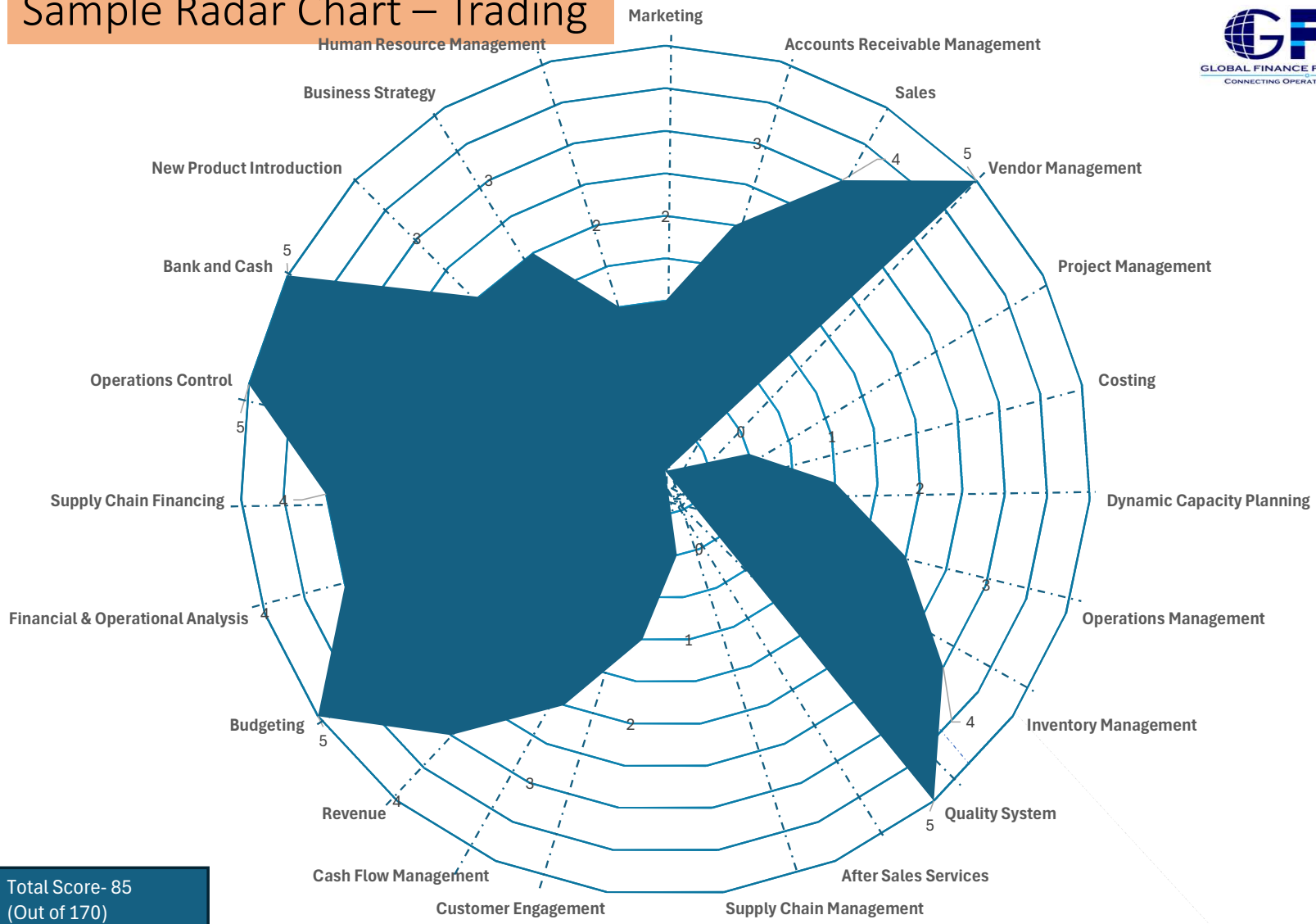
Business Area	Business Area Explanation	Process Name	Detailed Process Explanation	Criticality	Startup (New Born) 0 to 3 year	Control (Crawl) 3.1 Years to 6 Years	Information (Walk ) 6.1 years-10 years	Managed (Run) More than 10 years	Optimized (Fly) Enterprise	Marks From 0 to 5
Inventory Management	Inventory management is the process of planning, organizing, and controlling the acquisition, storage, and distribution of inventory to meet customer demand while minimizing costs. It involves balancing the need to have sufficient stock on hand to avoid stockouts with the desire to avoid excessive inventory holding costs.	Stock Levels	Balancing inventory levels to avoid overstocking (which ties up capital and risks obsolescence) or under stocking (which can lead to missed sales opportunities). At each level, the trading business should assess its current capabilities and implement strategies to move to the next level.	Medium	Basic processes for managing stock levels are established.  There is an awareness of inventory, but practices may not be standardized or consistently applied	1. Processes are standardized, documented, and followed throughout the organization.  2. There is a clear understanding of stock requirements and control measures	1. Processes are measured and controlled.  2. Quantitative data is used to understand and predict stock level performance, leading to more effective decision-making	Focus is on continuous improvement. The company regularly evaluates and optimizes stock level processes for adaptability and efficiency	1. The organization uses advanced predictive analytics and machine learning algorithms to forecast demand with high accuracy.  2. It can adapt stock levels in real-time based on predictive models.	
Supply Chain Management	Supply chain management is the strategic coordination of activities involved in the flow of goods and services from raw materials to end customers. It encompasses the planning, execution, control, and monitoring of all stages of the supply chain, including sourcing, production, logistics, and distribution.	Supplier Reliability	Ensuring a consistent supply of goods from suppliers, who may be global or local. This involves managing risks related to supply chain disruptions, delays, or changes in supplier terms.	High	1. Address immediate supplier issues as they arise. 2. Begin to document key processes and collect basic supplier performance data.	1. Establish and document standard operating procedures for managing suppliers. 2. Implement basic performance metrics and regularly review supplier performance. 3. Start developing relationships with key suppliers.	1. Develop and implement a comprehensive supplier management process. 2. Use data-driven approaches to measure and improve supplier performance. 3. Conduct regular reviews and audits of supplier processes.	1. Utilize advanced metrics and analytics to monitor supplier performance. 2. Implement predictive models to foresee and mitigate potential issues. 3. Focus on continuous improvement based on data insights.	1. Foster a culture of continuous improvement and innovation with suppliers. 2. Implement advanced technologies and practices to enhance reliability. 3. Collaborate with suppliers on joint improvement initiatives and strategic development.	

# Sample Radar Chart – Trading

**Business Self Evaluation Score Card- Trading**

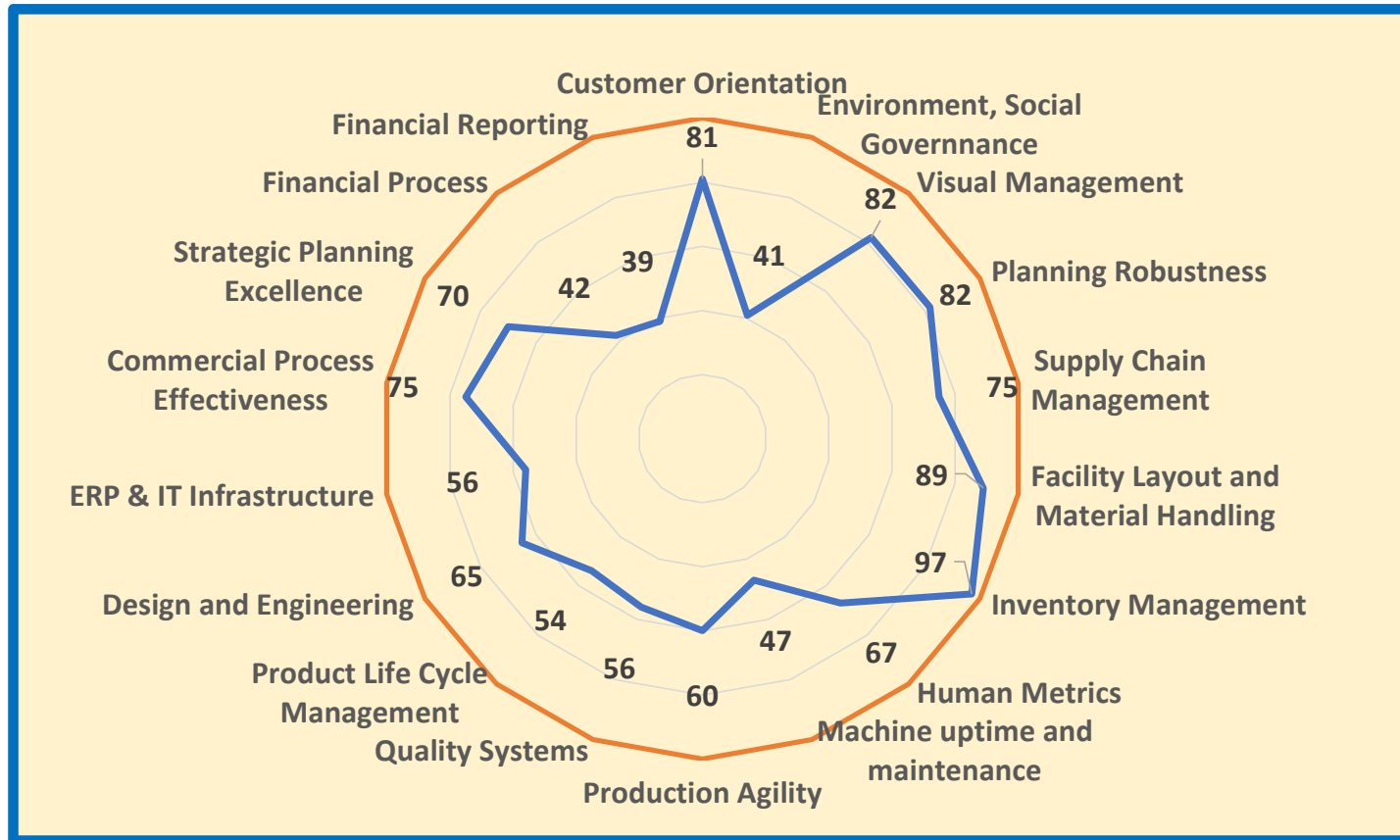
Sr.	Area	Actual Score out of 1
1	Marketing	2
2	Accounts Receivable Management	3
3	Sales	4
4	Vendor Management	5
5	Project Management	0
6	Costing	1
7	Dynamic Capacity Planning	2
8	Operations Management	3
9	Inventory Management	4
10	Quality System	5
11	After Sales Services	0
12	Supply Chain Management	1
13	Customer Engagement	2
14	Cash Flow Management	3
15	Revenue	4
16	Budgeting	5
17	Financial & Operational Analysis	4
18	Supply Chain Financing	4
19	Operations Control	5
20	Bank and Cash	5
21	New Product Introduction	3
22	Business Strategy	3
23	Human Resource Management	2
24	IT Systems	2
25	Management Information Systems( MIS)	1
26	Legal	1
27	Commercial Process	0
28	Compliance	0
<b>TOTAL:- (50%)</b>		<b>85</b>

**Total Score- 85  
(Out of 170)  
% Score – 50%**



# Business Excellence Scorecard

Score= 900/1800  
% Score- 50%



# Excellence Journey



## 2024 Reactive

### Enable Team & Processes

- Defining clarity of Organization mission, values, vision and brand promise.
- Product Costing
- GST Compliance Automation
- Budget & variance analysis
- MIS structure
- Team Performance & Incentive
- Competition and Market Share Awareness
- Quarterly Business Review with Critical Suppliers
- Percentage of operations controlled with SPC
- COPQ measurement
- Adherence to Preventive Maintenance Schedule
- Reliability Focussed Maintenance
- Disaster Recovery Plan deployment
- Conducting an organizational SWOT analysis
- Regular Business coaching
- MBR Review -3 W action plan execution
- Revenue generation
- Pending Litigations and Disputes
- Daily Cash flow preparation
- Emergency evacuation plan Deployment and Safety Drill Frequency
- Display of Quality Policy, Environment and Safety Policy, Vision, Mission, Values
- Employee Development Program
- Deployment of Mission, Vision, Values, Policy up to last employee KRA aligned with Organizational, Departmental and Individual Goals
- Safe working environment and practices
- Multi Skilling of workers in Process, Machine, Operation, maintenance, Quality Check, Reporting MIS
- Assessment of OEE at Bottleneck stations
- CRM / SRM deployment
- Bank Payment
- Returns filing and Gaps
- Revenue recognition
- Physical Stock Verification
- Worker level awareness and active participation in Suggestions / Kaizen/ CAPA/Improvement Projects
- Employees receiving Soft skill training / Team Building /ODP
- Existence of Preventive Maintenance Schedule
- Routine Maintenance by Operator
- Manufacturing Execution System software for all Plants
- Disaster Recovery Plan deployment
- Server and Connectivity deployment
- Awareness of Process and documentation up to Operator level
- Process Owner definition and accountability fixation
- SWOT analysis Environmental Competition

# Excellence Journey



## 2025 Proactive

**Automate Integrated Processes and systems as core to business**

- Procure to Pay Policy
- Accounting System Integration with Sub-Systems
- Negative Working Capital (WC)
- Inventory & RM Consumption
- Digital Presence - Website / Customer recommendations
- Display of Quality Policy , Environment and Safety Policy , Vision , Mission , Values
- Review of Shortage of Material and Capacity Constraints
- Supplier participation in Value engineering for cost reduction and elimination of NVA
- Structured Cost reduction program with Suppliers
- Production line down due to Material non - availability



## 2026 Preventive

**Accelerate by achieving excellence to ensure highest performance**

- Optimum fund utilization through effective interest rate
- Cash Policy
- Debtors Reconciliation
- Budgeting and variance Analysis.
- Data Analysis and evaluation process
- Boundary wall security adequacy for unauthorized access control
- Appropriateness of Material Handling System
- Inventory Turns Ratio of RM, WIP & FG - Value
- SPC Training to Manufacturing and Quality employees
- Process control capability measurement



## 2027 Predictive

**Benchmarked processes**

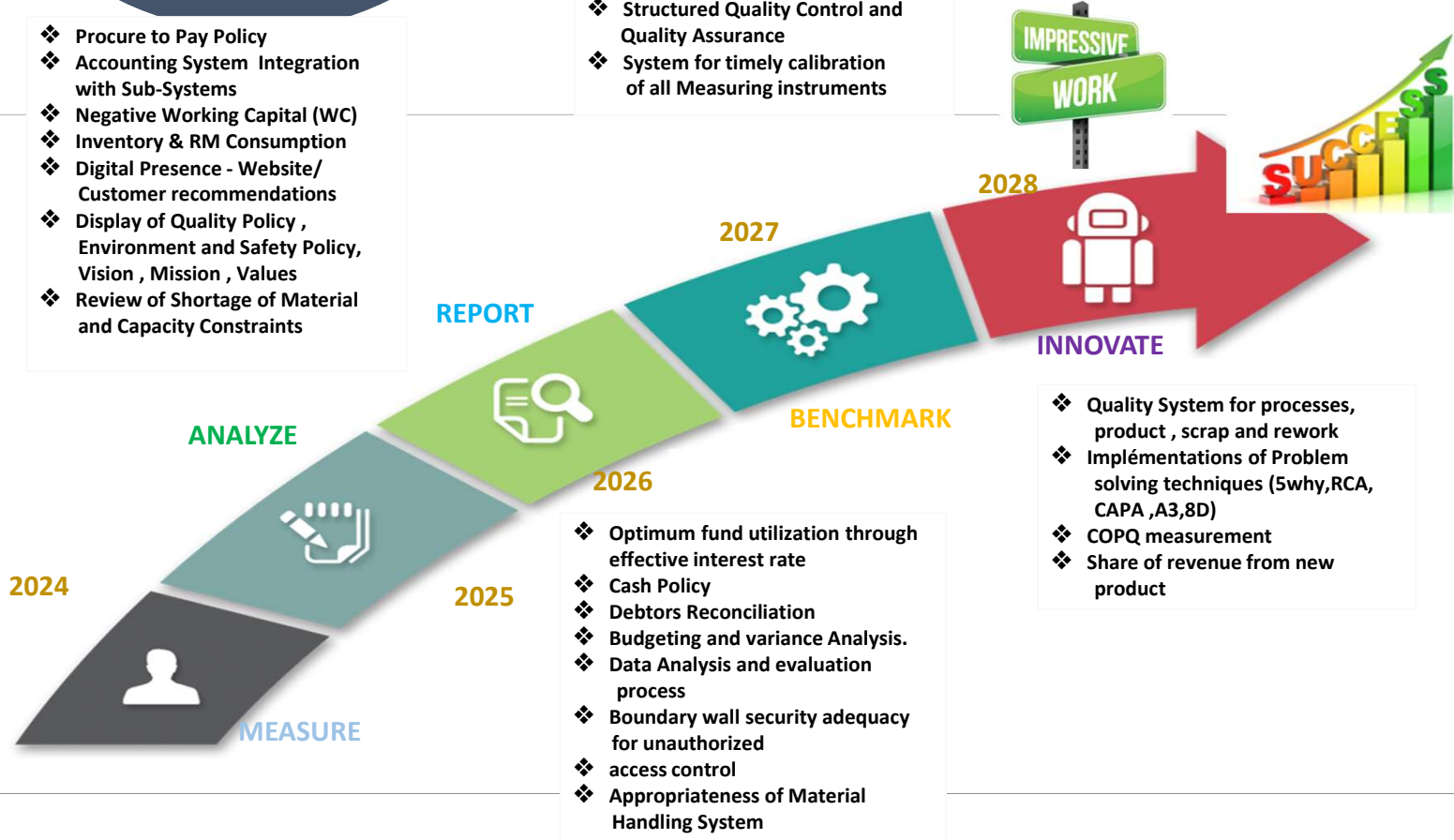
- Supplier Outstanding Balance Reconciliation
- Vendor Payment
- Disbursements - Manual
- Multi Skilling of workers in Process, Machine, Operation, maintenance, Quality Check , Reporting MIS
- Structured Quality Control and Quality Assurance
- System for timely calibration of all Measuring instruments
- Quality System for processes, product , scrap and rework
- Implementation of Problem solving techniques (5 why, CA, CAPA ,A3,8D)
- COPQ measurement
- Share of revenue from new product

## Business Transformation Way Forward Journey

- ❖ MIS structure
- ❖ Budget
- ❖ Team performance Incentive
- ❖ Costing
- ❖ GST Compliance Automation
- ❖ Competition and Market Share Awareness
- ❖ Quarterly Business Review with Critical Suppliers
- ❖ Percentage of operations controlled with SPC
- ❖ COPQ measurement
- ❖ Adherence to Preventive Maintenance Schedule
- ❖ Reliability Focussed Maintenance
- ❖ Disaster Recovery Plan deployment
- ❖ Defining clarity of Organization mission, values, vision and brand promise.
- ❖ Conducting an organizational SWOT analysis
- ❖ Regular Business coaching

- ❖ Procure to Pay Policy
- ❖ Accounting System Integration with Sub-Systems
- ❖ Negative Working Capital (WC)
- ❖ Inventory & RM Consumption
- ❖ Digital Presence - Website/ Customer recommendations
- ❖ Display of Quality Policy , Environment and Safety Policy, Vision , Mission , Values
- ❖ Review of Shortage of Material and Capacity Constraints

- ❖ Supplier Outstanding
- ❖ Balance Reconciliation
- ❖ Multi Skilling of workers in Process, Machine , Operation, maintenance, Quality Check Reporting MIS
- ❖ Structured Quality Control and Quality Assurance
- ❖ System for timely calibration of all Measuring instruments



- ❖ Optimum fund utilization through effective interest rate
- ❖ Cash Policy
- ❖ Debtors Reconciliation
- ❖ Budgeting and variance Analysis.
- ❖ Data Analysis and evaluation process
- ❖ Boundary wall security adequacy for unauthorized access control
- ❖ Appropriateness of Material Handling System

- ❖ Quality System for processes, product , scrap and rework
- ❖ Implementations of Problem solving techniques (5why,RCA, CAPA ,A3,8D)
- ❖ COPQ measurement
- ❖ Share of revenue from new product

# GFP TEAM OF EXPERTS



**Divyanand Deshbhandari**  
PGDMM-IIMM, Grad. Ind. Engg-IIIE  
Supply Chain & NLP



**Dr. Nitin Dumasla**  
PhD in ESG | Founder,  
President & CEO at  
Growlity, Inc.  
ESG Excellence



**Shrikant Kulkarni**  
B Tech (Metallurgical Eng.)  
IIT - Kanpur  
Metallurgist- Quality & Testing



**Sharad Dhumane**  
B Tech (Metallurgical Eng.)  
IIT - Kanpur  
Foundry Excellence



**Vidhu Sharma**  
B.Sc. Applied Science, Masters in  
Labor Studies Exc Leadership Prgm  
(Kelly University, USA)  
HR Strategy Transformation



# GFP TEAM OF EXPERTS



**Heramb Phatak**

BE – Mechanical – Pune University  
M.Tech. – Process Metallurgy  
IIT - Mumbai  
Foundry Operations



**Shashank Kotwal**

Consultant for  
Enterprise, SMEs  
and Start-ups  
Balance Scorecard  
Excellence



**Sandeep Karkhanis**

BE Electronics  
Business Excellence



**Sanjay Kulkarni**

B.E. Mechanical  
Manufacturing &  
Maintenance



**Prabhat Pant**

B.Tech- Ind.Engg.,  
MBA (Spain)  
Sustainable Procurement

# GFP TEAM OF EXPERTS



**Rakesh Chougule**  
B.E. Electronics  
ITIL V3 TOGAF 9 Certified  
ERP Technical



**CA Vishwajit Honap**  
FCA, ACS, CMA  
Finance Regulatory



**CA Kallappa Chougule**  
M.Com. (Hons), FCA, CS  
Costing Process



**CA Mitesh Katira**  
M.Com, FCA, DISA, FAFP  
Digital Transformation



**CA Ulhas Limaye**  
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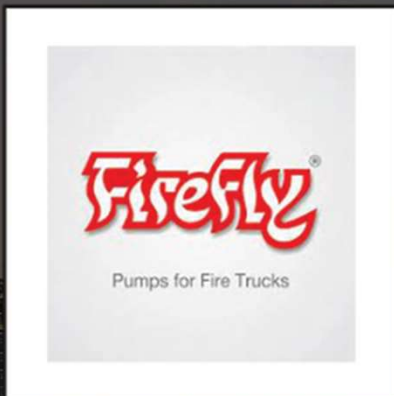
# PRESENTATIONS, SEMINARS, TRAINING, & KNOWLEDGE SHARING



# OUR ESTEEMED CLIENTS



**Sanjay Ghodawat Group (SGG)**  
Diversified Business Conglomerate



**Firefly Fire Pumps Pvt. Ltd.**  
Manufacturer, Supplier and Exporter  
of Vehicle Mounted Fire Fighting Pumps



**Maurya Group**  
Foundry & Machine Shop of Grey Cast Iron



**Manorama Infosolutions**  
Healthcare IT Solutions



**Laxmi Pumps & Oil Engines**  
Premium Water Pumps & Pumping Solutions



**Ceraflux India Pvt. Ltd.**  
Manufacturer and Exporter of Foundry  
alias Metallurgical Chemicals



**Om Metallics**  
Manufacturer of Aluminium Casting Machine  
Components & Assemblies for Engineering Industry



**Tulip Casting Pvt. Ltd.**  
Foundry & Machine Shop for  
Heavy Steel Casting



**Siddhivinayak Concordance Medicare LLP**  
Multi-speciality Hospital



**Deccan Institute of Commerce**  
Educational Institute

# OUR ESTEEMED CLIENTS



**Shloka Industries Pvt. Ltd.**  
Manufacturer and Distributor  
of Packaged Drinking Water



**Dr. Kurade's**  
Largest Mushroom Producer of India



**Diebold Nixdorf**  
ATM Machine & Banking Solutions



**Morya Trading Company**  
TOYOTA Showrooms & Workshops



**TTE Technology India Pvt. Ltd.**  
Electronics Company



**Speciality Sintered Products Pvt. Ltd.**  
Manufacturer of Sintered Parts



**Dunung Industries**  
Kolhapur

**Dunung Group of Industries**  
Manufacturer of Iron Casting &  
Assemblies for Engineering Industry



**Mohite Industries Ltd.**  
(formerly known as R M Mohite Industries Limited)  
Manufacturing & Exporting 100% cotton yarn



**VEEJAY FACILITY MANAGEMENT PVT LTD**  
*You Establish We Maintain*

**Veejay Facility Management Pvt. Ltd.**  
Facility Management Services



**Ion Exchange (India) Limited**  
Water and Environment Management

# OUR ESTEEMED CLIENTS



**London School of Accountancy & Finance**  
Professional Educational Institute



**Mayura Steels Pvt. Ltd.**  
Manufacturer of Steel Casting



**CA Kedar Kumbhojkar & Company**  
Chartered Accountant Firm



**FOUR ACES FASHION HOUSE Pvt. Ltd.**  
Manufacturer of Eco-Friendly Clothing



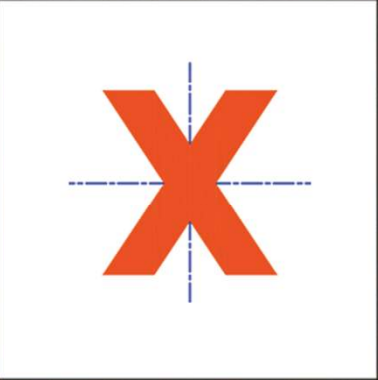
**Ahire Machine Tools Pvt. Ltd.**  
Productivity Improvement Solutions



**Mandovi Drydocks**  
Ship Builders & Repairers



**Maharashtra Forge Pvt. Ltd.**  
Manufacturer and Exporter of  
Closed Die Steel Machined Forgings



**Axies Engineering Systems**  
Manufacturer of Special Purpose Machines



**Sonu Exim Pvt. Ltd.**  
Manufacturer and Exporter in  
Apparel Industry



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# THANK YOU

**GFP MANAGEMENT CONSULTING SERVICES PVT. LTD.**

CIN : U74999GA2021PTC014685



**Mumbai**

D-613/614, Neelkanth  
Business Park  
Chunabhatti,  
Mumbai - 400056



**Pune**

A-403, Golden Cascade,  
Wakad,  
Pune - 411057



**Mapusa (Goa)**

AG2, Orchid Green,  
Daungi Colony, Mapusa,  
Goa - 403507



**Kolhapur**

Flat No. T 1, Utkarsha Residency,  
Behind Phalke Eye Hospital,  
Tarabai Park,  
Kolhapur - 416001

**Cell No.: 93 70 88 88 19 | 85 30 12 59 60**

**E- mail:** [Yogesh.Kulkarni@globalfinanceprofessionals.com](mailto:Yogesh.Kulkarni@globalfinanceprofessionals.com)

**Website:** [www.globalfinanceprofessionals.com](http://www.globalfinanceprofessionals.com)

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