

Group Project: Client Management Project

Who are we?

- The Organization is Solutions Plus, founded in 1927 head quartered in New York City, New York
- Small satellite offices in 10 cities in the US, 2 offices in Canada, 3 in South America, 3 in Europe and 1 in Australia.
- Currently servicing clients in North and South Americas, Eastern Europe
- Looking to expand in Asia Pacific (China, Hong Kong, Japan)
- Small foot print in Australia, like to make it bigger
- Current revenue is 10 Billion
- Private firm owned and operated by a group of **managing partners** (25 of member)
 - 35,000 **consultants** in the field
 - 15,000 **consultants** centralized
 - 1000 **Client Relationship manager**
 - 750 **Administrative staff**
 - 500 **Directors**
 - Total employee count 52,250

Our Mission:

Our organization is focused on the become a trusted partner with our clients, providing consulting services in a range of business disciplines across all major industries, to directly increase our clients revenue and reduce operating expenses.

Disciplines:

Tax
Audit
Human Capital
Information Technology
Financial planning
Organizational Governance

Industries Served:

Manufacturing
Federal Government
Financial Industry
Risk Management

Opportunities:

Expansion geographically

- Nationally
- Internationally

Expand into new disciplines

- Healthcare benefits
- Petroleum and Natural Gas Exploration

Challenges:

- Expanding Resources Geographically will require better communications channels to share information with our employees. Difficult to identify consultant's skills and assignments
- Initial client setup and billing is a very manual
- Travel booking is time consuming and requires administration resource support
- Expense submission is manual process
- Expense tracking is not well governed