



FINANCE TRANSFORMATION & OPERATIONS

Technology and AI are transforming the finance function across organizations, offering unprecedented opportunities to optimize processes, enhance data governance, and drive digital innovation. However, this transformation also presents challenges such as fragmented systems, complex data management, and evolving risks associated with emerging technologies such as AI.

Our practice works closely with finance teams on comprehensive transformation initiatives, including maturity assessments, target operating model design, process improvements, financial close optimization, shared services, finance performance, data intelligence, digital finance, data governance, outsourced managed services, learning and development, and knowledge management.

Guided by our vision to build world-class finance organizations, we combine deep functional expertise with agile methodologies, tools, and accelerators tailored to your specific requirements, enabling the finance function to become an effective business enabler powered by skills, efficient processes, strong controls, and advanced technology.

FINANCE TRANSFORMATION

Finance transformation encompasses three phases covering maturity assessment, design, and implementation. Maturity assessment is a structured evaluation of the finance function of an organization focusing on six key pillars, namely, target operating model (TOM), people, process, technology, data, and governance, to have a clear roadmap to transform the finance function.

Fragmented systems, manual processes, and limited integration hinder finance functions, resulting in inefficiencies and delays. Challenges such as misaligned organizational structures, delayed book closures, skill gaps, and weak data governance highlight the necessity for finance transformation.

How can we help?

Uniquis helps organizations assess their finance function's maturity. Our agile approach provides timely, actionable insights to transform the finance function. Based on the insights, a design blueprint is developed, which is an enabler for implementation. Uniquis also partners with organizations to implement the design and end-to-end program management throughout the implementation lifecycle.

Target Operating Model

A **target operating model (TOM)** is a blueprint for a finance organization structure designed to operate in the future and achieve the organization's strategic goals. By enabling a streamlined, business-aligned organizational design, it addresses decentralized finance teams, misaligned structures, and unclear roles, with future TOMs comprising a combination of humans and agents working in tandem.

Key focus themes

- In-source vs outsourcing
- Responsible, accountable, consulted, and informed (RACI) matrix
- Centralization vs decentralization
- Roles and responsibilities
- FTE sizing
- Alignment with business model, strategy and vision

How can we help?

Uniquis can help organizations evaluate their current operating model through comprehensive assessment of the structure and design future TOM based on rational assessment and benchmarking insights.

Process transformation

Process transformation involves fundamentally rethinking and redesigning finance processes to enhance efficiency, optimize costs, and drive automation and innovation. By leveraging digital solutions, it minimizes manual efforts, supports scalability, optimizes workflows, and improves decision-making, contributing to long-term competitive advantage.

Key focus themes

- Order to cash (O2C)
- Procure to pay (P2P)
- Record to report (R2R)
- Acquire to dispose (Capex)
- Working Capital management
- Governance, risk and compliance (GRC)
- Hire to retire (H2R)
- Financial planning and analysis (FP&A)
- Treasury

How can we help?

Uniquis can help re-engineer processes by identifying inefficiencies, streamlining workflows, and implementing best practices to minimize errors and enhance efficiency. Our approach leverages automation and digital solutions including AI to drive operational efficiency, ensuring long-term savings. Uniquis also partners with organizations to implement re-engineered processes and end-to-end project management.

FINANCE SHARED SERVICES ADVISORY

Finance shared services advisory focuses on advising finance organizations to evaluate, design, and implement a shared service operating model. It enables cost savings, scalability, and compliance through process automation, standardization, and centralized operations, enabling the finance team to focus on strategic business priorities.

Key focus themes

- Business case, site selection, and cost benefit analysis
- Service delivery model and governance structure
- Process and technology architecture
- Performance monitoring (KPIs)
- AI deployment in finance operations
- Communication and change management
- Transition models- (lift shift and transform, transform, lift and shift etc)
- Shadow and reverse shadow
- Trainings and workshops

How can we help?

Uniquis helps finance organizations assess, design, and implement efficient finance shared services that help centralize processes, optimize costs, achieve standardization, and improve service delivery. Our approach focuses on streamlining operations, enhancing scalability, and driving consistency across the finance function. Uniquis also partners with organizations through end-to-end program management throughout the implementation lifecycle.

QUALITY CLOSE

A well-executed financial close process ensures the accuracy, transparency, and integrity of financial statements. It helps businesses comply with regulations, improve decision-making, and enhance investor confidence. A quality close reduces financial closure cycle time, enhances accuracy and reliability, and strengthens reporting controls for more timely and trusted financial insights.

Key focus themes

- Automated reconciliations
- Standardized workflows
- Early cut-offs and reduction in manual JVs
- AI accelerators for automated journals and accruals
- Efficient chart of accounts
- Connected systems and automation
- Smooth audit closure

How can we help?

Uniquis provides customized solutions to optimize, accelerate and transform your financial close process. Whether it is close calendar, automation, reconciliation, or compliance, we ensure that your organization achieves a seamless and high-quality financial close.

FINANCE AND PERFORMANCE INTELLIGENCE

Finance functions today are expected to do more than close the books and report the numbers. Business leaders need timely, reliable financial insight to plan, allocate capital, and respond to change. Yet many finance teams remain constrained by fragmented data, manual processes, and planning cycles that lag behind the pace of decisions. Finance Performance and Intelligence addresses this gap and is positioned to drive strategic decisions across the organization.

Key focus themes

Strategic planning, budgeting, and forecasting	Report and analyze	Consolidate	Transform and operate	Technology and implementation
• Long-range planning and target setting • Annual operating plans and driver-based / zero-based budgeting • Rolling forecasts, scenario and sensitivity modeling	• CFO, board and management reporting frameworks • KPI design and benchmarking • Variance, profitability and root-cause analysis	• Group, multi-entity and multi-currency consolidation • Intercompany reconciliation and elimination • Chart of accounts and hierarchy design	• FP&A operating model redesign and CoE setup • Finance talent and capability build • Managed EPM services	• EPM platform selection and business case • Tool Implementation and integration • AI-powered forecasting and analytics

How can we help?

Uniquis works with finance teams to evaluate how effectively the finance function supports planning, performance management, and decision-making across the organization. We help identify where processes, data, and reporting structures are limiting the finance function's ability to provide reliable, forward-looking insight and design a future state that addresses those gaps practically and sustainably.

Where technology is part of the solution, we support platform selection, process redesign, implementation, and integration across all major EPM tools. Our approach is platform-agnostic and tailored to the organization's structure, scale, and priorities, not driven by any one vendor. The goal is a finance function that generates consistent, decision-grade insight and operates as a genuine strategic partner to the business.

FINANCE DATA INTELLIGENCE

Data governance

In any organization, it is crucial to maintain the integrity of data used to generate information for reporting and decision-making. Building a sustainable data governance model is imperative for organizations to leverage data efficiently.

It ensures accurate, standardized, and consistent information by eliminating duplications, enabling a 360-degree view, and improving the reporting reliability.

Key focus themes

- Centralized data management and governance framework
- Data cleansing and migration
- Centralized data lake and analytics architecture design
- Data integration
- Reporting rationalization and standardization

How can we help?

Uniquus helps organizations to strengthen data governance and improve data management through robust data management framework, tools and metrics. Our approach ensures compliance, enhances transparency, and aligns financial outcomes with strategic business goals. Data management framework covers all aspects of lifecycle of enterprise data management (Master data, Transactional Data, Reports and Meta data).

Digital finance

The rapid evolution of digital technologies is reshaping the way organizations manage their finance function. Digital finance is not just about automating traditional processes but about creating new and more efficient ways of delivering disruptive technology services. Our cross function teams are working on several initiatives to enable real-time reporting and accurate insights while driving a lean, efficient, and future-ready finance function.

Key focus themes

- Finance technology architecture
- ERP upgrade and optimal use of core ERP
- Automation of upstream and downstream activities around ERP
- Tools and accelerators and optimal use of other existing technology stack
- Seamless integration between systems
- Unified data lake
- Real-time data visualization
- Leveraging AI in finance operations through use case assessment, PoC and implementation
- Empowering CXOs suites with AI powering finance operations

How can we help?

Uniquus can help organizations transform their finance function through digital technologies, automating processes, improving accuracy, and enhancing real-time decision-making. Our approach helps us to identify cutting-edge solutions with a focus on AI-driven tech, cloud platforms, and data analytics, enabling smarter, faster, and more agile finance operations. Support in implementation and optimization of Digital tools – Blackline, Anaplan, Board, Tableau, Power BI, FIS, High-radius, e-invoicing systems, ERP, AI-enabled tools, etc.

AI in Finance

Usage of AI in finance operations is transforming the way organizations manage, analyze, and act upon financial data. AI in finance is not limited to automating repetitive tasks but is focused on leveraging advanced algorithms to unlock deeper insights, predict outcomes, and enable agile decision-making. Our cross-functional teams are actively engaged in exploring diverse AI use cases within finance operations, developing Proofs of Concept (PoCs), and providing end-to-end implementation support to accelerate adoption. By acting as strategic AI enablers, we help businesses drive intelligent automation, enhance accuracy, deliver real-time reporting, and empower finance leaders to build a lean, resilient, and future-ready finance function.

Key focus themes

- End-to-end assessment of AI use cases in finance
- Development of PoCs and AI prototypes for validation
- Implementation support for AI-enabled finance operations
- Finance data lake creation and advanced analytics integration
- Automation of upstream and downstream ERP activities
- Seamless cross-platform integration of AI solutions with ERP and finance systems
- Enhanced real-time dashboards and predictive insights for CFO suites
- Deployment of intelligent digital tools: AI-enabled finance bots, advanced e-invoicing, anomaly detection engines, reconciliations, and forecasting accelerators

How can we help?

Uniquus supports organizations in identifying, experimenting, and scaling AI-driven finance operations. Our expertise spans AI-powered tools, intelligent process automation, data analytics, and cloud-based finance platforms. We serve our clients by combining our AI talent pool, functional domain expertise, proprietary accelerators and partnerships with niche AI-native companies globally.

FINANCE AS A MANAGED SERVICE (FAMS)

Finance as a Managed Service (FAMS) – End-to-end finance function and compliance management of legal entities (including SPVs) on an outsourced basis. Specific finance function activities on an outsourced basis, i.e., statutory financial reporting, fund reporting, financial consolidation, etc.

Key focus themes

- Financial reporting (including financial statements preparation and audit support)
- Fund accounting and reporting
- End to end finance function set-up and management for GCCs, SPVs backed by investors and family offices

How can we help?

Uniquis helps you set up and manage your finance operations or specific finance processes end-to-end, from transaction processing and compliance to reporting, ensuring smooth operations. Leveraging our off-shore talent pool, we are able to provide significant cost efficiencies along with timely and quality delivery.

LEARNING AND KNOWLEDGE MANAGEMENT

Learning and development

Continuous learning and development help finance professionals develop the skills, knowledge, tools, and strategic mindset needed to build the finance function of the future.

Our methodology

- Practical Insightful trainings
- Case-study based learning
- Online and In-person training programs

How can we help?

Uniquis can help organizations bridge the gap by equipping finance teams with the requisite skills and tools to drive efficiency, enhance decision-making, and lead strategic growth.

Knowledge management

Knowledge management (KM) is the process of capturing, organizing, storing, sharing, and effectively using knowledge within an organization. It involves strategies and technologies that help businesses and individuals manage their intellectual assets to improve decision-making, innovation, and efficiency.

How can we help?

We offer a comprehensive content portal designed specifically for finance professionals, featuring an AI-powered chatbot to assist with training material, a consultation portal for expert guidance, and access to relevant reference sources. Our platform also includes a centralized repository for policies and procedures, along with regular updates, tools, notifications, and customizable templates to support your day-to-day needs.

Why Us

Our deep expertise

1 Our leaders in the Finance Transformation and Operations practice bring deep, global expertise across the finance transformation agenda. **Shashikant Shenoy** brings over two decades of experience across finance operations reengineering, F&A shared services, digital controllership, automation, analytics, and process optimization. **Anthony Vitale** brings over 25 years of experience advising clients on finance strategy, operating model design (including GBS and shared services), and technology-enabled process optimization. **Vijay Sampathkumar** brings over 20 years of experience in enterprise performance management and finance technology transformation. **Anubhav Srivastava** brings over two decades of experience in AI, data and analytics, and enterprise technology innovation.

Deep and diverse talent pool and globally integrated delivery model

2 As a company specializing in providing consulting services to finance functions, we are a hotbed for high-quality talent in this area. Our leadership team is supported by more than 300 professionals who bring substantial expertise across finance operations and transformation, finance technology, accounting advisory, audit, governance, risk, and compliance. Due to our global organization structure, our talent pool is fully integrated, collaborating seamlessly across our key markets of the USA, India, and the Middle East. Leveraging our offshore talent pool, combined with substantial onsite presence, we deliver significant cost efficiencies while maintaining timely, high quality delivery.

Integration of Operational and Technology (OpTech) capabilities

3 Our unique model combines cross-functional teams trained in finance operations and enabling technologies. These OpTech teams combine deep process knowledge with hands-on expertise in automation, data architecture, systems implementation, and reporting platforms. Whether the goal is to standardize processes, embed internal controls, streamline reconciliations, or modernize the close process, our integrated teams ensure transformation is strategically aligned and operationally sustainable. This cohesive model minimizes silos, accelerates implementation timelines, and enhances adoption across the organization.

Agility and responsiveness

4 Our team embodies the essence of agility and responsiveness, fostering a dynamic environment where adaptability and quick responses to new technologies, including AI, are integral to our operations. From process mining to workflow automation and cloud-native implementations, we deliver scalable and intelligent digital finance operating models that are built to evolve with the organization. Our agility and responsiveness is enhanced by a high degree of partner/director involvement on projects.

AI-first approach

5 Our teams have built AI use cases across finance processes. Our strategic partnerships with AI-enabled platforms for finance transformation, coupled with significant investments in our proprietary AI UniVerse platform and related native use-case development, enable us to adopt an AI-first approach to address clients' transformational needs. We have built a strong AI partner ecosystem to holistically serve our clients.

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AI & DATA ANALYTICS PARTNER

glean

ENTERPRISE AI SEARCH PARTNER

numeric

FINANCIAL CLOSE AUTOMATION PARTNER

numero

AI-DRIVEN FINANCE TRANSFORMATION PARTNER

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FULL-STACK BUILD PARTNER

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