

# Providing clarity for better insights.

To rapidly understand your business and provide you with the best solutions, **Ascension Group requires an appropriate level of visibility into your company's data.** Outlined below is the information we generally assess when performing an initial Desktop Review.

## — WHY DO A DESKTOP REVIEW?

### We can't improve what we can't see.

Seeing involves site walkthroughs, which are critical in gaining a perspective on the people, products, processes, and systems of your organization.

The initial desktop review of your historical information enables us to understand, analyze, and help prioritize potential growth and value-creation opportunities through collaborative workshops.

## — HERE'S WHAT WE LOOK AT.

### Historical financial reports (10 years is preferred)

This includes, but is not limited to: Balance sheet details; P&L details with all dated transactions; Trial balance; Purchasing transaction files with all dated transactions; Order intake log which should be directly tied to invoices; Shipping transaction files including order and promise dates

### Current financial reports

Including current backlog in units/value; Detailed A/P and A/R; Detailed inventory

### Human capital

Organization chart and list with salaries and supervisor hierarchy (including hire/termination dates and open headcount)

### Quality management

Customer complaints; Warranty history

### Glossary of terms

Definition of unique terms specific to the company (i.e., acronyms used)



# Sharing your information

All information should be provided in a detailed, dated transaction table format, such as .csv or .xls. This format is crucial as it allows us to **efficiently process and analyze the data, leading to faster, more accurate insights.**

## WHAT YOU CAN EXPECT FROM US

01

Site visit(s)

02

Information request

03

Three weeks of data analysis upon information receipt

04

Interactive desktop review (live preferred)



3 - 4 Weeks

## DELIVERABLES



### Desktop review of the business

P&L review; Sales History; Order-to-deliver performance; Vendor history; Inventory review; Organizational review; Quality review



### Financial observations including:

Business review of the financials; Market/sector/competitive analysis; Health, key ratios; Planning



### Digital evolution maturity

Business by the numbers (data integrity); Customer and digital experience observations



### Audience

Owner and critical individuals (identified by owner)