



NEOFORM

NEOFORM Business Partners

Who we are and What we do

November 2024



Pioneer Businesses Know That ...

- ⬢ What is the financial strategy that driving success of their business?
- ⬢ How do they measure financial health and progress of their operations?
- ⬢ How much financial resources are allocated across different business lines?
- ⬢ What is the return on investment (ROI) generated by each business line?
- ⬢ How much cash is required for maintenance and development to meet strategic goals?
- ⬢ Which product or service is the most profitable, and what factors drive its value?
- ⬢ What is the impact of x% changes in foreign exchange rates or prices on company profit and cash flow?
- ⬢ How would selling x% below or above the budget affect the company's profit and loss (P&L) and cash flow?
- ⬢ How can the business achieve its strategic goals with x% less financial resources?
- ⬢ How can the business increase sales growth or profitability by x% with the current financial utilization rate?

What We Do

As Finance Business Partners, we strive to enhance and empower business and financial teams and systems to effectively address these questions, support informed decision-making, manage performance, and maximize enterprise value, through:

- ❖ Maximizing sustainable sales growth
- ❖ Maximizing return on invested capital (ROIC)
- ❖ Minimizing financial risks



Who We Are

- At **NEOFORM** we are dedicated Finance-Business Partners (FBP*) committed to driving business performance through strategic financial insights.
- Our mission is to empower teams with the financial acumen needed to excel in today's competitive landscape. By fostering financially capable teams, we ensure every department can contribute to the overall success & sustainability of the organization.
- Together, we navigate the complexities of finance to unlock new opportunities and drive growth.

*FBP: finance professionals who work as strategic collaborators actively working alongside business leaders (departments/units) to achieve shared goals, creating a real and active partnership with both operations and management



Partners



Farzaneh Hedayat

Managing Partner

CFO & FBP in

MNCs Sanofi & Hayat



Majid Ant

Managing Partner

CFO & FBP in

IT startups Azki,
Sheypoor & DigiPay

Our Values



Continuous Improvement

We are committed to constant growth and innovation, always striving to be better in everything we do.



Integrity & Clarity

We build relationships based on trust and transparency, ensuring honesty and openness in every interaction.



Result-Driven Excellence

We focus on achieving meaningful outcomes, delivering measurable success for our clients and partners.



People - Centered

Every individual counts. We value and respect each person recognizing that everyone's contributions matter.



Shared Success & Accountability

We believe in mutual interests and responsibility, fostering partnerships where success and accountability are shared equally.

Our Promise

🏠 We are dedicated to delivering value, making a significant impact, and ensuring satisfaction.

🏠 Performance-Based Payment

We believe in aligning our success with our business partners. Our payment structure is based on deliverables, ensuring that business only pay for the value we create measurable results and maintaining the highest standards of accountability.

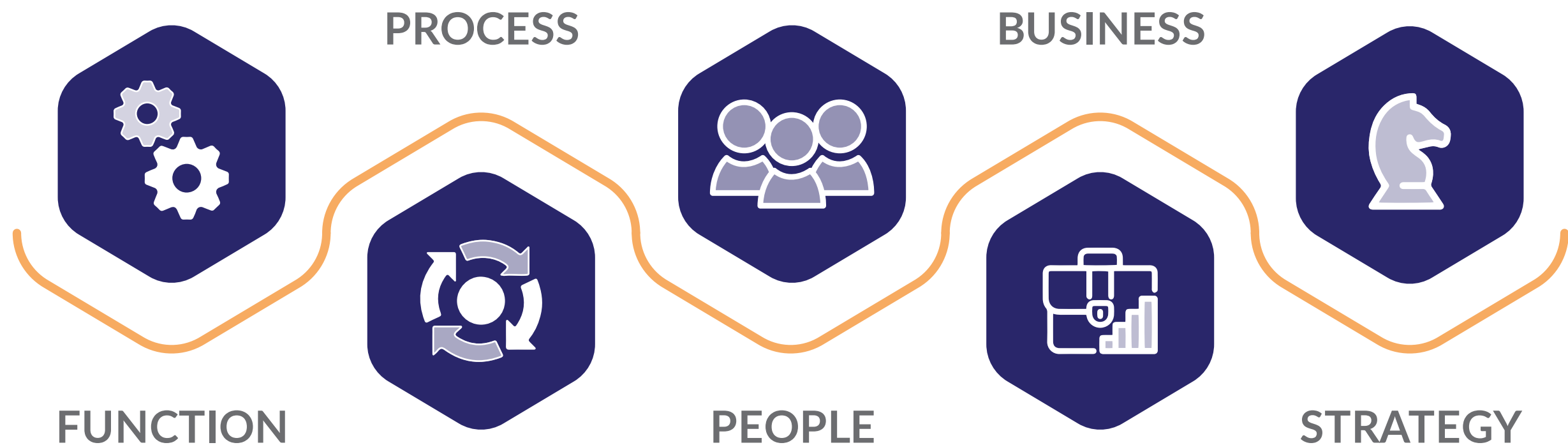


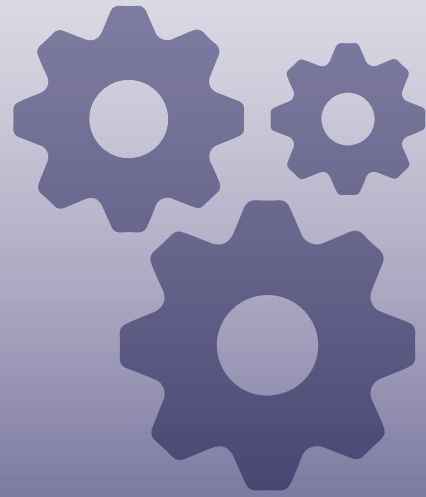
"Transforming Finance into a Growth Engine."

Our Mission

Empowering businesses to achieve their full potential by transforming performance through strategic financial insights and innovative solutions, driving sustainable growth and long-term success.

Our Services





Functional Services

-  Set-up functions & systems for:
- Accounting
 - Treasury & Financing
 - Financial Planning & Analysis (FP&A)
 - Finance Business Partnering (FBP)
 - Control & Risk Management



Functional Services; When?



- ❏ **Businesses may require a specific function or the entire finance team to:**
 - Build from scratch
 - Develop its functionalities
 - Optimize its performance

- ❏ **Board or senior executives need to measure and monitor functional performance of finance department**
 - Through a performance dashboard that includes 44 Performance Indicators (PI) across 7 functions
 - Additionally, they receive recommendations for improving these PIs.




Overview of Functional Services

- Tailor function requirements and its delivery to align with business needs
- Set up and integrate information systems, tools, and data flows
- Design and implement financial and operational processes and workflows
- Hire the right talent and train them to effectively use tools and systems
- Upskill and reskill employees with the designed system
- Create templates, checklists, and dashboards
- Document principles, roles, and processes





Process Oriented Services

-  Financial Processes Optimization & Operational Excellency
-  Digital Transformation for Finance
-  Accounting Automation



Process-Oriented Services; When?

When the finance function is operational but processes need optimization and transformation, it may be due to the following issues:

- Lack of clarity or definition
- Manual and time-consuming tasks
- Inefficiency, leading to high costs and multiple reworks
- Low-quality outcomes
- Unreliable and unsustainable processes
- Complexity and fragmentation







Overview of Process Services

- Identify, define, and design processes.
- Create process profiles, including stakeholders, outcomes, workflows, etc.
- Map and visualize process workflows.
- Engineer processes to be lean, simple, and standardized.
- Automate processes and bring them online.
- Design and implement a control set of processes.
- Create process KPI dashboards and reports.





People Services

-  Finance Team Set up
-  Team Optimization
-  People Development
-  Coaching & Training Courses



People Services; When?

Businesses need to:

- Gather and hire the entire finance team or specific roles/functions.
- Transform a fragmented group of finance experts into a motivated and collaborative team.
- Enhance the productivity of the finance team or develop new functionalities.
- Upskill and reskill finance personnel.
- Instill a financial mindset, knowledge, and skills in non-finance executives.



Overview of People Services

- Design the finance team structure and chart, and define job roles.
- Define job profiles, career paths, and job ladders with competencies.
- Assess individuals against job profiles and provide recommendations.
- Assist in hiring for finance roles.
- Train and coach finance personnel in technical, communication, managerial, and leadership skills.
- Provide financial coaching and mentorship for the CEO, board members, and senior executives.
- Conduct financial courses and trainings for non-financial staff.





Business Oriented Services

-  Financial KPIs Monitoring and Governing
-  Business Portfolio Management
-  Dynamic Pricing Optimization
-  Cash Flow Optimization





Business-Oriented Services; When?

For businesses with established accounting systems seeking impactful business partnerships and need finance team to lead cross-functional programs that drive tangible value. Some like:

- Measuring and analyzing financial risk and return across various business units, product lines, and activities.
- Identifying key value drivers in sales & marketing, operations & supply chain, product development, and service delivery, and providing solutions to enhance their impact.
- Implementing smart and agile financial resource planning and allocation to ensure business continuity and foster high-value creation.
- Managing a diverse portfolio of businesses and products, tailoring financial approaches to their unique situations throughout their lifecycle.



Overview of Business Services

We specialize in transforming data into actionable insights by:

- **Collecting and connecting data** from accounting, market, sales, technology, products, operations, and supply chain.
- **Integrating data silos** to create a holistic information system, enabling the extraction of new and deeper insights.
- **Analyzing trends and relationships** to understand system dynamics and develop dynamic financial models.
- **Defining and measuring financial metrics and ratios** to ensure accurate performance tracking.
- **Combining vertical analysis - sales to profit - with cash flow and capital analysis** for comprehensive financial insights.

Overview of Business Services

- Shortening financial reporting cycles and delivering reliable, insightful dashboards.
- Preparing mid-term revolving plans and driver-based, performance-oriented budgets.
- Conducting budget realization processes, including monthly reviews of actual performance against budget and KPIs.
- Implementing continuous improvement processes through planning, acting, controlling/reviewing, and learning.





Strategic Services

Financial Strategy Development, Formulation and Execution for:

-  Growth Acceleration
-  Profitable Growth Optimization
-  Cost Saving & Restructuring
-  Lean Asset Utilization
-  Financial Risk Management



Strategic Services; When?

When businesses need strategic business partnering from finance leaders and they seek to understand:

- **The business environment and market dynamics** from a financial perspective.
- **The current financial position and the historical value created** by previous strategies.
- **Available financial resources**, along with their risks and limits.
- **The financial risk and return** of different strategic choices.
- **Key financial performance and health metrics** to track.
- **Optimal financial resource allocation** to support business strategies.
- **The best financial initiatives** to foster strategic programs.





Overview of Strategic Services

- Analyze the business environment and the company's financial performance, providing insights through market analytics.
- Create driver-based dynamic financial models and projections of business activities using the business canvas.
- Determine and develop financial capabilities and resources.
- Simulate financial scenarios for different strategic initiatives, considering market responses.
- Analyze ROI, risk, cash needs, and capital requirements for various strategic paths.
- Examine the value stream of the business through its value chain, identifying value-creating and waste activities.

A Successful Service Delivery





azki

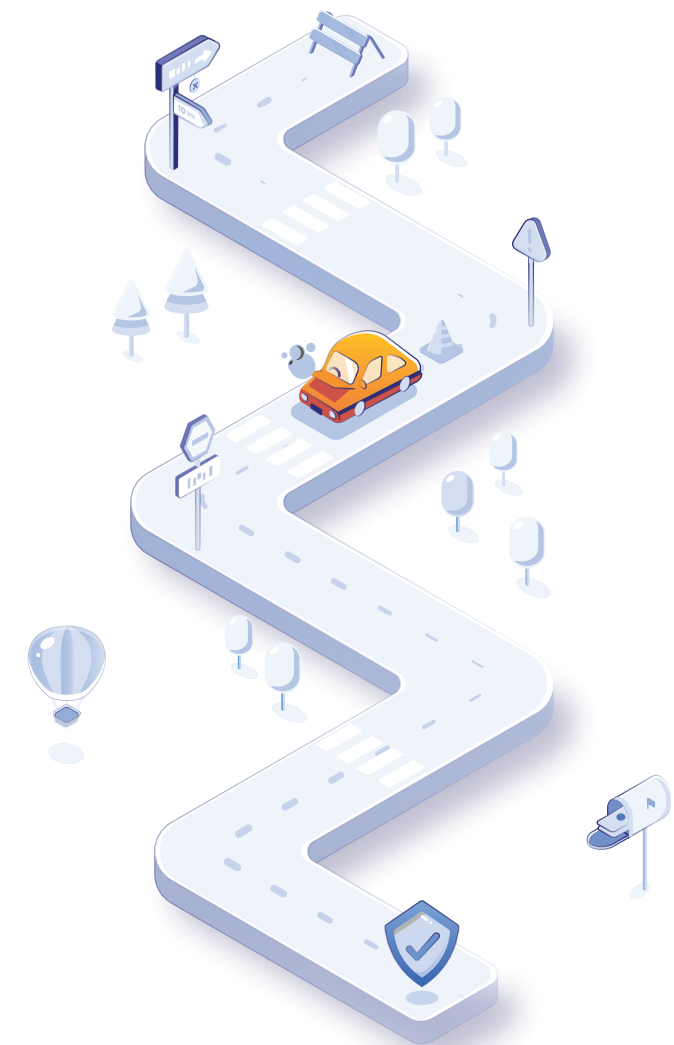


www.azki.com

Our Success Story in azki.com

 Azki is the leading online insurance aggregator in Iran, boasting a multi-deca million USD turnover. Within a year, we could contribute to achieve remarkable milestones:

-  Made the company cash flow positive (+10% of GMV) while sustaining triple-digit GMV growth.
-  Improved the EBITDA margin by more than 10 percentage points.
-  Diminished financial risks, ensuring all risk metrics are in the green zone.
-  Increased sales per employee by 3.2x.



Financial Evolution in Azki



Before

- No business plan and financial model
- No financial strategy and KPIs
- No budget
- Monthly simple report of P&L
- Monolithic and unspecialized accounting team
- No digital financial process
- No defined risk management

After

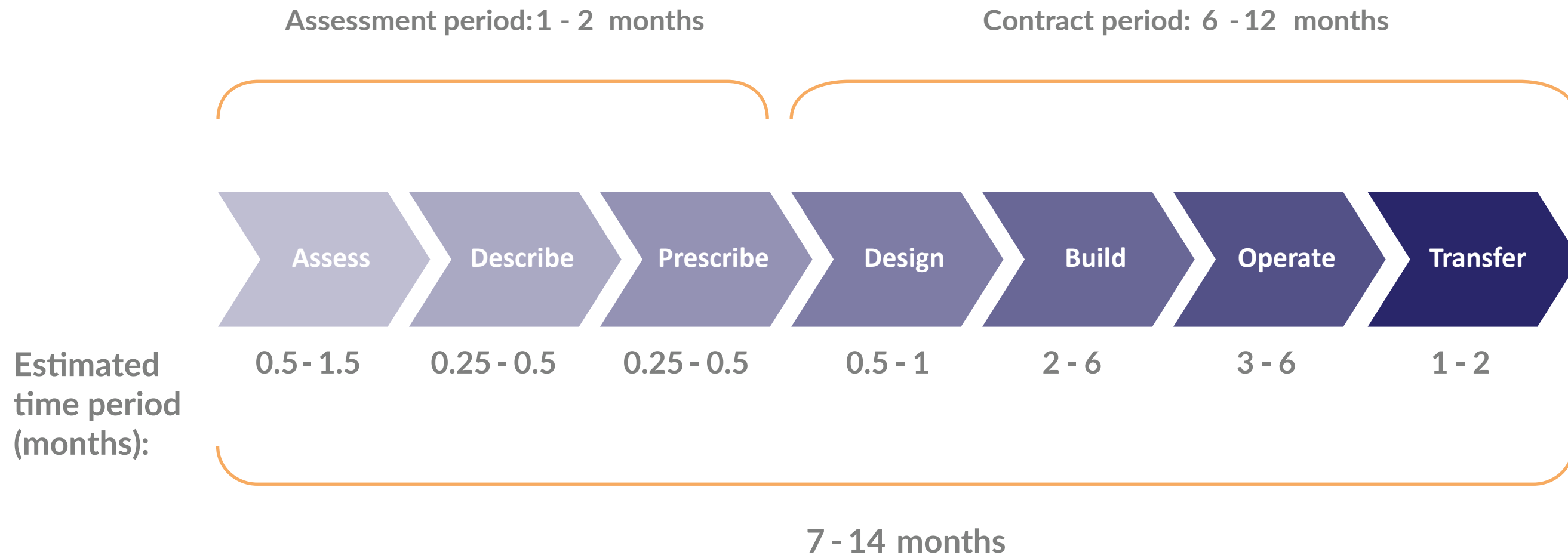
- Comprehensive financial model for all business units.
- 5-year financial projection with multiple scenarios.
- Defined long-term and short-term financial goals and KPIs, aligned with business strategy and plans.
- Complete running FP&A process.
- Build multiple new teams and functions like FP&A, commercial finance, investment management and process engineering.
- Defined and measured financial risks and health metrics.





& How We Work How to Start

How We Work



First Step: Initial Assessment

1. Financial Capability Maturity Model (CMM):

Evaluate corporate capabilities in these 5 dimensions from level 1 (inadequate) to level 5 (leading edge):

- Financial governance and leadership
- Financial planning
- Finance for decision making
- Financial monitoring and forecasting
- Financial and performance reporting



2. Finance function Performance Indicators (PIs):

Evaluate finance function PIs in these 7 working areas from very good (super green) to very bad (super red)

- Finance team – Accounting – Statutory – Treasury – FP&A – Control – Strategy & FBP

Initial Assessment (2)

3. Corporate finance KPIs

Evaluate financial KPIs of business from 5 perspectives

- Revenue growth
- Profitability – profit margin
- Profitability – ROIC & capital management
- Liquidity risk
- Financial leverage risk

4. 360 satisfaction survey of Finance function



Evaluate internal & external satisfaction of finance team

- Job satisfaction survey from finance team members
- Service/customer satisfaction survey from units that receive service from finance team



Assessment Report & Proposal

After conducting our initial assessment, we will provide you with:

-  **An initial assessment report** (Description – Problem phase)
-  **Proposed program(s)** (Prescription - Solution phase)

If you are satisfied with our proposal, we can proceed with signing a contract for the program execution.

-  **Estimated time for initial assessment:** 2 - 4 weeks
-  **Estimated cost:** 2 million toman per hour (approximately 15 to 30 hours)

No assessment fee will be paid in case the proposed program is not accepted.

Program Proposal

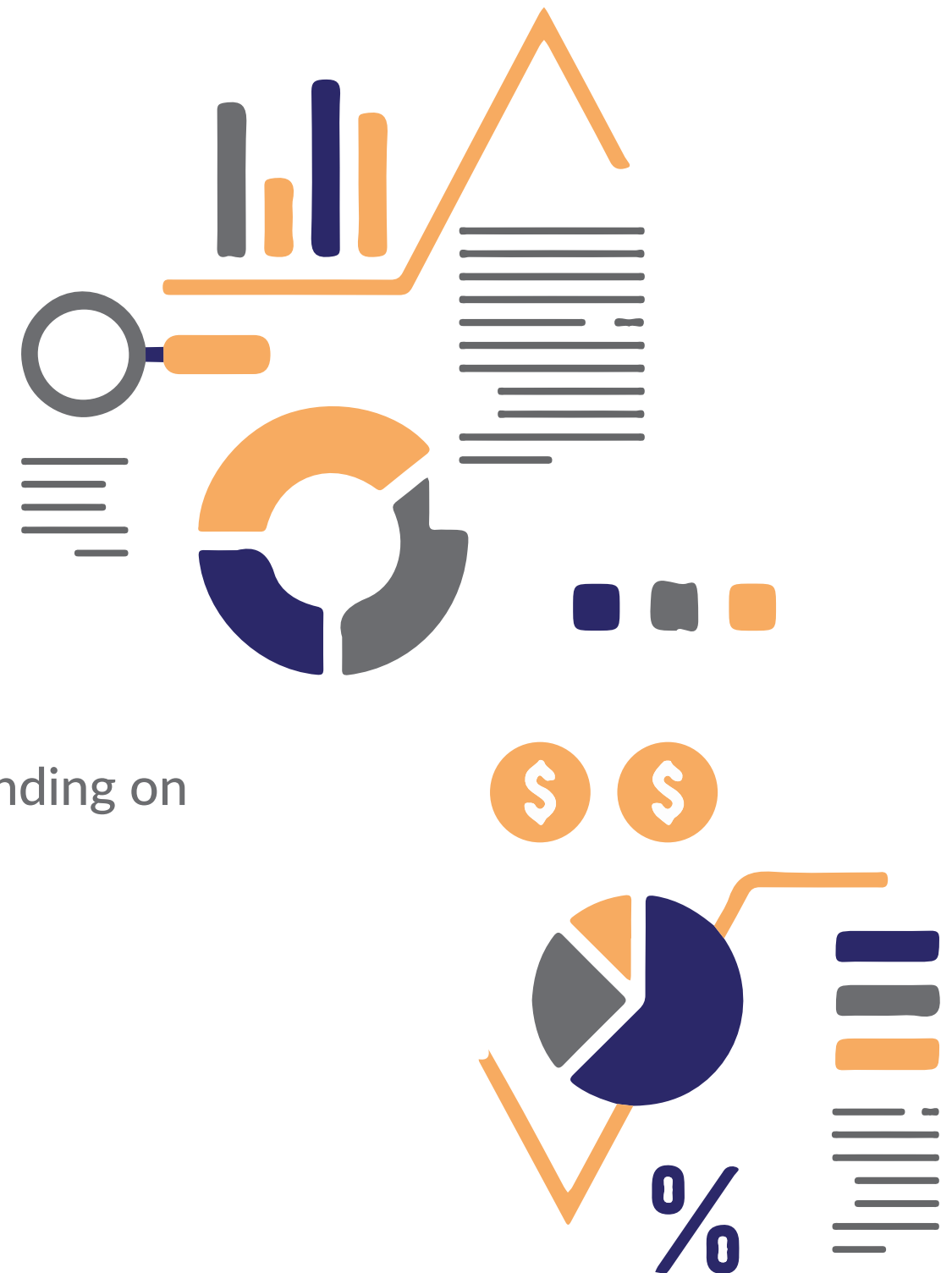
Including:

NEOFORM obligations:

- Time-bounded expected outcome (deliverables)
- List of projects and tasks to be completed

NEOFORM compensation:

- We typically charge clients on a fixed monthly basis, depending on the estimated effort and value created by our services.



Contracts



- Programs typically span 6 to 24 months. However, to remain agile and ensure quick delivery, **we break them into 3-month contracts.**
- Each contract has its own independent deliverables, and we have a **promise** to deliver results and create value with every phase.

Execution & Delivery

Each 3-month contract comes with a detailed project **Gantt chart**.

Initially, it might take more than a week to plan the first project and prepare this chart.

Reporting of progress and delivery:

- **Weekly** updates
- **Monthly** progress report
- **Quarterly** delivery report





Contact Us



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NEOFORM

Thank You

NEOFORM BUSINESS PARTNERS