



Case Studies in Process Improvement and Operational Excellence

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2025

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Introduction

Welcome to Case Studies in Process Improvement and Operational Excellence, authored by Fernanda Sezar.

As an Operational Excellence Consultant and founder of a proprietary process improvement methodology, I specialise in optimising workflows, enhancing performance, and aligning operations with strategic goals. My human-centric approach integrates business psychology, leadership, and soft skills into process improvement, ensuring sustainable growth.

With expertise in Lean, Kaizen, and Six Sigma, I help solo entrepreneurs, start-ups, and small businesses implement cost-effective, resourceful solutions that optimise operations even within limited budgets.

These case studies showcase how small, strategic changes and creative problem-solving can drive significant impact, proving that businesses can achieve lasting transformation, even with constraints.

Case Study #1

Eliminating Operational Backlogs and Enhancing Workflow Efficiency

Client: Multinational Pharmaceutical Organisation
Project Duration: 5 months

CHALLENGE

The client faced an 800-email backlog in their Purchase-to-Pay process, causing delays and inefficiencies during a critical spin-off transition. Escalations reached senior management, while vendors (pharmacies and clinics) threatened to terminate contracts, jeopardising operations.

SOLUTION

- Collaborated with SAP Super Users, the Head of Finance in France, the French Customer Account Manager and a Specialist in Process Controls to mitigate risks of future issues with vendors.
- Conducted root cause analysis and applied Lean methodologies to streamline workflows.
- Provided bilingual (English and French) support to improve communication with vendors and internal teams.

OUTCOME

1. Eliminated the 800-email backlog within five months, restoring vendor trust.
2. Prevented contract terminations by resolving disputes promptly.
3. Achieved 0% escalations during the transition period, ensuring operational stability.

Case Study #2

Reducing Workload and Improving Manual Processes

Client: Multinational Pharmaceutical Organisation
Project Duration: 6 months

CHALLENGE

The team faced inefficiencies in their manual Purchase-to-Pay (P2P) processes, resulting in payment delays, errors, and frequent escalations to senior management. Automation was not feasible due to time constraints and ongoing project transitions, requiring immediate manual interventions.

SOLUTION

Collaborated with the Purchase-to-Pay Business Partner in France, the IT Department, SAP Super Users, the Head of Finance, and Process Control Specialists to implement process changes in compliance with company regulations. Key actions included:

- Streamlining workflows by removing redundant steps using Lean strategies.
- Introducing targeted controls, and reallocating tasks to existing team members to reduce errors and improve oversight.

OUTCOME

1. Achieved a 50% workload reduction by optimising manual processes and eliminating inefficiencies.
2. Reduced errors significantly through improved controls and task reallocation.
3. Delivered substantial cost savings by avoiding the need for additional full-time employees while maintaining operational continuity.

Case Study #3

Streamlining Debt Collection and Improving Cash Flow

Client: UK Electrical Retailer

Project Duration: 8 months

CHALLENGE

The team faced inefficiencies in their debt collection processes across 250 accounts, resulting in delayed payments, account discrepancies, misallocations, and bad debt accumulation. These issues caused cash flow challenges and unresolved back-and-forth emails with key customers, leading to strained relationships.

SOLUTION

Conducted thorough investigations to identify and resolve discrepancies in the affected accounts. Collaborated with Cash Application, Customer Service, Treasury and Cash Management teams and key stakeholders to simplify the debt collection process. This included:

- Implementing a systematic approach to ensure accurate allocations.
- Using tools like SharePoint and Excel to streamline chasing processes to track progress effectively and rebuild trust with customers.

OUTCOME

1. Increased KPI performance by 100%, achieving high collection efficiency rates.
2. Resolved discrepancies in 90% of accounts through detailed investigations of misallocations and created long-lasting corrections.
3. Improved cash flow by addressing delayed payments and restoring account accuracy.
4. Reduced monthly escalation rates to just 4%.
5. Strengthened relationships with key customers by resolving disputes through clear communication.

Small-Scale Process Improvements

AUTOMATING A CRITICAL REPORT

Project Duration: 4 months

CHALLENGE

The reporting process was time-intensive and relied on a macro written within Citrix, which made it inefficient and difficult to use. The original macro's creator was unknown, requiring additional effort to rewrite it outside of Citrix. Collaboration was further complicated as the IT team member assisting with the rewrite was working on this outside their official job responsibilities and had limited availability.

SOLUTION

Collaborated with an IT specialist to rewrite the macro outside of Citrix environment, ensuring it could be used effectively. This required extensive communication and coordination to align schedules and overcome technical challenges.

The rewritten macro streamlined the reporting process while maintaining accuracy.

OUTCOME

1. Reduced reporting time by 95%, freeing up resources for higher-value tasks.
2. Delivered a fully functional macro after four months, improving operational efficiency despite resource constraints.

Small-Scale Process Improvements

KNOWLEDGE TRANSFER AND PROCESS STANDARDISATION

Project Duration: 1 month

CHALLENGE

During a major organisational transition, inconsistent workflows and the absence of standardised processes posed significant risks to operational continuity. The team faced challenges in maintaining efficiency, with a heightened risk of knowledge loss due to employee turnover, particularly following the implementation of process improvements.

SOLUTION

A thorough training programme ensured the team member became fully operational and independent by the end of the knowledge transfer. Guidance was provided on taking accurate notes and drafting the work instruction document based on the taught processes. The final document was reviewed and revised for consistency, compliance with company regulations, and operational effectiveness. It was formalised as an official standard to ensure consistent application of processes across teams.

OUTCOME

1. Ensured seamless knowledge transfer during the transition, reducing the risk of disruptions by creating a comprehensive and compliant process document.
2. Improved operational continuity by standardising workflows across teams.
3. Enhanced team efficiency, enabling employees to adapt quickly to new processes while maintaining high performance.

Conclusion

The case studies presented demonstrate the value of thoughtful process improvement strategies, offering practical solutions for organisations seeking measurable results.

While these examples focus on finance-related processes, the methodologies and principles applied are adaptable to any industry or department. Any process, regardless of its complexity or domain, can be optimised to enhance efficiency and align with strategic goals.

By leveraging methodologies such as Lean and Kaizen, collaborating with cross-functional teams, and focusing on resource optimisation, these projects achieved significant outcomes, including workload reductions, improved compliance, and enhanced operational efficiency.

It is worth noting that these projects did not require Six Sigma methodology. Instead, practical tools such as Process Mapping, 5 Why Analysis, Pareto Principle, and Control Impact Matrix were utilised to deliver effective results without the need for complex statistical analysis.

Contact Information

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