

AI-ERP & SAAS TRANSFORMATION ADVISORY

Turn ERP Rollouts Into AI-Powered Growth Engines

Real-time finance. Automated compliance. Decisions made in days, not months.

CFO-led ERP and SaaS transformation for Indian enterprises and global subsidiaries — engineered so systems think and report like a finance team, not just record transactions.

23+

Years CFO & ERP
Leadership

6

ERP / SaaS Platforms
Mastered

1,200+

Locations On Live MIS

225+

Professionals Trained

WE DON'T JUST CONFIGURE — WE TRANSFORM

Eight Pillars of AI-ERP Transformation

A CFO's lens on ERP, not an IT checklist — every rollout is built to feed faster, more accurate, AI-ready decision-making across the business.

01

ERP Strategy & Platform Selection

An unbiased assessment across Business Central, Dynamics 365 F&O, Zoho, Odoo and TallyPrime — matched to how Finance actually works.

02

Structured Implementation & Rollout

A milestone-driven methodology — schedules, trained champions and disciplined data migration, so go-live holds no surprises.

03

AI-Powered FP&A & MIS

Budgets, forecasts and variance reports reimagined as live, AI-assisted dashboards the board can read at a glance.

04

Process Re-engineering & Controls

Approval workflows redesigned so the system enforces discipline — not spreadsheets and tribal memory.

05

Back-Office Consolidation

Multi-location functions unified onto one system — cutting month-end close from 21 days to 3 in prior engagements.

06

Compliance Automation

GST, TDS and statutory workflows built into daily processing, not chased down under pressure.

07

Change Management & Enablement

225+ professionals trained and enabled, so adoption survives well past go-live.

08

Post Go-Live Optimization

Hypercare, dashboard tuning and continuous AI-led reporting improvements once the system is stable.

SECTOR EXPERIENCE

Manufacturing

Retail & FMCG

Services

Financial Services

Multi-Location Operations

Global Subsidiaries in India

TRACK RECORD

Built On 23 Years Of Back-Office Delivery

40+ Led Directly	200+ Team Members Enabled	1,200+ Locations, Live MIS
300+ Customers Reported On	15+ Segments Covered	86% Faster Month-End Close

METHODOLOGY

A Process Built For Adoption, Not Just Go-Live

01	Discover & Diagnose Map current processes, controls and pain points across the finance workflow before recommending a platform.
02	Design & Configure Milestone-driven configuration and workflow design, with training champions identified early.
03	Migrate & Integrate Legacy data migration, system integration and layered approval controls, tested before go-live.
04	Train & Go-Live Cross-functional training, parallel runs and a managed cut-over.
05	Optimize With AI Hypercare, dashboard refinement and AI-assisted reporting layered on top once stable.

WHY PARTNER

A CFO's Lens. Not Just An IT Rollout.

01

CFO's Lens, Not IT's

Decisions made for what Finance, investors and the board need to see.

02

Platform-Agnostic

The platform is chosen for you, across six major ERP/SaaS systems.

03

Change Management Built In

Training and cross-functional ownership run alongside the technical build.

04

AI-Driven Real-Time MIS

Dashboards proven across 1,200+ locations and 300+ customers.

05

Controls By Design

Approval frameworks and statutory compliance embedded from day one.

06

Post Go-Live Hand-Holding

Hypercare and optimization are part of the plan, not a follow-on proposal.

HOW WE CAN WORK TOGETHER

Engagement Models

2-3 WEEKS

Diagnostic Assessment

A structured audit of current systems, controls and reporting gaps — delivered as a platform-fit report and a prioritized roadmap, before any commitment to build.

END-TO-END

Full-Cycle Implementation

Platform selection through go-live and hypercare, managed on a milestone-driven methodology with change management built in throughout.

ONGOING RETAINER

Fractional CFO-ERP Advisory

Continued oversight of FP&A, compliance and MIS quality, plus ongoing system optimization — without the cost of a full-time hire.

WE ARE READY

Your Next Transformation Starts With One Conversation.

Whether it's ERP selection, a stalled rollout, or a full AI-FP&A build-out — let's talk about what your systems should be doing for you.

Schedule a Strategic Consultation

Get in touch via the contact page

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Yogendra P Sharma — 23+ years FP&A, PE/Debt/M&A, Banking & ERP Implementation | MBA · CA (Inter) · B.Com
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