



# Ogilvie

Accounting and Finance

## CLARITY. INSIGHT. RESULTS. STRONGER FINANCIAL PERFORMANCE.

An independent review designed specifically for construction and project-based businesses.

### WHY CHOOSE OGILVIE ACCOUNTING & FINANCE?



**20+ YEARS**  
of construction accounting  
and finance leadership



**CONSTRUCTION &  
PROJECT EXPERTISE**  
Job costing, WIP reporting,  
progress billing, and project  
performance insight



**ERP & FINANCIAL  
SYSTEMS EXPERTISE**  
Optimize systems, workflows,  
and reporting for better results



**PARTNER, NOT JUST  
A PROVIDER**  
We become an extension of  
your team—focused on  
your success.

### COMMON ISSUES WE HELP IDENTIFY

- ✓ Slow or inefficient month-end close
- ✓ Inaccurate or inconsistent job costing
- ✓ Cash flow surprises and liquidity gaps
- ✓ Inaccurate WIP or revenue recognition
- ✓ Limited visibility into project profitability
- ✓ Inefficient accounting workflows
- ✓ ERP reporting challenges
- ✓ Lack of meaningful KPIs and dashboards

# CONSTRUCTION FINANCIAL PERFORMANCE ASSESSMENT

A comprehensive review of your financial reporting, job costing, cash flow visibility, month-end close process, and accounting workflows.

Includes a written assessment and prioritized action plan. Ideal for construction and project-based businesses seeking improved financial visibility, profitability, and operational performance.

### WHAT WE REVIEW



#### FINANCIAL REPORTING & MONTH-END CLOSE

Review of financial statements, reporting package, close process, timelines, and supporting documentation.



#### JOB COSTING & PROJECT VISIBILITY

Evaluation of job cost setup, cost allocation, change orders, and project profitability visibility.



#### WIP REPORTING & REVENUE RECOGNITION

Assessment of WIP methodology, compliance with standards, and accuracy of revenue recognition.



#### CASH FLOW VISIBILITY & FORECASTING

Review of cash flow reporting, forecasting process, working capital management, and liquidity visibility.



#### ERP & ACCOUNTING WORKFLOWS

Evaluation of ERP (Vista, QuickBooks, etc.), workflows, integrations, automations, and reporting capabilities.



#### INTERNAL CONTROLS & PROCESS EFFICIENCY

Review of key internal controls, approvals, segregation of duties, and opportunities to improve efficiency and reduce risk.

### THE BENEFIT TO YOUR BUSINESS

- ✓ Better financial visibility and decision-making
- ✓ Stronger project profitability and cash flow
- ✓ More efficient processes and reduced risk
- ✓ A clear roadmap to improve performance and grow

STARTING AT

# \$1,995

One fixed fee.  
Clear insights. Actionable results.

### WHAT YOU RECEIVE



#### EXECUTIVE SUMMARY

High-level overview of key findings, strengths, risks, and opportunities.



#### WRITTEN ASSESSMENT REPORT

Detailed observations across financial reporting, job costing, cash flow, processes, and systems.



#### PRIORITIZED ACTION PLAN

Actionable recommendations with immediate, short-term, and long-term priorities to improve performance.



#### REVIEW MEETING

90–120 minute review meeting to walk through findings, answer questions, and discuss next steps.

### READY TO IMPROVE YOUR FINANCIAL PERFORMANCE?

Schedule a complimentary consultation to discuss your challenges, goals, and how we can help.

[www.ogilvieaccounting.com](http://www.ogilvieaccounting.com)  
[becky@ogilvieaccounting.com](mailto:becky@ogilvieaccounting.com)  
[www.linkedin.com/in/beckyogilvie](https://www.linkedin.com/in/beckyogilvie)



*Let's build clarity, improve performance,  
and drive your business forward—together.*

*All assessments are fixed-fee starting at \$1,995. Services can be customized to meet your business needs.  
Pricing may vary based on company size, complexity, and engagement requirements.*