Case Study

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Standardization issues. Reconciliation confusion. Documentation concerns… oh my!

How SAP Finance Consultant Steve Turner helped a global manufacturer regain control, confidence, and consistency in its finance operations.

Client Overview

A global manufacturing enterprise was facing a perfect storm in its SAP Finance environment. Fragmented processes, inconsistent documentation, and constant reconciliation headaches were stalling the company's finance function. Each regional branch ran SAP differently, knowledge transfer between teams had all but broken down, and staff turnover had eroded confidence in the system.

Despite a significant investment in SAP, the organization's finance leaders struggled to trust their numbers — or their processes. With a fiscal year-end approaching and audit pressure mounting, they needed someone who could quickly bring order to complexity.

That's when they engaged **Steve Turner**, a seasoned SAP Financial Accounting and Controlling (FICO) consultant with more than 25 years of experience and CPA-qualified finance expertise.

About the Consultant

Steve is known for bridging the gap between accounting logic and SAP design.
Across global projects in manufacturing, resources, and public sector environments, he's built a reputation for pragmatic problem-solving, calm leadership under pressure, and a laser focus on finance integrity.

For this client, Steve's mandate was clear: Stabilize finance operations, standardize SAP practices, and transfer knowledge back to the business.

Key Challenges

1. Lack of Knowledge Transfer

Employees didn't fully understand how SAP supported their business processes.

With the system hosted offshore and limited local configuration access, finance teams couldn't adapt or troubleshoot effectively. High turnover compounded the issue, institutional knowledge disappeared faster than it could be replaced.

Steve began by mapping the system's current state, identifying inherited issues from other regions, and resetting the foundation for how local finance users interacted with SAP.

He facilitated workshops that reconnected employees with their system, explaining not just *what* to do, but *why* it mattered.

> *"These employees didn't lack capability; they lacked confidence. Once they understood the logic behind SAP Finance, their performance transformed."*

2. Human Error and Non-Standard Practices

Inconsistent processes had crept in across departments.

Without clear documentation or oversight, users had developed their own "workarounds" to complete core Finance and Controlling tasks, resulting in unreconciled ledgers, duplicate postings, and reporting discrepancies between sites.

Steve implemented structured **process standardization**, introducing prescriptive documentation and reconciliation templates that aligned every finance user to the same playbook.

The result: simplified controls, faster closes, and transparent audit trails.

3. Organizational Disengagement

The SAP Center of Excellence (CoE) was managed in another country, creating communication gaps and shifting priorities.

Local teams felt disconnected from both system governance and decision-making.

Steve re-established governance links between the global CoE and local finance, ensuring consistent communication, clarity of ownership, and practical autonomy for onshore users.

He translated complex system requirements into business language, helping leaders understand where configuration changes could genuinely add value.

Steve's Approach and Solutions

Standardization

Steve's first principle was simple: *standardize to stabilize.*

He worked with the client to define clear, repeatable procedures for posting, reporting, and reconciliation across entities.

By formalizing policies and testing protocols, he helped the business achieve uniformity in data and process, turning a fragmented finance function into one cohesive system.

> *"Standardized processes aren't just efficiency tools, they're confidence tools. When everyone works the same way, you can finally trust your numbers."*

Reconciliation

The company's reconciliation process was a recurring pain point.

Subledger balances didn't tie to the general ledger, and clearing millions of records manually was unsustainable.

Steve created **custom reconciliation queries and upload tools** within SAP to automate data validation and clearing.

He also introduced a structured spreadsheet framework that aligned reconciliation rules with SAP master data, drastically reducing manual rework and audit risk.

By improving reconciliation accuracy, the finance team could close faster and focus on analysis, not firefighting.

The GR/IR Challenge

The client's **Goods Receipt / Invoice Receipt (GRIR)** accounts were a source of confusion.

Without proper configuration, liabilities were being double-counted, a major red flag for both audit and financial reporting.

Steve implemented a standardized GRIR management process using SAP's native tools and detailed documentation.

He also trained users on identifying and correcting mismatches, ensuring liabilities were recognized correctly and financial statements reflected reality.

Documentation and Controls

Steve is a firm believer that documentation is a control, not an afterthought.

He introduced clear process guides, step-by-step instructions with screenshots, and shared training materials accessible across departments.

These documents became the foundation for consistent operation, ensuring any team member could complete critical tasks the right way, every time.

When employees leave, the knowledge now stays.

Training and Knowledge Transfer

Rather than running one-off training sessions, Steve embedded learning into the project.

He showed users how to generate, edit, and interpret SAP reports relevant to their role, from cost center analytics to line-item drilldowns.

He also demonstrated how to troubleshoot errors, empowering teams to resolve issues without external dependency.

His training approach transformed the finance function from reactive to proactive, and restored a sense of ownership among users.

Results and Impact

After Steve's engagement, the client reported:

- **Standardized global processes** across multiple business units
- **Full reconciliation alignment** between subledgers and general ledger
- **Documented, auditable controls** that satisfied external auditors
- **Faster month-end closes** with fewer manual adjustments
- **Confident, capable finance users** equipped to sustain improvements

What began as a fragmented finance operation ended as a disciplined, well-documented, and audit-ready SAP environment, one the client could finally trust.

Core Insight

> *"When finance and IT speak the same language, everything moves faster, design decisions improve, reconciliations make sense, and the system starts serving the business, not the other way around."*
> — *Steve Turner, SAP Finance Consultant*

About CoreFi

CoreFi Partners provides senior SAP Finance expertise to CFOs and transformation leaders navigating high-stakes SAP programs.

Our fractional and project-based consultants bring the discipline of finance, the precision of SAP, and the calm assurance needed when timelines tighten and accountability matters most.

Need Year-End Confidence?

If your team is preparing for its first close on SAP or struggling to stabilize post-go-live, CoreFi can help.

Our **SAP Finance Stabilisation and Year-End Readiness Reviews** ensure your reconciliations, controls, and reporting are audit-ready, and your finance team is confident, not cautious.

👉 **Contact CoreFi Partners** to learn how we can help your finance function take ownership of SAP with clarity, consistency, and control.

For Further Inquiries

www.corefipartners.com | steve@corefipartners.com