

Optimizing Campus Services Finance and Administration

Challenge

A major university's longtime CFO had retired, creating an opportunity to optimize the Campus Services Finance and Administration (CSFA) office. The university needed to ensure a smooth transition while modernizing its operations to meet evolving institutional needs and support incoming leadership

Solution

SEI partnered with university stakeholders to conduct a comprehensive organizational assessment, leveraging both quantitative data and qualitative insights alongside design thinking strategies. With our team's support, we:

- Analyzed current-state processes and CSFA's organizational structure
- Identified 11 high-impact optimization initiatives
- Developed detailed roadmaps and implementation plans for each initiative
- Crafted a tailored onboarding experience to accelerate the new CFO's effectiveness
- Facilitated workshops to foster alignment, collaboration, and a shared vision within CSFA

Results

Our work delivered immediate improvements and laid the groundwork for lasting transformation:

- Stronger alignment across CSFA and better integration with university-wide goals
- A fully prepared incoming CFO, positioned to lead change from day one
- Actionable data and insights to guide future implementation and change management
- Measurable gains in key financial services, including accounting, budgeting, financial analysis, and procurement
- A 10% reduction in total university spending



**Data
Visualization**



**Operational
transformation**



**Strategy
Execution**



**Change
Management**