

Project Transactions



Bill Analysis

Client Analysis

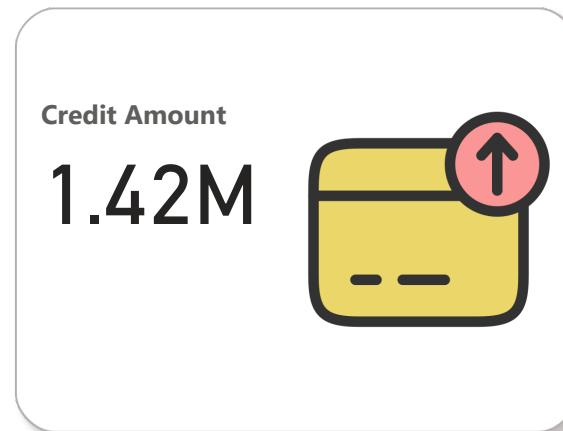
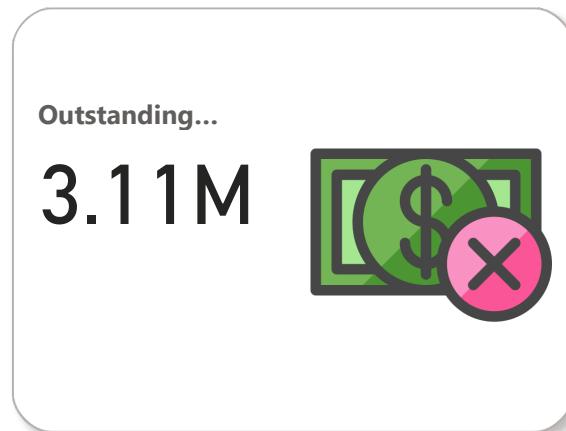
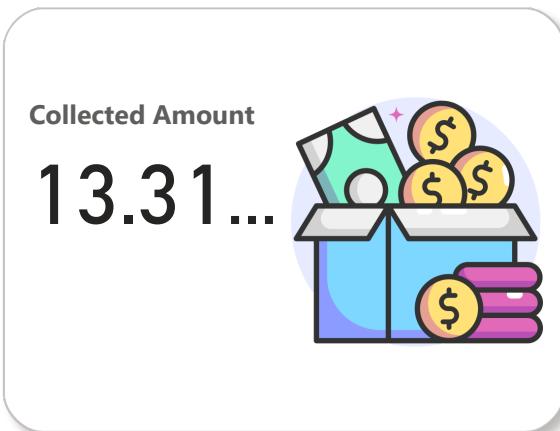
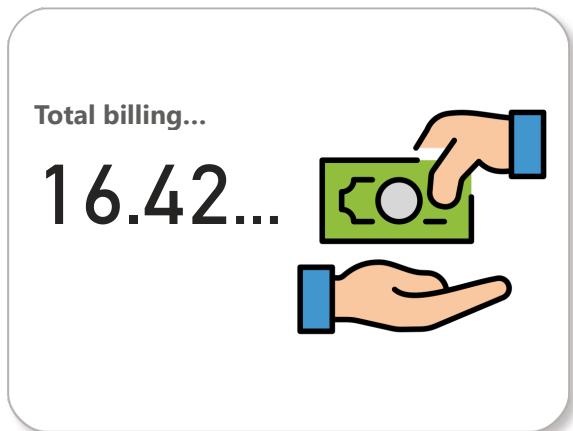
MD Performance

Department wise
Analysis

Conclusion



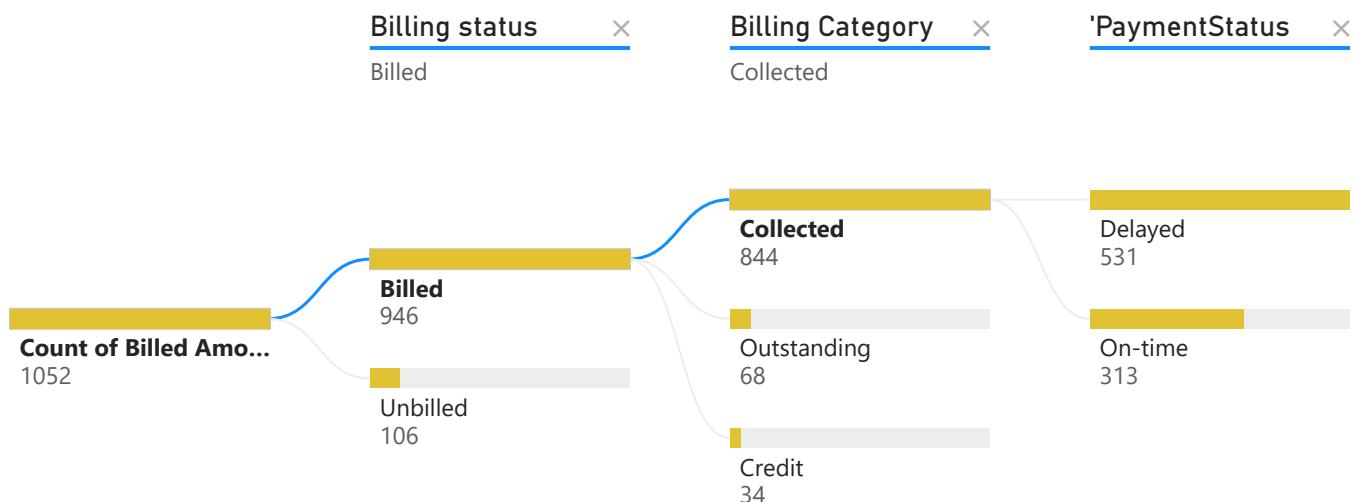
Bill Analysis



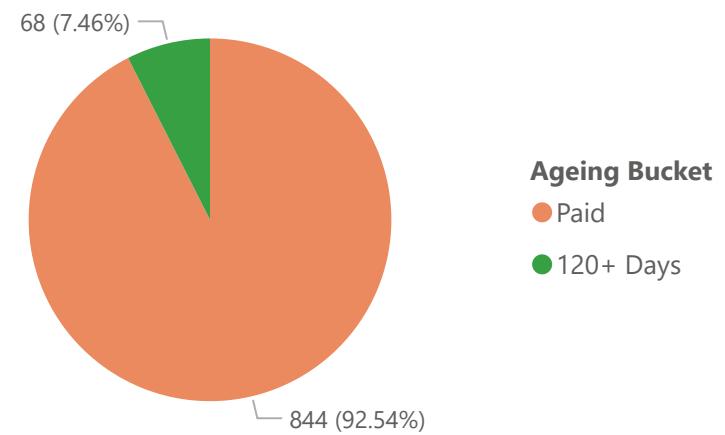
Years

(Blank)	2019	2020	2021	2022	2023	2024	2025
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Bill Count Overview



Ageing Bucket





Client Analysis



Total Clients

101



Total Projects

101



Payment Status

Delayed

On-time

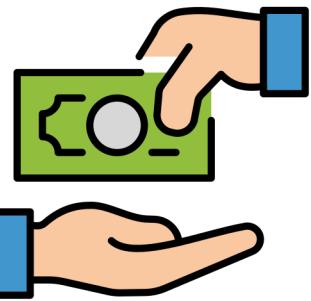
Outstan...

Top 10 clients - Revenue wise

Client Name	Total billing amount
Fairleigh Advisors	52,11,797.39
Stoneridge Innovations	15,12,138.75
Willow & Ash Associates	14,44,390.76
Lancaster & Co.	11,54,544.30
Imperial Edge	6,57,438.30
Hawkesworth Advisors	4,49,207.34
Windgate Advisors	4,18,942.44
Hampton Bay Industries	3,86,903.51
Richmond Summit	2,88,690.62
Larchwood Services	2,70,690.64
Total	1,17,94,744.05

Total billing amount

16.42...



Collected Amount

13.31...



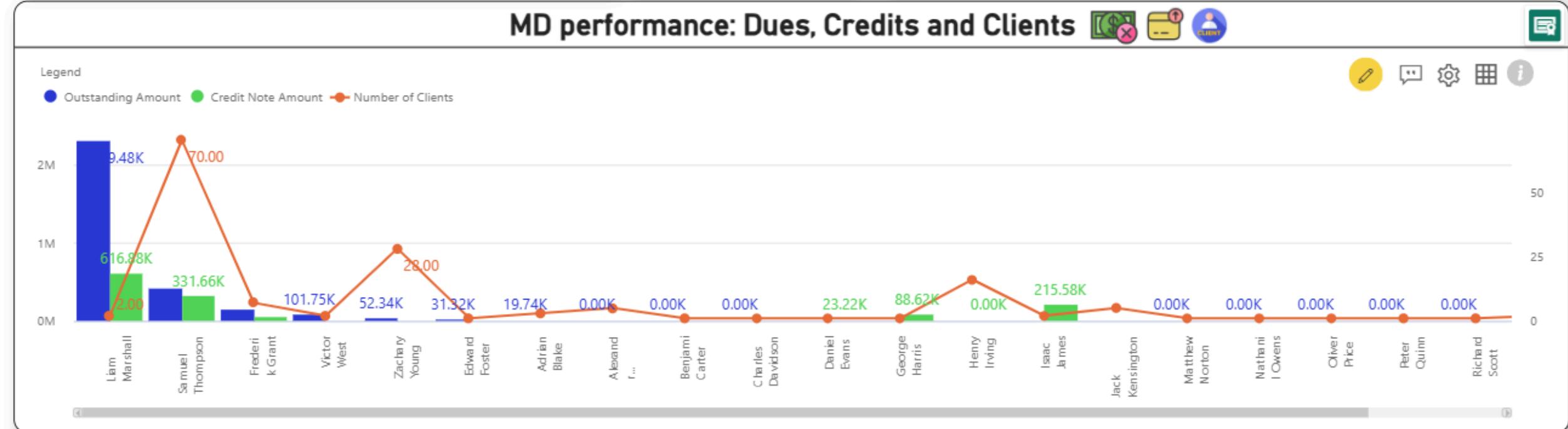
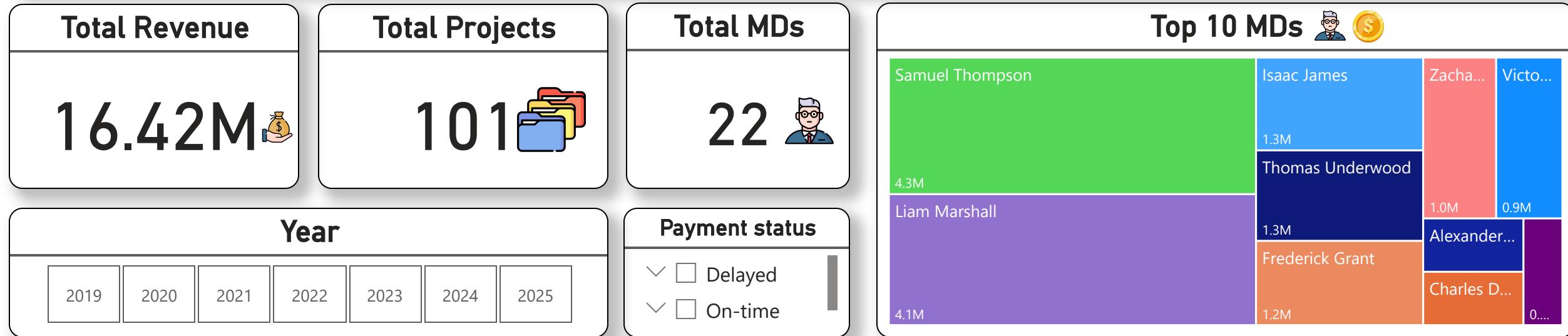
Outstanding Amount

3.11M





MD Performance





Department wise Analysis



Total Revenue

16.42M

Total Projects

101

Dept wise revenue



Year



Total Departments

6

Audit and Financial Advisory

Business Improvement

Adviso...

Risk ...

4.51M

Consulting Services

1.65M

1.46M

2.50M

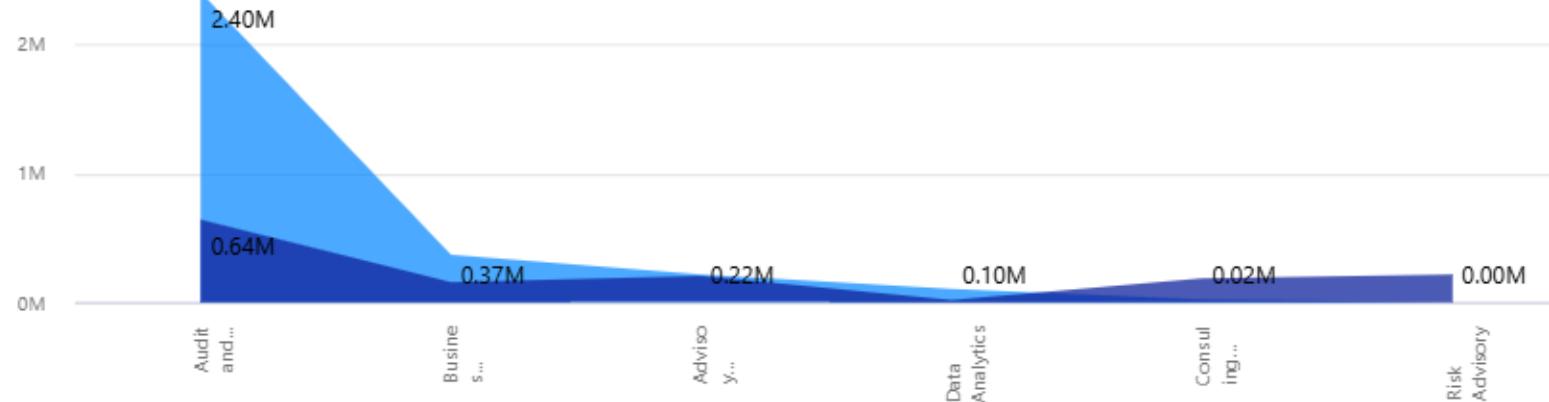
Data Analytics

Credit and Dues Analysis

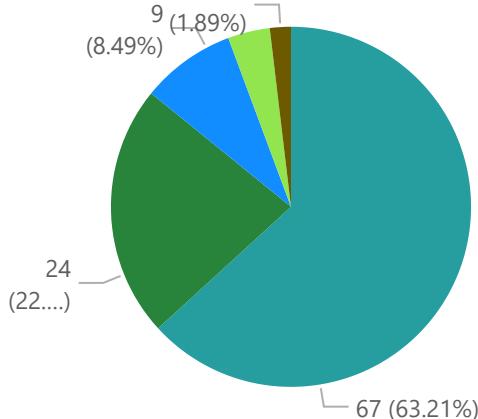


Legend

Outstanding Amount Credit Note Amount



Unbilled Bills Overview



Project Department

- Business Improvement
- Audit and Financial Advisory
- Consulting Services
- Advisory Services
- Data Analytics



Insights

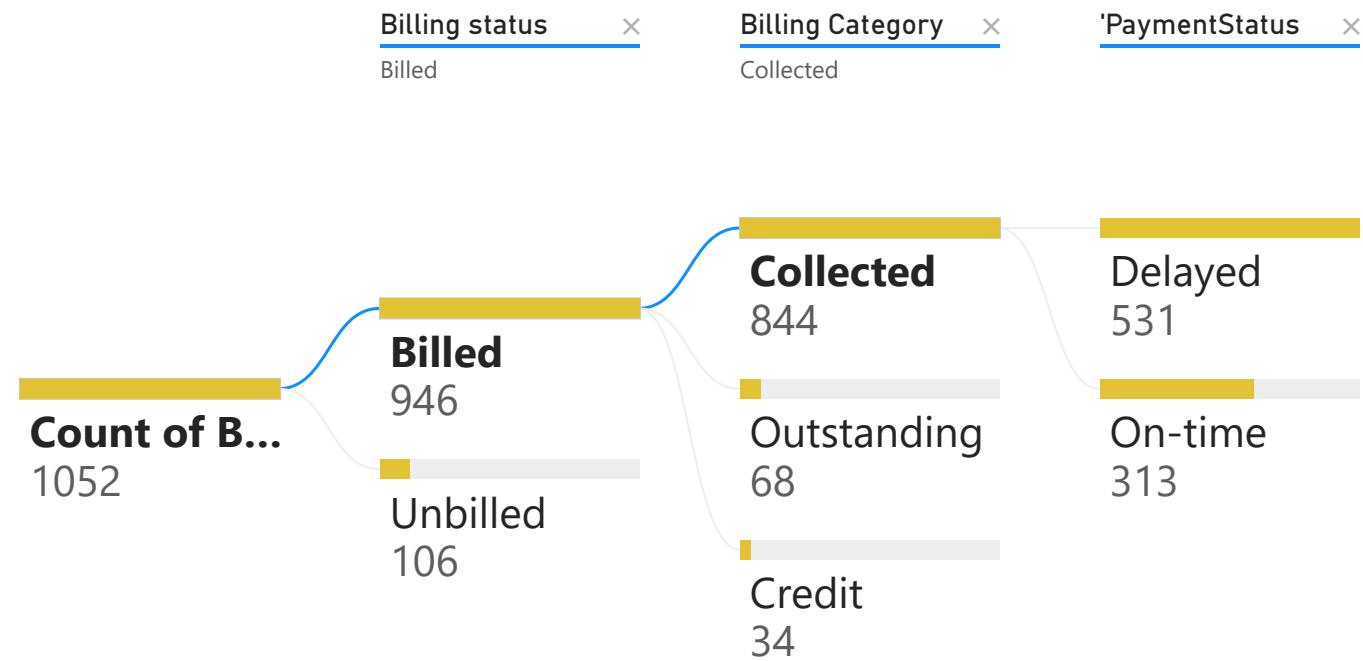
- 1.Increase in Payment Delays Post-2022** - There has been a noticeable **rise in payment delays** from clients **after 2022**, indicating a **decline in collection efficiency** over time.
- 2.Unpaid Invoices & Ageing** - Out of 912 total invoices, 68 remain unpaid. Among these, **56 invoices (82%)** fall into the "**120+ Days**" ageing bucket, highlighting a significant overdue risk.
- 3.Top Client by Revenue & Outstanding**- Farleigh Advisors is the **highest revenue-generating client**, but also accounts for the **highest outstanding balance and delayed payments**.
- 4.Top Performing MD – Samuel Thompson** leads in efficiency, managing the **highest number of projects (70)** and generating **top-line revenue** with comparatively **low outstanding balances**.

Recommendations

- 1.Set up **automated reminders** for clients with frequent delays
- 3.Strengthen relationships with **top revenue-generating clients** - explore **up-selling or cross-selling** opportunities with these clients
- 4.Reward **top-performing MDs/departments** with the most revenue and projects - set clear **KPIs** (Key Performance Indicators) for underperforming units
- 5.Use insights from bill ageing and client revenue trends to **inform future business strategies**

Tooltip 1

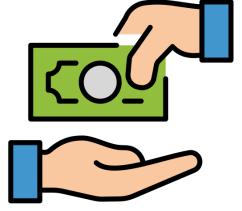
Bill Count Overview



Tooltip 2

Total billing...

16.42...



Collected Amount

13.31...



Outstanding...

3.11M



Credit Amount

1.42M

