

Project Transactions



Bill Analysis

Client Analysis

MD Performance

Department wise
Analysis

Conclusion

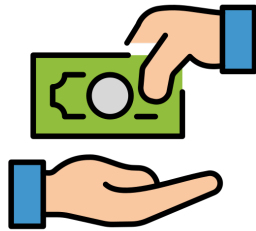


Bill Analysis



Total billing...

16.42...



Collected Amount

13.31...



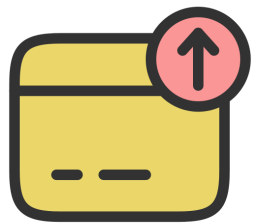
Outstanding...

3.11M



Credit Amount

1.42M



Years

(Blank)

2019

2020

2021

2022

2023

2024

2025

Bill Count Overview

Billing status



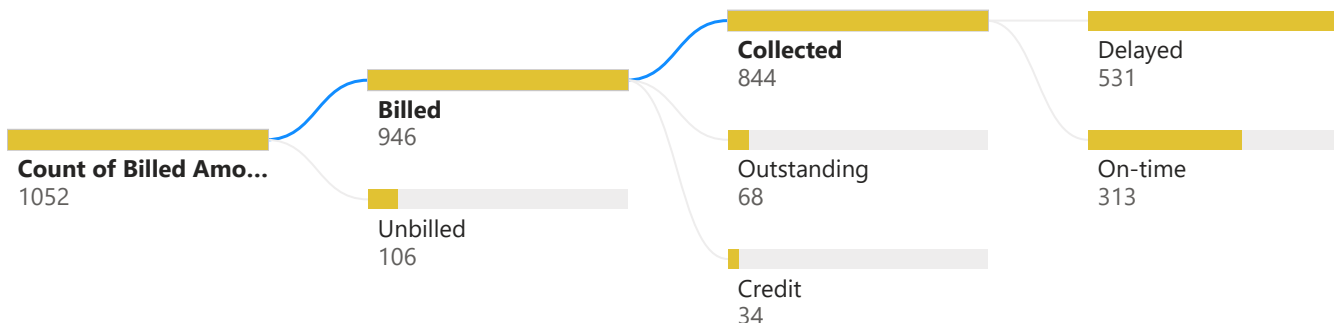
Billed

Billing Category

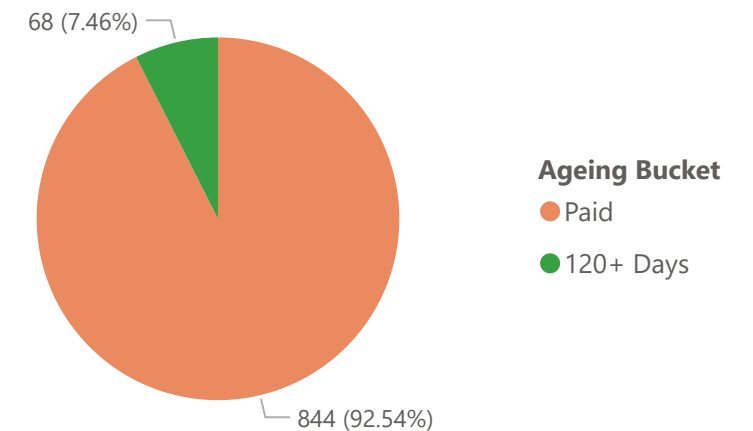


Collected

'PaymentStatus



Ageing Bucket





Client Analysis



Total Clients

101



Total Projects

101



Payment Status

Delayed

On-time

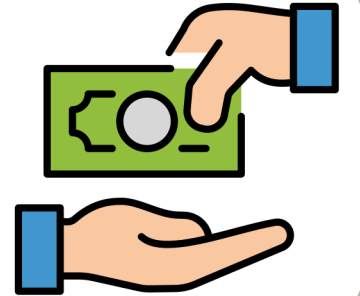
Outstan...

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...



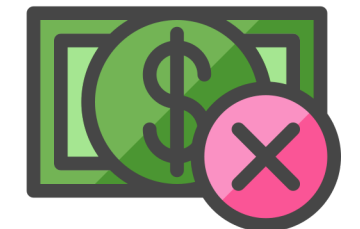
Collected Amount

13.31...



Outstanding Amount

3.11M





MD Performance



Total Revenue

16.42M 

Total Projects

101 

Total MDs

22 

Top 10 MDs

Samuel Thompson

4.3M

Liam Marshall

4.1M

Isaac James

1.3M

Thomas Underwood

1.3M

Frederick Grant

1.2M

Zachary Young

1.0M

Alexander Quinn

Charles Davidson

Victor West

0.9M

0.0M

Year

2019

2020

2021

2022

2023

2024

2025

Payment status

☒ Delayed

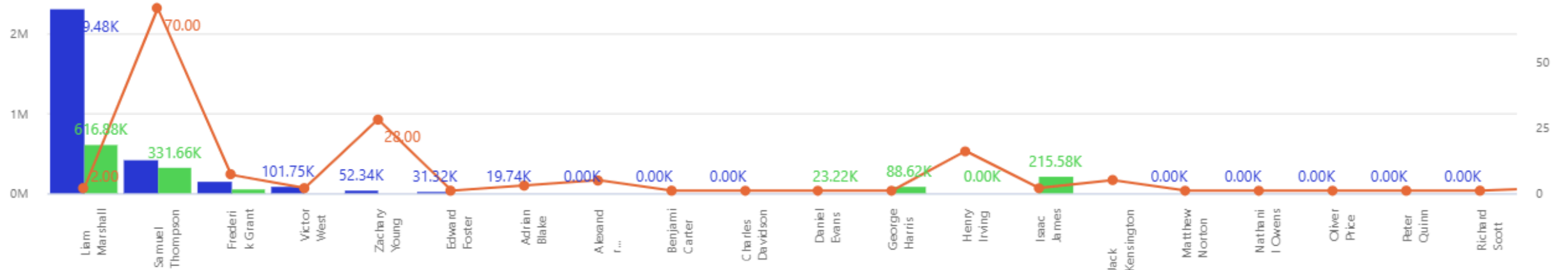
☒ On-time

MD performance: Dues, Credits and Clients



Legend

● Outstanding Amount ● Credit Note Amount ● Number of Clients





Department wise Analysis



Total Revenue

16.42M 

Total Projects

101 

Dept wise revenue



Audit and Financial Advisory

5.80M

Business Improvement

4.51M

Consulting Services

2.50M

Adviso...

1.65M

Data Analytics

Risk ...

1.46M

Year

2019

2020

2021

2022

2023

2024



Total Departments

6

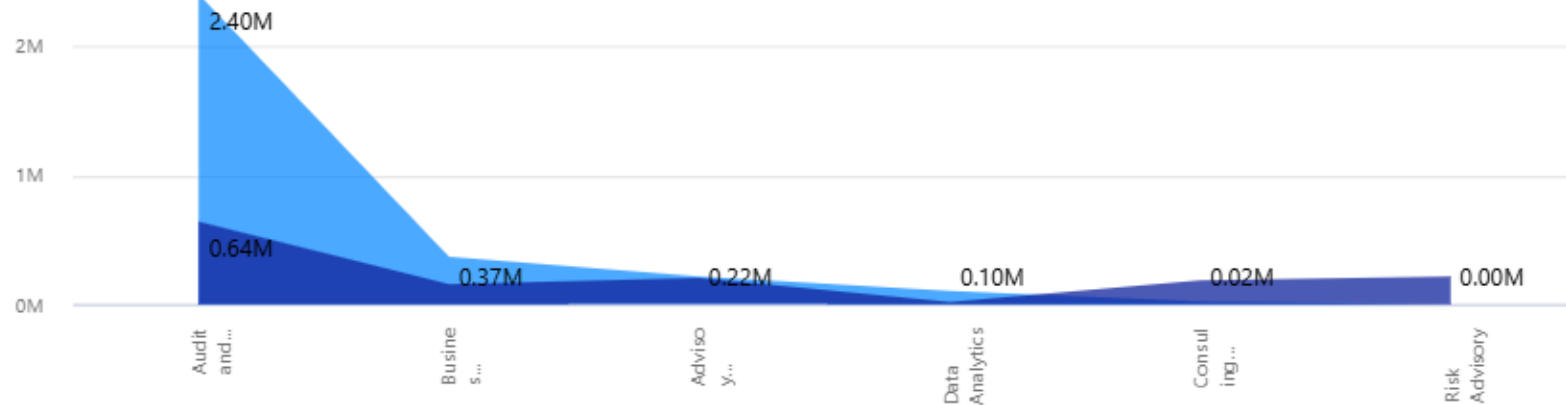


Credit and Dues Analysis

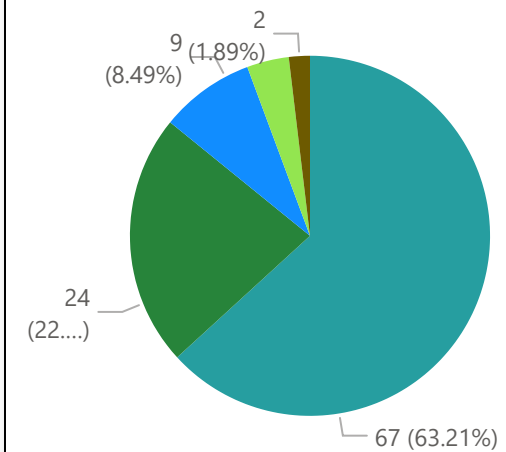


Legend

● Outstanding Amount ● Credit Note Amount



Unbilled Bills Overview



Project Department...

- Business Impro...
- Audit and Fina...
- Consulting Ser...
- Advisory Servic...
- Data Analytics



Insights

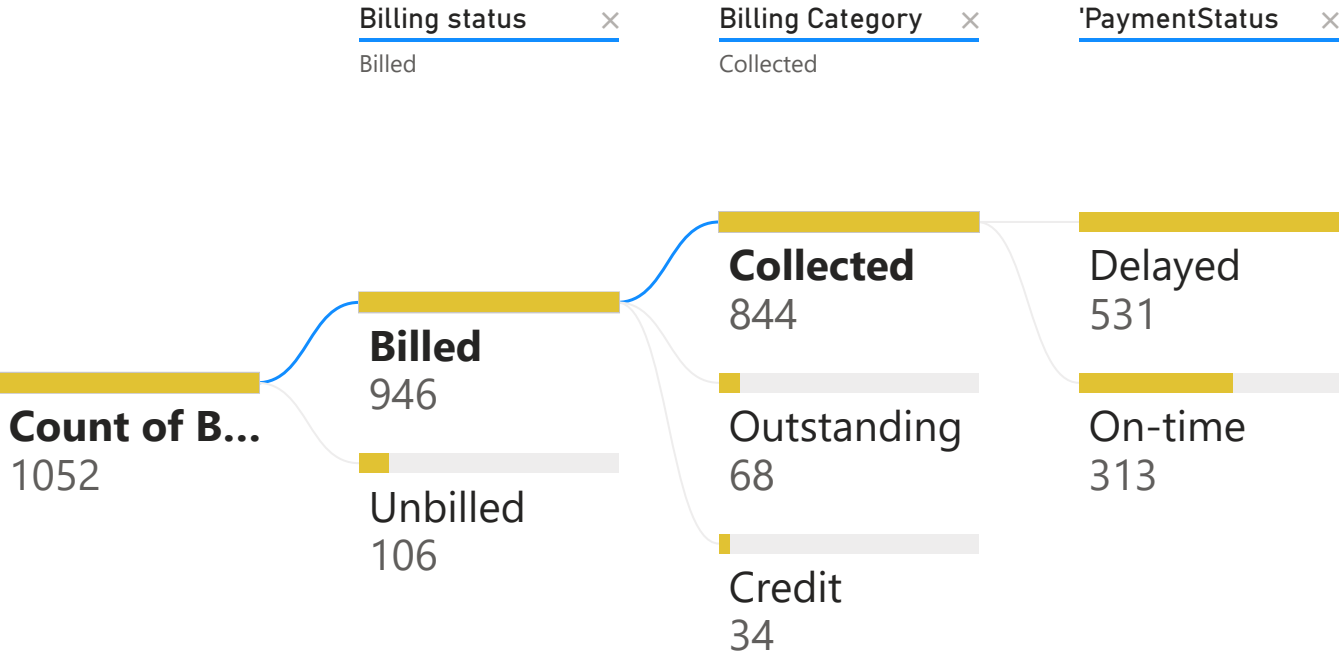
- 1.Increase in Payment Delays Post-2022** - There has been a noticeable **rise in payment delays** from clients **after 2022**, indicating a **decline in collection efficiency** over time.
- 2.Unpaid Invoices & Ageing** - Out of 912 total invoices, 68 remain unpaid. Among these, **56 invoices (82%)** 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

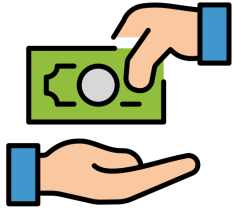
Bill Count Overview



Tooltip 2

Total billing...

16.42...



Collected Amount

13.31...



Outstanding...

3.11M



Credit Amount

1.42M

