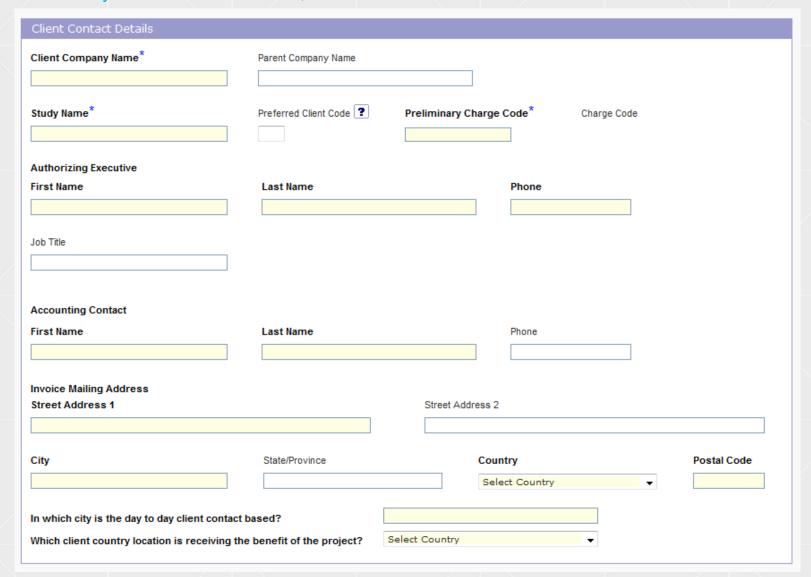
Navigating a CER

For Partners: Follow the link you receive in the email notifying you that Fill out each tab completely, navigating by a new CER has been added to your list. clicking on the links at the top. For APs and equivalent roles: Follow the link you receive in the email Click "Save" when you need to pause notifying you that you've been designated a viewer/editor of a CER. your work and return to complete later. Click "Submit" once all tabs are complete. My CERs **CER Form** In Progress Engagement Details | Financials | Knowledge Management | Risk Management Bold fields are required Submit Submit 图 Save 面 Delete 昌 Print * fields downloaded from Staffing (PeopleLink) McKinsey Contact Details All ED, BD and DCS must be partners at the start of the engagement. Only the primary ED and DCS (Global Parent) listed first will appear on the WIP reports. DCS (Global Parent) * Engagement Director* Julia Green - HOU Julia Green - HOU + Add Person + Add Person DCS (Local/Subsidiary) Other Viewers/Editors Julia Green - HOU [Created] + Add Person + Add Person Billing Director Billing Office Lindsey Forsythe - TSC Atlanta The CER online form consists of four tabs: **Engagement Details** Financials **Knowledge Management** Risk Management

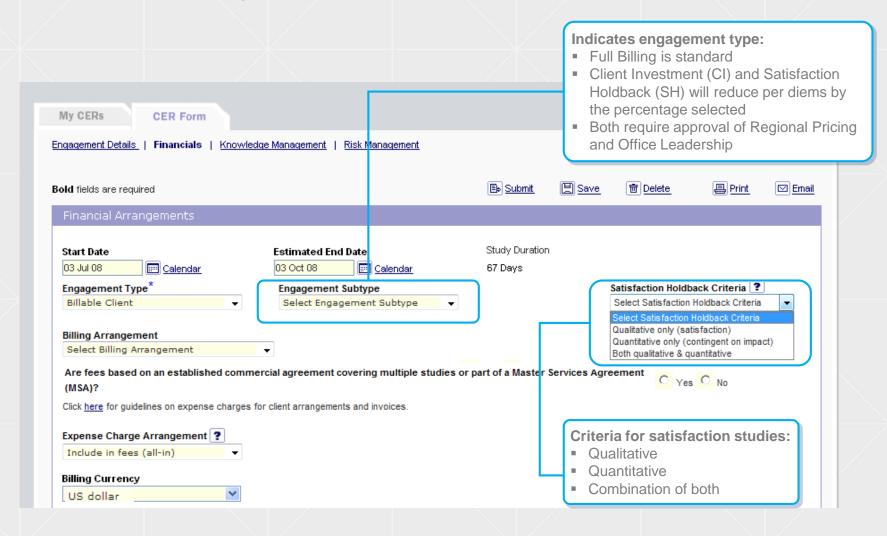
Completing client contact details in the Engagement tab

From the McKinsey contact details section, scroll down to enter client contact details.



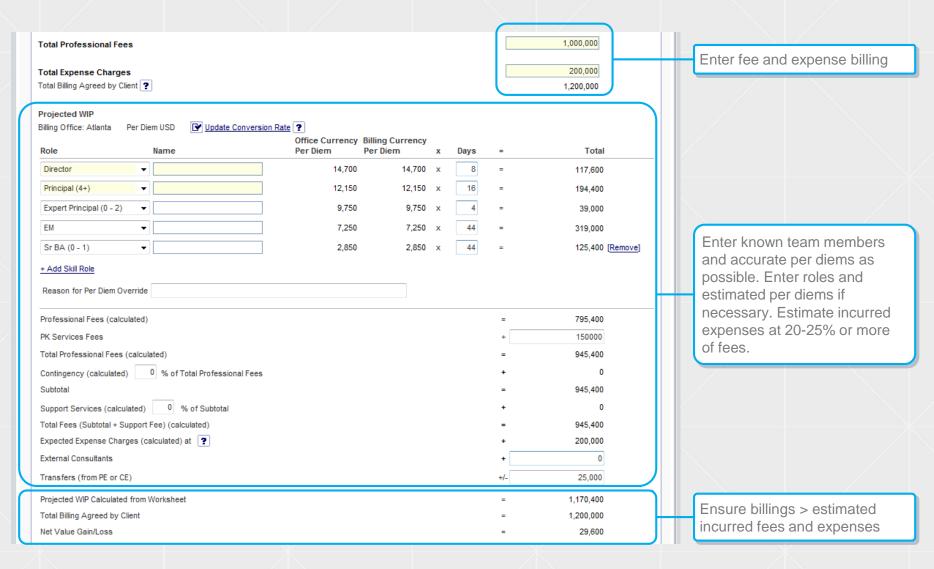
Completing CER billing information in the Financials tab

Click on the Financials link to open the tab.



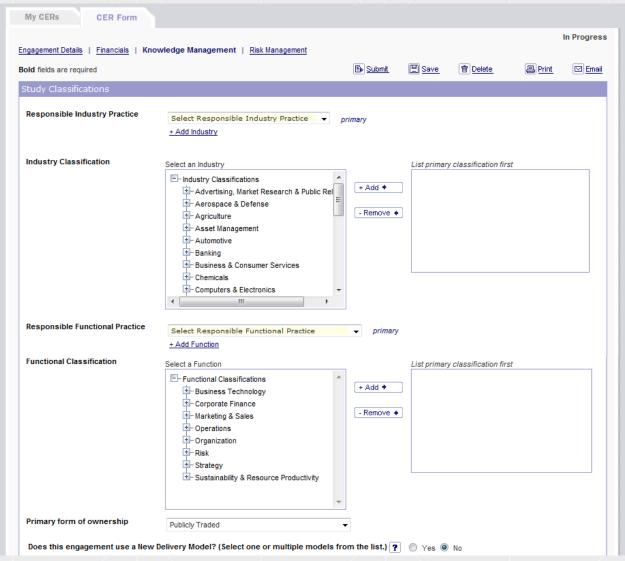
Completing the CER billing worksheet in the Financials tab

Scroll down to enter more details.



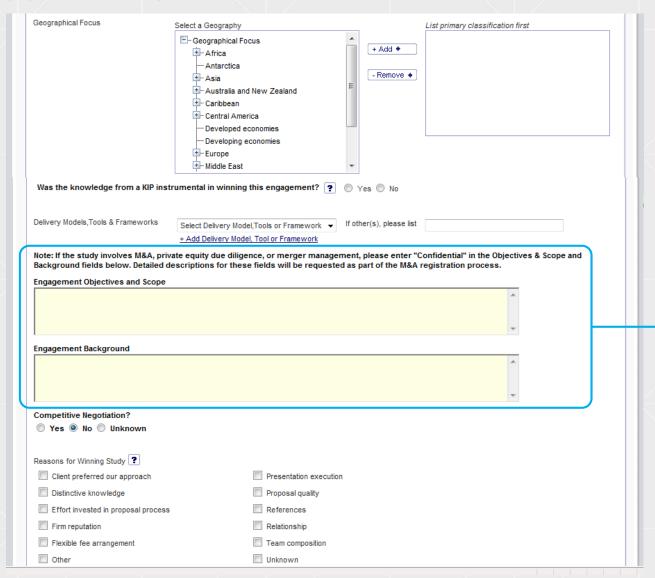
Completing the Knowledge Management tab

Enter the industry, functional practice, form of ownership, and New Service Capability (New Delivery Model) information.



Completing the Knowledge Management tab

Scroll down to enter the geographical focus, KIP, New Service Capabilities, engagement, and negotiation information.



All M&A studies should list "Confidential" for Engagement Objective/Scope and **Engagement Background**

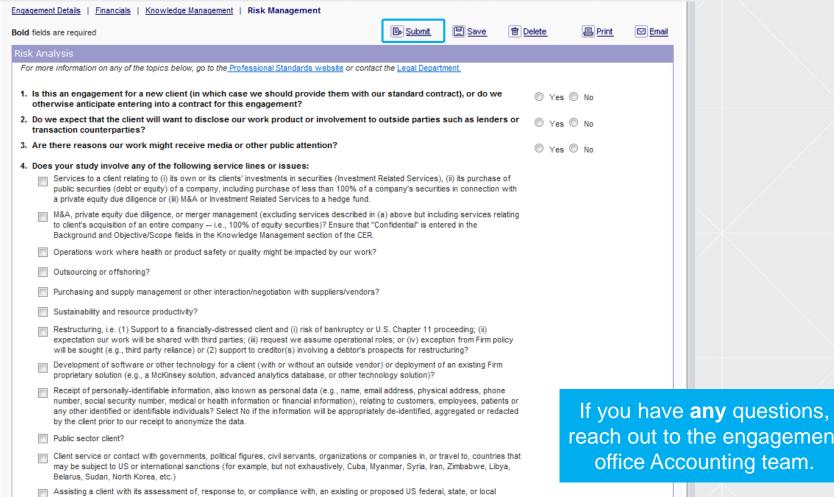
Completing the Risk Management tab

regulatory issue, rule making or other government proceeding or investigation?

None of the above apply

Answer the questions in the Risk Management tab.

Remember to click "Submit" after you have completed each of the four tabs. Keep in mind that you will not be able to make any revisions once the CER is approved.



reach out to the engagement office Accounting team.