McKinsey & Company

Client Invoicing/Billing

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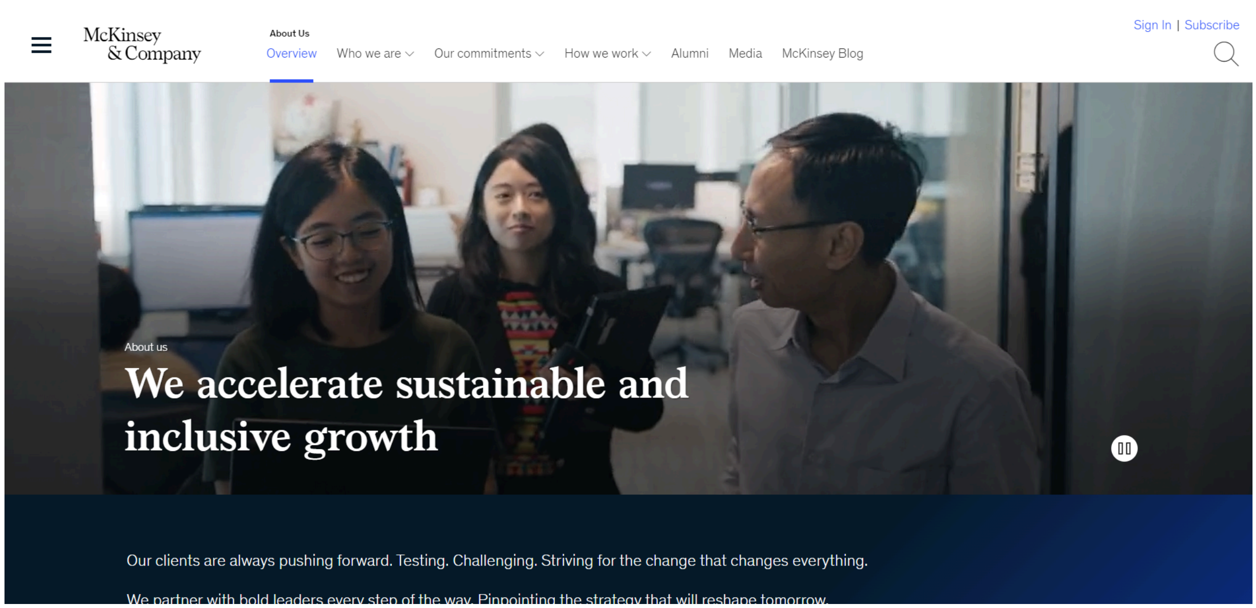
REPORT 1

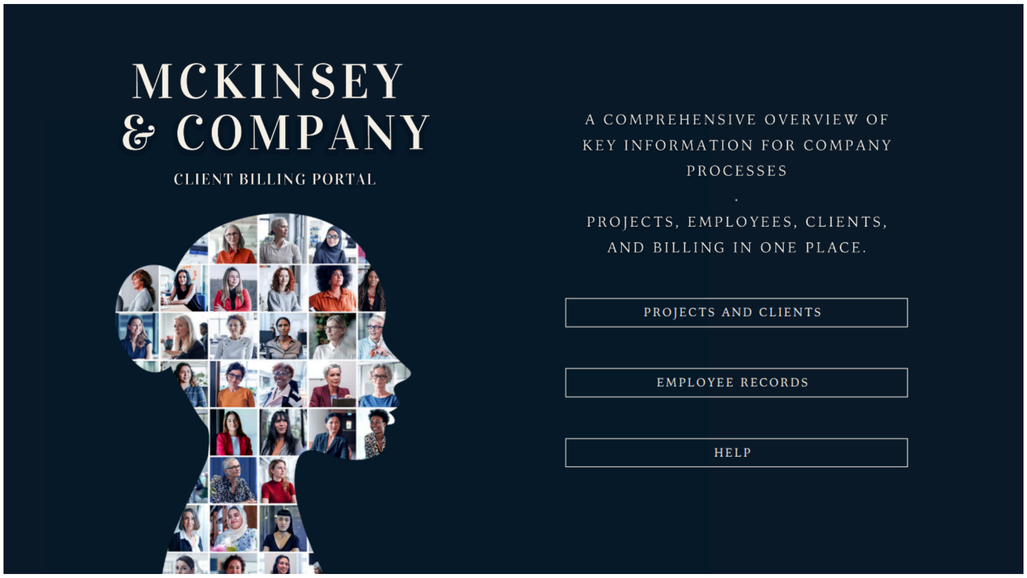
PART ONE: Company Overview

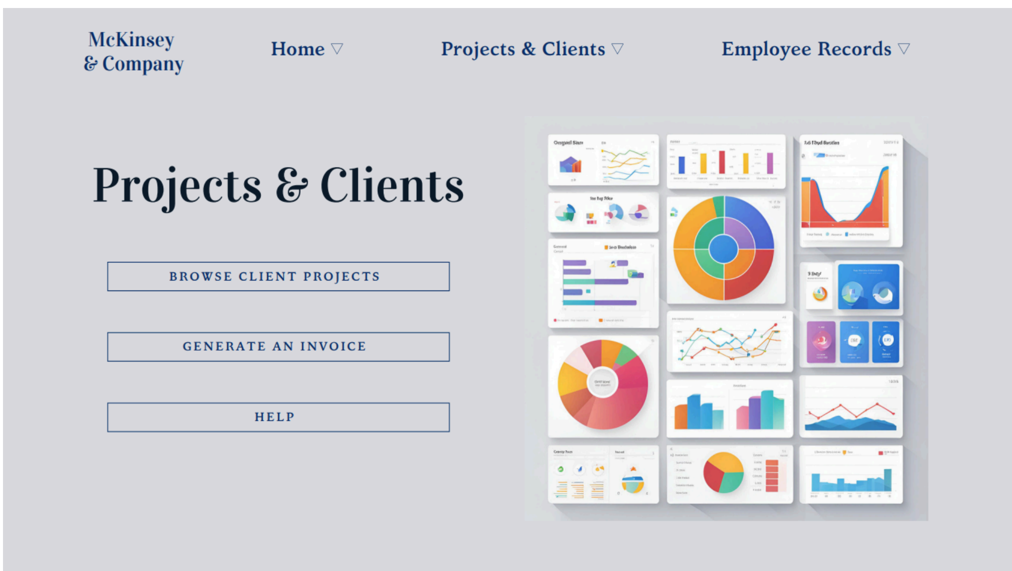
McKinsey & Company: Global Management Consulting

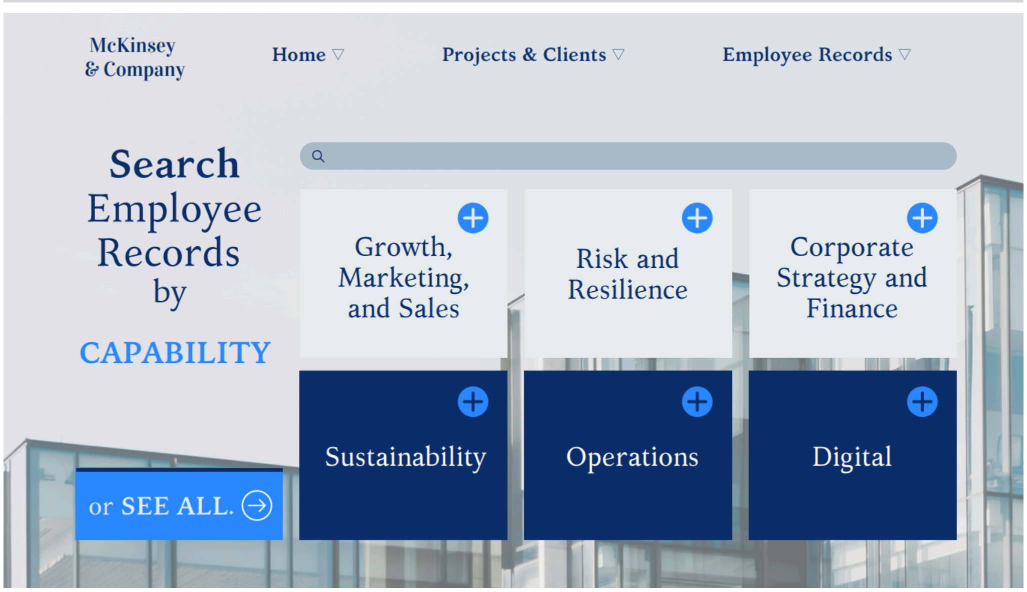
McKinsey & Company is a global management consulting firm that helps organizations with strategic planning, operational improvement, and digital transformation. They are hired by clients to analyze markets for entry, optimize business processes, and design organizational structures. A typical client-firm scenario includes a group of specialized McKinsey consultants assigned to advise a client company in a particular capability (note, clients may be assigned to several projects at once). Such projects are typically short-term, lasting anywhere from 6-18 months, and frequently include travel to client sites.



PART TWO: Webpage Task Overview







The above webpages (designed by me) are theoretical depictions of a few McKinsey internal pages relating to client billing. The first screenshot depicts the home page to the portal, allowing for navigation to access ongoing projects and clients as well as employee records. The second screenshot (“Projects and Clients”) is a graphical interface allowing access to backend data relating to current clients and ongoing company projects, including project type, progress, employees assigned, etc. Finally, a third webpage allows for employee records to be browsed including their department, project history, personal information, company spending, etc.

The task I will implement is the internal task of generating an invoice for client company billing. The amount billed will take into account (1) number of projects per client and for each project: (2) employee(s) assigned, (3) employee(s) total hours worked (4) employee(s) hourly rate, and (5) additional employee expenses (ex. travel, lodging, client meetings). Users of the webpage (internal McKinsey financial department) will be able to generate and disburse an invoice per project (for long-standing, returning clients) or per company (for short-term clients). This webpage will not encompass the tasks of employee payroll, employee hour entry, or employee expense reporting/approval. Rather, this system assumes prior availability of this information and simply stores it in an efficient manner that enables accurate assignment to a company billing office.

Consultants may be assigned to more than one project simultaneously (within their department/capability); thus, hours worked are entered as daily totals associated with a specific date, employee ID, and project ID. Employee expenses are linked to a corporate credit card number, unique to each employee, and logged alongside a transaction and project ID. Expenses may not exist without an associated project and employee. Client companies may hire McKinsey for several projects, but no projects may exist without an associated client. There may be duplicate client and employee names, but they remain distinguishable by a unique ID number.

PART THREE: ER Diagram