

DESIGNING WHAT'S NEXT: HOW VORTEX CONSULTING STAYS AHEAD OF CLIENT NEEDS

By Catalyn Joseph, CIOReview Editorial

For today's CIOs and finance leaders, the real challenge is rarely technology—it's execution. Systems are in place, data exists, and platforms like SAP ERP are already embedded at the core of the enterprise. What's often missing is a partner willing to step in, recognize there is a better way and transform complexity into a measurable business advantage.

That is where Vortex Consulting differentiates. When challenges are presented—whether operational inefficiencies, reporting bottlenecks, or growing data risk—Vortex doesn't simply deliver to the letter of the request. The firm proactively leans in, challenges assumptions, and works alongside client teams to solve the inefficiency behind the problem.

This approach was recently demonstrated through a collaboration with a long-time SAP client that was undertaking a labor-intensive monthly financial reporting process. By taking on the challenge holistically, Vortex recognized the issue and identified a better way to enable the client to move beyond incremental improvement to a smarter, automated, and more resilient reporting model—creating lasting value well beyond the original ask.



Matt Wendroff, CPA
President and Founding Partner

Above and Beyond Starts with Asking Better Questions

On the surface, Vortex Consulting recognized the issue as it appeared straightforward: reporting took too long and relied heavily on manual effort for their client.

The team asked deeper questions about governance, data confidence, scalability, and risk. What became clear was that the real challenge wasn't just time—it was an operating model built on manual downloads, spreadsheets, and offline logic that existed outside SAP.

By reframing the problem, Vortex identified an opportunity on the client's behalf not just to improve reporting speed, but to modernize the client's entire reporting foundation.

The Vortex Approach as a Trusted Partner

Going above and beyond means taking responsibility for outcomes, not just deliverables. In this case, Vortex Consulting helped the client define what financial reporting could—and should—look like:

- Reporting executed natively in SAP
- Automated, meta-driven logic instead of spreadsheets

- Built-in controls, security, and auditability
 - A one-click experience that finance could trust month after month
- Vortex's vision was aligned directly with leadership's broader goals around accuracy, governance, and speed to close.

Financial Reporting Automated

To bring this idea to life, Vortex Consulting designed and implemented a meta-driven solution that compliments the native SAP reporting framework using custom objects. Manual mappings and spreadsheet logic were replaced with automated processes embedded directly in SAP.

The result was a reporting solution that:

- Eliminated manual downloads and offline manipulation
- Strengthened governance and role-based security
- Improved visibility into data quality and reconciliation issues
- Delivered consistent, repeatable results with one-click execution

While the technical solution was critical, it was the mindset behind it—challenging assumptions and solving the problem—that made the difference.

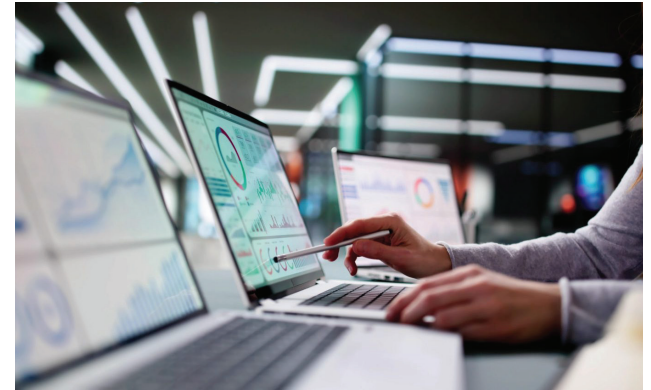
Results That Made a Big Impact

What started as a reporting efficiency initiative became a broader win for data quality, governance, and decision-making confidence. The impact extended far past time savings:

- 100+ hours eliminated annually from manual reporting
- Improved financial accuracy and consistency
- Shorter reporting cycles, accelerating monthly close
- Earlier identification of systemic data issues

A TRUE Partner, Not Just a Vendor

This engagement reflects how Vortex Consulting consistently works with SAP clients to go above and beyond to help clients



run more efficiently. As a long-time SAP services partner, Vortex Consulting combines deep SAP expertise with a consultative mindset—one that prioritizes long-term value over short-term delivery.

The firm's teams don't just implement solutions; they anticipate client needs, challenge conventional approaches, and design with the future in mind. That commitment to going above and beyond is what turns individual projects into lasting partnerships.

What Other Clients Can Learn from This Approach

- The most valuable partners solve problems you didn't explicitly ask them to
 - Going beyond the ask often delivers the greatest ROI
 - Native SAP solutions can be both flexible and governed
 - True transformation starts with mindset, not just technology
- At Vortex Consulting, financial reporting modernization was simply an example. The real story is how going above and beyond—every time—creates outcomes that clients didn't just request but truly need. **CR**

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